

Changes to Income Screens

Effective August 11, 2018

- **Tax Status Screens**
- **Earned Income/Building Income Screens**
- **Earned Income Summary Screens**
- **Benefit Income Summary Screens**
- **Additional Income Summary Screens**
- **Income Deductions Summary Screens**

Changes to Tax Status Screens:

Tax Status Screens

- The Tax Status of everyone in the household is requested in the order they were added to the account.
- The middle initial, suffix, and age of each household member is now displayed.
- The user must select the Tax Status for each member in order, starting with the Account Holder.
- Help text has been added to the instructions for clarity.

Tax Status

Tell us about the federal income tax filing status for the upcoming tax year of everyone on your application.

If someone is married and will file jointly, tell us whom they will file with. If there are changes to your marital status (separation, divorce, or death), tell us how you plan to file taxes for the upcoming year. Also, tell us about the dependents whom you plan to claim. You must include everyone in the household, even if they do not file taxes.

Please select the tax filing status of each individual listed below.

If you will not be filing taxes, choose “will not be filing taxes.”

If you are single, do not choose “Head of Household” unless you have qualifying dependents.

Robert H. Fitzgerald Sr. (41) - Account Holder

Select Robert's Tax Status for 2018?

Select

Alexandra O. Fitzgerald (37)

Select Alexandra's Tax Status for 2018

Select

Jordan A. Fitzgerald (21)

Select Jordan's Tax Status for 2018

Select

Robert H. Fitzgerald Jr. (17)

Select Robert's Tax Status for 2018

Select

Michelle T. Fitzgerald Jr. (15)

Select Michelle's Tax Status for 2018

Select

- Select
- Single
- Married filing jointly
- Married filing separately
- Head of Household (with qualifying individual)
- Qualifying widow(er) with dependent child
- Robert is a dependent and will be filing taxes
- Robert will not be filing taxes

Tax Status Screens



- If the user selects Head of Household (with qualifying individual), a link is displayed.
- When you click on the link, an additional information box appears to explain Head of Household.

Robert H. Fitzgerald Sr. (41) - Account Holder

Select Robert's Tax Status for 2018?

Head of Household (with qualifying individual) ▼

[Do I qualify to file as Head of Household?](#)

Do I qualify to file as Head of Household? X

In most cases, the IRS does not allow married individuals to file as Head of Household except for certain situations. Check with a tax professional if you are not sure if you meet one of these exceptions.

You may be able to file as head of household if you meet all these requirements:

1. You are unmarried or considered unmarried on the last day of the year.
2. You paid more than half the cost of keeping up a home for the year.
3. A qualifying person lived with you in the home for more than half the year (except for temporary absences, such as school). However, if the qualifying person is your dependent parent, he or she doesn't have to live with you.

For more information about this tax filing status, please ask your tax professional or visit the Internal Revenue Service (IRS) at www.irs.gov/Filing.

Tax Status Screens

- Selecting “Married filing jointly” will require the user to specify who in the household they are filing jointly with and ask who (if any) of the household members are to be claimed as dependents.
- If you click on the blue text stating that you don’t see who you are looking for, help text will appear instructing the user to go back to the household section of the application so they can add the missing member.

Robert H. Fitzgerald Sr. (41) - Account Holder
Select Robert's Tax Status for 2018?

Married filing jointly

Who is Robert Sr. filing jointly with?

Select

I don't see whom I am looking for.

Who will Robert claim as a dependent on next year's tax return?

Alexandra O. Fitzgerald (37)

Jordan A. Fitzgerald (21)

Robert H. Fitzgerald Jr. (17)

Michelle T. Fitzgerald (15)

I don't see whom I am looking for.

I don't see whom I am looking for.

If your spouse is not listed in the dropdown above, please click [here](#) to go back and add him/her to the application. X

I don't see whom I am looking for.

If your dependent is not listed above, please click [here](#) to go back and add this person to the application. X

Tax Status Screens

When the user selects the household member they are filing jointly with, that household member automatically has their Tax Status also set to “Married filing jointly.” This household member is now unavailable to be marked as a dependent.



Robert H. Fitzgerald Sr. (41) - Account Holder
Select Robert's Tax Status for 2018?
Married filing jointly

Who is Robert Sr. filing jointly with?
Alexandra O. Fitzgerald (37)

Who will Robert claim as a dependent on next year's tax return?
 Jordan A. Fitzgerald (21)
 Robert H. Fitzgerald Jr. (17)
 Michelle T. Fitzgerald (15)
[I don't see whom I am looking for.](#)

Alexandra O. Fitzgerald (37)
Select Alexandra's Tax Status for 2018
Married filing jointly

Tax Status Screens



If there are no other individuals on the account, the “No available dependents” message will display.

John P. Corensweet (57) - Account Holder

Select John’s Tax Status for 2018?

Married filing separately



No available dependents

Tax Status Screens



When a household member is not marked as either:

- married filing jointly with the account holder or
- the dependent of the account holder

the user must indicate the tax status for that individual and the full list of options will be displayed.

Jordan A. Fitzgerald (21)

Select Jordan's Tax Status for 2018

- Select
- Single
- Married filing jointly
- Married filing separately
- Head of Household (with qualifying individual)
- Qualifying widow(er) with dependent child
- Jordan is a dependent and will be filing taxes
- Jordan will not be filing taxes

Tax Status Screens

When a household member who is not claimed as a dependent by the Account Holder chooses “<name> is a dependent and will be filing taxes” as their Tax Status and answers “Yes” to being claimed as a dependent on someone else’s tax return, they are asked to provide additional information:

- Name of tax payer who is claiming the individual as a tax dependent
- Date of Birth of the tax payer (not a mandatory field)
- Social Security Number of the tax payer (not a mandatory field)
- Relationship between the member and the tax payer

Jordan A. Fitzgerald (21)

Select Jordan's Tax Status for 2018

Jordan is a dependent and will be filing taxes[▼]

Will Jordan be claimed as a dependent on someone else's tax return?

Yes No

Please give us the name and relationship of the person that will be claiming Jordan as a dependent.

Legal First Name Legal Last Name

Date of Birth (optional) / / Social Security Number (optional) - -

Relationship **Select** [▼]

- Spouse
- Parent**
- Child
- Sibling
- Grandparent
- Grandchild
- Adopted Child
- Aunt or Uncle
- Cousin
- Domestic Partner
- Ex-spouse
- Foster Child
- Guardian
- In-law/Brother or Sister
- In-law/Mother or Father
- In-law/Son or Daughter
- Nephew or Niece
- Not Related
- Stepchild
- Stepparent
- Ward

Tax Status Screens



Members who are being claimed as dependents have two Tax Status choices.

Robert H. Fitzgerald Jr. (17)

Select Robert's Tax Status for 2018

Select ▼

Robert Jr is a dependent and will be filing taxes

Robert Jr will not be filing taxes

Tax Status Screens



- When the Account Holder and another household member both select “Married filing separately” as their Tax Status, they can each select dependents from the remaining household members.
- Dependents can only be associated with one user.

Robert H. Fitzgerald Sr. (41) - Account Holder

Select Robert's Tax Status for 2018?

Married filing separately ▼

Who will Robert claim as a dependent on next year's tax return?

Jordan A. Fitzgerald (21)

Robert H. Fitzgerald Jr. (17)

Michelle T. Fitzgerald (15)

[I don't see whom I am looking for.](#)

Alexandra O. Fitzgerald (37)

Select Alexandra's Tax Status for 2018

Married filing separately ▼

Who will Robert claim as a dependent on next year's tax return?

Jordan A. Fitzgerald (21)

Robert H. Fitzgerald Jr. (17)

Michelle T. Fitzgerald (15)

[I don't see whom I am looking for.](#)

Changes to Earned Income/Building Income Screens:

Earned Income/Building Income Screens

- If the user is a tax filer and selects “Yes” they expect their income to be the same as what it was in the previous year, they are asked to provide their projected annual income.
- If the user selects “No” or “I don’t know,” the application is allowed to continue.
- If the user clicks on the “What income should I include?” link, help text is displayed.

Income Information

Do expect your household yearly income for <year> to be the same as what was reported on your <last year> federal income tax return?

Yes No I don't know

Please provide the expected annual income before taxes for the following household members.

[What income should I include?](#)

Projected Annual Income for 2018

\$	8569.80	Robert H. Fitzgerald Jr. (41)
\$	2292.20	Alexandra O. Fitzgerald (37)
<input type="checkbox"/>		I don't know

What income should i include?

We need to know about your taxable income including income from jobs, including self-employment. It should also include foreign income, unemployment insurance benefits, and Social Security payments (taxable and non-taxable). Also tell us about retirement, investments, pensions, and rental income you will receive. Do not include money you get from child support, Veterans Payments, worker's compensation, Supplemental Security Income (SSI), or gifts/inheritance.

Earned Income/Building Income Screens



NY State of Health receives data hits on household members.

If the data hits do not return income information for anyone in the household, the user is asked if anyone in the household received or expects to receive income from an employer or from their own business.

- If the user answers “No,” they can continue their application.
- If the user answers “Yes,” they are asked to provide additional information for each household member.

Earned Income

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No

Yes No

Please tell us who in the household received – or expects to receive – this income. This amount should include income already received, along with income your household expects to receive, between January 1 and December 31, <year>.

Click on **Add Income Source** to add a income from an employer or business.

Robert H. Fitzgerald Sr. (41)
Robert Sr. expects no earned income in 2018 + Add Income Source
Alexandra O. Fitzgerald (37)
Alexandra expects no earned income in 2018 + Add Income Source

Earned Income/Building Income Screens



NY State of Health receives data hits on household members.

If the data hits do return income information for anyone in the household, the question defaults to “Yes” for that member.

That member’s information is then displayed, and the user is asked to address each employment record.

Earned Income

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No

Yes No

You may see information listed about your current or previous employer.
 Click on **Edit** to tell us how much you receive from this job.
 Click on **Never Worked Here**, if you never worked at the job shown below.
 Click on **No Longer Work Here** if you will not be working at this job in the future.
 Click on **Add Income Source** to add a job that is not listed below.

Robert H. Fitzgerald Sr. (41)

Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
Lime Gazelle Toys Inc. 20 Country Estates Road, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
			+ Add Income Source

Alexandra O. Fitzgerald (37)

Employer / Date Range	Pay / Frequency	Income	Actions
Stewart's Shops 301 Main Street, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
Lime Gazelle Toys Inc. 20 Country Estates Road, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
			+ Add Income Source

Jordan A. Fitzgerald (21)

Jordan expects no earned income in 2018

[+ Add Income Source](#)

Earned Income/Building Income Screens



NY State of Health receives data hits on household members.

If the data hits do return income information for anyone in the household, the question defaults to the “Yes” for that member.

- If the user changes the answer from the default “Yes” to “No” and clicks the “Next” button, an error validation message will be displayed and the user cannot continue.

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No

Data from source must be reviewed.

You may see information listed about your current or previous employer.
Click on **Edit** to tell us how much you receive from this job.
Click on **Never Worked Here**, if you never worked at the job shown below.
Click on **No Longer Work Here** if you will not be working at this job in the future.
Click on **Add Income Source** to add a job that is not listed below.

Robert H. Fitzgerald Sr. (41)			
Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
Lime Gazelle Toys Inc. 20 Country Estates Road, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here

+ Add Income Source

Earned Income/Building Income Screens



If the user previously answered yes to this question, and entered their employer and wage data, then changes their answer to “No,” they will be shown an alert message, but can still continue the application.

Earned Income

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No



By selecting No you will lose all Earned Income data for this account when you click Next.

Earned Income/Building Income Screens



Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083			<input type="button" value="Edit"/>

Please click Edit to provide income details

Never Worked Here
No Longer Work Here

When the user clicks on the “Edit” button:

- and the information was received from a data source (Wage – state data sources or Federal Tax Information – IRS), the employer information cannot be modified.

Edit Earned Income | Robert H. Fitzgerald (41)

Lime Gazelle Toys Inc.
20 Country Estates Road, Greenville, NY 12083

Earned Income/Building Income Screens

Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083			Edit

Never Worked Here
No Longer Work Here

Please click Edit to provide income details

When the user clicks on the “Edit” button:

- and the information was initially entered by the user, then the employer information may be edited.
- Once the user edits the information and clicks on “Next” they will be asked for additional information

Edit Earned Income | Jordan A. Fitzgerald (21)

Employer/Company Name: Mowing Joe Lawn Service Inc. DBA: Mowing Joe's

Address Line 1: 145 Maple Avenue Address Line 2:

City: Greenville Zip: 12083 State: NY Self-Employed

Cancel **Next**

Edit Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Which of the following best describes how you are paid?
 Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount: \$ 100 How Often: Weekly

Total amount Jordan expects to earn from this job: \$5200

Back Cancel **Update Income**

Earned Income/Building Income Screens



Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083			Edit Never Worked Here No Longer Work Here

Please click Edit to provide income details

If the user clicks the “Never Worked Here” link, a screen will open asking them to confirm that they want to remove the source of income.

- If the user clicks the “No, Keep It” button, the employment record is kept.
- If the user clicks the “Yes” button, the employment record is removed.

Never Worked Here | Alexandra O. Fitzgerald (37)

Are you sure you want to remove this source of income?

Stewart’s Shops
301 Main Street, Greenville, NY 12083

Earned Income/Building Income Screens



Employer	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083			<input type="button" value="Edit"/>

Please click Edit to provide income details

Never Worked Here
No Longer Work Here

If the user clicks on the "No Longer Work Here" link, a new screen will open asking if they worked at this job during the year.

