

# Checklist of Income Qualification Documents for IRA Home Energy Rebates

Here's a checklist of the documents you can submit to verify your household income. Preparing these documents ahead of time and having them ready to upload to our secure platform will save you time and speed up the verification process.

## DO YOU PARTICIPATE IN A RECOGNIZED STATE OR FEDERAL PROGRAM LISTED IN PATH A?

- Yes (Path A)** ➔ Upload your enrollment documents for the program you participated in.
- ➔ If you do not have your enrollment documents, you can skip the upload documents step. Please note, this will result in a public assistance enrollment lookup through a third party, which may take additional processing time. If the program is unable to verify proof of enrollment, additional steps will be required to obtain approval.
- No (Path B)** ➔ Upload your income documents (**listed in the Income Documentation section**). If you have multiple streams of income, you will need to provide documentation for each one. Please provide income documentation for ALL members of your household.
- ➔ **Please provide income documentation for your annual income (Path B1) OR your monthly income (Path B2). Do not provide documentation for both. Black out all versions of Social Security numbers on forms prior to uploading.**

### PATH A: STREAMLINED ELIGIBILITY

If you have indicated that you participate in one of the programs listed below, you must provide your award letter that clearly shows the household member's name and address, the recognized federal program, and the date of enrollment or enrollment expiration date. If an award letter is not provided, the program will attempt to verify enrollment in your selected program via Wisconsin public assistance database(s). If enrollment cannot be confirmed, other recognized state and federal programs may be searched to verify your income. If your income cannot be confirmed this way, you must provide proof of participation.

- Supplemental Security Income (SSI).
  - *Please note this is NOT Social Security (SSA).*
- Medicaid.
  - *Please note this is NOT Medicare or BadgerCare.*
- 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).

\*80% Area Median Income (AMI) is greater than 200% Federal Poverty Level (FPL) for one- to five-person households in each of Wisconsin's 72 counties. In households of 6+ members, 80% AMI is less than 200% FPL. Therefore, the state will allow categorical eligibility for WAP only for households with one to five members.

\*\*Per the State of Wisconsin's published WIC Income Eligibility Table, 80% AMI is greater than 185% FPL for all household sizes in every county in Wisconsin except the following: Ashland, Barron, Bayfield, Buffalo, Burnett, Clark, Crawford, Florence, Forest, Grant, Green Lake, Iron, Jackson, Juneau, Lafayette, Langlade, Marinette, Marquette, Menominee, Oconto, Polk, Price, Richland, Rusk, Sawyer, Shawano, Taylor, Vernon, Vilas, Washburn, Wood, Manitowoc, Oneida, Monroe, Pepin, Dodge, Lincoln, Rock, Trempealeau, Waupaca, Dunn, Sauk, Door. Households that are not categorically eligible may still apply for higher rebate amounts through the income verification method. One- to eight-member households that are under 80% AMI are categorically eligible in the following counties: Fond du Lac, Sheboygan, Winnebago, Douglas, Chippewa, Eau Claire, Racine, Portage, Marathon, Walworth, Jefferson, La Crosse, Green, Kenosha, Brown, Kewaunee, Iowa, Columbia, Milwaukee, Ozaukee, Washington, Waukesha, Calumet, Outagamie, Dane, Pierce, Saint Croix.

**If you have already provided the award letter for a recognized state or federal program in Path A above, then you may skip this section and proceed with your application.**

### PATH B: INCOME DOCUMENTATION

#### B1: ANNUAL INCOME

Annual income is calculated based on your Federal Tax Form 1040, lines 1-8, to calculate the sum of all gross income received during the most recent tax year.

#### Accepted Income Support Documents:

Federal Tax Form 1040, pages 1 and 2 only. Black out all versions of Social Security numbers on forms prior to uploading. The Wisconsin Tax Form is not accepted for this option.

#### B2: MONTHLY INCOME

Monthly gross income is the total amount earned before any deductions, such as taxes and insurance, are taken out.  
*All accepted monthly income support documents are listed on the next page for reference.*

**Contact:** iraher@focusonenergy.com | 800.762.7077 | focusonenergy.com

#### REDUCING ENERGY WASTE ACROSS WISCONSIN

FOCUS ON ENERGY®, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment.

Funding for Wisconsin IRA Home Energy Rebate programs is provided by the U.S. Department of Energy pursuant to the Inflation Reduction Act of 2022. While the Focus on Energy program is the implementor for the IRA Home Energy Rebate programs, the programs are funded and managed as separate programs and not included in the Focus on Energy portfolio.

