

ACCESS NYC

Benefits Screening Guide

Version 1.27

April 2024

Implemented on

ACCESS NYC (access.nyc.gov)

NYC Benefits Screening API (screeningapidocs.cityofnewyork.us)

Contact screeningapi@nycopportunity.nyc.gov

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Appendix

Change Log

Introduction

This document provides general guidelines governing screening for **43** City, State, and Federal public benefits and programs. They are interpreted and implemented as logic in the rules engine that governs ACCESS NYC's screening tool and for the NYC Benefits Screening API and returns results of potentially eligible programs at the household level.

It's important to understand the following:

- The results from these guidelines do not represent an eligibility determination and do not guarantee eligibility in any program.
- To enroll in a benefit or program, a resident will need to submit an application through the administering governmental agency, which will determine eligibility.
- The results from these guidelines do not prohibit anyone from applying for any benefits or programs.
- These guidelines are subject to change at the discretion of the administering governmental agency. The Mayor's Office for Economic Opportunity makes reasonable efforts to produce updates on a quarterly basis, but such updates are not guaranteed.

Updates in 1.27

Date: March 2024

Screening API Changes

- Updated logic
 - Family Planning Benefit Program
- Income guidelines
 - Commodity Supplemental Food Program

Updates in 1.26.0

Date: March 2024

Screening API Changes

- Updated logic
 - EITC
 - Tax Prep
- Income guidelines
 - Fair Fares
 - OAEP
 - Medicaid for Pregnant Women
 - Head Start
- Removed inactive program
 - ACP

Updates in 1.25.0

Date: November 2023

Screening API Changes: Updated logic and income guidelines for

- SNAP
- Section 8 Housing
- Public Housing
- HEAP
- Child Care Voucher
- Infants & Toddlers
- Fair Fares

Updates in 1.24.0

Date: October 2023

Screening API Changes: Updated logic and income guidelines for

- Family Planning Benefit Program (FPBP)
- Medicaid for Pregnant Women
- Train & Earn
- Learn & Earn

Updates in 1.23.0

Date: September 2023

Screening API Changes: Updated logic and income guidelines for

- Public Housing
- WIC
- Commodity Supplemental Food Program (CSFP)
- EarlyLearn

Updates in 1.22.0

Date: August 2023

Screening API Changes: Updated logic and income guidelines for

- Cash Assistance

Updates in 1.21.0

Date: July 2023

Screening API Changes: Updated logic and income guidelines for

- SNAP
- Cooling Assistance
- Child Care Vouchers

Updates in 1.20.0

Date: May 2023

Screening API Changes: Updated logic and income guidelines for

- Head Start
- Older Adult Employment Program
- Fair Fares

- Lifeline
- Removed Covid-19 vaccines from rule set

Updates in 1.19.0

Date: March 2023

Screening API Changes

- Updated logic and income guidelines for
 - NYC Free Tax Prep
 - Earned Income Tax Credit (EITC)
 - Child and Dependent Care Tax Credit (CDCTC)
 - Child Tax Credit (CTC)
 - School Tax Relief Program (STAR)
- New program added
 - Affordable Connectivity Program (ACP)

Updates in 1.18.0

Date: October 2022

Screening API Changes: Income guidelines updated for

- Child Care Vouchers (ACS)
- Early Learn (DOE)

Updates in 1.17.0

Date: March 2022

Screening API Changes

- Income guidelines updated for:
 - Senior Employment Services (SES)
 - Fair Fares
- Updated logic for:
 - ACS Childcare Voucher (bug fixed)
- Removed inactive programs:
 - Emergency Broadband Benefit (EBB)
 - Emergency Rental Assistance Program (ERAP)

Updates in 1.16.0

Date: February 2022

Screening API Changes

- Income guidelines updated for:
 - Earned Income Tax Credit (EITC)
 - NYC Free Tax Prep
- Updated logic for:
 - Senior Citizen Rent Increase Exemption (SCRIE)
 - Home Energy Assistance Program (HEAP)

Updates in 1.15.0

Date: December 2021

Screening API Changes

- New Programs added:
 - Financial Empowerment Centers
 - Covid 19 Vaccines
 - NYC NY Connect
- Updated logic for:
 - Child Care Voucher
 - Child Tax Credit
- Income guidelines updated for:
 - Home Energy Assistance Program (HEAP)
 - School Tax Relief (STAR)
 - Supplemental Nutrition Assistance Program (SNAP)
 - EarlyLearn

Updates in 1.14.0

Date: August 2021

Screening API Changes: New programs added

- Emergency Rental Assistance Program (ERAP)
- Lifeline
- Emergency Broadband Benefit (EBB)

Updates in 1.13.0

Date: July 2021

Screening API Changes: New programs added

- 3-K for all
- Child Care Voucher

Updates in 1.12.0

Date: June 2021

Screening API Changes: Income guidelines updated for

- Commodity Supplemental Food Program (CSFP)
- Cooling Assistance Benefit
- Family Planning Benefit Program (FPBP)
- Head Start
- Medicaid for Pregnant Women
- Section 8
- Women, Infants, and Children (WIC)

Updates in 1.11.0

Date: February 2021

Screening API Changes: Income guidelines updated for

- Earned Income Tax Credit (EITC)
- Senior Employment Services (SES)
- NYC Free Tax Prep
- Fair Fares

Updates in 1.10.0

Date: November 2020

Screening API Changes: Income guidelines updated for

- Home Energy Assistance Program (HEAP)

Updates in 1.9.0

Date: October 2020

Screening API Changes

- New Programs added:
 - Train & Earn
 - Home Care Services Program
 - Medicaid for Pregnant Women
 - NYC Free Tax Prep
- Income guidelines updated for:
 - School Tax Relief (STAR)
 - Supplemental Nutrition Assistance Program (SNAP)

Updates in 1.8.0

Date: June 2020

Screening API Changes

- New Program added:
 - Public Housing
- Income guidelines updated for:
 - Women, Infants, and Children (WIC)
 - Commodity Supplemental Food Program (CSFP)
 - Family Planning Benefit Program (FPBP)
 - Cooling Assistance Benefit

Updates in 1.7.0

Date: February 2020

Screening API Changes

- New Program added:
 - Fair Fares NYC
- Logic updated for:
 - Earned Income Tax Credit (EITC)
 - Senior Employment Services (SES)

Updates in 1.6.0

Date: November 2019

Screening API Changes: Income guidelines are updated for

- Home Energy Assistance Program (HEAP)
- School Tax Relief Program (STAR)

Updates in 1.5.0

Date: August 2019

Screening API Changes

- New Program added:
 - Cooling Assistance Benefit
- Income guidelines updated for:
 - Women, Infants, and Children (WIC)
 - Commodity Supplemental Food Program (CSFP)
 - Family Planning Benefit Program (FPBP)
- Logic updated for:
 - Comprehensive After School System of NYC (COMPASS NYC)
 - Home Energy Assistance Program (HEAP)

Updates in 1.4.0

Date: March 2019

Screening API Changes: Income guidelines are updated for

- Supplemental Nutrition Assistance Program (SNAP)
- Earned Income Tax Credit (EITC)
- School Tax Relief (STAR)
- Senior Employment Services (SES)
- Section 8 Housing

Updates Prior to 1.4.0

All changes including those prior to update 1.4.0 are reflected in the Change Log Section of the Appendix.

Rules Owners

Agencies contributing to these rules and guideline

#	Agency	# of Programs	Program Names
1	Human Resources Administration (HRA)	9	SNAP
			Cash Assistance
			HEAP
			Health Insurance
			IDNYC
			Cooling Assistance Benefit
			Fair Fares
			Medicaid for Pregnant
			Home Care Services
2	Department of Finance (DOF)	6	SCRIE
			DRIE
			DHE
			SCHE
			Veterans' Property Tax Exemption
			STAR
3	Department of Consumer Affairs (DCA)	5	NYC Free Tax Prep
			Financial Empowerment Centers

4	Internal Revenue Service (IRS)		EITC
			Child Tax Credit
			Child and Dependent Care Tax Credit
5	Department of Education (DOE)	7	Community Meals (Summer Meals)
			SchoolFood
			Pre-K for All
			EarlyLearn Child Care
			EarlyLearn Head Start
			3-K for all
			Child Care Voucher
6	Department of Youth and Community Development (DYCD)	4	COMPASS
			Learn & Earn(ISY)
			SYEP
			Train & Earn
7	NYC Housing Authority (NYCHA)	3	Section 8
			NYCHA Resident Economic Empowerment and Sustainability (REES)
			Public Housing
8	NYS Department of Health (NYS DOH)	3	WIC

			Family Planning Benefit Program (FPBP)
			Commodity Supplemental Food Program (CSFP)
9	NYS Department of Labor (DOL)	1	NYS Unemployment Insurance
10	Department for the Aging (DFTA)	2	Older Adult Employment Program
			NYC NY Connects
11	Department of Health & Mental Hygiene (DOHMH)	1	Nurse-Family Partnership
12	Department of Small Business Services (SBS)	1	Workforce1
13	Universal Service Administrative Company (USAC)	1	Lifeline
Total		43	