- If the user clicks the "Yes, Edit" button, they are asked for additional information.

No Longer Work Here | Robert H. Fitzgerald Sr. (41)

Mowing Joe Lawn Service
145 Maple Avenue, Greenville, NY 12083

Did this person work at this job in <year>?

No Longer Work Here | Robert H. Fitzgerald Sr. (41)

Mowing Joe Lawn Service
145 Maple Avenue, Greenville, NY 12083

If you worked at this job for part of the year, tell us how long you worked at this job and how much you earned during that time period.

Click on **Update Income** after updating the information.

Amount: \$ 37982.20 How Often: Annually Start Date: 01/01/2018 End Date: 02/01/2018

Total amount Jordan expects to earn from this job: \$3,165.20

Earned Income/Building Income Screens

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?
 Yes No

Data from source must be reviewed.

You may see information listed about your current or previous employer.
Click on **Edit** to tell us how much you receive from this job.
Click on **Never Worked Here**, if you never worked at the job shown below.
Click on **No Longer Work Here** if you will not be working at this job in the future.
Click on **Add Income Source** to add a job that is not listed below.

Employer	Pay / Frequency	Income	Actions
Robert H. Fitzgerald Sr. (41)			
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
Lime Gazelle Toys Inc. 20 Country Estates Road, Greenville, NY 12083 Please click Edit to provide income details			Edit Never Worked Here No Longer Work Here
+ Add Income Source			

When the user clicks on the “Add Income Source” button, a new screen opens requesting additional information.

When the user clicks “Next,” they are asked how they are paid.

- If the user selects the “Full Time / Part Time” option they are asked for additional information.

Add Earned Income | Jordan A. Fitzgerald (21)

Employer / Company Name: Mowing Joe Lawn Service Inc. DBA: Mowing Joe's

Address Line 1: 145 Maple Avenue Address Line 2:

City: Greenville Zip: 12083 State: NY Self-Employed

Buttons: Cancel, **Next**

Add Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Which of the following best describes how you are paid?
 Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

Buttons: Back, Cancel, **Next**

Which of the following best describes how you are paid?
 Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount: \$ How Often:

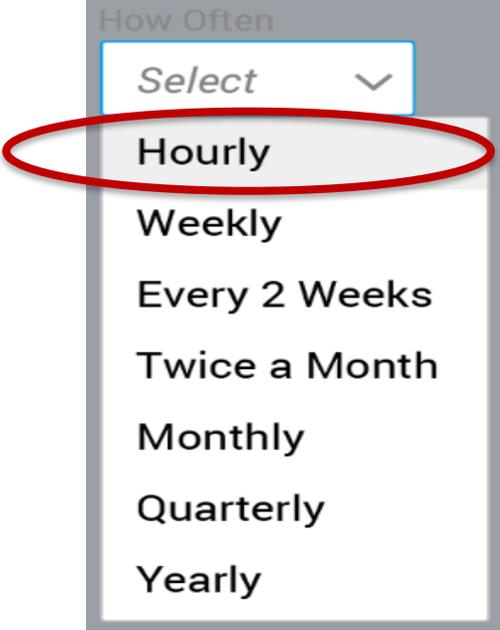
Amount Jordan expects to earn from this job:

How Often dropdown menu:
Select
Hourly
Weekly
Every 2 Weeks
Twice a Month
Monthly
Quarterly
Yearly

Earned Income/Building Income Screens



If the user selects "Hourly," they are asked how many hours they work per week, and the system calculates their earnings.



Which of the following best describes how you are paid?

Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

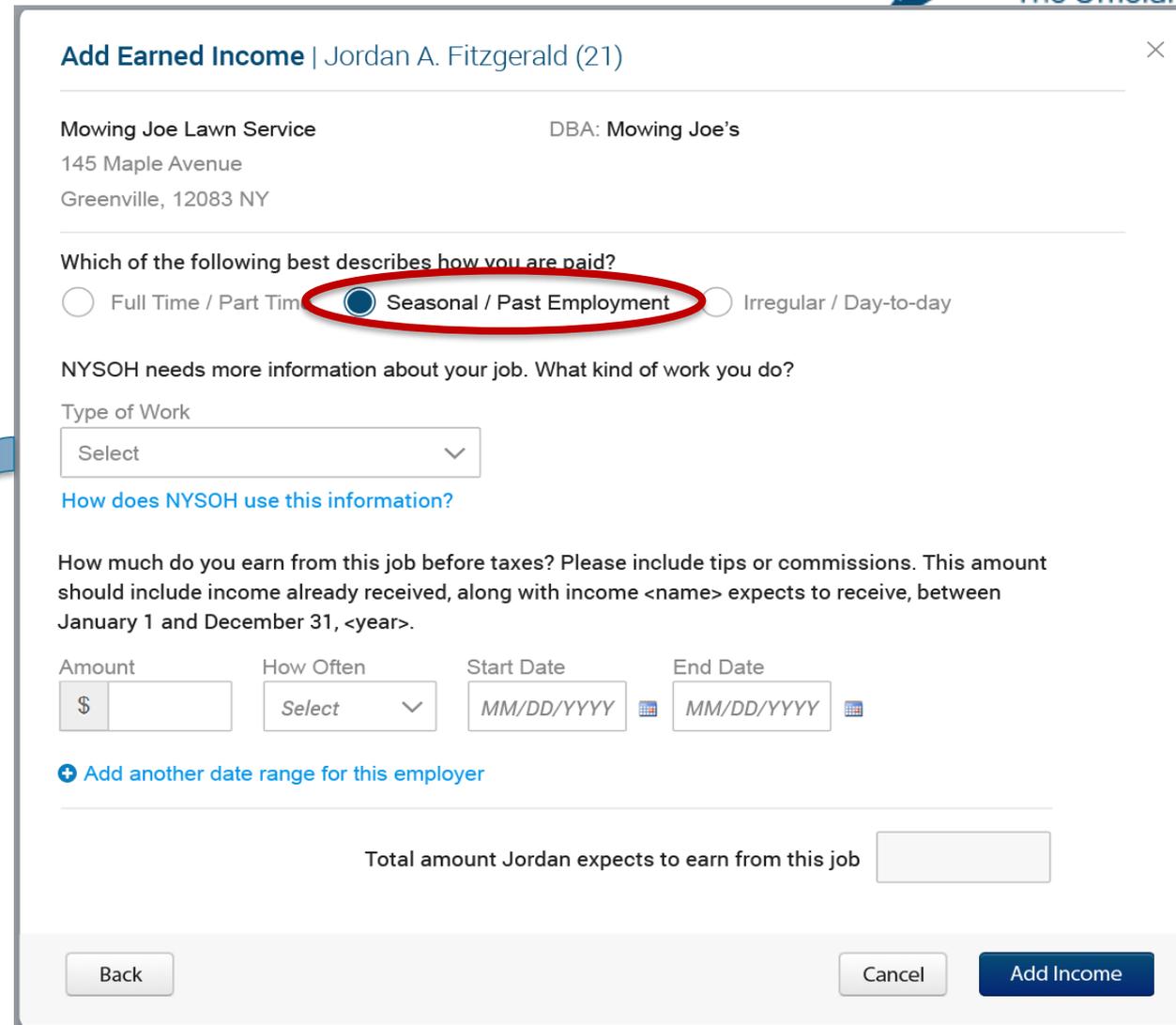
Amount	How Often	Hours/Week
\$ 8.95	Hourly	16

Total amount Jordan expects to earn from this job **\$7446.40**

Earned Income/Building Income Screens

If the user selects "Seasonal / Past Employment" they are asked for additional information.

- There is a new dropdown menu for "type of work"
- Once the user makes a selection from this dropdown a secondary dropdown will appear in order to specify the type of work in more detail. (see next slide)
- If the user selects "Other" from the Type of Work menu a text box is provided to specify the Type of Work.



Add Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Which of the following best describes how you are paid?

Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

NYSOH needs more information about your job. What kind of work you do?

Type of Work
Select

[How does NYSOH use this information?](#)

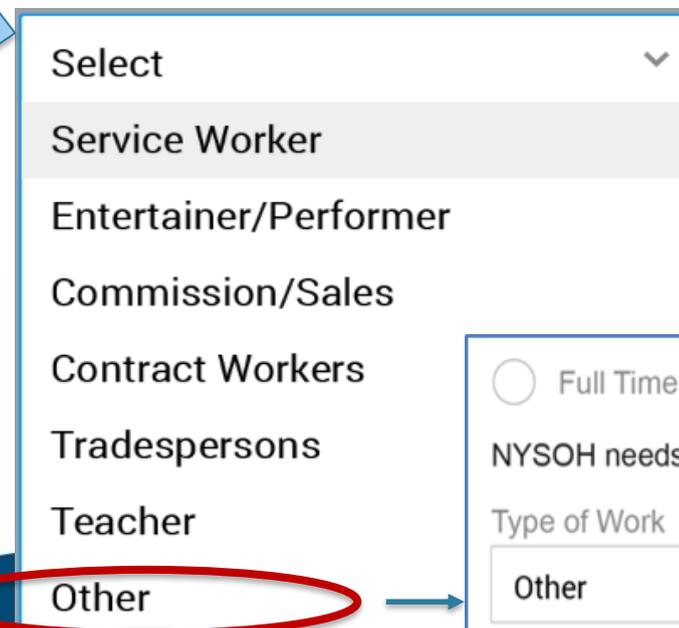
How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount: \$ How Often: Select Start Date: MM/DD/YYYY End Date: MM/DD/YYYY

[+ Add another date range for this employer](#)

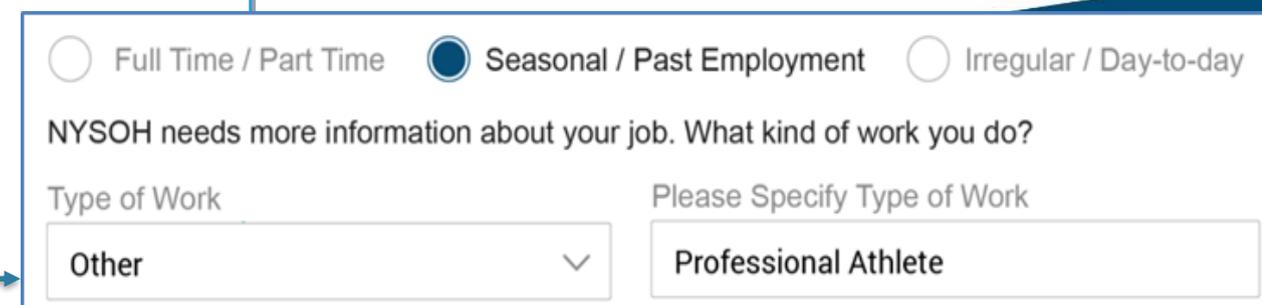
Total amount Jordan expects to earn from this job

Back Cancel Add Income



Select

- Service Worker
- Entertainer/Performer
- Commission/Sales
- Contract Workers
- Tradespersons
- Teacher
- Other**



Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

NYSOH needs more information about your job. What kind of work you do?

Type of Work
Other

Please Specify Type of Work
Professional Athlete

Earned Income/Building Income Screens



Secondary Dropdown Menus

Select

- Service Worker
- Entertainer/Performer
- Commission/Sales
- Contract Workers
- Tradespersons
- Teacher
- Other

Service Worker

Select

- Food Industry
- Child Care
- Cleaning Industry
- Barber/Stylist
- Property Maintenance
- Clerical/Clerk/Intern
- Driver
- Day Laborer
- Animal Care
- School Bus Driver/Attendant
- Other

Entertainer/Performer

Select

- Actor/Actress
- Singer/Songwriter/Musician
- Writer/Author
- Artist/Artisan
- Choreographer/Dancer
- Model
- Producer
- Other

Commission/Sales

Select

- Salesperson
- Marketer/Promoter
- Special Events Planner
- Vendor
- Real-estate Broker
- Insurance Broker
- Other

Contract Workers

Select

- Consultant
- Campaign Worker
- Private Investigator
- Security Guard
- Poll Worker
- Census Taker
- Tax Preparer
- Other

Tradespersons

Select

- Contractor
- Construction Worker
- Electrician
- Plumber
- Mason
- Auto Body/Mechanic
- Painter
- Interior Design
- Other

Teacher

Select

- Teacher/Professor
- Teacher's Aid
- Substitute Teacher
- Coach
- Umpire
- Other

Earned Income/Building Income Screens



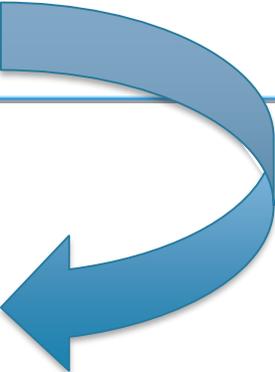
If "Other" is chosen from a secondary dropdown option, then a text box is provided so that the user can type in their type of work.

Select

- Service Worker
- Entertainer/Performer
- Commission/Sales
- Contract Workers**
- Tradespersons
- Teacher
- Other

Select

- Consultant
- Campaign Worker
- Private Investigator
- Security Guard
- Poll Worker
- Census Taker
- Tax Preparer
- Other**



NYSOH needs more information about your job. What kind of work you do?

Type of Work: **Contract Workers** | Please Specify Type of Work: **Other**

Type of Work: **Deep Water Salvage**

Earned Income/Building Income Screens

If the user clicks on the “How does NYSOH use this information?” link, help text is displayed.