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## ACCEPTED MONTHLY INCOME SUPPORT DOCUMENTS

MONTHLY INCOME TYPE	MONTHLY INCOME TYPE DESCRIPTION	ACCEPTED MONTHLY INCOME SUPPORT DOCUMENTS
Alimony Received	Payment(s) received from a former spouse.	<ul style="list-style-type: none"> <li>• Check stubs.</li> <li>• Copy of agreement/divorce papers (include only the section where the amount to be paid is stated).</li> </ul>
Child Support	<p>Child support money received is counted toward your income.</p> <p>Child support money paid is deducted from your income.</p>	<ul style="list-style-type: none"> <li>• Statement from child support office.</li> <li>• Check stubs.</li> <li>• Order from the court.</li> <li>• Bank statements.</li> </ul>
SSI Caretaker Supplement	Payments received from Social Security for taking care of a disabled person.	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Tax Form 1099.</li> </ul>
Disability Long Term or Short Term	Payments made by an employer or insurance company for a disability or medical condition (long term or short term).	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Check stub/payment receipt.</li> <li>• Tax Form 1099.</li> </ul>
Dividends/Interest/Royalties*	Money that is received/earned in any of the 12 months prior to application in excess of \$120 and a household member has access to withdraw the money without penalty. (Examples of interest that might be accessible: IRAs, CDs, etc.)	<ul style="list-style-type: none"> <li>• Check stub/payment receipt.</li> <li>• Tax Form 1099.</li> <li>• Copy of recent taxes.</li> <li>• Statements from companies paying dividends.</li> </ul>
Farm Income*	Net income earned from farming; zero out losses.	<ul style="list-style-type: none"> <li>• 1040 Schedule 1 and Schedule F.</li> <li>• 12 months of income and expenses.</li> </ul>
Gambling/Lottery/Bingo	All income received from gambling, lottery, or bingo activities. Do not deduct losses.	<ul style="list-style-type: none"> <li>• Tax Form 1040 Schedule 1.</li> <li>• Form W-2G.</li> </ul>
Land Contract Payment**	Provide only the interest received from the land contract payment.	<ul style="list-style-type: none"> <li>• Use the amortization chart from the agreement or the amount from the 1099 listed on the most recent tax form divided by 12.</li> </ul>
Other	Any other income received that is not listed in the table. Enter the type of income in the source field. Please attach a separate sheet describing the income.	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Statement showing the amount of income received.</li> <li>• Check stub/payment receipt.</li> </ul>
Pensions, Annuities, and IRAs	These payments are scheduled and paid on a regular basis. For pension or annuities paid on a monthly basis, enter the amount paid each month. For those paid on a quarterly or other basis, enter the average monthly amount. We take the gross amount and do not deduct Medicare.	<ul style="list-style-type: none"> <li>• Pension check stubs.</li> <li>• Statement attached to the pension checks.</li> <li>• Tax Form 1099.</li> <li>• Award letter or statement of benefits.</li> </ul>
Rental Income*	Net income received from rental properties.	<ul style="list-style-type: none"> <li>• 1040 Schedule 1 and Schedule E.</li> <li>• 12 months of income and expenses (rental receipts).</li> <li>• Copy of lease (if annual documents unavailable).</li> </ul>
Self-Employment*	The annual income from self-employment reported on the self-owned business's tax forms. The net annual amount is divided by 12 to get a monthly amount.	<ul style="list-style-type: none"> <li>• 1040 Schedule 1 and Schedule C.</li> <li>• 12 months of income and expenses.</li> </ul>
Social Security	Gross income received from Social Security because you or your spouse is retired. Medicare Part B (Medicare medical insurance) will not be included in your gross income.	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Tax Form 1099.</li> </ul>
Social Security Disability Income	Income received from Social Security for long-term disability. This amount includes the Social Security survivor's benefits and ancillary benefits paid to children because of a deceased or disabled parent.	<ul style="list-style-type: none"> <li>• Award letter.</li> <li>• Tax Form 1099.</li> </ul>
Tribal per Capita*	Tribal per capita gross amounts received in the 12 months prior to application or during the previous tax year, less the first \$2,000 received by the applicant in the same 12 months or the same tax year.	<ul style="list-style-type: none"> <li>• Distribution notice.</li> </ul>
Unemployment Compensation***	Payments received as part of unemployment benefits.	<ul style="list-style-type: none"> <li>• Unemployment Office Statement.</li> <li>• Check stub/payment receipt.</li> <li>• Tax Form 1099-G.</li> </ul>
Veterans Benefits	Income from VA Compensation, VA Pension, Retired Military Compensation, or Dependency and Indemnity Compensation (DIC).	<ul style="list-style-type: none"> <li>• Statement of benefits letter.</li> <li>• Income Amount Statement .</li> </ul>
Wages and Tips***	All gross wages and tip income received in the one month prior to the application month. If the primary source of income for an individual is considered seasonal, see *** note below chart for documents needed.	<ul style="list-style-type: none"> <li>• Pay stubs.</li> <li>• Pay statements.</li> <li>• <i>NOTE: If paid bi-weekly, attach two to three pay statements. If paid weekly, attach four to five pay statements.</i></li> <li>• W-2.</li> </ul>
Workers' Compensation	Money received as an insurance benefit paid to an employee to replace wage income lost due to an injury in a work-related incident. NOTE: Wage income for individuals under the age of 18 and those 18 and older currently enrolled in high school is not entered as counted household income.	<ul style="list-style-type: none"> <li>• W-2.</li> <li>• Pay statements or stubs.</li> <li>• <i>NOTE: If paid bi-weekly, attach two to three pay statements. If paid weekly, attach four to five pay statements.</i></li> </ul>

\*This income type is based on the average of the prior 12 months of income. A copy of tax records and IRS Form 1099 must be provided.

\*\*Only the interest income received is counted. A copy of the amortization schedule or the IRS Form 1099 issued for tax purposes must be provided.

\*\*\*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. Copies of IRS Form 1040, IRS Form W-2, and IRS Form 1099 must be provided. Additional income information may be requested. Call 800.762.7077 if you have questions.



### We're Here to Help

Are you eligible but don't have the supporting documents?  
Please reach out to our income specialists for assistance.

Contact: [iraher@focusonenergy.com](mailto:iraher@focusonenergy.com) | 800.762.7077 | [focusonenergy.com](http://focusonenergy.com)



Scan the QR code  
to verify your  
income online.