Income Sources

The following income sources are used on this screening document depending upon the program specific rules:

Income Source
Wages, Salary, Tips
Self-employment Income
Investment Income (interest, dividends, and profit from selling stocks)
Withdrawals from Deferred Compensation (IRA, Keogh, etc.)
Unemployment
Workers' Compensation
Supplemental Security Income (SSI)
Social Security Disability Benefits
Social Security Dependent Benefits
Social Security Survivor's Benefits
Social Security Retirement Benefits
Rental Income
Child Support (Received)
Alimony (Received)
Government or Private Pension
Boarder, Lodger
Cash Assistance Grant
Veterans Pension, Benefits
NYS Disability Benefits
Disability Related Medicaid
Gifts/Contributions (Received)

Resource Types

The following resource types may be included, depending upon the program specific rules:

Resource Types

Cash on Hand
Checking or Savings Accounts
Stocks, Bonds, or Mutual Funds

Expense Types

The following expense types may be included, depending upon the program specific rules:

Expense Type
Rent
Mortgage
Child Care
Child Support (Paid)
Dependent Care
Medical
Heating
Cooling
Third Party Health Insurance Premium
Utilities

S2_R001 – Child and Dependent Care Tax Credit (DCA/IRS)

These rules should be run for each household member individually.

1. Are there household members **under the age of 13**
OR are there household members **13 or over who are blind OR with a disability?**

- If No to either question, go to #4
 - If Yes, go to #2
2. Does the household member **have an expense type of Child Care or Dependent Care?**
- If No, go to #4
 - If Yes, go to #3
3. Did the **head of household OR spouse have an income type of wages, salaries, tips?**
- If No, go to #4
 - If Yes, the household member “May Be Eligible” for the Child and Dependent Care Tax Credit.
DONE
4. All other household members
- We are “Unable to Determine” the household’s potential eligibility for the Child and Dependent Care Tax Credit. **DONE**

S2_R002 – Child Care (HRA)

Since 2009, there is no need to have separate screening rules on ANYC for Child Care HRA and ACS.

S2_R003 – Infants & Toddlers (DOE)

1. Does the household **live in New York City?**
- If No, we are “Unable to Determine” the household’s potential eligibility for Infants & Toddlers.
DONE
 - If Yes, go to #2
2. Is there a household member **aged less than 3 years old?**
- If No, we are “Unable to Determine” the household’s potential eligibility for Infants & Toddlers.
DONE
 - If Yes, go to #3
3. Does a household member **aged less than 3 years old have a relationship type of foster child?**
- If yes, the household member “May Be Eligible” for Infants & Toddlers. **DONE**
 - If no, go to # 4
4. Does the **head of household OR spouse have an income type of Cash Assistance OR SSI?**
- If yes, the household member “May Be Eligible” for Infants & Toddlers. **DONE**
 - If no, go to # 5
5. Is the household member **aged less than 3 years old**
AND does the head of household have a relationship of parent OR step-parent to the child?

- If No, go to #6
- If Yes, determine the number of household members and count all income for:
 - the child's head of household
 - the spouse of the head of household (if there is one)
 - any other household members that are aged less than 18
- Then check gross monthly income levels by household size.

# of People in Household	Monthly Household Income	Eligible
2	≤ \$5,624	✓
3	≤ \$6,948	✓
4	≤ \$8,271	✓
5	≤ \$9,594	✓
6	≤ \$10,918	✓
7	≤ \$11,166	✓
8	≤ \$11,414	✓

Source: Liaison Communication

Update: November 2023

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for Infants & Toddlers. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member's potential eligibility for Infants & Toddlers. **DONE**

6. Is the household member **aged less than 3?**

AND does the **head of household** have a relationship **OTHER** than parent **OR** step-parent to the child?

- If No, go to #4
- If Yes, sum the child's income, treat the household size as one. Check gross monthly income levels by household size.

# of People in a Household	Monthly Household Income	Eligible
1	≤ \$4,301	✓

Source: Liaison Communication

Update: November 2023

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for Infants & Toddlers. **DONE**

- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member’s potential eligibility for Infants & Toddlers.

S2_R004 – Child Tax Credit (DCA/IRS)

1. Are any household members **under the age of 17**?
 - If No, go to #4
 - If Yes, go to #2
2. Is the **head of household married**?
 - If Yes, go to #3
 - If No, go to #4
3. Is the **gross household income \geq than \$2,500 AND \leq than \$400,000**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Child Tax Credit. **DONE**
 - If Yes, the household “May Be Eligible” for Child Tax Credit. The message that displays on the results screen should read “Household Members with a Dependent Child”. **DONE**
4. Is the **gross household income \geq than \$2,500 AND \leq than \$200,000**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Child Tax Credit. **DONE**
 - If Yes, the household “May Be Eligible” for Child Tax Credit. The message that displays on the results screen should read “Household Members with a Dependent Child”. **DONE**
5. All other households
 - We are “Unable to Determine” the household’s potential eligibility for Child Tax Credit. **DONE**

S2_R005 – Disability Rent Increase Exemption (DRIE) (DOF)

1. Does the household **live in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for DRIE. **DONE**
 - If Yes, go to #2

2. Is the **primary applicant aged 18 or older**?
AND does the household **rent their primary residence**?

AND is the **primary applicant named on the lease OR the rent order OR have been granted succession rights to the apartment**?

AND does the household live in an apartment regulated by the Division of Housing and Community Renewal (DHCR); (**Rental Type of Rent Stabilized; Rent Controlled; HDFC Cooperative Shareholder**

apartment; Mitchell-Lama Apartment; Section 213 Cooperative)

AND does the **primary applicant** have an **income type of Federal Supplemental Security Income (SSI); Federal Social Security Disability Insurance (SSDI); U.S Department of Veterans Affairs Disability Pension or Compensation** (Must be military service-related disability pension or compensation); **Disability Related Medicaid** (if the applicant has received either SSI or SSDI in the past).

- If No, to any question, go to #3
- If Yes, sum all income sources for all household members. Check gross annual income is less than or equal to \$50,000.

Annual Household Income	Eligible
≤ \$50,000	✓

- If the household's gross annual income is less than or equal to \$50,000, the household "May Be Eligible" for DRIE. **DONE**
- If the household's gross annual income is greater than \$50,000 we are "Unable to Determine" the household's potential eligibility for DRIE. **DONE**

3. All other households

- We are "Unable to Determine" the household's potential eligibility for DRIE. **DONE**

S2_R006 – Earned Income Tax Credit (EITC) (DCA/IRS)

1. Does the **household live in New York City?**

- If yes, go to #2
- If no, we are "Unable to Determine" the household's potential eligibility for EITC. **DONE**

2. Does the **Head of Household (HoH) OR** their **spouse** have **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income)?

- If yes, go to #3
- If no, go to #5

3. Does this household have a **qualifying child**? A **qualifying child** must have a **relationship type** of child, step child, foster child, grandchild, **OR** brother/sister to the HoH.

AND be **18 or under AND** younger then the HoH **OR** their Spouse

OR be **full-time student** who is **23 or under AND** younger then the HoH **OR** their Spouse

OR be a person with a **disability** (blind **OR** disabled)

- If yes, go to #4

- If no, go to #5
4. For households **WITH** a qualifying child.
Is the **HoH married** (has a relationship type of spouse)?
- If yes, go to #4a.
 - If no, go to #4b.
- a. If the HoH is **married**, then count the number of **qualifying children**, **SUM** the HoH and Spouse's **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income), and separately **SUM** their **Investment Income** (income type of investment **OR** rental).
Determine if these incomes are under the limits in **Table 1**.
- If no, go to #6
 - If yes, the household "May Be Eligible" for EITC. **DONE**
- b. If the HoH is **not married**, then count the number of **qualifying children**, **SUM** the HoH's **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income), and separately **SUM** their **Investment Income** (income type of investment **OR** rental).
Determine if these incomes are under the limits in **Table 2**.
- If no, go to #6
 - If yes, the household "May Be Eligible" for EITC. **DONE**
5. For households **WITHOUT** a qualifying child.
Is the **HoH married** (has a relationship type of spouse)?
- If yes, go to 5a.
 - If no, go to #5b.
- a. If the HoH is **married**, check that the HoH **OR** Spouse are **at least age 25 and less than 65**?
Then **SUM** the HoH and Spouse's **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income), and separately **SUM** their **Investment Income** (income type of investment or rental).
Determine if these incomes are under the limits in **Table 1**.
- If no, go to #6
 - If yes, the household "May Be Eligible" for EITC. **DONE**
- b. If the HoH is **not married**, check that the HoH is **at least age 25 and less than 65**?
Then **SUM** the HoH's **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income), and separately **SUM** their **Investment Income** (income type of investment **OR** rental).
Determine if these incomes are under the limits in **Table 2**.
- If no, go to #6
 - If yes, the household "May Be Eligible" for EITC. **DONE**
6. Is there a **household member** (other than the HoH or their spouse) **at least age 25 and less than 65**?