Add Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Which of the following best describes how you are paid?
 Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

NYSOH needs more information about your job. What kind of work you do?

Type of Work
Select

[How does NYSOH use this information?](#)

How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount	How Often	Start Date	End Date
\$	Select	MM/DD/YYYY	MM/DD/YYYY

+ Add another date range for this employer

Total amount Jordan expects to earn from this job

Back Cancel Add Income

How does NYSOH use this information?

Information about the type of job helps us understand your work history if you have to provide income documents later.

Earned Income/Building Income Screens



Once the user completes entering information on their Seasonal / Past Employment, this screen will appear summarizing each employment record individually.

- The user can delete the last date range entered by clicking on the “X.”

Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

NYSOH needs more information about your job. What kind of work you do?

Type of Work: Please Specify Type of Work:

[How does NYSOH use this information?](#)

How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount	How Often	Hours/Week	Start Date	End Date
\$ 8.50	Hourly	30	01/01/201	03/18/201
\$ 8.50	Hourly	30	07/01/201	07/07/201
\$ 8.50	Hourly	30	11/01/201	12/31/201

[+ Add another date range for this employer](#)

Total amount Jordan expects to earn from this job:

Earned Income/Building Income Screens



If the user selects "Irregular / Day to Day" they are asked for additional information.

- The same Type of Work menu, including submenus, are available to the user in this instance.

Full Time / Part Time Seasonal / Past Employment Irregular / Day-to-day

Irregular/Day-to-day should be selected when you are not paid on a regular basis or when you have been or expect to be paid on an occasional basis during the tax year.

NYSOH needs more information about your job. What kind of work you do?

Type of Work

[How does NYSOH use this information?](#)

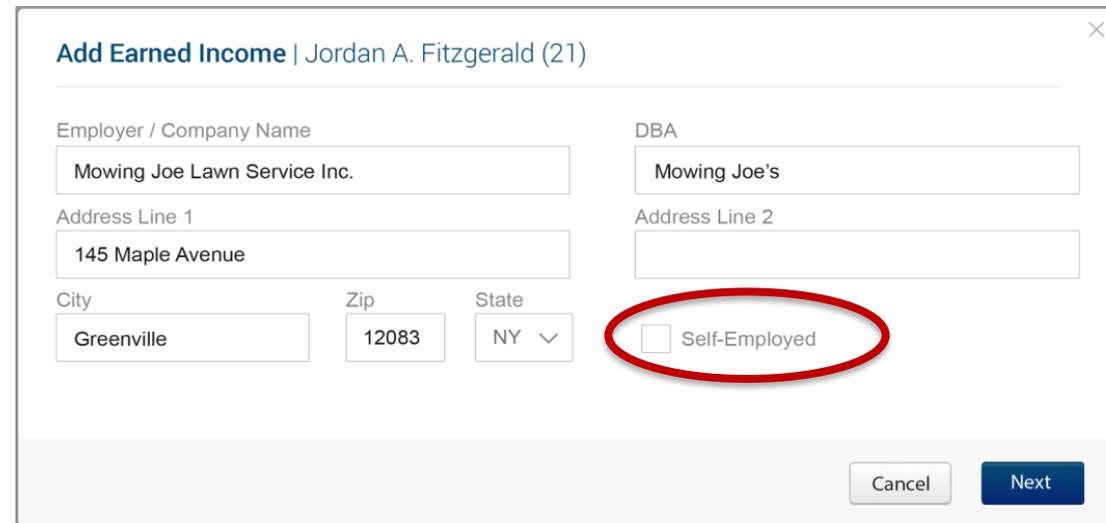
How much do you earn from this job before taxes? Please include tips or commissions. This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Amount	Start Date	End Date
<input type="text" value="\$"/>	<input type="text" value=""/>	<input type="text" value="mm/dd/yyyy"/>

[+ Add another date range for this employer](#)

Total amount Jordan expects to earn from this job

Earned Income/Building Income Screens



Add Earned Income | Jordan A. Fitzgerald (21)

Employer / Company Name: Mowing Joe Lawn Service Inc. DBA: Mowing Joe's

Address Line 1: 145 Maple Avenue Address Line 2:

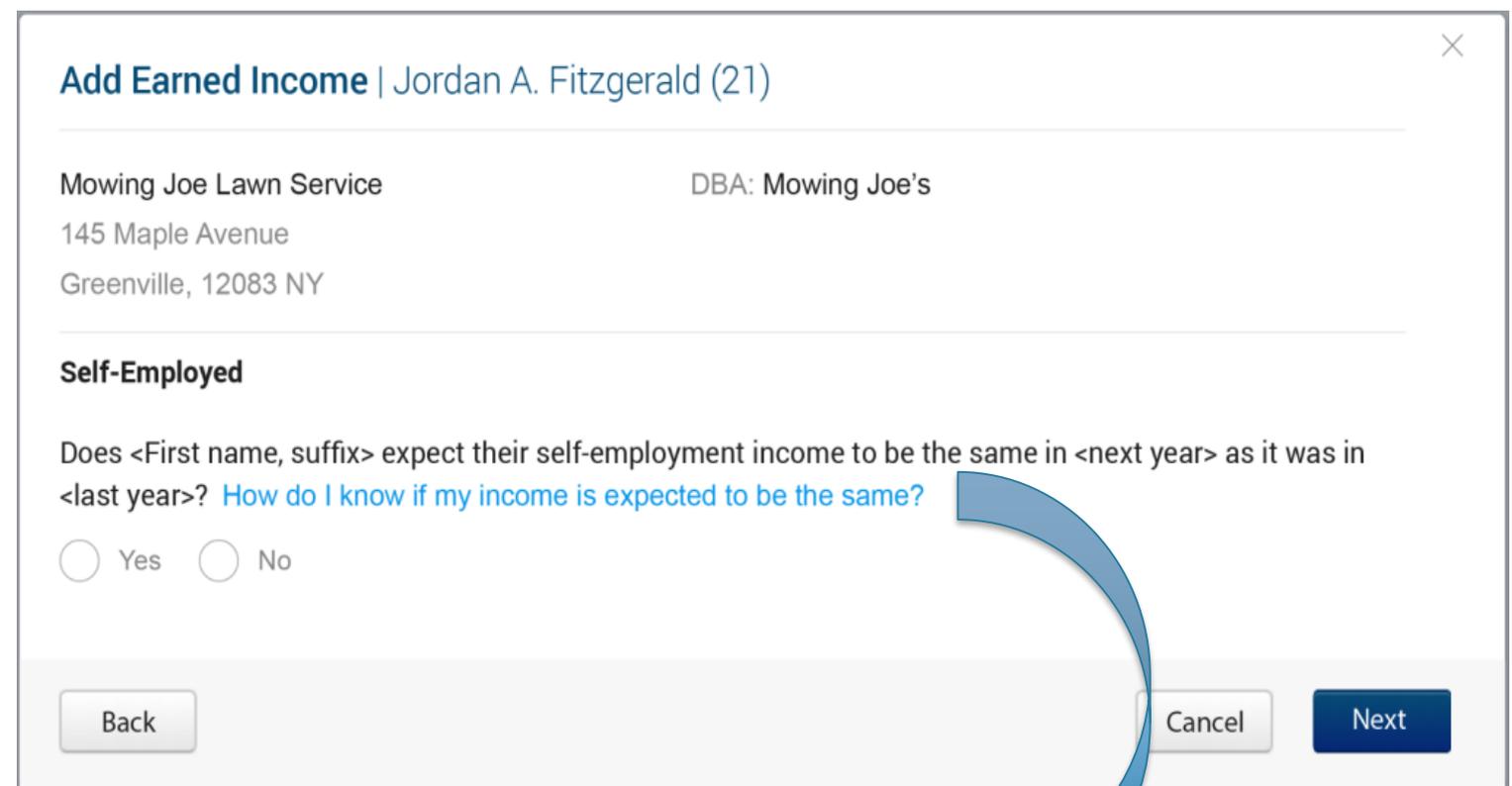
City: Greenville Zip: 12083 State: NY

Self-Employed

Cancel Next

If the user checks the “Self-Employed” checkbox when adding income, they are asked if they expect the taxable portion of their self-employment income to be the same in 2018 as it was in 2016.

- If the user clicks on the “How do I know if my income is expected to be the same?” link, help text is displayed.



Add Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Self-Employed

Does <First name, suffix> expect their self-employment income to be the same in <next year> as it was in <last year>? [How do I know if my income is expected to be the same?](#)

Yes No

Back Cancel Next



Click yes if the taxable portion of your self employment income in this tax year is similar to the past tax year.

Earned Income/Building Income Screens



When the user answers “Yes” indicating that their self-employment income is expected to be the same in 2018, they are asked to enter the amount they expect to earn in 2018.

- This should include the income already received in the calendar year added to the amount they expect to receive for the remainder of the year.

Add Earned Income | Jordan A. Fitzgerald (21) ✕

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Self-Employed

Does <First name, suffix> expect their self-employment income to be the same in <next year> as it was in <last year>? [How do I know if my income is expected to be the same?](#)

Click yes if the taxable portion of your self employment income in this tax year is similar to the past tax year. ✕

Yes No

How much does <name> expect to earn from this self-employment income?

This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

\$ 76,232.43.00

Back Cancel Add Income

This amount should include income already received, along with income <name> expects to receive, between January 1 and December 31, <year>.

Earned Income/Building Income Screens



Self-Employed

Does <First name, suffix> expect their self-employment income to be the same in <next year> as it was in <last year>?

Yes No

When the user answers “No” indicating that their self-employment income is not expected to be the same in 2018, additional help text is displayed and the screen expands to open the self-employment three month record and calculator.

Tell us about your expected self-employment income. You can tell us about the last 3 months of actual business income and expenses from this year. If this does not represent your income for the current year, tell us about your estimated income and expenses for the first 3 months of <year>. This information will be used to calculate your projected yearly income.

Business Income	Month 1	Month 2	Month 3
	Select ▾	Select ▾	Select ▾
Gross Sales	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Rents Received	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Royalties Received	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Inventory Purchases	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Gross Income	<input type="text"/>		

Please include any other categories that describe your business expenses. If you have other income or deductions not related to your business, do not include this information here. You can enter that information in the Additional Income or Deduction sections of this application.

[+ Add Another Expense](#)

Total amount Jordan expects to earn from this job

Earned Income/Building Income Screens

Business Income	Month 1	Month 2	Month 3
Gross Sales	\$	\$	\$
Rents Received	\$	\$	\$
Royalties Received	\$	\$	\$
Inventory Purchases	\$	\$	\$
Gross Income			

Please include any other categories that describe your business expenses.
If you have other income or deductions not related to your business, do not include this information here.
You can enter that information in the Additional Income or Deduction sections of this application.

Business Expenses	Month 1	Month 2	Month 3
Business travel, meals	\$ 1000.00	\$ 0.00	\$ 1000.00
Legal and professional services	\$ 0.00	\$ 0.00	\$ 8000.00
Add Another Expense			

Select

- Advertising
- Bank Charges
- Business Equipment Rental
- Business Rental Property
- Business Taxes and licenses
- Business travel, meals
- Business Vehicle Expenses
- Commissions and fees
- Contract labor
- Depletion
- Depreciation and section 179 Expense deduction
- Employee benefit programs
- Heat/Utilities
- Insurance
- Interest
- Legal and professional services
- Office expenses
- Pension and profit-sharing plans
- Repairs and Maintenance
- Supplies
- Telephone
- Other Expenses (specify)

If the user clicks on “Add Another Expense,” an additional row will be displayed for the user to enter Expense information.

- The user can delete the last date range entered by clicking on the “X.”
- Expense Type dropdown options have also been updated.



Earned Income/Building Income Screens



Once the user has completed the section entering all of their self-employment income and expenses, the calculator will display the total amount the user expects to earn from this job.

Add Earned Income | Jordan A. Fitzgerald (21)

Mowing Joe Lawn Service DBA: Mowing Joe's
145 Maple Avenue
Greenville, 12083 NY

Self-Employed
Does <First name, suffix> expect their self-employment income to be the same in <next year> as it was in <last year>?
 Yes No

Tell us about your expected self-employment income. You can tell us about the last 3 months of actual business income and expenses from this year. If this does not represent your income for the current year, tell us about your estimated income and expenses for the first 3 months of <year>. This information will be used to calculate your projected yearly income.

	Month 1 January	Month 2 February	Month 3 April
Business Income			
Gross Sales	\$ 7654.32	\$ 6543.27	\$ 5476.62
Rents Received	\$ 0.0	\$ 0.0	\$ 0.0
Royalties Received	\$ 0.0	\$ 0.0	\$ 0.0
Inventory Purchases	\$ 1000.00	\$ 0.00	\$ 1000.00
Gross Income	\$6654.32	\$6543.27	\$4476.62

Please include any other categories that describe your business expenses. If you have other income or deductions not related to your business, do not include this information here. You can enter that information in the Additional Income or Deduction sections of this application.

	Month 1	Month 2	Month 3
Business Expenses			
Business travel, meals	\$ 1000.00	\$ 0.00	\$ 1000.00
Legal and professional services	\$ 0.00	\$ 0.00	\$ 8000.00

[Add Another Expense](#)

Total amount Jordan expects to earn from this job \$7,674.21

Back Cancel **Add Income**

Earned Income Summary Screens

Earned Income Summary Screens

When a user needs to provide income details, instructional messaging will appear on their summary screen.

