

**SENIOR CITIZENS AGING SERVICES  
INTAKE, PROFILE AND REFERRAL (IPR) FORM**

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**INSTRUCTIONS**

Title III reporting requirements provide statistical data for management and advocacy initiatives serving as indicators for new and continued funding of programs for seniors. The data collected is used for budget justifications, congressional inquiries, program development and mandated reports for federal, state and local agencies. Information must be accurate for it to be useful in supporting program services.

- ◆ **FORM:** This form is an Intake, Profile and Referral (IPR) Form, and not an assessment form. Profile characteristics are used in developing new programs to meet the needs of the elderly. Each Service Provider may have their own assessment form for their specific programs.
  - ◆ **DATA RETENTION:** Client data is inputted and retained in a main registry.
  - ◆ **INCOME LEVEL:** The Income Level is based on the U.S. Department of Health and Human Services Poverty Guidelines and shall be completed before the Intake, Profile and Referral Form is processed.
  - ◆ **PRIORITIZATION OF SERVICES:** Based on the need to activate Prioritization of Services, the number of persons to be served will be determined by the existing conditions of clients enrolled in a program and those on a wait list at the time of implementation. Information on mobility, support system, housing condition, activities of daily living, health status and financial assets is collected should prioritization of services be necessary.
  - ◆ **REFUSAL TO ANSWER:** Should a client refuse to answer a certain question, leave it blank. In the comments section, list the reason for not answering the question. This does not apply to Income Level.
  - ◆ **SIGNATURE:** The signature of the client or responsible party is required before services can be provided.
  - ◆ **SPECIAL ACCOMMODATIONS:** Clients requiring special accommodations shall inform the program in advance of their requirements.
- ◆ **PROGRAM SPECIFIC INFORMATION:**
    - **Case Management Services.** Case Management Services Program provides a systematic process of assessment and reassessment, planning, service and care coordination, referral, and monitoring. The Case Management Services Program serves as a key entry point for aging services, determines eligibility and authorizes services for individuals requesting Adult Day Care Services, In-Home Services and Home-Delivered Meals. Entry into these programs shall not be permitted before an assessment is made and eligibility established by Case Management Services.
    - **Transportation Services.** In order to meet demands, clients requesting transportation shall make reservations with the Transportation Services Program in advance for service. If the date requested cannot be accommodated, the Transportation Services Program shall recommend an alternate date. Requests for persons using wheelchairs or having a Personal Assistant/Personal Care Attendant shall be made in the same manner, whether for Center participation or to and from medical appointments, etc.
    - **Elderly Nutrition Program.** To the extent practicable, meals are prepared to meet special dietary needs of eligible participants, and shall be supported by a statement from the client's doctor or religious leader stating the necessity for special meals. Mechanical (chopped) or pureed (blenderized) meals are not classified as special meals and shall be provided to the client at their request.

**FOR ADULT PROTECTIVE SERVICES (APS)  
REFERRALS, CALL (671) 735-7421 / 7415  
Monday – Friday, 8 a.m. to 5 p.m.  
(Except on Recognized Holidays)  
OR  
24-HOUR APS  
CRISIS INTERVENTION HOTLINE  
at (671) 632-8853  
TWENTY-FOUR HOURS A DAY  
SEVEN DAYS A WEEK.**

**SENIOR CITIZENS AGING SERVICES  
 INTAKE, PROFILE AND REFERRAL (IPR) FORM AND FINANCIAL ASSETS SCALE  
 PLEASE PRINT CLEARLY USING BLUE OR BLACK INK.**

<b>A. CLIENT IDENTIFICATION</b>	
Last Name	
First Name	
Middle Name	
Nickname	
Email Address	
Homeless	<input type="checkbox"/> Yes <input type="checkbox"/> No
Receives Care from NFCSP Caregiver	<input type="checkbox"/> Yes <input type="checkbox"/> No
Requires Assistance in an Emergency	<input type="checkbox"/> Yes <i>(Specify)</i> <input type="checkbox"/> No
Home Address	
Mailing Address	
Phone (1)	
Phone (2)	
<b>B. CLIENT CONTACTS</b>	
<b>Primary Emergency Contact</b>	
Relationship	
Address	
Phone	
Email	
<b>Physician Contact</b>	
Physician Type	
Address	
Phone	
Email	