Check that the household member have **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income)?

Then **SUM** household members **Earned Income** (check for income type of Wages, Salary, Tips **OR** Self-Employment Income), and separately **SUM** their **Investment Income** (income type of investment **OR** rental).

Determine if these incomes are under the limits in **Table 2** row 1 (assume there are 0 children).

- If yes, the household “May Be Eligible” for EITC. **DONE**
- If no, we are “Unable to Determine” the household’s potential eligibility for EITC. **DONE**

EITC INCOME TABLES

TABLE 1 - Head of Household is married			
# of Children in Household	Annual Earned Income	Annual Investment Income	Eligible
0	≤ \$24,210	≤ \$11,000	✓
1	≤ \$53,120	≤ \$11,000	✓
2	≤ \$59,478	≤ \$11,000	✓
≥ 3	≤ \$63,398	≤ \$11,000	✓

TABLE 2 - Head of Household is not married			
# of Children in Household	Annual Earned Income	Annual Investment Income	Eligible
0	≤ \$17,640	≤ \$11,000	✓
1	≤ \$46,560	≤ \$11,000	✓
2	≤ \$52,918	≤ \$11,000	✓
≥ 3	≤ \$56,838	≤ \$11,000	✓

Updated: January 2024

S2_R007 – Supplemental Nutrition Assistance Program (SNAP/Food Stamps) (HRA)

1. Does the household live in New York City?

- If **No**, we are “Unable to Determine” the household’s potential eligibility for SNAP benefits. **DONE**
 - If **Yes**, go to #2
2. Do all household members have an income source of Supplemental Security Income **OR** Cash Assistance Grant?
- If **No**, go to #3
 - If **Yes**, the household “May Be Eligible” for SNAP benefits. **DONE**
3. For households **WITHOUT** a member age 60+ **OR** a disability (checkbox disability or blind).
- a. If the household **has out-of pocket-dependent care costs** (Expense type Child Care or Dependent Care)
Then use **Table 1, 200%**; compare to **gross income MINUS Child Support (Paid)**
 - If **No**, go to #3b
 - If **Yes**, the household “May Be Eligible” for SNAP benefits. **DONE**
 - b. If the household **has earned income** (Income type Wages..., Boarder..., or Self-Employed)
Then use **Table 2, 150%**; compare to **gross income MINUS Child Support (Paid)**
 - If **No**, go to #3c
 - If **Yes**, the household “May Be Eligible” for SNAP benefits. **DONE**
 - c. If the household **does not have out-of pocket dependent care costs** (No Expense type of Child Care or Dependent Care) **AND** does not receive earned income (Any income type but Wages..., Boarder..., or Self-Employed)
Then use **Table 3, 130%**; compare to **gross income MINUS Child Support (Paid)**
 - If **No**, we are “Unable to Determine” the household’s potential eligibility for SNAP benefits. **DONE**
 - If **Yes**, the household “May Be Eligible” for SNAP benefits. **DONE**
4. For households **WITH** an member age 60+ **OR** a disability (checkbox disability or blind)
- a. Use **Table 1, 200%**; compare to **gross income MINUS Child Support (Paid)**
 - If **No**, we are “Unable to Determine” the household’s potential eligibility for SNAP benefits. **DONE**
 - If **Yes**, the household “May Be Eligible” for SNAP benefits. **DONE**

SNAP INCOME TABLES

TABLE 1 - 200% of poverty level
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Household Member Aged 60 or Over OR Household Member with Disability/Blind OR Household Member Incurs Dependent Care Costs		
# of people in Household	Monthly Household Income (200%)	Eligible
1	≤ \$2,430	✓
2	≤ \$3,287	✓
3	≤ \$4,143	✓
4	≤ \$5,000	✓
5	≤ \$5,857	✓
6	≤ \$6,713	✓
7	≤ \$7,570	✓
8	≤ \$8,427	✓
Each Additional Person	\$857	✓

TABLE 2 - 150% of poverty level Households with earned income AND Do not contain an elderly OR Disabled individual OR No out-of-pocket dependent care expenses		
# of people in the Household	Monthly Household Income (150%)	Eligible
1	≤ \$1,823	✓
2	≤ \$2,465	✓
3	≤ \$3,108	✓
4	≤ \$3,750	✓
5	≤ \$4,393	✓
6	≤ \$5,035	✓
7	≤ \$5,678	✓
8	≤ \$6,320	✓

Each Additional Person	\$643	✓
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TABLE 3 - 130% of poverty level NO household member who's 60+ OR Disabled/blind AND Did not incur dependent expenses AND Has no earned income		
# of people in Household	Monthly Household Income (130%)	Eligible
1	≤ \$1,580	✓
2	≤ \$2,137	✓
3	≤ \$2,694	✓
4	≤ \$3,250	✓
5	≤ \$3,807	✓
6	≤ \$4,364	✓
7	≤ \$4,921	✓
8	≤ \$5,478	✓
Each Additional Person	\$557	✓

Updated: Effective date of October 1, 2023. October 2022

Source: Upstate and NYC – Updated Supplemental Nutrition Assistance Program (SNAP) Standards for October 2023

S2_R008 – Head Start (DOE)

While these rules should be run for each household member individually, the overall household size and gross income will be used.

- Does the household live in New York City?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Head Start. **DONE**
 - If Yes, go to #2
- Does the household have an income source of “Cash Assistance Grant” or “Supplemental Security Income”?
 - If Yes, the household member “May Be Eligible” for Head Start. **DONE**
 - If No, go to #3

3. Is the household member's age 3 or 4 years old?

4. x

- If No, we are "Unable to Determine" the household member's potential eligibility for Head Start. **DONE**
- If Yes, check gross yearly income levels by household size.

# of People in a Household	Annual Household Income	Eligible
1	≤ \$15,060	✓
2	≤ \$20,440	✓
3	≤ \$25,820	✓
4	≤ \$31,200	✓
5	≤ \$36,580	✓
6	≤ \$41,960	✓
7	≤ \$47,340	✓
8	≤ \$52,720	✓

Source: Head Start Family Income Guidelines for 2023

- If the household's gross annual income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member "May Be Eligible" for Head Start. **DONE**
 - If the household's gross annual income is **GREATER THAN** the income levels for the household size, go to #4.
5. If the person completing the screener is "Head of Household", is the **household member's relationship to the HOH** a "Foster Child"?
- If Yes, the household member "May Be Eligible" for Head Start. **DONE**
 - If No, go to #5
6. All other household members
- We are "Unable to Determine" the household member's potential eligibility for Head Start. **DONE**

S2_R009 – Comprehensive After School System of NYC (COMPASS NYC) (DYCD)

These rules should be run for each household member individually.

1. Does the household live in New York City?

- If No, we are "Unable to Determine" the household member's potential eligibility for the Comprehensive After School System of NYC (COMPASS NYC). **DONE**

- If Yes, go to #2
2. Is the household member a **student aged between 5 and 21 years old**?
- If No, go to #3
 - If Yes, the household “May Be Eligible” for the Comprehensive After School System of NYC (COMPASS NYC). **DONE**
3. All other households members
- We are “Unable to Determine” the household member’s potential eligibility for the Comprehensive After School System of NYC (COMPASS NYC). **DONE**

S2_R010 – Cash Assistance (HRA)

1. Does the household live in New York City?
- If Yes, go to #2
 - If No, we are “Unable to Determine” the household’s potential eligibility for Cash Assistance. **DONE**
2. Are there children (18 and under) or pregnant people in the household?
- If No, go to #3
 - If Yes, determine **Total Monthly Needs** based on household size from TABLE 1.

TABLE 1					
Household with children					
	Basic Allowance	Energy Grant	Shelter Allowance	Total S/M Needs	Total Monthly Needs
hh size 1	79.00	12.55	138.50	230.05	< 460.10
hh size 2	126.00	19.75	141.50	287.25	< 574.50
hh size 3	168.00	26.50	200.00	394.50	< 789.00
hh size 4	216.50	34.35	225.00	475.85	< 951.70
hh size 5	267.00	42.35	250.50	559.85	< 1119.70
hh size 6	308.50	48.60	262.00	619.10	< 1238.20
hh size 7	351.00	54.85	273.00	678.85	< 1357.70
hh size 8	393.50	61.10	273.00	727.60	< 1455.20

Reference: W-203K

- Then determine **Total Monthly Income**
 - First calculate the **Total Monthly unearned**. Sum all income types below:
 - ◀ Workers' Compensation
 - ◀ New York State Disability
 - ◀ Unemployment Insurance Benefits

- ◀ Social Security Benefits (dependent, disability, survivor, retirement)
 - ◀ Veterans' pension or compensation
 - ◀ Interest/Dividends
 - ◀ Child support/Combined Child and Spousal Support (alimony)
 - Then calculate the **Monthly net earned income**. First determine the **Monthly gross earned income**. Sum all income types below:
 - ◀ Income type Wages
 - ◀ Boarder
 - ◀ Self-Employed
 - Next calculate the **Monthly work expense disregard**. For each employed individual sum 150.
 - To determine the **Monthly net earned income**, subtract the **Monthly work expense disregard** from the **Monthly gross earned income**.
 - Then calculate the **Total Monthly Income** by summing the **Monthly net earned income** and the **Total Monthly unearned**.
- If the household's **Total Monthly Income** is less than the **Total Monthly Needs**, then the household “May Be Eligible” for Cash Assistance. **DONE**
 - If not, then we are “Unable to Determine” the household’s potential eligibility for Cash Assistance. **DONE**

3. Are there no children (18 and under) or pregnant people in the household?

- If **No**, then we are “Unable to Determine” the household’s potential eligibility for Cash Assistance. **DONE**
- If **Yes**, determine **Total Monthly Needs** based on household size from TABLE 2.