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No

You may see information listed about your current or previous employer.

Click on **Edit** to tell us how much you receive from this job.

Click on **Remove** to delete this income source.

Click on **Never Worked Here**, if you never worked at the job shown below.

Click on **No Longer Work Here** if you will not be working at this job in the future.

Click on **Add Income Source** to add a job that is not listed below.

Robert H. Fitzgerald Sr. (41)			\$3,165.20
Employer / Date Range	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083 01/01/17 - 03/18/2018	Seasonal / Past Employment \$307.30/week	\$3,165.20	Edit Remove
Lime Gazelle Toys Inc. 20 Country Estates Road, Greenville, NY 12083			Edit Never Worked Here No Longer Work Here

Please click Edit to provide income details

[+ Add Income Source](#)

Earned Income Summary Screens

When an earned income page is completed there are no additional instructions and the user may move to the next section of the application (Unemployment Benefits).

Earned Income

NY State of Health (NYSOH) checks state, federal and other data sources for any income you and your family may have received this year. NYSOH will use this information to verify what you tell us about your income.

Has anyone in your household received—or does anyone expect to receive—income from an employer or their own business in <year>?

Yes No

You may see information listed about your current or previous employer.

Click on **Edit** to tell us how much you receive from this job.

Click on **Remove** to delete this income source.

Click on **Add Income Source** to add a job that is not listed below.

Robert H. Fitzgerald Sr. (41)			\$10,607.44
Employer / Date Range	Pay / Frequency	Income	Actions
Mowing Joe Lawn Service 145 Maple Avenue, Greenville, NY 12083 01/01/17 - 03/18/2018	Seasonal / Past Employment \$307.30/week	\$3,165.20	Edit Remove
Lime Gazelle Toys Inc. 27628 Surprise Result Road, East Greenbush, NY 12083	Full Time / Part Time \$7,442.24/year	\$7,442.24	Edit Remove
+ Add Income Source			

Alexandra O. Fitzgerald (37)			\$9,004,889.00
Employer / Date Range	Pay / Frequency	Income	Actions
Stewart's Shops 301 Main Street, Greenville, NY 12083	Full Time / Part Time \$9,000,000.00/year	\$9,000,000.00	Edit Remove
Cone-Y-Island Ice Cream 301 Main Street, Greenville, NY 12083 02/14/12 - 03/16/2018	Irregular / Day-to-Day	\$240.00	Edit Remove
04/01/12 - 06/30/2018		\$1,449.00	
08/15/12 - 09/04/2018		\$3,200.00	
+ Add Income Source			

Jordan A. Fitzgerald (21)			\$4,889.00
Employer / Date Range	Pay / Frequency	Income	Actions
Jordan's Jams 696 Maple Street, South Westerlo, NY 12083	Self-Employed \$4,889.00/year	\$4,889.00	Edit Remove
+ Add Income Source			

Unemployment Benefit Income Summary Screens

Unemployment Benefit/Social Security Screens

- If the system does not receive any hits from services, the user is asked whether anyone in the household expects to have received Unemployment Insurance or Social Security Benefits.

Benefit Income

Has anyone in your household received—or does anyone expect to receive — Unemployment Insurance or Social Security Benefits in <year>? [What are Social Security Benefits?](#)

Yes No

- When the user clicks on the "What are Social Security Benefits?" help text, a blue help text box opens. It can be dismissed by clicking the "X."

Has anyone in your household received—or does anyone expect to receive — Unemployment Insurance or Social Security Benefits in <year>? [What are Social Security Benefits?](#)

Social Security Benefits include Social Security Disability, Retirement (including income from Railroad Retirement), and Survivor's Benefits.

Yes No

Unemployment Benefit/Social Security Screens



- If the user answers “Yes,” they are asked who in the household received or if anyone expects to receive Unemployment Insurance or Social Security Benefits in <year>.

Has anyone in your household received—or does anyone expect to receive — Unemployment Insurance or Social Security Benefits in <year>? [What are Social Security Benefits?](#)

Yes No

Please tell us who in the household received – or expects to receive – benefits, what type of benefit they receive, and the amount of the benefit. This amount should include benefits already received, along with benefits your household expects to receive, between January 1 and December 31, <2018>.

Click on **Add Benefit Income** to add information about unemployment insurance or Social Security Benefits.

Robert H. Fitzgerald Sr. (41)
Robert Sr. expects no benefit income in 2018 + Add Benefit Income
Alexandra O. Fitzgerald (37)
Alexandra expects no benefit income in 2018 + Add Benefit Income
Jordan A. Fitzgerald (21)
Jordan expects no benefit income in 2018 + Add Benefit Income
Robert H. Fitzgerald Jr. (17)
Robert Jr. expects no benefit income in 2018 + Add Benefit Income
Michelle T. Fitzgerald (15)
Michelle expects no benefit income in 2018 + Add Benefit Income

Unemployment Benefit/Social Security Screens



- If the system does get a positive hit from the Services, they will be displayed to the user.
- The user is asked to click "Edit" to provide details.

You may see information listed about your current or previous benefits received from NYS Department of Labor or the Social Security Administration.

Click on **Edit** to tell us how much you receive from this benefit.

Click on **Remove** to delete this benefit.

Click on **Never Received**, if you never received the benefit shown below.

Click on **No Longer Receiving** if you will no longer receive this benefit in the future.

Click on **Add Benefit Income** to add a benefit income not listed below.

Robert H. Fitzgerald Sr. (41)			
Robert Sr. expects no benefit income in 2018			+ Add Benefit Income
Alexandra O. Fitzgerald (37)			
Benefits	Pay / Frequency	Income	Actions
Unemployment Insurance Benefits Please click Edit to provide Benefit details			Edit Never Received No Longer Receiving
Social Security Benefits Please click Edit to provide Benefit details			Edit Never Received No Longer Receiving
			+ Add Benefit Income

Unemployment Benefit/Social Security Screens

Benefits	Pay / Frequency	Income	Actions
Unemployment Insurance Benefits Please click Edit to provide Benefit details			<input type="button" value="Edit"/> Never Received No Longer Receiving

- If the user clicks on “Never Received,” they are asked to verify that they want to remove this Benefit.
- If the user clicks on “No longer Receiving,” they are asked if the person received this Benefit at any time in 2018.

Never Received Benefit | Alexandra O. Fitzgerald (37) ✕

Social Security Benefits

Are you sure you want to remove this Benefit?

No Longer Receiving Benefit | Robert H. Fitzgerald Sr. (41) ✕

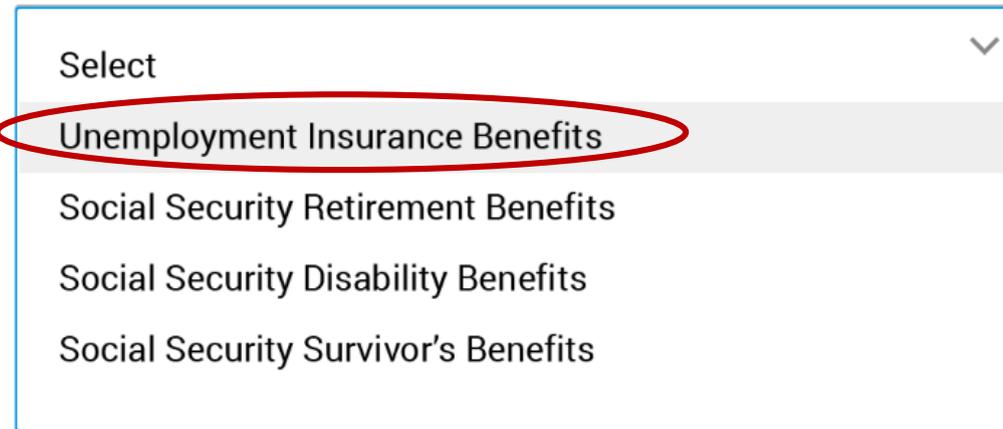
Social Security Benefits

Did this person receive this Benefit at any time in 2018?



Unemployment Benefit/Social Security Screens

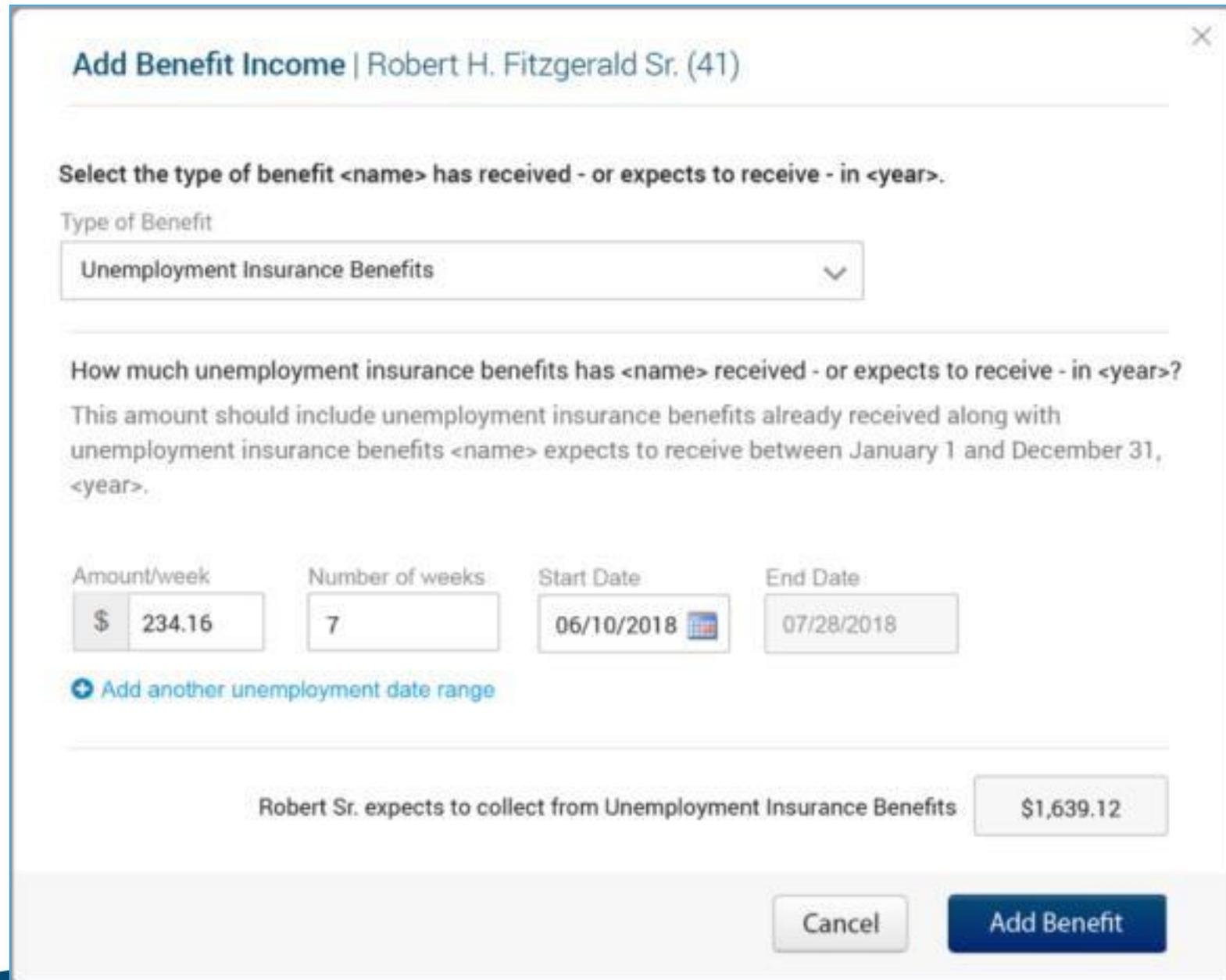
- If the user clicks on “Add Benefit Income,” the system will display a Type of Benefit dropdown.



Select

- Unemployment Insurance Benefits
- Social Security Retirement Benefits
- Social Security Disability Benefits
- Social Security Survivor's Benefits

- If the user selects “Unemployment Insurance Benefits,” they are asked for additional information.



Add Benefit Income | Robert H. Fitzgerald Sr. (41)

Select the type of benefit <name> has received - or expects to receive - in <year>.

Type of Benefit
Unemployment Insurance Benefits

How much unemployment insurance benefits has <name> received - or expects to receive - in <year>?
This amount should include unemployment insurance benefits already received along with unemployment insurance benefits <name> expects to receive between January 1 and December 31, <year>.

Amount/week	Number of weeks	Start Date	End Date
\$ 234.16	7	06/10/2018	07/28/2018

[+ Add another unemployment date range](#)

Robert Sr. expects to collect from Unemployment Insurance Benefits **\$1,639.12**

Cancel Add Benefit

Unemployment Benefit/Social Security Screens

- The user can enter multiple date ranges for Unemployment Insurance Benefits.

Add Benefit Income for 2018 | Robert H. Fitzgerald Sr. (41)

Select the type of benefit <name> has received - or expects to receive - in <year>.

Type of Benefit
Unemployment Insurance Benefits

How much unemployment insurance benefits has <name> received - or expects to receive - in <year>?
This amount should include unemployment insurance benefits already received along with unemployment insurance benefits <name> expects to receive between January 1 and December 31, <year>.

