

MASSACHUSETTS  
**Workforce Investment Act**

STEERING COMMITTEE

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**WIA Communication No. 01-08**

Policy  Information

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**To:** Chief Elected Officials  
Workforce Investment Board Chairs  
Workforce Investment Board Directors  
Title I Administrators  
Career Center Directors  
Title I Fiscal Officers  
DET Regional Directors  
DET Area Directors

**cc:** WIA State Partners

**From:** Jonathan Raymond, President  
Commonwealth Corporation

**Date:** February 22, 2001

**Subject:** Income Inclusions/Exclusions

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**Income Inclusions/Exclusions for Low Income Adults and Youth**

The WIA Communications policy issued May 24, 2000 Title I Eligibility Requirements (Revised) included the definition of low-income individuals found at §101(25) of the Workforce Investment Act. This definition lists only a few of the types of income that can be excluded from the income calculation to determine if an individual is low-income.

A more extensive listing of income inclusions/exclusions was previously issued in the definition of family income found in Policy Directive 94-09 JTPA Eligibility Policies issued in October 1994. The information in PD 94-09 is derived from the income inclusions/exclusions defined by the Department of Health and Human Services in connection with the annual poverty guidelines. Pending further guidance from USDOL, both the JTPA and WIA guidance on income inclusions/exclusions may be used in determining income eligibility for Title I.

For convenience, a listing of the JTPA and WIA income inclusions/exclusions are displayed in the attached chart.

**Older Worker Eligibility**

The Omnibus Appropriations Act of 1998 at §405(d)(33)(D) amended the Older Americans Act of 1965 to state that older workers participating in Title V projects carried out jointly with programs under Title I of the Workforce Investment Act of 1998 “ shall be deemed to satisfy the (eligibility) requirements” found at §134 of WIA, including low-income eligibility. This is similar to the eligibility provisions for older workers under JTPA.

**Questions:** Any questions related to this correspondence should be directed to Gene White at (617) 727-8158, extension 1391.

**Filing:** Please file this in your notebook of previously issued WIA Communication Series Issuances as #01-08.

**WIA TITLE I  
INCOME INCLUSIONS AND EXCLUSIONS  
FOR THE PURPOSE OF DETERMINING INCOME ELIGIBILITY**

<b>INCOME INCLUSIONS</b>	
<b>1</b>	Gross wages and salaries (before deductions) including wages earned in OJT, wages earned while on reserve duty in the Armed Forces and severance pay.
<b>2</b>	Net receipts from non farm self-employment (receipts from a person's own incorporated business, professional enterprise, or partnership, after deductions for business expenses).
<b>3</b>	Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses).
<b>4</b>	Social Security retirement (regular payments).
<b>5</b>	Social Security Disability Insurance (SSDI) (regular payments).
<b>6</b>	Railroad retirement (regular payments).
<b>7</b>	Strike benefits from union funds (regular payments).
<b>8</b>	Workers Compensation (regular payments).
<b>9</b>	Veteran's payments (regular payments).
<b>10</b>	Training Stipends (regular payments).
<b>11</b>	Alimony.
<b>12</b>	Military family allotments or other regular payments (excluding child support) from an absent family member or someone not living in the household (but considered as part of the family definition).
<b>13</b>	Pensions (e.g., private, government, military retirement).
<b>14</b>	Regular insurance or annuity payments.
<b>15</b>	College or university grants, fellowships, and assistantships (excluding needs-based scholarships).
<b>16</b>	Interest and dividends.
<b>17</b>	Net rental income.
<b>18</b>	Net royalties and/or periodic receipts from estates or trust.
<b>19</b>	Net gambling or lottery winnings.

<b>INCOME EXCLUSIONS</b>	
<b>1</b>	Cash payments under a Federal, State or local income based public assistance program.
<b>2</b>	Unemployment insurance payments.
<b>3</b>	Child support payments.
<b>4</b>	Survivor insurance benefits received under Section 202 of the Social Security Act (42 U.S.C. 402).
<b>5</b>	Supplemental Security Income (SSI) from SSA.
<b>6</b>	Foster child care payments.
<b>7</b>	Capital gains.
<b>8</b>	Any assets drawn down as withdrawals from a bank, sale of property, a house or a car.
<b>9</b>	Tax refunds.
<b>10</b>	One-time gifts, loans, and lump-sum inheritances.
<b>11</b>	One-time payments such as for accident, death or casualty insurance payments or compensation for injury.
<b>12</b>	Non-cash, in-kind benefits such as: employer paid fringe benefits, food stamps, Medicare, Medicaid, school meals, fuel or other housing assistance, and food or housing received in lieu of wages.
<b>13</b>	Needs-based financial aid (Pell Grants, scholarships).
<b>14</b>	Income earned while on active military duty and certain other veteran's benefits (i.e., compensation for service-connected disability, compensation for service-connected death, vocational rehabilitation and education assistance.

The income exclusions are based on the WIA Title I definitions and/or exclusions listed in the USHHS Poverty Income Level and USDOL 70% Lower Living Standard Income Level.