TABLE 2					
Household without children					
	Basic Allowance	Energy Grant	Shelter Allowance	Total S/M Needs	Total Monthly Needs
hh size 1	79.00	12.55	107.50	199.05	< 398.10
hh size 2	126.00	19.75	125.00	270.75	< 541.50
hh size 3	168.00	26.50	143.00	337.50	< 675.00
hh size 4	216.50	34.35	156.00	406.85	< 813.70
hh size 5	267.00	42.35	168.50	477.85	< 955.70
hh size 6	308.50	48.60	174.50	531.60	< 1063.20
hh size 7	351.00	54.85	201.50	607.35	< 1214.70
hh size 8	393.50	61.10	210.50	665.10	< 1330.20

Reference: W-203K

- Then determine **Total Monthly Income**

- First calculate the **Total Monthly unearned**. Sum all income types below:
 - ◀ Workers' Compensation
 - ◀ New York State Disability
 - ◀ Unemployment Insurance Benefits
 - ◀ Social Security Benefits (dependent, disability, survivor, retirement)
 - ◀ Veterans' pension or compensation
 - ◀ Interest/Dividends
 - ◀ Child support/Combined Child and Spousal Support (alimony)
 - Then calculate the **Monthly net earned income**. First determine the **Monthly gross earned income**. Sum all income types below:
 - ◀ Income type Wages
 - ◀ Boarder
 - ◀ Self-Employed
 - Next calculate the **Monthly work expense disregard**. For each employed individual sum 150.
 - To determine the **Monthly net earned income**, subtract the **Monthly work expense disregard** from the **Monthly gross earned income**.
 - Then calculate the **Total Monthly Income** by summing the **Monthly net earned income** and the **Total Monthly unearned**.
- If the household's **Total Monthly Income** is **LESS THEN** the **Total Monthly Needs**, then the household “May Be Eligible” for Cash Assistance. **DONE**
 - If not, then we are “Unable to Determine” the household’s potential eligibility for Cash Assistance. **DONE**

S2_R011 – Health Insurance Assistance (HRA)

These rules should be run for the household.

1. All Households ‘May Be Eligible’ for Health Insurance assistance. **DONE**

S2_R012 – School Tax Relief (STAR) (DOF)

These rules should be run for the household.

1. Does the household live in New York City?
 - If No, we are “Unable to Determine” the household’s potential eligibility for STAR. **DONE**
 - If Yes, go to #2
2. Is the primary residence owned?
 - If No, go to #4
 - If Yes, go to #3
3. Does owner #1 or owner #2 combined gross annual income meet the income requirements?

- Sum all income sources for owner #1 and owner #2. Check gross annual income against the level below.

Annual Household Income	Eligible
≤ \$500,000	✓

Updated: March 2023

- If No, go to #4
 - If Yes, the household “May Be Eligible” for STAR. **DONE**
4. All other households
- We are “Unable to Determine” the household’s potential eligibility for School Tax Relief (STAR). **DONE**

S2_R013 – Section 8 Housing (NYCHA)

These rules should be run for the household.

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for Section 8. **DONE**
- If Yes, go to #2

2. Is the head of household age 18 or older?

- If No, go to #3.
- If Yes, use the household size and gross income for all household members to determine if the household may be eligible for Section 8.

# of People in Household	Annual Household Income	Eligible
1	≤ \$49,450	✓
2	≤ \$56,500	✓
3	≤ \$63,550	✓
4	≤ \$70,600	✓
5	≤ \$76,250	✓
6	≤ \$81,900	✓
7	≤ \$87,550	✓
8	≤ \$93,200	✓

Last Updated: October 2023

- If the household's gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household "May Be Eligible" for Section 8. **DONE**
 - If the household's gross monthly income is **GREATER THAN** the income level for the household size, we are "Unable to Determine" the household's potential eligibility for Section 8. **DONE**
3. All other households members
- We are "Unable to Determine" the household's potential eligibility for Section 8. **DONE**

S2_R014 – Senior Citizen Homeowners' Exemption (SCHE) (DOF)

These rules should be run for the household.

1. Does the **household live in New York City**?
- If No, we are "Unable to Determine" the household's potential eligibility for SCHE. **DONE**
 - If Yes, go to #2
2. Is **owner #1 OR owner #2 aged 65 or older**
AND does the household **own their primary residence**?
- If No to either question, go to #3
 - If Yes, sum all income sources for owner #1 and owner #2. Check gross annual income against the level below.

Annual Household Income	Eligible
≤ \$58,399	✓

Source: [DOF's website SCHE eligibility requirement section](#) (Updated Dec. 2017)

- If the owner's gross annual income is **LESS THAN OR EQUAL TO** the income level, the household "May Be Eligible" for SCHE. **DONE**
 - If the owner's gross annual income is **GREATER THAN** the income level, we are "Unable to Determine" the household's potential eligibility for SCHE. **DONE**
3. All other households
- We are "Unable to Determine" the household's potential eligibility for SCHE. **DONE**

S2_R015 – Senior Citizen Rent Increase Exemption (SCRIE) (DOF)

These rules should be run for the household.

1. Does the **household live in New York City**?

- If No, we are “Unable to Determine” the household’s potential eligibility for SCRIE. **DONE**
- If Yes, go to #2

2. Is the **primary applicant aged 62 or older?**

- If No, unable to determine
- If Yes, go to #3

3. Does the **household rent their primary residence?**

AND is the primary applicant named on the lease?

OR the rent order

OR have been granted succession rights to the apartment?

AND does the household live in one of the following apartment types that are regulated by the Division of Housing and Community Renewal (DHCR): (Rent Stabilized or Rent Controlled; Mitchell-Lama Apartment; Rent Regulated Hotel Unit; HDFC Cooperative Shareholder apartment, Section 213 Cooperative)

- If No, we are “Unable to Determine” the household’s potential eligibility for SCRIE. **DONE**
- If Yes, go to step 4

4. **SUM all household member income sources (excluding income source of Gifts - Received). CHECK** the gross annual income in comparison to the chart below.

Annual Household Income	Eligible
≤ \$50,000	✓

- If the household’s gross annual income is **LESS THAN OR EQUAL TO** the income level, the household “May Be Eligible” for SCRIE. **DONE**
- If the household’s gross annual income is **GREATER THAN** the income level, we are “Unable to Determine” the household’s potential eligibility for SCRIE. **DONE**

5. All other households

- We are “Unable to Determine” the household’s potential eligibility for SCRIE. **DONE**

NOTE

Deprioritized Rule: Does the household spend more than one-third of combined monthly income on rent?

- Discussion with DOF December 2021
- DOF stated that sometimes applicants make mistakes in calculating 1/3 of their monthly income being spent on rent. So for high-level general eligibility screening on ANYC, it is best to leave this step out of the rules. This way the screener won’t exclude many people from being potentially eligible.

S2_R016 – Pre-K for All (Pre-K) (DOE)

These rules should be run for each household member individually.

1. Does the **household live in New York City?**

- If No, we are “Unable to Determine” the household’s potential eligibility for Pre-K. **DONE**
- If Yes, go to #2

2. Is the **household member at least 4 years old?**

- If No, go to #3
- If Yes, the household member “May Be Eligible” for Pre-K. **DONE**

3. All other household members

- We are “Unable to Determine” the household member’s potential eligibility for Pre-K. **DONE**

S2_R017 – Disabled Homeowners’ Exemption (DHE) (DOF)

These rules should be run for the household.

1. Does the household **live in New York City?**

- If No, we are “Unable to Determine” the household’s potential eligibility for DHE. **DONE**
- If Yes, go to #2

2. Is owner #1 OR owner #2 disabled OR blind

OR does owner #1 or owner #2 have an income type of Supplemental Security Income OR Social Security Disability Benefits?

AND does the household own their primary residence?

- If No to either question, go to #3
- If Yes, sum all income sources for owner #1 and owner #2. Check gross annual income against the level below.

