

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 help speed up the verification process. Please provide income documentation for ALL members of your household.

If at least one member of your household is currently enrolled in a recognized state or federal program, then you may submit proof of enrollment instead of income documentation. Please refer to the list of recognized programs below:

Recognized State and Federal 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 that clearly shows the household member's name, the recognized federal program, and the date of enrollment or enrollment expiration date.

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.

Tax Documents

- **Federal Tax Return** from the most recent year's filing, including all applicable schedules. Black out all versions of Social Security numbers on forms prior to uploading. The Wisconsin Tax Form is not accepted for this option.
- **Self-Employment Income** from the most recent year's tax return for the business, including all applicable schedules.

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.

Checklist continued on next page.

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



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Government Assistance Income Documents

- **Social Security Disability Insurance:** SSA benefit verification letter; SSA-1099 social security benefit statement; SSA Form 2458.
- **Veterans Benefits:** Award letter from Veterans Administration (VA) or the Department of Defense; current VA benefit check stub; Form 1099.
- **Workers' Compensation:** Award letter from Workers' Compensation Board; current check showing gross benefit, frequency of benefit, and date of loss of employment.

Zero Income Statement Documents

Please call **800.762.7077** for more information.

Unemployment Income Documents

- **Proof of unemployment:** Income statement.
- **Strike benefits:** Award letter; copy of checks; letter from appropriate administrative agency.

* Please note that you can either upload proof of enrollment in a recognized federal program OR proof of income. Also, 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 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.



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 | 800.762.7077 | [focusonenergy.com](https://www.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.

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