<b>Primary Caregiver</b>	
Relationship	
Address	
Phone	
Email	
<b>Personal Contact</b>	
Relationship	
Address	
Phone	
Email	
<b>C. CLIENT DEMOGRAPHICS</b>	
Date of Birth	Age
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
Transgender	<input type="checkbox"/> Male <input type="checkbox"/> Female
Disabled	<input type="checkbox"/> Yes <i>(Specify Type)</i> <input type="checkbox"/> No
Disability	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Not Applicable (N/A)
Physical Disability	<i>(Specify)</i> <input type="checkbox"/> N/A
Intellectual Disability	<i>(Specify)</i> <input type="checkbox"/> N/A
Mental Illness	<i>(Specify)</i> <input type="checkbox"/> N/A
Cerebral Palsy	<i>(Specify)</i> <input type="checkbox"/> N/A
If < 60 Reason for Service	<input type="checkbox"/> Caregiver <input type="checkbox"/> Disabled <input type="checkbox"/> Meal Volunteer <input type="checkbox"/> Other: _____ <input type="checkbox"/> Spouse <input type="checkbox"/> N/A
Citizenship <i>(Specify)</i>	

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<i>Race (Specify)</i>	<input type="checkbox"/> White <input type="checkbox"/> Black/African American <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Asian <input type="checkbox"/> Native Hawaiian/Other Pacific Islander <input type="checkbox"/> Other <input type="checkbox"/> Multiple	Housing Type	<input type="checkbox"/> House/Own <input type="checkbox"/> House/Rent <input type="checkbox"/> Apartment/Duplex <input type="checkbox"/> Residential Care Facility <input type="checkbox"/> Nursing Facility <input type="checkbox"/> Other <input type="checkbox"/> None
<i>Ethnicity</i>	(Specify)	<i>Lives With</i>	<input type="checkbox"/> Alone <input type="checkbox"/> Family <input type="checkbox"/> Spouse <input type="checkbox"/> Non-Relative <input type="checkbox"/> Other
Primary Language	(Specify)	Referral Source	<input type="checkbox"/> Self <input type="checkbox"/> Family/Friend <input type="checkbox"/> Agency: _____ <input type="checkbox"/> Other: _____
English Fluency	<input type="checkbox"/> Needs Translation <input type="checkbox"/> Limited <input type="checkbox"/> Fluent	Sources of Support	<input type="checkbox"/> Family <input type="checkbox"/> Friend/Neighbor <input type="checkbox"/> Paid Help <input type="checkbox"/> Has help but unsure who provides help <input type="checkbox"/> Unknown
Literacy	<input type="checkbox"/> In English <input type="checkbox"/> In Primary Language <input type="checkbox"/> In Both <input type="checkbox"/> Illiterate	Assisted Transportation	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>Relationship Status</i>	<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Single (Never Been Married) <input type="checkbox"/> Widowed <input type="checkbox"/> Domestic Partner	Needs an Escort	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>Employment Status</i>	<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Retired <input type="checkbox"/> Un-Employed <input type="checkbox"/> Volunteer <input type="checkbox"/> Disabled	Primary Transportation	<input type="checkbox"/> Owns Car <input type="checkbox"/> Aide <input type="checkbox"/> Friend <input type="checkbox"/> Public Transport <input type="checkbox"/> Senior Transport <input type="checkbox"/> Family <input type="checkbox"/> Other <input type="checkbox"/> None
Veteran Status	<input type="checkbox"/> Veteran <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> No		
<i>Urban/Rural</i>	<input checked="" type="checkbox"/> Rural		