Annual Household Income	Eligible
≤ \$58,399	✓

Source: [DOF’s website DHE eligibility requirement section](#) (Updated Dec. 2017)

- If the owner’s gross annual income is **LESS THAN OR EQUAL TO** the income level, the household “May Be Eligible” for DHE. **DONE**
- If the owner’s gross annual income is **GREATER THAN** the income level, we are “Unable to Determine” the household’s potential eligibility for DHE. **DONE**

3. All other households

- We are “Unable to Determine” the household’s potential eligibility for DHE. **DONE**

S2_R018 – Veterans' Property Tax Exemption (DOF)

These rules should be run for the household.

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for Veterans’ Exemption. **DONE**
- If Yes, go to #2

2. Is owner #1 or owner #2 a veteran?

AND does the household own their primary residence?

- If No, go to #3
- If Yes to both questions, the household “May Be Eligible” for Veterans’ Exemption. **DONE**

3. All other households

- We are “Unable to Determine” the household’s potential eligibility for Veterans’ Exemption. **DONE**

S2_R019 – Home Energy Assistance Program (HEAP) (HRA)

These rules should be run for the household.

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for HEAP. **DONE**
- If Yes, go to #2

2. Does the household contain a member 6 years old or younger, 60 years old or older, or a person with a disability (use checkbox disability or blind)?

- If No, we are “Unable to Determine” the household’s potential eligibility for HEAP. **DONE**
- If yes, got to #3

3. Does a Household member have an income type of Cash Assistance OR does a household size of one receive Supplemental Security Income’ (Code A SSI) OR meet the income guidelines?

- If no, got to #4
- If yes, the household “May Be Eligible” for HEAP. **DONE**

4. Use the household size and gross income to determine if the household may be eligible for HEAP.

# of People in Household	Monthly Household Income	Eligible
1	≤ \$3,035	✓
2	≤ \$3,970	✓
3	≤ \$4,904	✓

# of People in Household	Monthly Household Income	Eligible
4	≤ \$5,838	✓
5	≤ \$6,772	✓
6	≤ \$7,706	✓
7	≤ \$7,881	✓
8	≤ \$8,056	✓

Updated: October 2023

Source: 2023-2024 HEAP Monthly Income Limits (<https://otda.ny.gov/programs/heap/#regular-benefit>)

- If the household's gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household "May Be Eligible" for HEAP. **DONE**
- If the household's gross monthly income is **GREATER THAN** the income level for the household size, we are "Unable to Determine" the household's potential eligibility for HEAP. **DONE**

S2_R020 – SchoolFoods (School Meals) (DOE)

These rules run for each household member individually.

1. Does the household live in New York City?

- If No, we are "Unable to Determine" the household's potential eligibility for School Meals. **DONE**
- If Yes, go to #2

2. Is the household member's age between 0 - 21 AND is the household member a student?

- If No, we are "Unable to Determine" the household member's potential eligibility for School Meals. **DONE**
- If Yes, the household member "May Be Eligible" for School Meals. **DONE**

NOTE

All students are able to receive free meals in school regardless of their family's economic situation

- Confirmed by the agency liaison.
- The table rules are not needed for NYC's School Child Nutrition Program. 8/22/2018.
- ACCESS NYC is not currently screening for this program.

S2_R021 – New York State Unemployment Insurance (NYS Department of Labor)

These rules should be run for each household member individually.

1. Is the household member currently unemployed?
AND did the household member work within the last 18 months?

- If No to either questions, go to #2
- If Yes to both questions, the household member “May Be Eligible” for Unemployment Insurance. **DONE**

2. All other household members

- We are “Unable to Determine” the household member’s potential eligibility for Unemployment Insurance. **DONE**

S2_R022 – Women, Infants and Children (WIC) (NYS DOH)

These rules should be run for each household member individually.

1. Does the household live in New York City?

- If Yes, go to #2
- If No, we are “Unable to Determine” the household’s potential eligibility for WIC. **DONE**

2. Is the household member pregnant?

- If Yes, go to 4
- If No question, go to #3

3. Is the household member’s age less than 6?

- If Yes, go to 4
- If No, we are “Unable to Determine” the household’s potential eligibility for WIC. **DONE**

4. Check gross monthly income levels by household size.

# of People in a Household	Annual Household Income	Eligible
1	≤ \$26,973	✓
2	≤ \$36,482	✓
3	≤ \$45,991	✓
4	≤ \$55,500	✓
5	≤ \$65,009	✓
6	≤ \$74,518	✓
7	≤ \$84,027	✓
8	≤ \$93,536	✓
Each Additional Person	\$9,509	✓

Source: USDA, WIC Policy Memorandum #2023-4
Updated: Aug 2023 (Effective through June 30, 2024)

- If the household's gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member "May Be Eligible" for WIC. **DONE**
- If the household's gross monthly income is **GREATER THAN** the income level for the household size, we are "Unable to Determine" the household member's potential eligibility for WIC. **DONE**

S2_R023 – Community Meals (formerly known as Summer Meals) (DOE)

Starting September 2021, the program is not active for the year hence ACCESS NYC is not screening for it.

These rules should be run for each household member individually.

1. Is the household member aged less than 19?
 - If No, go to #2
 - If Yes, the household member "May Be Eligible" for Summer Meals. **DONE**
2. All other household members
 - We are "Unable to Determine" the household member's potential eligibility for Summer Meals. **DONE**

S2_R024 – NYCHA Resident Economic Empowerment & Sustainability (REES) (NYCHA)

These rules should be run for each household member individually.

1. Does the household live in New York City?
 - If No, we are "Unable to Determine" the household member's potential eligibility for REES. **DONE**
 - If Yes, go to #2
2. Does the household rent their primary residence and have a residence type of 'Housing Authority'?
 - If No, we are "Unable to Determine" the household member's potential eligibility for REES. **DONE**
 - If Yes, go to #3
3. Is the household member 18 or older?
 - If No, we are "Unable to Determine" the household member's potential eligibility for REES. **DONE**
 - If Yes, the household member "May Be Eligible" for REES. **DONE**

S2_R025 – Older Adult Employment Program (DFTA)

These rules should be run for each household member individually.

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household member’s potential eligibility for Older Adult Employment Program. **DONE**
- If Yes, go to #2.

2. Is the household member 55 years old or older?

- If No, we are “Unable to Determine” the household member’s potential eligibility for Older Adult Employment Program. **DONE**
- If Yes, go to #3.

3. Is the household member currently unemployed?

- If No, we are “Unable to Determine” the household member’s potential eligibility for Older Adult Employment Program . **DONE**
- If Yes, go to #4.

4. Check gross annual income levels by household size.

# of people in the Household	Annual Household Income	Eligible
1	≤ \$18,825	✓
2	≤ \$25,550	✓
3	≤ \$32,275	✓
4	≤ \$39,000	✓
5	≤ \$45,725	✓
6	≤ \$52,450	✓
7	≤ \$59,175	✓
8	≤ \$65,900	✓

Updated: February 2024

Source: 2024 Older Adult Employment Program Income Eligibility Figures - Use 125%

- If the household’s gross income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member “May Be Eligible” for Older Adult Employment Program . **DONE**
- If the household’s gross income is **GREATER THAN** the income level for the household size, we are “Unable to Determine” the household member’s potential eligibility for Older Adult Employment Program . **DONE**

S2_R026 – Workforce1 (SBS)

These rules should be run for each household member individually.

1. Is the household member 18 or older?

- If No, we are “Unable to Determine” the household member’s potential eligibility for Workforce1. **DONE**
- If Yes, the household member “May Be Eligible” for Workforce1. **DONE**

S2_R027 – Commodity Supplemental Food Program (CSFP) (NYS DOH)

Rule set last Updated ▾ on Apr 9, 2024

1. Does the household live or work in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for CSFP. **DONE**
- If Yes, go to #2

2. Is there a household member aged 60 or older?¹

- If No, we are “Unable to Determine” the household’s potential eligibility for CSFP. **DONE**
- If Yes, go to #3

3. Determine the household size. Check gross monthly income levels by household size.²

# of People in a Household	Annual Household Income	Eligible
1	≤ \$19,578	✓
2	≤ \$26,572	✓
3	≤ \$33,566	✓
4	≤ \$40,560	✓
5	≤ \$47,554	✓
6	≤ \$54,548	✓
7	≤ \$61,542	✓
8	≤ \$68,536	✓

- If the household’s gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member “May Be Eligible” for CSFP. **DONE**

¹Release 1.27: NYC DOH, CSFP, [How Do I Apply](#), Visited Apr 9, 2024

²Release 1.27: NYC DOH, CSFP, [Income Eligibility Guidelines](#), Visited Apr 9, 2024

- If the household's gross monthly income is **GREATER THAN** the income level for the household size, we are "Unable to Determine" the household member's potential eligibility for CSFP. **DONE**

S2_R028 – Learn & Earn (DYCD)

These rules should be run for each household member individually.

