

# Quick Guide to Verifying Your Household Income for the Energy Saver North Carolina Program

## What is Categorical Eligibility?

Categorical eligibility means your household automatically qualifies for the Energy Saver North Carolina program if you're enrolled in another recognized federal program. Check if you or any household members are enrolled in any of these programs\*:

- Supplemental Security Income (SSI)
- Medicaid
- Supplemental Nutrition Assistance Program (SNAP)
- Low Income Home Energy Assistance Program (LIHEAP)
- Weatherization Assistance Program (WAP)\*\*
- Head Start
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)\*\*
- Lifeline Support for Affordable Communications (Lifeline)
- Food Distribution Program on Indian Reservations (FDPIR)
- National School Lunch Program – Free (NSLP)
- Housing Improvement Program (HIP)
- Housing Opportunities for Persons with AIDS (HOPWA)
- Public Housing (housing owned and operated by Public Housing Authorities)

To verify your enrollment, please provide an award letter showing the household member's name, current address, the recognized federal program, and the date of enrollment or enrollment expiration date.

## What if I Don't Have Categorical Eligibility?

You can still verify your household income by providing the necessary income documents for all household members. You have two options:

### 1. Express option with last year's federal tax return:

- **Federal Tax Return** from the most recent year's filing, including all applicable schedules.
- **Self-Employment Income** from the most recent year's tax return for the business, including all applicable schedules.
- **Black out all versions of Social Security numbers on forms prior to submission.**

### 2. Standard option with other household income documents: Provide any documents (on the next page) to identify all sources of income.

\*Please note that you can either upload proof of enrollment in a recognized federal program OR proof of income. At least one member of your household must show proof of enrollment within the **last 12 months**.

\*\*80% Area Median Income (AMI) is greater than 200% Federal Poverty Level (FPL) for one- to five-person households in each of North Carolina's 100 counties. In households of 6+ members, 80% AMI is less than 200% FPL. Therefore, the state will allow categorical eligibility for WAP and WIC only for households with one to five members.

## Other Household Income Documents

Black out all versions of Social Security numbers on forms prior to submission.

### Wage Income Documents

- **Pay statements:** If you're paid bi-weekly, attach two to three pay statements. If you're paid weekly, attach four to five pay statements.
- **Form W-2:** If the household member is a seasonal employee (a person whose main source of income is inconsistent throughout the calendar year), the annual income must be provided for both wages and unemployment compensation received in the prior tax year.

### Retirement Income Documents

- **Pension(s):** Award letter or letter from administrative agency; pension check stubs; Form 1099; statements attached to the pension checks.
- **Social Security:** Award letter or Form 1099.
- **401(k):** 401(k) retirement plan statement; Form 1099; award letter; statement of benefit.
- **Pensions, Annuities, and IRAs:** Check stubs; statements attached to the disbursement checks; Form 1099; award letter; statement of benefits.

### Investment Income Documents

- **Dividends and interest:** Bank statement or letter from bank dated within 60 days; check stub/payment receipt; Form 1099; copy of recent tax return; statements from companies paying dividends or interest.
- **Rental income:** Income tax Form 1040 (Schedule 1 and Schedule E); 12 months of income and expenses (rent receipts); notarized statement from applicant listing each apartment and the rent received per month, as well as a description and amount of deductible expenses; copy of lease(s) if annual documents are unavailable.
- **Royalties:** Income tax return; current statement from the company issuing checks.

### Family Income Support Documents

- **Alimony:** Court order; pertinent pages of separation agreement or divorce decree that identifies the payee and amount of alimony received.
- **Child support:** Child support court order from the district clerk's office in the county where the order was issued; statement from child support office; check stubs; order from the court; bank statements.

## We're Here to Help



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