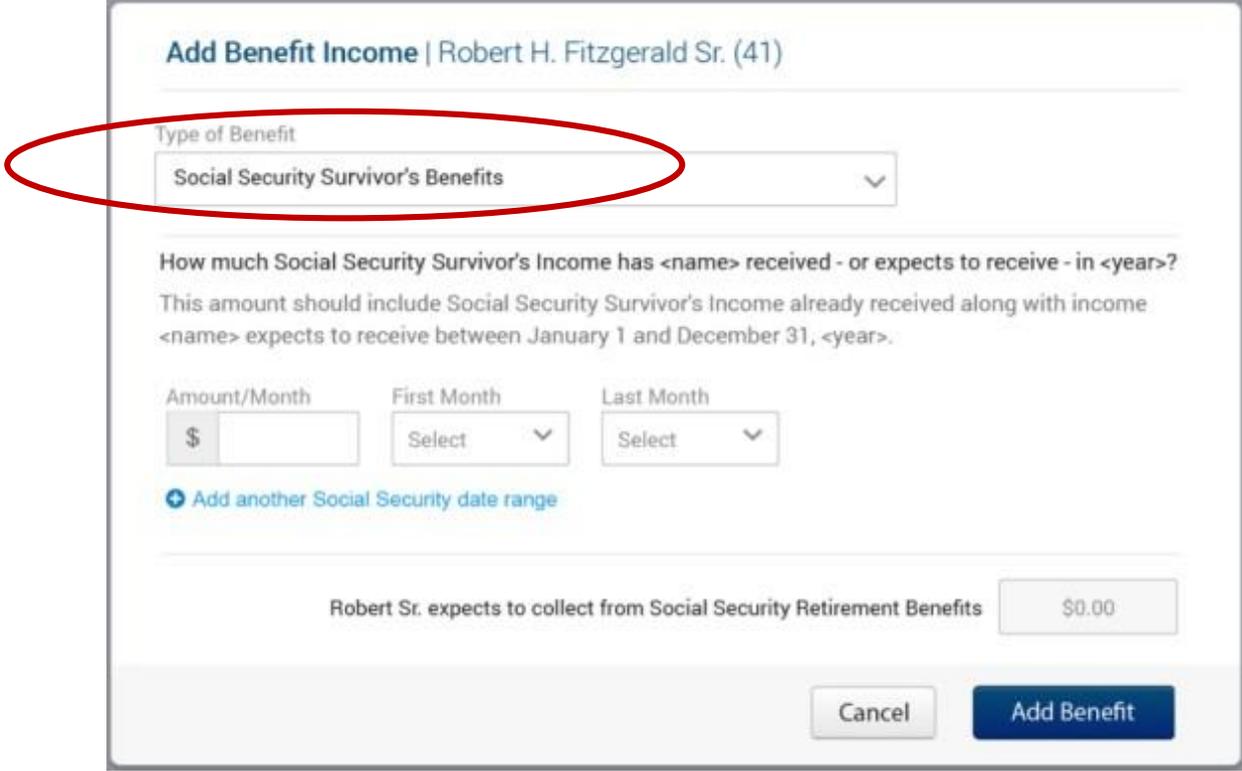
Amount/week	Number of weeks	Start Date	End Date
\$ 234.16	7	06/10/2018	07/28/2018
\$ 234.16	13	10/01/2018	12/31/2018

[Add another unemployment date range](#)

Robert Sr. expects to collect from Unemployment Insurance Benefits **\$4,683.20**

Unemployment Benefit/Social Security Screens

- If the user selects “Social Security Survivor’s Benefits” from the Type of Benefits dropdown, they will be asked for additional information.



Add Benefit Income | Robert H. Fitzgerald Sr. (41)

Type of Benefit
Social Security Survivor's Benefits

How much Social Security Survivor's Income has <name> received - or expects to receive - in <year>?
This amount should include Social Security Survivor's Income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount/Month: \$
First Month: Select
Last Month: Select

[Add another Social Security date range](#)

Robert Sr. expects to collect from Social Security Retirement Benefits

Cancel Add Benefit

- If the user selects “Social Security Retirement Benefits,” from the Type of Benefits dropdown, they will be asked for additional information.



Add Benefit Income | Robert H. Fitzgerald Sr. (41)

Type of Benefit
Social Security Retirement Benefits

How much Social Security Retirement Income has <name> received - or expects to receive - in <year>?
This amount should include Social Security Retirement Income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount/Month: \$
First Month: Select
Last Month: Select

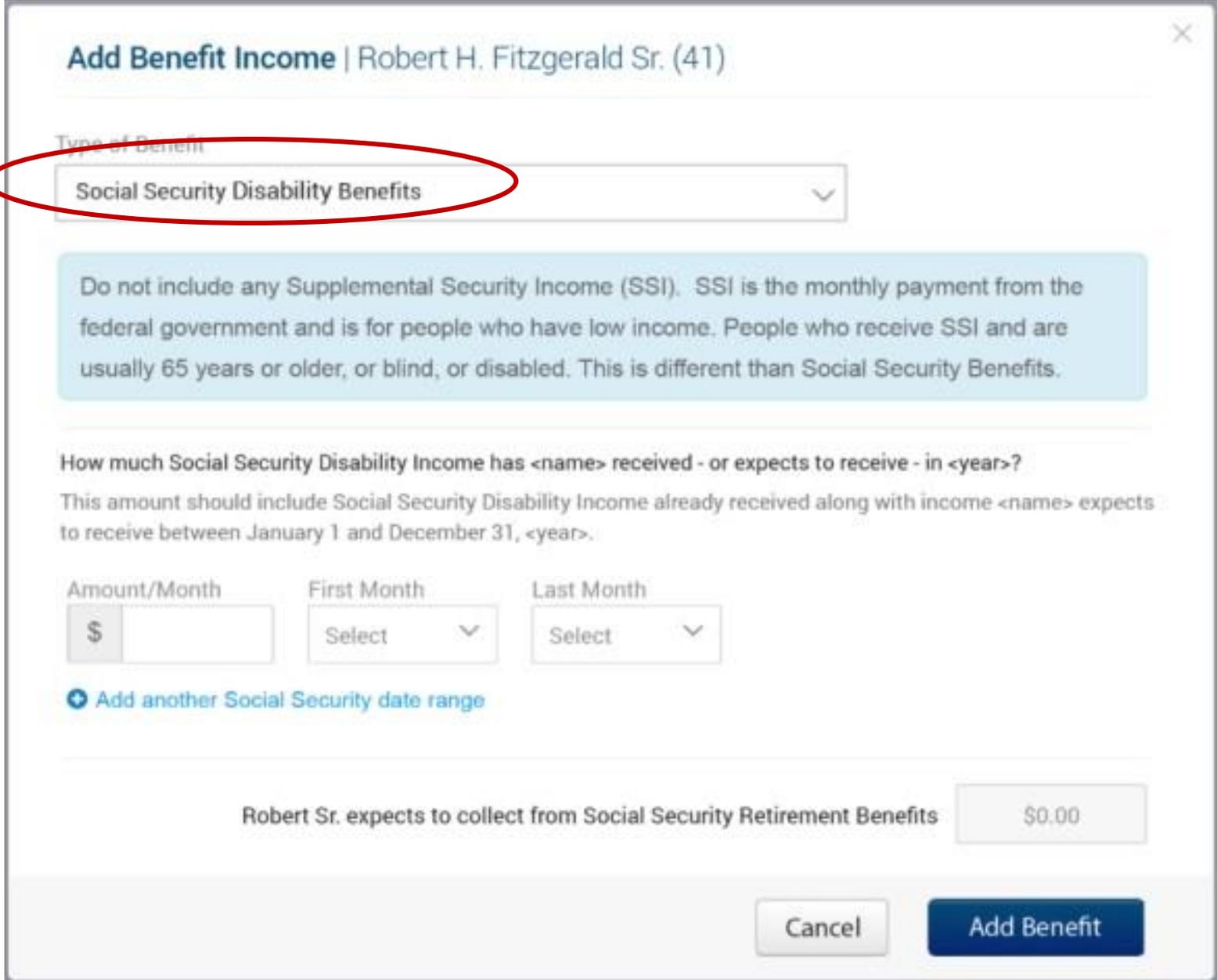
[Add another Social Security date range](#)

Robert Sr. expects to collect from Social Security Retirement Benefits

Cancel Add Benefit

Unemployment Benefit/Social Security Screens

- If the user selects “Social Security Disability Benefits” from the Type of Benefits dropdown, they will be asked for additional information.



Add Benefit Income | Robert H. Fitzgerald Sr. (41)

Type of Benefit
Social Security Disability Benefits

Do not include any Supplemental Security Income (SSI). SSI is the monthly payment from the federal government and is for people who have low income. People who receive SSI and are usually 65 years or older, or blind, or disabled. This is different than Social Security Benefits.

How much Social Security Disability Income has <name> received - or expects to receive - in <year>?
This amount should include Social Security Disability Income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount/Month: \$
First Month: Select
Last Month: Select

[Add another Social Security date range](#)

Robert Sr. expects to collect from Social Security Retirement Benefits

Cancel Add Benefit

Unemployment Benefit/Social Security Screens

- If the service hits return a different Benefit Income than the previous service hit return, an alert message will be displayed asking the user to review for accuracy.

Robert H. Fitzgerald Sr. (41)			\$6330.40
Benefit / Date Range	Pay / Frequency	Income	Actions
Unemployment Insurance Benefits			
06/10/2018 - 07/28/2018	\$234.16/wk for 12 weeks	\$3,165.20	Edit Remove
10/01/2018 - 12/31/2018	\$234.16/week for 12 weeks	\$3,165.20	
 Records indicate that the Unemployment Insurance Benefits Robert Sr. received may have changed. Please review the previously entered details and verify their accuracy.			
+ Add Benefit Income			

Alexandra O. Fitzgerald (37)			\$13,138.66
Benefit / Date Range	Pay / Frequency	Income	Actions
Unemployment Insurance Benefits			
06/10/2018 - 07/28/2018	\$234.16/wk for 12 weeks	\$3,165.20	Edit Remove
10/01/2018 - 12/31/2018	\$234.16/week for 12 weeks	\$3,165.20	
Social Security Survivor's Benefits			
February - July	\$432.23/month	\$2593.38	Edit Remove
Social Security Disability Benefits			
January - June	\$234.16/month	\$1,404.96	Edit Remove
August - October	\$234.16/month	\$1,404.96	
Social Security Retirement Benefits			
January - December	\$234.16/month	\$1,404.96	Edit Remove
 Records indicate that the Social Security Benefits Alexandra received may have changed. Please review the previously entered details and verify their accuracy.			
+ Add Benefit Income			

Additional Income Summary Screens

Additional Income Summary Screens



- The user will be asked if anyone in the household has any additional income.

Additional Income

NY State of Health also needs to know about other income you and your family will have received during the coverage year.

This may include income from a pension, investments, tax-exempt interest, some lump sum payments, alimony received, or other types of income.

You do not have to tell us about some income sources such as child support, Veterans Payments, worker's compensation, Supplemental Security Income (SSI), or gifts/inheritances.

[What other types of income should **not** be included?](#)

Has anyone in your household received—or does anyone expect to receive—any additional income in <year>?

Yes No

- If the user clicks on the “What other types of income should not be included?” link, a blue help text box opens. It can be dismissed by clicking the "X."

[What other types of income should **not** be included?](#)

When you apply for health insurance through NY State of Health, you do not have to tell us about the amount of your assets and resources (such as bank accounts, savings accounts, IRAs, etc.)

X

Additional Income Summary Screens

- If the user answers “No,” they can continue through the application. If they answer “Yes,” the household members are displayed.

Please tell us who in the household received – or expects to receive – this additional income from other sources. This amount should include additional income already received, along with additional income your household expects to receive, between January 1 and December 31, <year>.

Click on **Add Additional Income** to include income from other sources.