1. Does the household live in New York City? AND

- If No, we are "Unable to Determine" the household member's potential eligibility for Learn & Earn. **DONE**
- If Yes, go to #2

2. Is the household member's age between 14 and 21? AND

- If No, we are "Unable to Determine" the household member's potential eligibility for Learn & Earn. **DONE**
- If Yes, go to #3

3. Is the member homeless (have a housing situation type of in a shelter or homeless) OR

- If Yes, the household member "May be eligible" for Learn & Earn. **DONE**
- If No, go to #4

4. Is the household member in foster care (member has a relationship type of foster child or another hh member has a relationship type foster parent to member)? OR

- If Yes, the household member "May be eligible" for Learn & Earn. **DONE**
- If No, go to #5

5. Does the household member identify as having a disability (checkbox disability or blind)? OR

- If Yes, the household member "May be eligible" for Learn & Earn. **DONE**
- If No, go to #6

6. Is the household member pregnant or a parent (have a relationship type of child)? OR

- If Yes, the household member "May be eligible" for Learn & Earn. **DONE**
- If No, go to #7

7. Does the household member qualify as "low income"? AKA Do any household members have an income type of CA or SSI? OR

- If Yes, the household member "May be eligible" for Learn & Earn. **DONE**
- If No, go to #8

8. Does the household member qualify as "low income"? Is the household \leq 100% of the FPL?

# of People in Household	Annual Household Income	Eligible
1	≤ \$14,580	✓
2	≤ \$19,720	✓
3	≤ \$24,860	✓
4	≤ \$30,000	✓
5	≤ \$35,140	✓
6	≤ \$40,280	✓
7	≤ \$45,420	✓
8	≤ \$50,560	✓

Source: FLP 2023 Chart

(<https://aspe.hhs.gov/sites/default/files/documents/1c92a9207f3ed5915ca020d58fe77696/detailed-guidelines-2023.pdf>)

- If yes, the household member “May be eligible” for Train & Earn. **DONE**
- If no, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**

S2_R029 – Nurse-Family Partnership (DOHMH)

These rules should be run for each household member individually.

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for NFP. **DONE**
- If Yes, go to #2

2. Is the household member pregnant?

- If No, go to #3
- If Yes, increase the household size by one (to account for the unborn child) and check if the household member’s monthly income is less than or equal to SS

# of People in a Household	Monthly Household Income	Eligible
1	≤ \$2,960	✓
2	≤ \$3,733	✓
3	≤ \$4,606	✓
4	≤ \$5,280	✓

5	≤ \$6,053	✓
6	≤ \$6,826	✓
7	≤ \$7,599	✓

Updated: February 2016

- If the household member's gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member "May Be Eligible" for NFP. **DONE**
- If the household member's gross monthly income is **GREATER THAN** the income level for the household size, we are "Unable to Determine" the household member's potential eligibility for NFP. **DONE**

3. All other households members

- We are "Unable to Determine" the household member's potential eligibility for NFP. **DONE**

S2_R030 – Summer Youth Employment Program (SYEP) (DYCD)

These rules should be run for each household member individually.

1. Does the household live in New York City?

- If No, we are "Unable to Determine" the household member's potential eligibility for SYEP. **DONE**
- If Yes, go to #2

2. Is the household member's age between 14 and 24?

- If Yes, the household member is potentially eligible for SYEP. **DONE**
- If No, we are unable to determine eligibility for SYEP. **DONE.**

S2_R031 – Family Planning Benefit Program (FPBP) (NYS DOH)

Rule set last **Updated** on Apr 9, 2024

While these rules should be run for each household member individually, the overall household size and gross income will be used.

1. Does the household live in New York City?

- If No, we are "Unable to Determine" the household's potential eligibility for the Family Planning Benefit program. **DONE**
- If Yes, go to #2

2. Is the household **member enrolled in Medicaid or Disability-Related Medicaid?**³

- If No, go to #3
- If Yes, we are “Unable to Determine” the household’s potential eligibility for the Family Planning Benefit program. **DONE**

3. Check gross monthly income by household size.⁴

# of People in a Household	Monthly Household Income	Eligible
1	≤ \$2,799	✓
2	≤ \$3,799	✓
3	≤ \$4,799	✓
4	≤ \$5,598	✓
5	≤ \$6,798	✓
6	≤ \$7,798	✓
7	≤ \$8,798	✓
8	≤ \$9,798	✓

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for the Family Planning Benefit program. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member’s potential eligibility for the Family Planning Benefit program. **DONE**

S2_R032 – IDNYC (HRA)

1. Does the household live in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for IDNYC. **DONE**
- If Yes, proceed to 2.

2. Is any other household member 10 years old or older?

- If No, we are “Unable to Determine” the household member’s potential eligibility for IDNYC. **DONE**
- If Yes, the household member “May be eligible” for IDNYC. **DONE**

³Release 1.27: NYC DOH, FPBP, [How do I know if I qualify for the FPBP?](#), Visited Apr 9, 2024

⁴Release 1.27: NYC DOH, FPBP, [How do I know if my income qualifies me for the FPBP?](#), Visited Apr 9, 2024

S2_R033 – Cooling Assistance Benefit (HRA)

These rules should be run for the household.

1. Does the **household live in New York City?**

- If No, we are “Unable to Determine” the household’s potential eligibility for Cooling Assistance Benefit . **DONE**
- If Yes, go to #2

2. Does the household contain a **member 6 years old or younger OR 60 years old or older OR**

A person **with a disability (checked disability or blind)?**

- If no, we are “Unable to Determine” the household’s potential eligibility for Cooling Assistance Benefit. **DONE**
- If yes, got to #3

3. Does a Household member have an **income type of Cash Assistance OR**
Does a **household size of one receive Supplemental Security Income’ (Code A SSI) OR**
Meet the income guidelines?

THEN use the household size and gross income to determine if the household may be eligible for Cooling Benefits.

# of People in a Household	Monthly Household Income	Eligible
1	≤ \$2,852	✓
2	≤ \$3,730	✓
3	≤ \$4,608	✓
4	≤ \$5,485	✓
5	≤ \$6,363	✓
6	≤ \$7,241	✓
7	≤ \$7,405	✓
8	≤ \$7,570	✓

Effective March 2023

- If the household’s gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household “May Be Eligible” for Cooling Assistance. **DONE**
- If the household qualifies for neither, we are “Unable to Determine” the household’s potential eligibility for Cooling Assistance. **DONE**

S2_R034 – Fair Fares (HRA)

These rules should be run for the household.

1. Does the **household live in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Fair Fares. **DONE**
 - If Yes, go to #2
2. Is the household member **aged between 18 and 64**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Fair Fares. **DONE**
 - If Yes, go to #3
3. Check gross monthly income levels by household size.

# of People in a household	Annual Household Income	Eligible
1	≤ \$18,072	✓
2	≤ \$24,528	✓
3	≤ \$30,984	✓
4	≤ \$37,440	✓
5	≤ \$43,896	✓
6	≤ \$50,352	✓
7	≤ \$56,808	✓
8	≤ \$63,264	✓

Updated: January 2024

- If No, we are “Unable to Determine” the household’s potential eligibility for Fair Fares. **DONE**
- If Yes, the household member “May Be Eligible” for NYC Fair Fares. **DONE**

S2_R035 – Public Housing (NYCHA)

1. Does the **household live or work in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Public Housing. **DONE**
 - If Yes, go to #2
2. Is the **head of the household aged 18 or older**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Public Housing. **DONE**
 - If Yes, go to #3

3. If the head of household has a **spouse OR domestic partner**, is this person **18 years or older**?

- If No, we are “Unable to Determine” the household’s potential eligibility for Public Housing. **DONE**
- If Yes, go to #4

4. Do **households larger than 1 person** have at least one relationship that meets NYCHA’s definition of **family**: Is the head of the household member related by blood, marriage, domestic partnership, adoption, guardianship or court-awarded custody with another household member?

To determine “Related”, check the following relationship types: spouse, child, foster child, parent, grandparent, foster parent, sister/brother, domestic partners, step-child, step parent, step sister.

- If No, go to #6
- If Yes, go to #5

5. **Check gross annual income levels by household size.**

# of People in a Household	Annual Household Income	Eligible
1	≤ \$79,200	✓
2	≤ \$90,500	✓
3	≤ \$101,800	✓
4	≤ \$113,100	✓
5	≤ \$122,150	✓
6	≤ \$131,200	✓
7	≤ \$140,250	✓
8	≤ \$149,300	✓

Source: <https://www1.nyc.gov/site/nycha/eligibility/eligibility.page>

Updated: Aug 2023

- If the household’s gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member “May Be Eligible” for Public Housing. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household’s potential eligibility for Public Housing. **DONE**

6. If the **household contains 2 or more adults (18+)** and all other household members are “unrelated” to the head of household. **Check the income of each household member who is at least 18 years old with the income threshold for a household size of one.**

To determine “Unrelated”, check the following relationship types: unrelated, related in some other way, boyfriend/girlfriend.