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Income Level				
Is your income less than				
Unit Size	Per Month	Per Year	Yes	No
One (1)	\$1,517.50	\$18,210.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Two (2)	\$2,053.33	\$24,640.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Three (3)	\$2,589.16	\$31,070.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Four (4)	\$3,125.00	\$37,500.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Five (5)	\$3,660.83	\$43,930.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Six (6)	\$4,196.66	\$50,360.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Seven (7)	\$4,732.50	\$56,790.00		
Is your combined income less than				
Unit Size	Per Month	Per Year	Yes	No
Eight (8)	\$5,268.33	\$63,220.00		
<input type="checkbox"/> For families/households with more than 8 persons, add \$6,430 for each additional member. \$ _____				
<b>Income Information</b>	<input type="checkbox"/> Above 100% FPL <input type="checkbox"/> At or Below 100% FPL			
<b>Financial Assets</b> <i>(Refer to FAS Scale)</i>	<input type="checkbox"/> 29% to 49% below the poverty level <input type="checkbox"/> 50% to 74% below the poverty level <input type="checkbox"/> 75% or greater below the poverty level <input type="checkbox"/> N/A			
<b>Receives Social Security</b>	<input type="checkbox"/> None <input type="checkbox"/> Retirement <input type="checkbox"/> Disability <input type="checkbox"/> Dependent			
<b>Receives Private Pension</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No			

Health Insurance	(Specify)
Medicare	<input type="checkbox"/> Part A <input type="checkbox"/> Part B Claim No. _____ <input type="checkbox"/> None <input type="checkbox"/> Part D Claim No. _____ <input type="checkbox"/> None <input type="checkbox"/> Medicare Supplemental Claim No. _____ <input type="checkbox"/> None
Medicaid	<input type="checkbox"/> Yes Claim No. _____ <input type="checkbox"/> None
Guardian/ Conservator	<input type="checkbox"/> None <input type="checkbox"/> Voluntary <input type="checkbox"/> Involuntary
Person/ Organization Holding Guardianship/ Conservatorship	
Guardian Conservator Type	<input type="checkbox"/> Estate <input type="checkbox"/> Person <input type="checkbox"/> Both <input type="checkbox"/> Dementia Power <input type="checkbox"/> Medical Authority <input type="checkbox"/> None
Durable Power of Attorney	<input type="checkbox"/> Unknown <input type="checkbox"/> Limited <input type="checkbox"/> Health <input type="checkbox"/> Both <input type="checkbox"/> None
Supplemental Nutrition Assistance Program (SNAP)	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>D. CLIENT FUNCTIONAL ASSESSMENT</b>	

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<b>Impairment of Activities of Daily Living (ADL):</b> Indicate the inability to perform one or more of the following six activities of daily living without personal assistance, stand-by assistance, supervision or cues:		<b>Impairment in Instrumental Activities of Daily Living (IADL):</b> Indicate the inability to perform one or more of the following eight instrumental activities of daily living without personal assistance, stand-by assistance, supervision or cues:	
Transfer Mobility	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Preparing Meals	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Bathing	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Shopping for Personal Items	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Dressing	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Medication Management	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Toileting	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Managing Money	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Eating	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Using Telephone	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Ambulating (i.e. Walking)	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent	Doing Heavy Housework	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Assistive Devices <i>(Specify)</i>		Doing Light Housework	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Mobility Devices <i>(Specify)</i>			

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Transportation Ability (Refers to the individual's ability to make use of available transportation without assistance)	<input type="checkbox"/> Unknown <input type="checkbox"/> Independent <input type="checkbox"/> Supervision <input type="checkbox"/> Assistance <input type="checkbox"/> Dependent
Communication Skills Status	
Receptive	<input type="checkbox"/> Unknown <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor <input type="checkbox"/> Does Not Understand
Expressive	<input type="checkbox"/> Unknown <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor <input type="checkbox"/> Cannot Be Understood
Sensory Skills	
Vision	<input type="checkbox"/> Unknown <input type="checkbox"/> Good <input type="checkbox"/> Limited <input type="checkbox"/> Legally Blind <input type="checkbox"/> Blind
	<input type="checkbox"/> Glasses <input type="checkbox"/> Other
Hearing	<input type="checkbox"/> Good <input type="checkbox"/> Limited <input type="checkbox"/> Deaf
	<input type="checkbox"/> Unknown <input type="checkbox"/> Hearing Aid <input type="checkbox"/> Other
Support System	<input type="checkbox"/> Unknown <input type="checkbox"/> Support is Available <input type="checkbox"/> Minimum Support <input type="checkbox"/> No Support