Robert H. Fitzgerald Sr. (41)

Robert Sr. expects no additional income in 2018

[+ Add Additional Income](#)

Alexandra O. Fitzgerald (37)

Alexandra expects no additional income in 2018

[+ Add Additional Income](#)

Jordan A. Fitzgerald (21)

Jordan expects no additional income in 2018

[+ Add Additional Income](#)

Robert H. Fitzgerald Jr. (17)

Robert Jr. expects no additional income in 2018

[+ Add Additional Income](#)

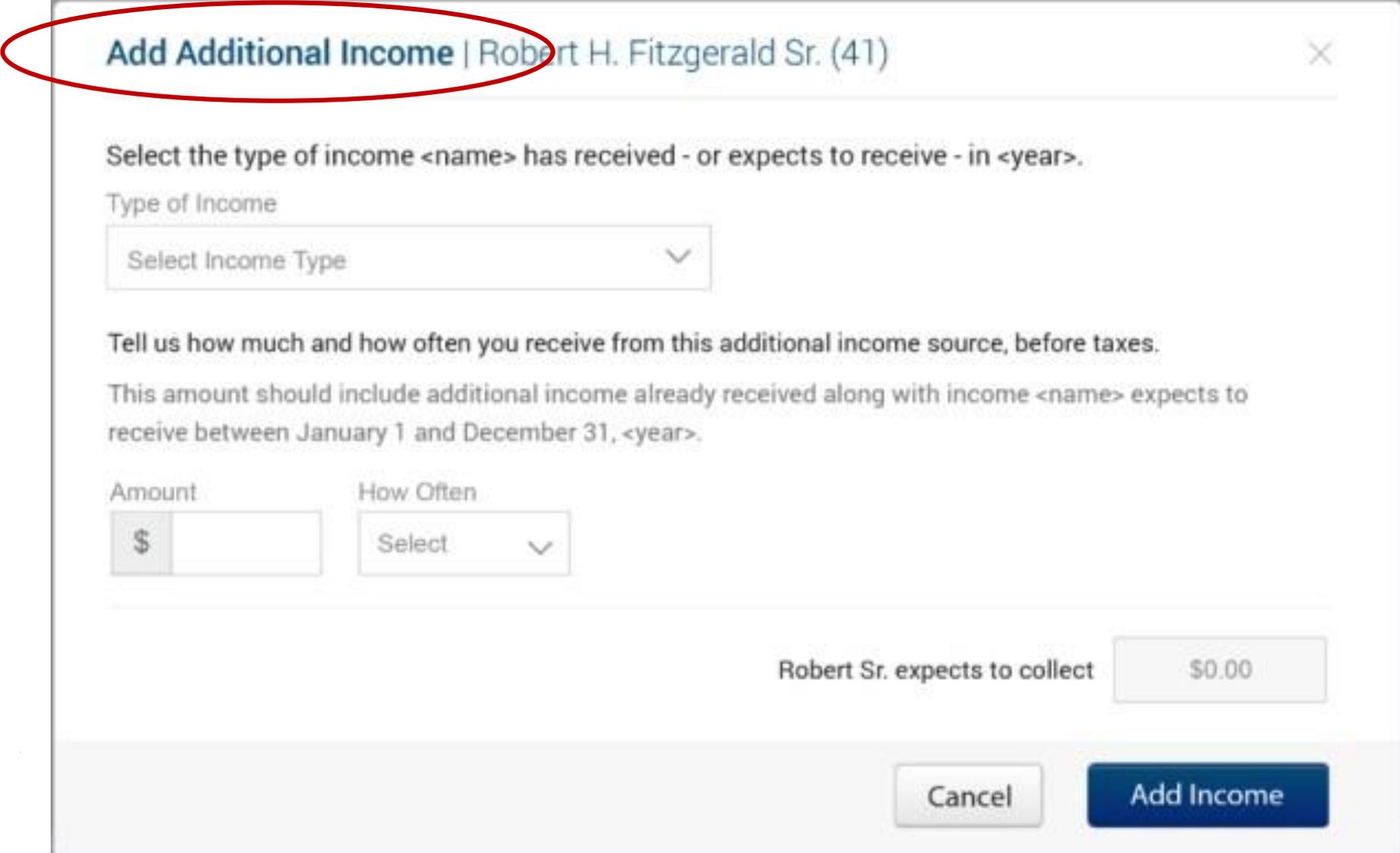
Michelle T. Fitzgerald (15)

Michelle expects no additional income in 2018

[+ Add Additional Income](#)

Additional Income Summary Screens

- When the user clicks on “Add Additional Income,” a module will display to request additional information.



Add Additional Income | Robert H. Fitzgerald Sr. (41) ✕

Select the type of income <name> has received - or expects to receive - in <year>.

Type of Income

Tell us how much and how often you receive from this additional income source, before taxes.
This amount should include additional income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount How Often

Robert Sr. expects to collect

Additional Income Summary Screens

- If the user changes their answer from “Yes” to “No,” they will be shown an alert message, but can still continue the application.

Has anyone in your household received—or does anyone expect to receive—any additional income in <year>?

Yes No

 By selecting No you will lose all Additional Income data for this account when you click Next.

- When the user clicks on “Add Additional Income,” a module will display to request additional information.

Add Additional Income | Robert H. Fitzgerald Sr. (41) ×

Select the type of income <name> has received - or expects to receive - in <year>.

Type of Income

Tell us how much and how often you receive from this additional income source, before taxes.
This amount should include additional income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount How Often

Robert Sr. expects to collect

Additional Income Summary Screens



Type of Income dropdown menu

Select ▼

- Railroad Board Benefits
- Taxable Interest
- Tax Exempt Interest
- Ordinary Dividends
- Capital Gain Distributions (applicable to 1040A only)
- Capital Gain
- IRS Distributions (taxable amount only)
- Pension & Annuities (taxable amount only)
- Alaska Permanent Fund Dividends
- Taxable refunds, credits, etc. of state & local income taxes
- Alimony Received
- Business Income
- Other Gains
- Rental R-E, royalties, partnerships, S-Corps, trusts
- Farm Income
- Net Operating Loss
- Stock Options
- Cancellation of Debt
- Foreign Earned Income Exclusion (amt is excluded from income to arrive at total income for line 22)
- Gambling Income
- Other Income
- Capital Loss
- Business Loss
- Other Losses

Additional Income Summary Screens

- If the user selects “Other Income” from the dropdown, a text box will be provided to Specify Other Type of Income and they will be asked for a date range.

Add Additional Income | Robert H. Fitzgerald Sr. (41)

Select the type of income <name> has received - or expects to receive - in <year>.

Type of Income
Other Income ▼

Specify Other Type of Income
Micro Transactions on Carnival Rides

Tell us how much and how often you receive from this additional income source, before taxes.
This amount should include additional income already received along with income <name> expects to receive between January 1 and December 31, <year>.

Amount	How Often	Hours / Week	Start Date	End Date
\$ 0.23	Hourly ▼	168	06/01/2018 📅	09/30/2018 📅

From this income source Robert Sr. expects to collect **\$840.00**

Completed Additional Income Screen

Additional Income

NY State of Health also needs to know about other income you and your family will have received during the coverage year.

This may include income from a pension, investments, tax-exempt interest, some lump sum payments, alimony received, or other types of income.

You do not have to tell us about some income sources such as child support, Veterans Payments, worker's compensation, Supplemental Security Income (SSI), or gifts/inheritances.

[What other types of income should not be included?](#)

Has anyone in your household received—or does anyone expect to receive—any additional income in <year>?

Yes No

Please tell us who in the household received – or expects to receive – this additional income from other sources.

This amount should include additional income already received, along with additional income your household expects to receive, between January 1 and December 31, <year>.

You may see information listed about additional income you and your family received in <year>.

Click on **Edit** to tell us how much you receive from this source.

Click on **Remove** to delete this income source.

Click on **Add Additional Income** to include income from other sources.

Robert H. Fitzgerald Sr. (41)

Additional Income / Date Range	Pay / Frequency	Income	Actions
Other Micro Transactions on Carnival Rides 06/01/2018 - 09/30/2018	\$0.23/hour - 168 hours per week	\$840.00	Edit Remove
Rental R-E, royalties, partnerships, S-Corps, trusts Annually	\$1,449.00/year	\$1,449.00	Edit Remove

[+ Add Additional Income](#)

Alexandra O. Fitzgerald (37)

Alexandra expects no additional income in 2018

[+ Add Additional Income](#)

Michelle T. Fitzgerald (15)

Michelle expects no additional income in 2018

[+ Add Additional Income](#)

Deduction Screens

Deductions Screens



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Logged in as [craquinty79](#) Account Number [AC0000032631](#) [Sign Out](#)

- ✓ ACCOUNT INFORMATION
- ✓ Contact Information
- ✓ BUILD HOUSEHOLD
- ✓ Household Members
- ✓ Relationships
- ✓ Residential Address
- ✓ Household Summary
- ✓ COVERAGE PREFERENCE
- ✓ Public MEC
- ✓ INCOME INFORMATION
- ✓ Filing Status
- Income Details [➤](#)
- Income Summary
- OTHER INFORMATION
- APPLICATION SUMMARY
- FIND A PLAN

Income Deductions

If you or your family members pay for certain things that can be deducted on a federal income tax return, telling us about them will help NY State of Health accurately determine your household's income.

Please note: Federal tax law no longer allows a deduction for tuition and fees for tax years beginning after December 31, 2016. [What deductions should I include?](#)

Has anyone in your household claimed—or does anyone expect to claim—any deductions for <year>?

Yes No

Tell us who in the household plans to claim deductions, and identify the type and amount of each deduction. You may see information listed about deductions you and your family claimed in <year>.

Click on **Edit** to tell us about the type and amount of the deduction.
Click on **Remove** to delete this deduction.
Click on **Add Deduction** to claim a deduction.

Note: As of 2018 some deductions are no longer allowed. Please click "Remove" to clear the entry. Additionally, the maximum allowable amount for some deductions may have changed, click on "Edit Deduction" to change the amount. Click on "Add Deduction" for a list of available deductions.

Robert H. Fitzgerald Sr. (41)	\$4,000.00	
Robert will not claim any deductions in 2018.		+ Add Deduction
Alexandra O. Fitzgerald (37)	\$9,000,000,021,961.40	
Deduction / Frequency	Amount	Actions
Educator Expenses \$4,000.00 annually	\$250.00	Edit Remove
Student Loan Interest Deduction \$3,481.40 annually	\$2,500.00	Edit Remove
Health savings account deduction \$3,086.00 annually	\$3,086.25	Edit Remove
Health savings account deduction \$2,500.00 annually	\$2,500.00	Edit Remove
Certain business expenses of reservists, performing artists, etc. (Form 2016) \$900.00 annually	\$9,000,000,000,000.00	Edit Remove
		+ Add Deduction
Michelle T. Fitzgerald (15)		
Michelle will not claim any deductions in 2018.		+ Add Deduction

Other members intentionally not shown here

[Back](#)
[Next](#)

Deductions Screens

- The user will be asked if anyone in the household plans to claim any deductions.
- When the user clicks on the “What deductions should I include?” help link, a blue help text box opens. It can be dismissed by clicking the “X.”

Income Deductions

If you or your family members pay for certain things that can be deducted on a federal income tax return, telling us about them will help NY State of Health accurately determine your household's income.

Please note: Federal tax law no longer allows a deduction for tuition and fees for tax years beginning after December 31, 2016. [What deductions should I include?](#)

Has anyone in your household claimed—or does anyone expect to claim—any deductions for <year>?

Yes No

Most deductions are listed on the front page of the Internal Revenue Service (IRS) 1040 form. X

Common deductions include:

- Alimony you pay
- Student loan interest you pay
- Educator expenses if you are a teacher and pay for supplies out-of-pocket
- Moving expenses if you are moving to live much closer to your job
- Contributions to your individual retirement account if you do not have a retirement account through a job

You do not need to tell us about deductions such as charitable contributions, home mortgage interest, property taxes, or child care expenses. You also should not enter a deduction that is already considered a cost or expense as part of your business. Only include deductions that are part of your adjusted gross income on the tax return. This means that you should not include anything that is part of your itemized deductions (Schedule A of the Internal Revenue Service 1040 Form).

Deductions Screens

- If the user answers “Yes,” the household members are displayed.

Has anyone in your household claimed—or does anyone expect to claim—any deductions for <year>?

Yes No

Please tell us who in the household plans to claim deductions, and identify the type and amount of each deduction.

Click on **Add Deduction** to claim a deduction.

Robert H. Fitzgerald Sr. (41)
Robert Sr. expects no deductions in 2018 + Add Deduction
Alexandra O. Fitzgerald (37)
Alexandra expects no deductions in 2018 + Add Deduction
Jordan A. Fitzgerald (21)
Jordan expects no deductions in 2018 + Add Deduction
Robert H. Fitzgerald Jr. (17)
Robert Jr. expects no deductions in 2018 + Add Deduction
Michelle T. Fitzgerald (15)
Michelle expects no deductions in 2018 + Add Deduction

Deductions Screens

- If the user then changes their answer to “No,” they will be shown an alert message, but can still continue the application.
- When the user clicks on “Add Deduction,” a module window will display for the user to select the Type of Deduction and enter additional information.

Has anyone in your household claimed—or does anyone expect to claim—any deductions for <year>?

Yes No

 By selecting No you will lose all Income Deduction data for this account when you click Next.

Add Deduction | Robert H. Fitzgerald Sr. (41) ×

Select the type of deduction <name> has claimed - or expects to claim - in <year>.

Type of Deduction

Alimony paid (not child support) ▾

Tell us how much and how often you will claim for this deduction.

This amount should include deductions already claimed along with deductions <name> expects to claim between January 1 and December 31, <year>.

Amount

How Often

Yearly

Robert Sr. expects to deduct

Deductions Screens



- Type of Deduction dropdown.

Select

Additional adjustments added on line 36 (Form 1040)

Alimony paid (not child support)

Archer MSA deduction

Certain business expenses of reservists, performing artists, etc. (Form 2016)

Deductible part of Self-Employment tax (Schedule SE Form 1040)

Domestic production activities deduction (Form 8903)

Educator Expenses (out-of-pocket costs, max \$250 each)

Health savings account deduction

IRA deduction (Traditional only and not from a job)

Moving expenses (50+ miles closer to their job min. for civilians | Form 3903)

Penalty on early withdrawal of savings

Self-employed health insurance deduction

Self-employed SEP, SIMPLE, & qualified plans

Student loan interest deduction (interest only)

Deductions Screens

- The user will be advised that some previously entered deductions are no longer allowed.
- They are also advised that the maximum allowable amount for some deductions may have changed.
- They are given the opportunity to remove or edit their deductions.

Click on **Edit** to tell us about the type and amount of the deduction.
Click on **Remove** to delete this deduction.
Click on **Add Deduction** to claim a deduction.