# of People in a Household	Annual Household Income	Eligible
1	≤ \$79,200	✓

- If any household member's gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member “May Be Eligible” for Public Housing. **DONE**
- If all household member's gross monthly income is **GREATER THAN** the income level for the household size we are “Unable to Determine” the household’s potential eligibility for Public Housing. **DONE**

S2_R036 – Train & Earn (DYCD)

These rules should be run for each household member individually except income.

1. Does the **household live or work in New York City?** **AND**
 - If No, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**
 - If Yes, go to #2
2. Is the household **member between 16 - 24 years old?** **AND**
 - If No, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**
 - If Yes, go to #3
3. Is the **member a student?** **AND**
 - If Yes, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**
 - If No, go to #4
4. Is the **member unemployed** (select unemployed checkbox)? **AND**
 - If Yes, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**
 - If No, go to #5
5. Is the member **homeless** (have a housing situation type of in a shelter or homeless)? **OR**
 - If Yes, the household member “May be eligible” for Train & Earn. **DONE**
 - If No, go to #6
6. Is the household member **in foster care** (member has a relationship type of foster child or another hh member has a relationship type foster parent to member)? **OR**
 - If Yes, the household member “May be eligible” for Train & Earn. **DONE**

- If No, go to #7

7. Does the household member **identify as having a disability** (checkbox disability or blind)? **OR**

- If Yes, the household member “May be eligible” for Train & Earn. **DONE**
- If No, go to #8

8. Is the household member **pregnant or a parent** (member has a relationship type of child)? **OR**

- If Yes, the household member “May be eligible” for Train & Earn. **DONE**
- If No, go to #9

9. Does the household member **qualify as “low income”**? AKA Do any Household members **have an income type of CA OR SSI**? **OR**

- If Yes, the household member “May be eligible” for Train & Earn. **DONE**
- If No, go to #10

10. Does the household member **qualify as “low income”**? Is the **household ≤ 100% of the FPL**?

# of People in Household	Annual Household Income	Eligible
1	≤ \$14,580	✓
2	≤ \$19,720	✓
3	≤ \$24,860	✓
4	≤ \$30,000	✓
5	≤ \$35,140	✓
6	≤ \$40,280	✓
7	≤ \$45,420	✓
8	≤ \$50,560	✓

Source: FLP 2023 Chart

(<https://aspe.hhs.gov/sites/default/files/documents/1c92a9207f3ed5915ca020d58fe77696/detailed-guidelines-2023.pdf>)

- If yes, the household member “May be eligible” for Train & Earn. **DONE**
- If no, we are “Unable to Determine” the household’s potential eligibility for Train & Earn. **DONE**

S2_R037 – Home Care Services Program (HRA)

1. Does the household live or work in New York City?

- If No, we are “Unable to Determine” the household’s potential eligibility for Home Care Services. **DONE**

- If Yes, go to #2

2. Is the household **member receiving Medicaid**?

- If No, we are “Unable to Determine” the household’s potential eligibility for Home Care Services. **DONE**
- If Yes, the household member “May Be Eligible” for Home Care Services. **DONE**

S2_R038 – Medicaid for Pregnant Women (HRA)

These rules should be run for each household member individually.

1. Does the **household live in or work in New York City**?

- If No, we are “Unable to Determine” the household’s potential eligibility for Medicaid for Pregnant. **DONE**
- If Yes, go to #2

2. Is the **household member pregnant**?

- If No, “Unable to Determine” the household’s potential eligibility for Medicaid for Pregnant. **DONE**
- If Yes, continue to step 3.

3. Check **gross annual income levels by household size**.

- If No, we are “Unable to Determine” the household’s potential eligibility for Medicaid for Pregnant. **DONE**
- If Yes, the household member “May Be Eligible” for Medicaid for Pregnant. **DONE**

# of People in Household	Annual Household Income	Eligible
1	≤ \$33,584	✓
2	≤ \$45,581	✓
3	≤ \$57,579	✓
4	≤ \$69,576	✓
5	≤ \$81,573	✓
6	≤ \$93,571	✓
7	≤ \$105,568	✓
8	≤ \$117,566	✓

Source: Liaison Update

Updated: February 2024

S2_R039 – NYC Free Tax Prep (DCA)

1. Does the **household live in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for NYC Free Tax. **DONE**
 - If Yes, go to #2
2. Is the **household one person only**?
If yes, is the **household income** \leq \$59,000?
 - If yes, the household member “May Be Eligible” for NYC Free Tax Prep. **DONE**
 - If no, go to step #3
3. Does the **head of household have dependent(s)** (relationship type of child, or step child)?
If yes, is the **household income** \leq \$85,000?
 - If No, we are “Unable to Determine” the household’s potential eligibility for NYC Free Tax. **DONE**
 - If Yes, the household member “May Be Eligible” for NYC Free Tax. **DONE**

S2_R085 – 3-K for all (DOE)

These rules should be run for each household member individually.

1. Does the **household live in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for 3-K for all. **DONE**
 - If Yes, go to #2
2. Is there at least one **3 year old in the household**?
 - If No, go to #3
 - If Yes, the household member “May Be Eligible” for 3-K for all. **DONE**
3. All other household members
 - We are “Unable to Determine” the household member’s potential eligibility for 3-K for all. **DONE**

S2_R040 – Child Care Voucher (ACS)

1. Does the **household live in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Child Care Voucher. **DONE**
 - If Yes, go to #2

2. Is the household **member's age 13 years old or less**
AND does the **head of household have a relationship of parent OF step-parent to the child?**

- If No, go to #3
- If Yes, determine the number of household members and count all income for:
 - the child
 - head of household
 - the spouse of the head of household (if there is one)
 - any other household members that are aged less than 18
- **Check gross monthly income levels by household size.**

# of People in a household	Monthly Household Income	Eligible
2	≤ \$5,624	✓
3	≤ \$6,948	✓
4	≤ \$8,271	✓
5	≤ \$9,594	✓
6	≤ \$10,918	✓
7	≤ \$11,166	✓
8	≤ \$11,414	✓

Source: Liaison Communication

Updated: November 2023

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for Child Care Voucher. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member’s potential eligibility for Child Care Voucher. **DONE**

3. Is the household **member blind or disabled AND**

Aged 19 years old or less AND

A full time student AND

Does the **head of household have a relationship of parent or step-parent to the child?**

- If Yes, determine the number of household members and count all income for:
 - the child
 - head of household
 - the spouse of the head of household (if there is one)
 - any other household members that are aged less than 18
- **Check gross monthly income levels by household size.**

# of People in a household	Monthly Household Income	Eligible
2	≤ \$5,624	✓
3	≤ \$6,948	✓
4	≤ \$8,271	✓
5	≤ \$9,594	✓
6	≤ \$10,918	✓
7	≤ \$11,166	✓
8	≤ \$11,414	✓

Source: Liaison Communication

Updated: November 2023

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for Child Care Voucher. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member’s potential eligibility for Child Care Voucher. **DONE**

4. Is the household member’s age 13 years old or less AND

Does the head of household have a relationship other than of parent or step-parent to the child?

- If No, go to #5
- If Yes, sum the child’s income, treat the household size as one. Check gross monthly income levels by household size.

# of People in a household	Monthly Household Income	Eligible
1	≤ \$4,301	✓

Source: Liaison Communication

Updated: November 2023

- If the gross monthly income is **LESS THAN OR EQUAL TO** the income levels for the household size, the household member “May Be Eligible” for Child Care Voucher. **DONE**
- If the gross monthly income is **GREATER THAN** the income levels for the household size, we are “Unable to Determine” the household member’s potential eligibility for Child Care Voucher. **DONE**

5. All other household members

- We are “Unable to Determine” the household member’s potential eligibility for Child Care.

S2_R043 – Lifeline (MOCTO)

These rules should be run for each household member individually.

1. Does the **household live in New York City?**

- If No, we are “Unable to Determine” the household’s potential eligibility for Fair Fares NYC. **DONE**
- If Yes, go to #2

2. Is the household **member receiving Medicaid or Disability-related Medicaid?**

- If No, go to #3
- If Yes, the household “May Be Eligible” for Lifeline. **DONE**

3. Does one or more household **members have an income type of SSI OR Veterans Pension OR Social Security Survivors Benefit**

- No, go to #4
- If Yes, the household “May Be Eligible” for Lifeline. **DONE**

4. Check gross annual income levels by household size.

# of People in a Household	Annual Household Income	Eligible
1	≤ \$19,683	✓
2	≤ \$26,622	✓
3	≤ \$33,561	✓
4	≤ \$40,500	✓
5	≤ \$47,439	✓
6	≤ \$54,378	✓
7	≤ \$61,317	✓
8	≤ \$68,256	✓

Source: 135% of the Federal Poverty Guideline

Updated: April 2023

- If the household’s gross monthly income is **LESS THAN OR EQUAL TO** the income level for the household size, the household member “May Be Eligible” for Lifeline. **DONE**
- If the household’s gross monthly income is **GREATER THAN** the income level for the household size, we are “Unable to Determine” the household member’s potential eligibility for Lifeline.. **DONE**

S2_R045 – Financial Empowerment Centers (DCWP)

These rules should be run for each household member individually.

