



Healthy San Francisco Tax Form Guide

Use this guide to select the appropriate One-e-App income type from the income type drop-down box in One-e-App for applicants with a recent tax return as their proof of income. Enter each value listed on the reference line for the specific tax return. Note: some applicants may have more than one type of income listed on their tax return and each type must be entered separately into One-e-App.

HSF Countable Income	One-e-App Income Type	Tax Return Type	Reference Line*
Earning from Job	Earning from Job	1040	7
		1040A	7
		1040EZ	1
Self Employment Earnings	Self Employment	1040 with Schedule C	Line 12 on 1040, plus lines 24b and line 13 from Schedule C (meals and entertainment expenses and depreciation)
Interest Income (Taxable interest only)	Interest Income	1040 with Schedule B**	8a
		1040A with Schedule B**	8a
		1040EZ	2
Dividends Income	Other Income	1040 with Schedule B**	9a
		1040A with Schedule B**	9a
Tax Refund (Taxable portion only)	Other Income	1040	10
I.R.A. Distributions	Other Income	1040	15b
		1040A	11b
Pensions	Pensions	1040	16b
		1040A	12b
Insurance Annuity	Insurance Annuity	1040	16b
		1040A	12b
Rental Income	Rental Income	1040 with Schedule E	Line 3 on Schedule E less lines 7,9,12,13,14,16, and 17 on Schedule E
Unemployment Compensation	Unemployment Compensation	1040	19
		1040A	13
		1040EZ	3
Social Security	Social Security Retirement	1040	20b
		1040A	14b
Retirement Survivors Disability Insurance	Retirement Survivors Disability Insurance	1040	20b
		1040A	14b
Trust Income	Other Income	1040 with Schedule E	17
Alimony	Alimony	1040	11
Farm Income	Other Income	1040 with Schedule F	18
Capital Gains (If its negative, count as zero)	Other Income	1040 with Schedule D	13
		1040A with Schedule D	10
Other Taxable Income (ex. Gambling, prize winning)	Other Income	1040	21
Self Employment Partnership	Self Employment Partnership	1040 with Schedule E	17

*All reference lines refer to tax form 1040, 1040A, or 1040 EZ, unless stated otherwise