Note: As of 2018 some deductions are no longer allowed. Please click "Remove" to clear the entry. Additionally, the maximum allowable amount for some deductions may have changed, click on "Edit Deduction" to change the amount. Click on "Add Deduction" for a list of available deductions. X

Robert H. Fitzgerald Sr. (41)		\$4,000.00
Deduction / Frequency	Amount	Actions
Tuition & Fees - Deduction no longer available \$4,000.00 annually	Please Remove \$4,000.00	<input type="button" value="Remove"/>
<input type="button" value="+ Add Deduction"/>		
Alexandra O. Fitzgerald (37)		\$9,000,000,021,961.40
Deduction / Frequency	Amount	Actions
Educator Expenses \$4,000.00 annually	\$4,000.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Student Loan Interest Deduction \$3,481.40 annually	\$3,481.40	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Health savings account deduction \$123.45 every two weeks	\$3086.25	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Certain business expenses of reservists, performing artists, etc. (Form 2016) \$9,000,000,000,000.00 annually	\$9,000,000,000,000.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
Other Animal Crackers in my Soup - Deduction no longer available \$34.66/day	Please Remove \$12,480.00	<input type="button" value="Remove"/>
<input type="button" value="+ Add Deduction"/>		

Deductions Screens

Click on **Edit** to tell us about the type and amount of the deduction.

Click on **Remove** to delete this deduction.

Click on **Add Deduction** to claim a deduction.

- After the user clicks “Next,” the system will advise the user of any errors with their deductions so they can be corrected.

Note: As of 2018 some deductions are no longer allowed. Please click “Remove” to clear the entry. Additionally, the maximum allowable amount for some deductions may have changed, click on “Edit Deduction” to change the amount. Click on “Add Deduction” for a list of available deductions. X

Robert H. Fitzgerald Sr. (41)

\$4,000.00

Robert will not claim any deductions in 2018.

[+ Add Deduction](#)

Alexandra O. Fitzgerald (37)

\$9,000,000,021,961.40

Deduction / Frequency

Amount

Actions

Educator Expenses
\$4,000.00 annually

Cannot exceed \$250.00 annually
\$4,000.00

[Edit](#)
[Remove](#)

Student Loan Interest Deduction
\$3,481.40 annually

Cannot exceed \$2,500.00 annually
\$3,481.40

[Edit](#)
[Remove](#)

Health savings account deduction
\$123.45 every two weeks

Frequency must be quarterly or annual
\$3086.25

[Edit](#)
[Remove](#)

Certain business expenses of reservists, performing artists, etc. (Form 2016)
\$9,000,000,000,000.00 annually

\$9,000,000,000,000.00

[Edit](#)
[Remove](#)

[+ Add Deduction](#)

Deductions Screens

- Completed Income Deductions with all outstanding deduction errors/corrections addressed.

Click on **Edit** to tell us about the type and amount of the deduction.

Click on **Remove** to delete this deduction.

Click on **Add Deduction** to claim a deduction.

Note: As of 2018 some deductions are no longer allowed. Please click "Remove" to clear the entry. Additionally, the maximum allowable amount for some deductions may have changed, click on "Edit Deduction" to change the amount. Click on "Add Deduction" for a list of available deductions. X

Robert H. Fitzgerald Sr. (41)	\$4,000.00
Robert will not claim any deductions in 2018. + Add Deduction	

Alexandra O. Fitzgerald (37)		\$9,000,000,021,961.40
Deduction / Frequency	Amount	Actions
Educator Expenses \$4,000.00 annually	\$250.00	Edit Remove
Student Loan Interest Deduction \$3,481.40 annually	\$2,500.00	Edit Remove
Health savings account deduction \$3,086.00 annually	\$3,086.25	Edit Remove
Health savings account deduction \$2,500.00 annually	\$2,500.00	Edit Remove
Certain business expenses of reservists, performing artists, etc. (Form 2016) \$900.00 annually	\$900.00	Edit Remove
		+ Add Deduction

Final Set of Income Screens

Income Summary Screens



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Household Income Summary

Review the information on this page to make sure it accurately reflects what you have reported or updated.

Click on **Make Changes** in any area that you would like to edit or modify. You can also click **Back** to review your information.

If the information is correct, check the box **I agree with the amount shown** and then click **Next**.

Earned Income Make Changes

Member	Income Source	Annual Amount
Robert Q. Fitzgerald Jr. (43)	ARCS STATE AND LOCAL LLC	\$66,003.96
Clair M. McSquinty (37)	LIME GAZELLE INC	\$32,122.54

Unemployment Insurance & Social Security Benefits Make Changes

Member	Benefit Source	Annual Amount
Robert Q. Fitzgerald Jr. (43)	Social Security Retirement Benefits	\$3,762.47
Robert Q. Fitzgerald Jr. (43)	Social Security Disability Benefits	\$922.44
Clair M. McSquinty (37)	Social Security Survivor's Benefits	\$22752
Clair M. McSquinty (37)	Unemployment Benefits	\$672.12

Additional Income Make Changes

Member	Income Type	Annual Amount
Robert Q. Fitzgerald Jr. (43)	Gambling Income	\$2,673.11

Deductions Make Changes

Member	Deduction	Annual Amount
Clair M. McSquinty (37)	Educator expenses	\$250.00

I agree with the amount shown

Back Next

Income Summary Screens



- The system will display a summary of Household Income to the user.

Earned Income			Make Changes
Member	Income Source	Annual Amount	
Robert Q. Fitzgerald Jr. (43)	ARCS STATE AND LOCAL LLC	\$66,003.96	
Clair M. McSquinty (37)	LIME GAZELLE INC	\$32,122.54	

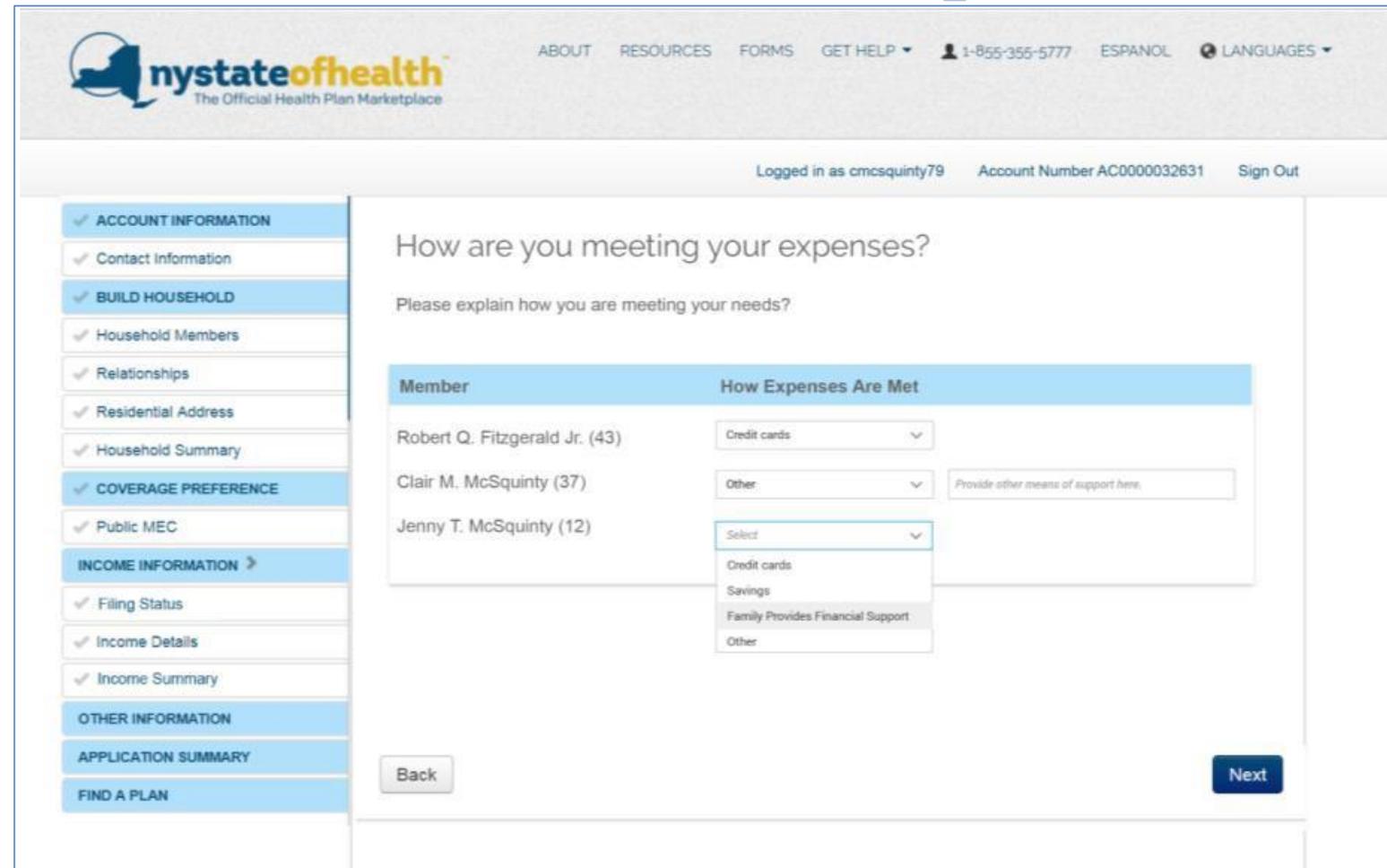
Unemployment Insurance & Social Security Benefits			Make Changes
Member	Benefit Source	Annual Amount	
Robert Q. Fitzgerald Jr. (43)	Social Security Retirement Benefits	\$3,762.47	
Robert Q. Fitzgerald Jr. (43)	Social Security Disability Benefits	\$922.44	
Clair M. McSquinty (37)	Social Security Survivor's Benefits	\$22752	
Clair M. McSquinty (37)	Unemployment Benefits	\$672.12	

Additional Income			Make Changes
Member	Income Type	Annual Amount	
Robert Q. Fitzgerald Jr. (43)	Gambling Income	\$2,673.11	

Deductions			Make Changes
Member	Deduction	Annual Amount	
Clair M. McSquinty (37)	Educator expenses	\$250.00	

Meeting Expenses Screens

- The user is asked to explain how they meet their expenses.

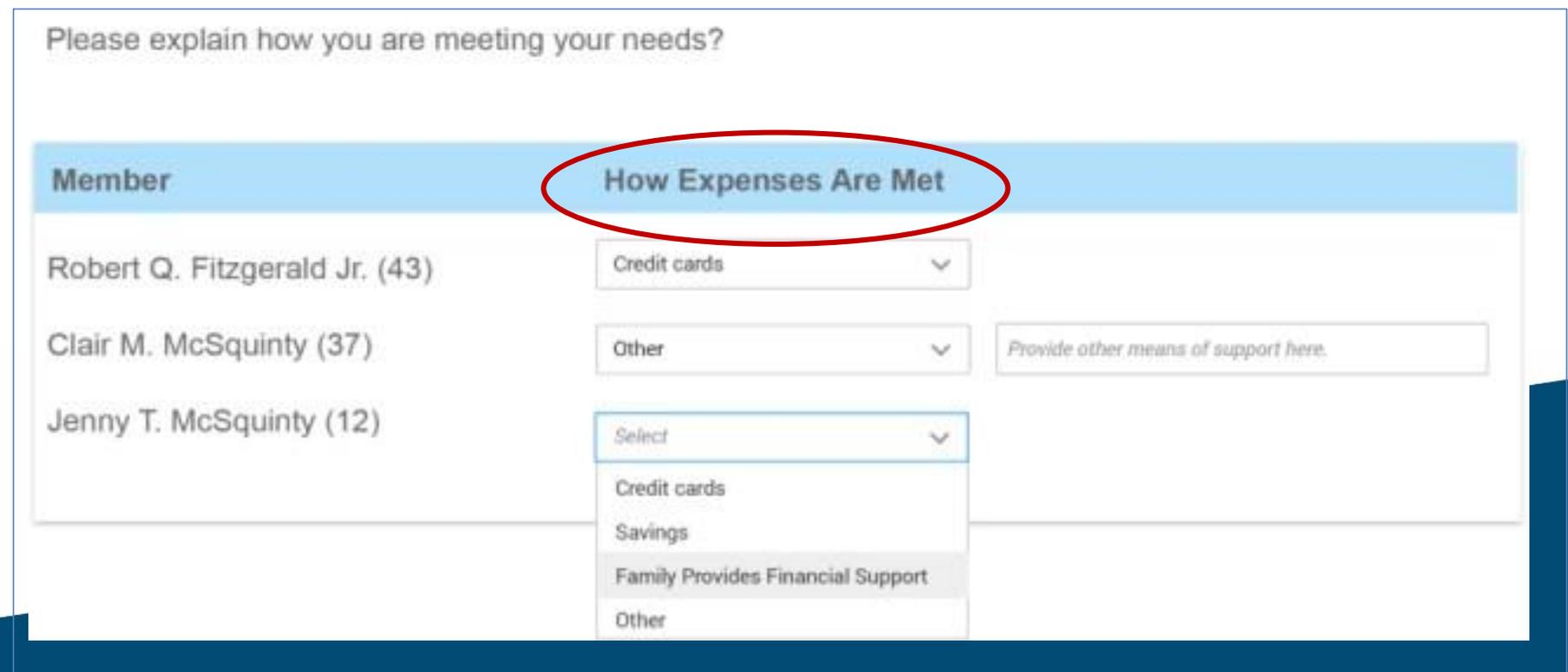


How are you meeting your expenses?

Please explain how you are meeting your needs?