1. Does the **household live or work in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Financial Empowerment Centers.
 - If Yes, go to #2
2. Is the household **member 18 years or older**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for Financial Empowerment Centers. **DONE**
 - If Yes, the household “May Be Eligible” for Financial Empowerment Centers. **DONE**

S2_R046 – COVID-19 Vaccines (DOHMH)

These rules should be run for each household member individually.

1. Does the **household live or work in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for COVID-19 Vaccines. **DONE**
 - If Yes, go to #2
2. Is the household **member aged 5 or more**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for COVID-19 Vaccines. **DONE**
 - If Yes, the household member “May Be Eligible” for COVID-19 Vaccines. **DONE**

S2_R047 – NYC NY Connects (DFTA)

These rules should be run for each household member individually.

1. Does the **household live or work in New York City**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for NYC NY Connects.
 - If Yes, go to #2
2. Does the household **member have the status of being blind or have a disability**?
 - If No, we are “Unable to Determine” the household’s potential eligibility for NYC NY Connects.
 - If Yes, the household member “May Be Eligible” for NYC NY Connects. **DONE**

3. Does a household **member receive benefit: Disability related medicaid?**

- If No, go to #4
- If Yes, the household “May Be Eligible” for NYC NY Connects. **DONE**

4. Does a household **member have an income type: Disability related Medicaid?**

- If No, we are “Unable to Determine” the household’s potential eligibility for NYC NY Connects
- If Yes, the household “May Be Eligible” for NYC NY Connects. **DONE**

Appendix

“DONE” - When eligibility rules state “DONE” at the end of eligibility step, it means that the rule doesn't check anything else or it doesn’t look any further to check eligibility within the specific step.

Gross Income - total pay before taxes or other deductions.

Head of household - is the person who can represent everyone in your family and pays most of the family’s expenses. If you pay more than half the cost for your home this year, you are the head of household.

Household (HH) - is composed of one or more people who live together. For SNAP, it applies to people who eat and prepare meals together.

May be eligible - it is not guaranteed but most probably so.

Primary residence - principal and permanent place of residence.

One can have only one primary residence but may own more than one property. A registered legal address (on New York State (NYS) driver's license or non-driver license New York City identification card, on Income Taxes or voters registration) is considered your primary residence.

Unable to Determine - it is unable to know or decide what will be the outcome.

Change Log

These changes are implemented in the NYC Benefits Screening API, on [ACCESS NYC](#), and in this document. The updates originate from the administering government agency.

Program name	Updates Type	API Implemented Date
FPBP	Updated logic	April 2024
CSFP	Income guidelines	April 2024
ACP	Removed	March 2024
EITC	Updated logic	March 2024

Tax Prep	Updated logic	March 2024
Fair Fares	Income guidelines	March 2024
OAEP	Income guidelines	March 2024
Medicaid for Pregnant Women	Income guidelines	March 2024
Head Start	Income guidelines	March 2024
SNAP	Income guidelines	Nov 2023
Section 8 Housing	Income guidelines	Nov 2023
Public Housing	Logic update	Nov 2023
HEAP	Logic and income guideline	Nov 2023
Child Care Voucher	Income guidelines	Nov 2023
Infants & Toddlers	Income guidelines	Nov 2023
Fair Fares	Income guidelines	Nov 2023
Family Planning Benefit Program (FPBP)	Logic and income guidelines	Oct 2023
Medicaid for Pregnant Women	Logic and income guidelines	Oct 2023
Train & Earn	Logic and income guidelines	Oct 2023
Learn & Earn	Logic and income guidelines	Oct 2023
Public Housing	Logic and income guidelines	Sept 2023
WIC	Logic and income guidelines	Sept 2023

Commodity Supplemental Food Program (CSFP)	Logic and income guidelines	Sept 2023
EarlyLearn	Logic and income guidelines	Sept 2023
Cash Assistance	Logic and income guidelines	August 2023
SNAP	Logic and income guidelines	July 2023
Cooling Assistance	Logic and income guidelines	July 2023
Child Care Vouchers	Income guidelines	July 2023
Head Start	Logic and income guidelines	May 2023
Older Adult Employment Program	Logic and income guidelines	May 2023
Fair Fares	Logic and income guidelines	May 2023
Lifeline	Logic and income guidelines	May 2023
Covid-19 vaccines	Removed from rule set	May 2023
Affordable Connectivity Program (ACP)	New program added to the screener	March 2023
Child and Dependent Care Tax Credit (CDCTC)	Logic and income guidelines	March 2023
Child Tax Credit (CTC)	Logic and income guidelines	March 2023
Earned Income Tax Credit (EITC)	Logic and income guidelines	March 2023
NYC Free Tax Prep	Logic and income guidelines	March 2023
School Tax Relief Program (STAR)	Logic and income guidelines	March 2023

Child Care Voucher	Income guideline	October 2022
EarlyLearn	Income guideline	October 2022
Senior Employment Services (SES)	Income guideline	March 2022
Fair Fares	Income guideline	March 2022
Child Care Voucher	Logic is updated	March 2022
Emergency Broadband Benefit (EBB)	Removed inactive program	March 2022
Emergency Rental Assistance Program (ERAP)	Removed inactive program	March 2022
Earned Income Tax Credit (EITC)	Income guideline	February 2022
NYC Free Tax Prep	Income guideline	February 2022
Senior Citizen Rent Increase Exemption (SCRIE)	Logic is updated	February 2022
Home Energy Assistance Program (HEAP)	Logic is updated	February 2022
Financial Empowerment Centers	New program added to the screener	December 2021
COVID-19 Vaccines	New program added to the screener	December 2021
NYC NY Connects	New program added to the screener	December 2021
Home Energy Assistance Program (HEAP)	Income guideline	December 2021
Supplemental Nutrition Assistance Program (SNAP)	Income guideline	December 2021
School Tax Relief (STAR)	Income guideline	December 2021

EarlyLearn	Income guideline	December 2021
Child Tax Credit (CTC)	Age limit updated	December 2021
Child Care Voucher	Updated incorrect income limit for household size 6	December 2021
Emergency Broadband Benefit (EBB)	New program added to the screener	July 2021
Lifeline	New program added to the screener	July 2021
Emergency Rental Assistance Program (ERAP)	New program added to the screener	July 2021
3-K for all	New program added to the screener	July 2021
Child Care Voucher	New program added to the screener	July 2021
Commodity Supplemental Food Program (CSFP)	Income guideline	June 2021
Cooling Assistance Benefit	Income guideline	June 2021
Family Planning Benefit Program (FPBP)	Income guideline	June 2021
Head Start	Income guideline	June 2021
Medicaid for Pregnant Women	Income guideline	June 2021
Section 8	Income guideline	June 2021
Women, Infants, and Children (WIC)	Income guideline	June 2021
Earned Income Tax Credit (EITC)	Income guideline	February 2021
Senior Employment Services (SES)	Income guideline	February 2021

NYC Free Tax Prep	Income guideline	February 2021
Fair Fares	Income guideline	February 2021
Home Energy Assistance Program (HEAP)	Income guideline	November 2020
Supplemental Nutrition Assistance Program (SNAP)	Income guideline	October 2020
School Tax Relief (STAR)	Income guideline	October 2020
Train & Earn, Home Care Services Program, Medicaid for Pregnant Women, NYC Free Tax Prep	New program added to the screener	October 2020
Public Housing	New program added to the screener	June 2020
FPBP	Income guideline	June 2020
CSFP	Income guideline	June 2020
Cooling Assistance	Income guideline	June 2020
WIC	Income guideline	June 2020
EITC	Income guideline	February 2020
SES	Income guideline	February 2020
Fair Fares NYC	New program added to the screener	February 2020
HEAP	Income guideline	November 2019
STAR	Income guideline	November 2019
Cooling Assistance Benefit	New program added to the screener	August 2019

Family Planning Benefit Program (FPBP)	Income guideline	August 2019
Commodity Supplemental Food Program (CSFP)	Income guideline	August 2019
HEAP	Logic is corrected: living situation “In Shelter/Homeless” is removed from potential eligibility.	August 2019
COMPASS	Logic is corrected: member condition 'Student' is added to potentially eligible criteria.	August 2019
WIC	Income guideline	August 2019
Supplemental Nutrition Assistance Program(SNAP)	Income guideline	March 2019
Earned Income Tax Credit (EITC)	Income guideline	March 2019
School Tax Relief (STAR)	Income guideline	March 2019
Senior Employment Services (SES)	Income guideline	March 2019
Section 8 Housing	Income guideline	March 2019