

## In-person/Phone Interview Example

### Employee:

How did you hear about us?

Are you familiar with our program, or is this your first experience with Head Start?

We are a needs-based program in the community, and we typically work with families that are at or below the poverty line, those receiving the Cash-Aid portion of CalWORKs, CalFRESH, TANF, or Supplemental Security Income (SSI), and also foster and displaced families.

This is what sets the needs basis for Head Start, and our waitlist is built around those needs, which means our waitlist is unique in that it is not a first come, first serve waitlist; it is need-based. All of our applicants start at a waitlist status.

I would like to get started on the eligibility process to place you on the waitlist to be considered for any possible openings. Do you have time to complete that process now? If not, I can schedule an eligibility appointment for you to return, or we can complete it over the phone.

Before we start, I would like to review the eligibility for the program.

Can I ask you a few questions about your household?

### Categorical Eligibility

**Employee:** Does anyone in your household receive Cash-Aid (CalWORKs/TANF/Tribal TANF) or CalFRESH?

- Verification of Benefits (dated within the last three months)
- Notice of Action (NOA) (dated within the last three months)

**Employee:** Does anyone in your household receive Supplemental Security Income?

(not Social Security Retirement benefits)

- SSI Award Letter (dated within the last three months)

**Employee:** Are you a foster parent?

- Foster Care/Placement Agreement (dated within the last three months)
- If older than three months, complete and send Foster Verification to the social worker
- Health & Education Passport (first 3-4 pages only) may be used to support the Foster Care/Placement Agreement that is older than three months

### Residency:

**Employee:** Do you consider yourself displaced? Can you tell me why?

*If not fixed, adequate, and regular, Do you have alternatives?*

*You will move on to **Income Eligibility** if the family does not qualify as categorically eligible.*

### Income Eligibility

**Employee:** It sounds like we would be using your income to determine eligibility. I need to gather some basic information for the application, and then I'll ask more questions about your household and determine what documentation we will need from you.

*Start filling in the Application for Services (EL001) with Child's name/DOB and work your way down each section with the family.*

***ALWAYS ASK the question before filling out the Application for Services (EL001):***

**Just to confirm, are you the legal guardian of the child?**

*After completing the Application for Services, move onto page 1 of the Eligibility Form (EL002), begin filling out page 1 of the Income Calculation Worksheet & Staff Statement/Interview Notes (EL003)*

**Employee:** Has your family experienced a significant financial change between this year and last year (e.g., became unemployed or decreased work hours)? Or is your income relatively the same as the last calendar year? *You want to see if the "significant financial change" would change the family's eligibility category, such as going from Over Income (130%+) to Income Eligible or 100-130%.*

**Employee:** If a 2-parent household: Are either of you currently working? *Start with Parent A:* Where are you working, and how long have you been employed there? *Ask the same questions regarding Parent B. Gather information for ALL jobs BOTH parents worked in the relevant period (e.g., Jan 1-Dec 2024 or the last 12 months).*

If a parent is not working: How long have you/he/she been unemployed? Do you receive benefits? If no: Are you a homemaker? Are you retired? *If the timeframe is less than 12 months, you must ask about their work history before the unemployed/homemaker status to ensure you have covered the last 12 months or calendar year.*

*After you have completed the Income Calculation Worksheet & Staff Statement/Interview Notes (EL003) and determined the income documentation the family will need to provide, return to page 2 of the Eligibility Form (EL002) and check the boxes for the applicable income documents.*

## **Age Verification**

**Employee:** Shasta Head Start also requires proof of age for your child, do you have his/her county birth certificate? Hospital Certificate? If no: Do you have their Medi-Cal BIC card or Partnership card?

## **Acceptable Age Verification Documents**

- County Birth Certificate
- Foster Placement Agreement
- Hospital Certificate
- Immunization Record
- Medi-Cal BIC/Partnership card
- Medical Records (CHDP)
- Passport
- Verification of Benefits

*If the family has no documentation to verify their child's age, ask them to self-declare the child's name and date of birth. Provide the family with the Age Verification: Self-Declaration form (EL029)*

## Excessive Housing Costs

If the family's income appears to be over 100% of the [current Federal Poverty Guidelines](#), consider asking about their housing costs, as SHS can deduct the amount of housing costs exceeding 30% of their calculated income. **Contact ERSEA for assistance with excessive housing costs.**

Housing costs include only the following:

- Mortgage/Rent
- Mortgage Interest
- Property Taxes
- Homeowners/Renters Insurance
- HOA fees
- Utilities
  - Electricity
  - Gas
  - Water
  - Sewer
  - Trash

## Income

*Below is a list of income as defined by the Head Start Performance Standards:*

Income	Not Income
Wages	Adoption Assistance
Business Income	Alimony
Unemployment Compensation/PFL	Child Support
Pensions	Public Assistance (any form)
Annuities	Social Security (SSA Retirement Benefits)
Gifts exceeding tax withholding threshold	Veteran's Benefits
Military Income (Not including Hazzard pay or Housing Allowance)	
Student Grants/Stipends/Financial Aid	

## Examples of Acceptable Income and Housing Costs Documentation

Income Documentation	Housing Costs Documentation
1099	Lease Agreement
Check stub	Mortgage Note
Income Tax Form 1040 (All Pages)	Mortgage Statement
Letter of Verification	Rent Receipts
Pay stub/Envelope	Utility Bill Statements
Student Grant Award Letter	
Unemployment Payment History	
Paid Family Leave Payment History	
W-2	

**Because every family's situation is unique, this example will not address every scenario you might encounter. If you have any questions while meeting/talking with a family, please call the ERSEA Department.**