Member	How Expenses Are Met
Robert Q. Fitzgerald Jr. (43)	Credit cards
Clair M. McSquinty (37)	Other <input type="text" value="Provide other means of support here."/>
Jenny T. McSquinty (12)	Select Credit cards Savings Family Provides Financial Support Other

Back Next



Please explain how you are meeting your needs?

Member	How Expenses Are Met
Robert Q. Fitzgerald Jr. (43)	Credit cards
Clair M. McSquinty (37)	Other <input type="text" value="Provide other means of support here."/>
Jenny T. McSquinty (12)	Select Credit cards Savings Family Provides Financial Support Other

Income Differences Screens



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Explanation of Income Differences

NY State of Health found some differences between the income information in your application and what was returned from state, federal, and other data sources.

For each income type listed below, tell us why the income you told us would be different than what we found in data sources. For example, your income now may be different because you recently got a job, lost a job or exhausted some benefits.

You can also select **Other** if none of the reasons apply and tell us the reason.

Changes in Income

Member	Income Type	Stated Amount	Reason
Robert Q. Fitzgerald Jr. (43)	Income from a job	\$96,003.96	Select
Clair M. McSquinty (37)	Income from a job	\$3,122.54	Lost a job
Has <name> applied for unemployment benefits?			Select

Back Next

Income Differences Screens

- The user is asked to explain the difference in the income amount entered and what was received from service hits.

Explanation of Income Differences

NY State of Health found some differences between the income information in your application and what was returned from state, federal, and other data sources.

For each income type listed below, tell us why the income you told us would be different than what we found in data sources. For example, your income now may be different because you recently got a job, lost a job or exhausted some benefits.

You can also select **Other** if none of the reasons apply and tell us the reason.

Changes in Income

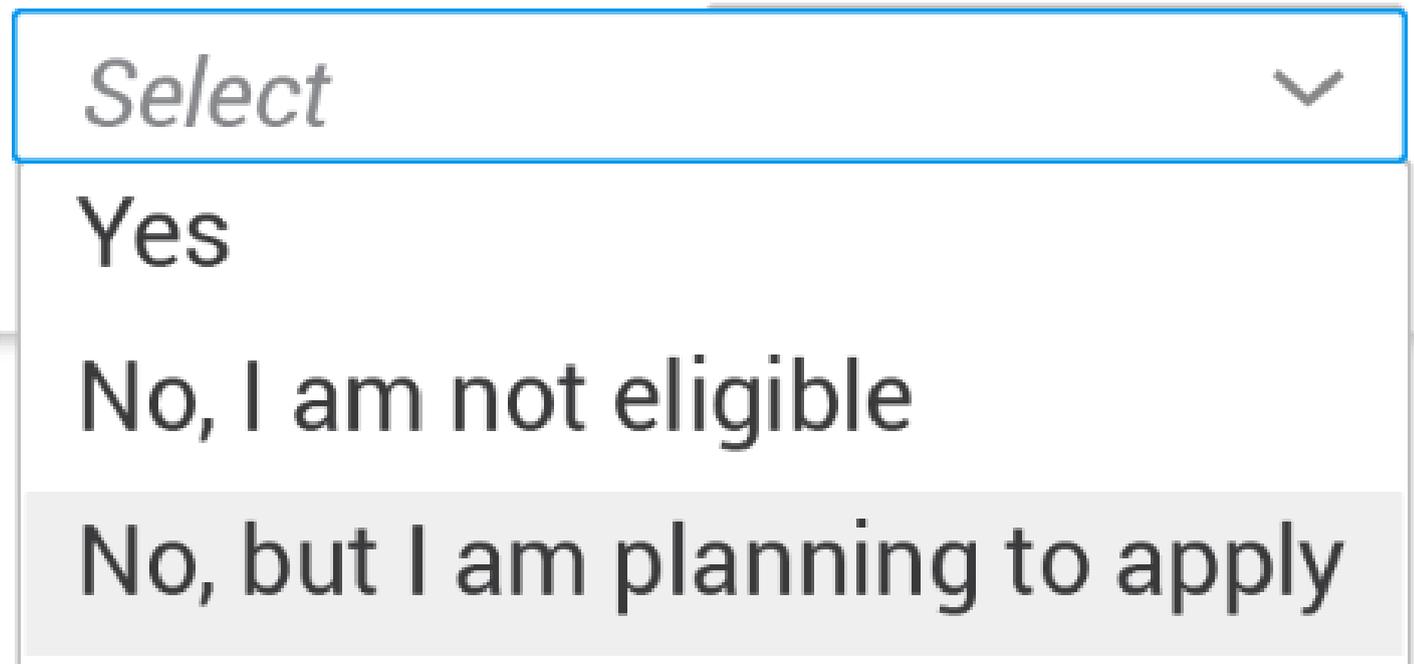
Member	Income Type	Stated Amount	Reason
Robert Q. Fitzgerald Jr. (43)	Income from a job	\$96,003.96	Select <input type="button" value="v"/>
Clair M. McSquinty (37)	Income from a job		Select <input type="button" value="v"/>

- Changed Jobs
- Exhausted Unemployment Insurance Benefits
- Stopped working
- Lost a job
- Different amounts of hours worked
- Other

Income Differences Screens

Member	Income Type	Stated Amount	Reason
Robert Q. Fitzgerald Jr. (43)	Income from a job	\$96,003.96	Select <input type="button" value="v"/>
Clair M. McSquinty (37)	Income from a job	\$3,122.54	Lost a job <input type="button" value="v"/>
Has <name> applied for unemployment benefits?			Select <input type="button" value="v"/>

- If the user selects “Lost a job” from the Reason dropdown, they are asked if the household member has applied for unemployment benefits.
- Unemployment benefits answer dropdown.



Select

Yes

No, I am not eligible

No, but I am planning to apply

Current Income Screens



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Current Income

Based on information you told us in the application and the projected annual income, we calculated an average monthly income. The projected average monthly income for each of the household members is:

Member	Average Monthly Income
Robert Q. Fitzgerald Jr. (43)	\$8,000.33 per month
Clair M. McSquinty (37)	\$2,676.87 per month
Jenny T. McSquinty (12)	\$0.00 per month

Is the average monthly income for each person the same as their income in February?*

Yes No

Current Income Screens

- The user is asked to verify the Average Monthly Income of the household members.

Current Income

Based on information you told us in the application and the projected annual income, we calculated an average monthly income. The projected average monthly income for each of the household members is:

Member	Average Monthly Income
Robert Q. Fitzgerald Jr. (43)	\$8,000.33 per month
Clair M. McSquinty (37)	\$2,676.87 per month
Jenny T. McSquinty (12)	\$0.00 per month

Is the average monthly income for each person the same as their income in February?*

Yes No

Current Income Screens

- If the user answers “No,” they are asked to provide last month’s income for each household member.

Is the average monthly income for each person the same as their income in February?*

Yes No

Tell us how much income each person received before taxes in the last month. This information should be for the previous calendar month.

Robert H. Fitzgerald Sr. (41)
Average Monthly Income: \$4,000.33
Tell us the amount that this person received in the previous calendar month.
\$ <input type="text"/>

Clair M. McSquinty (37)
Average Monthly Income: \$2,676.87
Tell us the amount that this person received in the previous calendar month.
\$ <input type="text"/>

Jenny T. McSquinty (12)
Average Monthly Income: \$0.00
Tell us the amount that this person received in the previous calendar month.
\$ <input type="text"/>

Current Income Screens



New York State of Health uses your **PROJECTED** annual income and other factors to determine if you qualify to receive tax credits to purchase health coverage, enroll in Medicaid, Child Health Plus, or the Essential Plan, or buy a qualified health plan at full cost. You may request that NY State of Health use your actual **CURRENT** monthly income to see if you qualify for Medicaid.

Do you want to use your **PROJECTED** annual income or your actual **CURRENT** monthly income to see if you qualify for Medicaid?

- Use my Projected Annual Income.
- Use my Current Monthly Income.

- The user is then asked if they want to use their projected or current monthly income to see if they qualify for Medicaid.

Recent Medical Expenses Screens



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- INCOME INFORMATION** 
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Recent Medical Expenses

Medicaid may be able to pay for medical care, services and supplies received in the three months before the start of your application for health insurance coverage.

Does anyone in the household want help paying for past medical bills or coverage?

Yes No

Please tell us who in the household wants help paying for past medical bills?

- Robert Q. Fitzgerald Jr. (43)
- Clair M. McSquinty (37)
- Jenny T. McSquinty (12)

For which months is Jenny requesting assistance

- December 2017
- January 2018
- February 2018

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Recent Medical Expenses Screens (Retro-Medicaid)



Medicaid may be able to pay for medical care, services and supplies received in the three months before the start of your application for health insurance coverage.

Does anyone in the household want help paying for past medical bills or coverage?

Yes No

Please tell us who in the household wants help paying for past medical bills?

Robert Q. Fitzgerald Jr. (43)

Clair M. McSquinty (37)

Jenny T. McSquinty (12)

For which months is Jenny requesting assistance

December 2017

January 2018

February 2018

- The user is asked if anyone in the household wants help paying for past medical bills. If they answer “Yes,” they are asked to select the household members and the months for which they are requesting assistance. If they answer “No,” they can continue through the application.

Past Income



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Past Income

You told us that you would like help paying for medical bills from the past. Please tell us what your income was in those months. For each month shown, you must tell us if the average monthly income (below in bold) is what your income was in that month or if it was a different amount.

- If your income in that month is the same as the average monthly income, click **Yes**.
- If your income is different than the average monthly income in any of the months below, click **No**. Then tell us the income for that month.
- If you had no income in any of the months below, click on the **No Income** box for each month when that was true.
- Do not include income from child support, veterans payments, worker's compensation, Supplemental Security Income (SSI), or gifts/inheritance.

Robert H. Fitzgerald Sr. (41)

Based on the information you told us, we calculated the average monthly income for Robert Sr. to be \$4634.12.

Month	Average	Agree with Average?	Actual Income
August 2018	\$4634.12	<input checked="" type="radio"/> Yes <input type="radio"/> No	\$4634.12 <input checked="" type="checkbox"/> Agreed
July 2018	\$4634.12	<input type="radio"/> Yes <input checked="" type="radio"/> No	\$472.56 <input type="checkbox"/> No Income
June 2018	\$4634.12	<input type="radio"/> Yes <input checked="" type="radio"/> No	\$0.00 <input checked="" type="checkbox"/> No Income

Clair M. McSquinty (37)

Based on the information you told us, we calculated the average monthly income for Clair to be \$3494.17.

Month	Average	Agree with Average?	Actual Income
August 2018	\$3494.17	<input checked="" type="radio"/> Yes <input type="radio"/> No	\$3494.17 <input checked="" type="checkbox"/> Agreed
July 2018	\$3494.17	<input checked="" type="radio"/> Yes <input type="radio"/> No	\$3494.17 <input checked="" type="checkbox"/> Agreed
June 2018	\$3494.17	<input checked="" type="radio"/> Yes <input type="radio"/> No	\$3494.17 <input checked="" type="checkbox"/> Agreed

Jenny T. McSquinty (12)

Based on the information you told us, we calculated the average monthly income for Jenny to be \$0.00.

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Next

Past Income

- When the user answers “Yes” to needing help with past medical bills, they are asked to verify their Past Income.

You told us that you would like help paying for medical bills from the past. Please tell us what your income was in those months. For each month shown, you must tell us if the average monthly income (below in bold) is what your income was in that month or if it was a different amount.

- If your income in that month is the same as the average monthly income, click **Yes**.
- If your income is different than the average monthly income in any of the months below, click **No**. Then tell us the income for that month.
- If you had no income in any of the months below, click on the **No Income** box for each month when that was true.
- Do not include income from child support, veterans payments, worker’s compensation, Supplemental Security Income (SSI), or gifts/inheritance.

Robert H. Fitzgerald Sr. (41)

Based on the information you told us, we calculated the average monthly income for Robert Sr. to be \$4634.12.

Month	Average	Agree with Average?	Actual Income
August 2018	\$4634.12	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="\$4634.12"/> <input checked="" type="checkbox"/> <i>Agreed</i>
July 2018	\$4634.12	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="\$472.56"/> <input type="checkbox"/> No Income
June 2018	\$4634.12	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="\$0.00"/> <input checked="" type="checkbox"/> No Income

Terms, Rights, and Responsibilities (TRR)

- The Terms, Rights and Responsibilities page will be updated to require only the Account Holder's initials.

Request for Financial Assistance - Terms Rights and Responsibilities

- I have given true answers to all the questions on this form to the best of my knowledge. I know that there may be a penalty if I'm not truthful.
- I understand the New York State of Health Marketplace (the Marketplace) will keep my information private as required by law. My answers on this form will only be used to decide if I qualify for health coverage or help paying for coverage.
- I understand the Marketplace will not ask any questions about medical history.
- Household members who don't want coverage will not be asked questions about citizenship or immigration status.
- I know that I must tell the Marketplace if anything changes from what I wrote on this application. I should call 1-855-355-5777 or visit www.nystateofhealth.ny.gov to report any change or for help getting required information.
- I know that it is against federal law to discriminate on the basis of race, color, national origin, sex, or disability. I can file a discrimination complaint by visiting www.hhs.gov/ocr/office/file.
- I confirm that no one applying for health insurance on this application is living in a medical facility.

 Download & Print



Robert Huckabee Fitzgerald Sr. (41)

Please initial here for consent

I agree to the terms, rights, and responsibilities

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Finish

Questions?



Email Questions To:
ASSISTOR.ADMIN@HEALTH.NY.GOV