**Schedule B is only required if the dividends or interest income reported exceeds \$1,500.

Healthy San Francisco Acceptable Verification Documents List

Identity	Citizenship/U.S. Residency	S.F. Residency	Countable Income	Countable Assets ⁵
U.S. Passport	U.S. Passport	CA Driver's License/ID	Job Earnings² ▪ Paystub ▪ Tax Return: 1040/1040A/1040EZ	Cash ▪ Self-Declaration
Certificate of U.S. Citizenship	Certificate of U.S. Citizenship	Rental/Lease Agreement	▪ Signed Employer Letter ▪ Affidavit of Income	
Certificate of Naturalization	Certificate of Naturalization	Rental Payment Receipt	Self-Employment Earnings³ ▪ Signed Profit and Loss Statement ▪ Tax Return: 1040 w/Schedule C	Checking/Money Market/Savings Acct ▪ Bank Statement ▪ Bank Letter
CA Driver's License/ID	U.S. Birth Certificate/ U.S. Public Birth Record	Property Tax Bill		
U.S. State/Territory ID	U.S. Citizen Card 1-197	DMV Registration	Taxable Government Benefits (Disability, Unemployment, Social Security, RSDI, Veteran's Benefits) ▪ Award Letter ▪ Bank Stmt w/Direct Deposit ▪ Benefits Check/Stmt/Stub ▪ Tax Return: 1040/1040A/1040EZ	Stocks/Mutual Funds ▪ Brokerage Statement with market value ▪ Mutual Fund Statement w/ market value
U.S. Merchant Mariner Card	Certificate of Birth Abroad	Paystub		
Military Record/Draft Record	Certification of Birth Issued by Dept of State	Electronic Verification ⁴	Rental Income² ▪ Tax Return: 1040 w/Schedule E Rental Income Worksheet	CD ▪ CD Certificate ▪ Bank Statement
Military Dependant's ID Card	Report of Birth Abroad by U.S. Citizen	Bank Statement	Self-Employment Partnership Earnings² Tax Return: w/ Schedule E	Bonds ▪ Copy of Bond ▪ Bank Statement
Certificate of Indian Blood	American Indian Card	SFUSD School Registration	Alimony Received² ▪ Copies of Checks Received ▪ Bank Stmt w/Direct Deposit Tax Return: 1040	529 Education Savings Plan (Cashed out amounts only)
American Indian Tribal Document	Adoption Decree with U.S. Place of Birth	Utility Bill		
Alaska Native Tribal Document	Evidence of Pre-1976 Civil Service Employment	General Assistance Stmt	Interest Income² Tax Return: 1040/1040A/1040EZ (w/Schedule B, if filed)	
Law Enforcement/ Corrections ID	U.S. Military Record with U.S. Place of Birth	SSI Award Letter	Insurance Annuity Income² ▪ Bank Stmt w/Direct Deposit Tax Return: 1040/1040A	
Law Enforcement/ Corrections Verified ID	Electronic Verification of Birth Record Information ¹	Unemployment Benefits Stmt	Trust Income² ▪ Tax Return: 1040 w/Schedule E ▪ Bank Stmt w/Direct Deposit	
Affidavit of Good Faith Effort ¹	Life, Health, Insurance Record with US Birth Place ¹	Pension Check/Stmt	Pensions/401K Income ▪ Tax Return: 1040, 1040A ▪ Bank Stmt w/Direct Deposit	
H.S.A. Verified ID in CalWin ¹	Seneca Tribal Census Record ¹	Social Security Award Letter	IRA Distributions² ▪ Tax Return: 1040, 1040A ▪ Bank Stmt w/Direct Deposit	
Temporary Resident Card	Admission Papers from Nursing, Care Facility, Institution w/U.S. Citizenship/U.S. Birth Place ¹	Affidavit of Support with 3 rd Party Proof of S.F. Residency	Workers Compensation ▪ Award Letter ▪ Bank Stmt w/Direct Deposit ▪ Benefits Check/Stmt/Stub	
Student Picture ID	HSA Verified Citizenship in CalWin Eligibility File ¹	S.F. City ID Card	Capital Gains Income² ▪ Tax Return: 1040, 1040A w/Schedule D	
S.F. City ID Card	Medical Record w/U.S. Birth Place ¹	Residential Program Letter	Farm Income² ▪ Tax Return: 1040 w/Schedule F	
Consular ID	SSA Verified Place of Birth ¹	Disability Stmt	Other Taxable Income² ▪ Tax Return 1040	
Foreign ID	Amended U.S. Birth Record ¹	Self-Declaration (Homeless Only)	Tax Refund² ▪ Tax Return: 1040	
Other Government ID	Statement Signed by Physician Midwife in Attendance at Birth ¹		Financial Support from 3rd Party ▪ Affidavit of Support form/letter	
Credit Card Picture ID	U.S. State Vital Statistics Official Notification ²		Dividend Income² ▪ Tax Return: 1040, 1040A (w/Schedule B, if filed)	
Employment Auth w/Photo ID	Extract of U.S. Hospital Record Established at Birth ¹		NON-COUNTABLE INCOME	NON-COUNTABLE ASSETS
Foreign Driver's License/ID	Bureau of Indian Affairs Tribal Census Rec of Navaho Indians ¹		Child Support Income No docs required	Life Insurance No docs required
Affidavit of Identity	Federal/State Census Record w/ U.S. Citizenship/U.S. Birth Place ¹		Public Assistance³ ▪ Award Letter ▪ Benefits Stmt/Stub ▪ Electronic Verification ⁴	Retirement/Pension Account Balances 401K/IRA/Annuity ▪ Retirement/Annuity Statement
DPH Short Form Intake	Affidavit of Good Faith Effort		Financial Aid/Scholarship ▪ Student ID	Property/Autos No docs required

1. Must have been created at least 5 years before the application date; value only selectable by HSF Administration

2. Taxable portion only

3. County, State and Federal Public Assistance, including CalWORKS, SSI/SSP, General Assistance (GA), Supplemental Security Income Pending (SSIP), Cash Assistance Linked to Medi-Cal (CALM), Personal Assisted Employment Services (PAES), 1931(b) Medi-Cal Only, Aid to Adoption Payments (AAP), Refugee Cash Assistance (RCA), Foster Care Income, 20% Social Security Increase (Pickle)

4. Cal-WIN, Client Index, MEDS

5. Countable assets are liquid assets which are counted toward the applicant's calculated Federal Poverty Level (FPL). The balance of the liquid asset, (less 2K for individuals, 3K for a family of two and an addition \$150 per additional family member) is divided by 12 to obtain a gross monthly asset figure, which is added to the applicant's gross monthly countable income.