

06 **Budgeting Income - Overview**

REVISION 45
(01/01/17 - 12/31/17)

The following apply to budgeting income:

- Consider all income available to the budgetary unit when determining eligibility.

NOTE Do not consider the income of a nonparticipant available to the budgetary unit.

- Budget countable gross income before deductions when determining eligibility for benefits.

NOTE When the gross income amount includes countable and not countable income, separate and budget the income types individually.

- Budget the countable gross income before deductions for the following:

When the participant's income is being reduced for fraud or Intentional Program Violation (IPV).

When checks or cash are lost or stolen.

NOTE When the lost or stolen items are replaced, do not count the replacement.

EXCEPTION

Budget the net income when the income is reduced to collect an overpayment from the same source.

When an employee makes stock purchases from their employer, the employer may match some or all of their stock purchase. Any purchase for the employee by the employer is not countable as earned income. Budget the customer's gross income minus the amount the employer paid.

CA EXCEPTION

AZTECS budgets the gross CA benefit for all programs when the CA payment is reduced for any of the following reasons:

- CA sanction for noncompliance.
- Withholding TPEP payments.

- CA overpayments caused by the participant. This includes changes reported untimely, fraud, and [IPV](#). (See [Recoupment of CA Income](#))

Give [special consideration](#) to the income of a participant whose needs are not included in the budgetary unit.

When income of one or more [participants\(g\)](#) and a [nonparticipant\(g\)](#) are combined into one payment, identify each participant's share of income using the [verification process](#).

When each participant's share of income cannot be identified through the verification process, complete the following:

- Divide the gross income equally between the number of participants and nonparticipants for whom the income is intended.
- Count the resulting amount as each participant's share of income.

Count income as received at the time it is made available to the participant.

EXCEPTION

Count income in the month for which it is intended rather than the month in which it is made available for reasons including, but not limited to, any of the following:

- An extra child, medical, or spousal support check is received due to a change in issue dates.
- Income is paid directly to a financial institution and it is automatically deposited into the participant's account.
- Income is held or delayed at the request of the participant, or the participant fails to obtain the income when it becomes available.
- An extra check is received due to a change in pay dates, such as a third or fifth check issued early due to a holiday or weekend.
- A change in pay dates or mailing cycles results in monthly or semi-monthly pay being received in another month.

Key earned income on EAIC or SEEI, and unearned income on UNIE or UNIC.

Policy and procedures for budgeting income are outlined as follows:

- [Projecting Income](#)
- [Anticipating Income](#)
- [Converting Income](#)
- [Actual Income](#)
- [Prorating Income](#)
- [Budgeting Support Payments](#)
- [Budgeting Contract Income](#)
- [Budgeting Out-of-State Military Income](#)
- [Budgeting IDA Deposits](#)
- [Calculating Year to Date](#)
- [Special Considerations](#)
- [Budgeting Documentation](#)