Housing	<input type="checkbox"/> Unknown <input type="checkbox"/> Full Concrete <input type="checkbox"/> Semi Concrete <input type="checkbox"/> Tin and Wood				
Homebound	<input type="checkbox"/> Unknown <input type="checkbox"/> Yes <input type="checkbox"/> No				
Bedridden	<input type="checkbox"/> Unknown <input type="checkbox"/> Yes <input type="checkbox"/> No				
<b>E. AGING SERVICES REQUESTED</b>					
<input type="checkbox"/> <b>Adult Day Care (ADC) Services</b> _____ (Specify Center)					
<input type="checkbox"/> <b>Elderly Nutrition Program (ENP):</b> <input type="checkbox"/> Congregate Meals (Center/Day Care) <input type="checkbox"/> Home-Delivered Meals (Homebound) <b>Meal Type:</b> <input type="checkbox"/> Regular <input type="checkbox"/> Mechanical <input type="checkbox"/> Chopped <input type="checkbox"/> Pureed/Blenderized <input type="checkbox"/> Special ( <i>Provide document from physician or religious leader to certify special meal requirement</i> )					
<input type="checkbox"/> <b>Case Management Services (CMS)</b>					
<input type="checkbox"/> <b>In-Home Services (IHS)</b>					
<input type="checkbox"/> <b>Legal Assistance Services (LAS)</b> _____ (Specify)					
<table border="1" style="width: 100%;"> <tr> <td style="width: 60%;"></td> <td style="width: 40%; text-align: center;">Received By/Date</td> </tr> <tr> <td style="text-align: center;">Expedite for ADC Admission</td> <td></td> </tr> </table>			Received By/Date	Expedite for ADC Admission	
	Received By/Date				
Expedite for ADC Admission					
<input type="checkbox"/> <b>National Family Caregiver Support Program (NFCSP)</b>					
<input type="checkbox"/> <b>Senior Center Operations (SCO)</b> _____ (Specify Center)					
<input type="checkbox"/> Has an individual with disability 18 and older who lives with the older individual					

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**Transportation Services (TSP)**

- Walks with no assistance (Non-Assisted)
- Walks with assistance (Assisted)
- Field Trips
- Food Commodity (Center)
- Food Commodity (Non-Center)

COMMENTS:

**F. HIGH RISK CLIENTS UNDER EMERGENCY DECLARATION**

A client is considered High Risk under Emergency Declaration if any of the following exists. This information shall be provided to the client's village mayor in preparation for emergencies. **Check all that apply.**

- Bedridden.
- Requires transportation and/or escort assistance for evacuation to shelter, e.g., those living alone.
- Requires refrigeration of medication and/or is insulin dependent.
- Requires oxygen.
- Lives in substandard housing.
- Lives in a low-lying area.
- Lives alone.
- Not Applicable.

**G. ELIGIBILITY AND CONSENT OF CLIENT**

Individuals age sixty (60) years and older are eligible for Title III programs under the Older Americans Act. This Act also prioritizes services for:

- ◆ Persons who are frail, homebound by reason of illness or incapacitating disability, or otherwise isolated; and
- ◆ Persons with greatest economic need and older individuals with greatest social needs (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas); and
- ◆ Older individuals with disabilities (with particular attention to individuals with severe disabilities).

Voluntary contributions to Title III programs are encouraged and used to expand services. Services may not be denied because the client will not or cannot contribute to the cost of the program.

**I CERTIFY THE INFORMATION GIVEN BY ME IS TRUE TO THE BEST OF MY KNOWLEDGE, AND I UNDERSTAND IT WILL BE KEPT CONFIDENTIAL AND USED ONLY TO HELP ME RECEIVE THE BENEFITS/SERVICES WHICH I MAY BE ENTITLED.**

**I HEREBY AUTHORIZE THE DISCLOSURE AND RELEASE OF THIS INFORMATION ONLY FOR THE PURPOSES FOR WHICH IT IS INTENDED. THIS AUTHORIZATION MAY BE REVOKED BY THE UNDERSIGNED AT ANY TIME BY GIVING WRITTEN NOTICE TO THE PARTIES AUTHORIZED HEREIN.**

Signature of Client or Authorized Representative (AR)	
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Date	
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Relationship to Client, if AR	
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**H. INTAKE INFORMATION**

Intake Worker	
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Signature of Intake Worker	
Date/Time of Intake	
Organization	
Phone Number	
<b>IPR Forwarded To</b> <input type="checkbox"/> Case Management Services Program <input type="checkbox"/> Adult Day Care Services Program _____ (Specify Center) <input type="checkbox"/> In-Home Services Program <input type="checkbox"/> Elderly Nutrition Program (Home-Delivered Meals)  <input type="checkbox"/> Elderly Nutrition Program (Congregate Meals) <input type="checkbox"/> Legal Assistance Services Program <input type="checkbox"/> Senior Center Operations Program _____ (Specify Center) <input type="checkbox"/> Transportation Services Program <input type="checkbox"/> National Family Caregiver Support Program <input type="checkbox"/> Preventive Health Program	
Forwarded By	
Date Forwarded	
Time Forwarded	
<b>I. RECEIVING ORGANIZATION INFORMATION</b>	
IPR Received By	
Date	

Time	
Date of Initial Contact with Client	
Time of Initial Contact with Client	
Time of Intake	
Organization	
Phone Number	

***MyPlate 10 Health Eating Tips for People age 65+\****

1. *Drink plenty of liquids.*
2. *Make eating a social event.*
3. *Plan healthy meals.*
4. *Know how much to eat.*
5. *Vary your vegetables.*
6. *Eat for your teeth and gums.*
7. *Use herbs and spices.*
8. *Keep food safe.*
9. *Read the Nutrition Facts label.*
10. *Ask your doctor about vitamins and supplements.*

*\*Ref.: <http://www.choosemyplate.gov/choosing-healthy-meals-you-get-older#sthash.PROfnx5z.dpuf>*



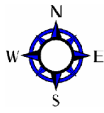
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**J. CLIENT'S HOME**

**IF MAP IS SENT SEPARATELY, INCLUDE THE CLIENT'S NAME AND SSN AT TOP OF MAP**

Does the home have an accessible driveway?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you use a wheelchair, is there an accessible ramp?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**MAP TO THE CLIENT'S HOME**  
 In the box below, draw a map to the client's residence marking the client's home with an "X". Indicate the house number, street name and the village where the client is from. Include primary and secondary access roads, type and color of the house, if fenced, landmarks such as adjacent to or across from the village community center, store, bus stop, etc. ***All pets at your home shall be controlled by leash, cage, etc. in accordance with P.L. 22-13 and 26-76.***



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**Financial Assets Scale (FAS)**

*(U.S. Department of Health and Human Services Poverty Guidelines for 2023)*

*Refer to Page 3 on IPR*

<b>Unit Size One (1)</b>	<b>Per Month \$1,517.50</b>	<b>Per Year \$18,210.00</b>
29% to 49% below the poverty level	Earning between \$1,077.43 and \$773.92	Earning between \$12,929.10 and \$9,287.10
50% to 74% below the poverty level	Earning between \$758.75 and \$394.55	Earning between \$9,105 and \$4,734.60
75% or greater below the poverty level	Earning below \$379.37	Earning below \$4,552.50

<b>Unit Size Two (2)</b>	<b>Per Month \$2,053.33</b>	<b>Per Year \$24,640.00</b>
29% to 49% below the poverty level	Earning between \$1,457.86 and \$1,047.20	Earning between \$17,494.40 and \$23,432.64
50% to 74% below the poverty level	Earning between \$1026.67 and \$533.87	Earning between \$12320.00 and \$6406.40
75% or greater below the poverty level	Earning below \$513.34	Earning below \$6,160.00

<b>Unit Size Three (3)</b>	<b>Per Month \$2,589.16</b>	<b>Per Year \$31,070.00</b>
29% to 49% below the poverty level	Earning between \$1,838.29 and \$1,320.47	Earning between \$22,059.70 and \$15,845.70
50% to 74% below the poverty level	Earning between \$1,294.58 and \$673.18	Earning between \$15,535 and \$8,078.20
75% or greater below the poverty level	Earning below \$647.29	Earning below \$7,767.50

Eight (8) or more in Family Unit Size, add \$535.83 per month or \$6,430 per year for each additional household member.

\$ \_\_\_\_\_