

Process Manual

Entering Earned Income

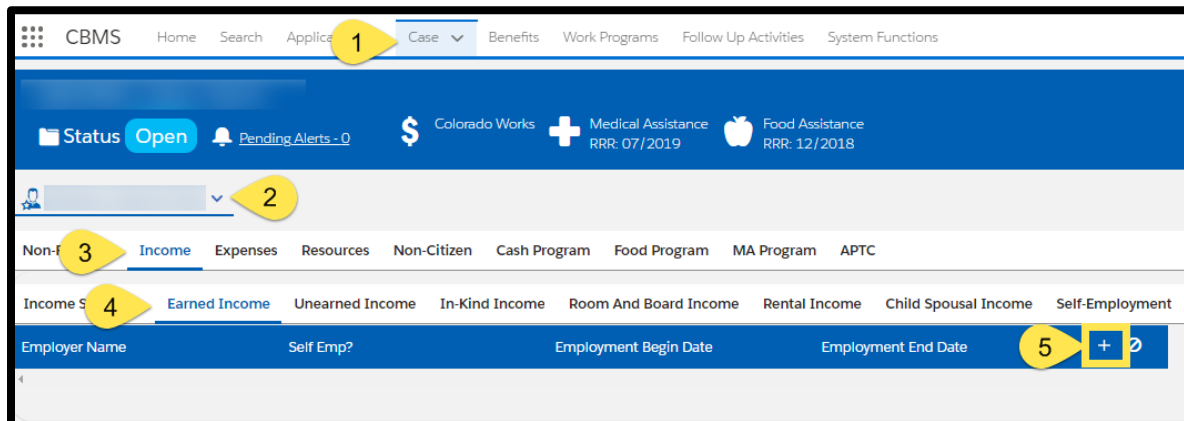
Overview

This document provides a step-by-step process for how to enter new earned income on the Income Summary page of CBMS. Examples of earned income include, but are not limited to: Wages, Salaries, Commissions, Self-Employment, Training Allowances, etc.

The Income Summary page is looked at by all program areas based on certain fields. The best practice is to always enter all income information based on the verification provided.

Process

- 1) Initiate the Case Queue for the case (Interactive Interview).
 - a) When you Begin Interactive Interview, you will be directed to the Members page.
 - b) Select the Member Card for the individual who has the earned income.
- 2) From the household member drop-down menu, make sure that the individual who you are entering income for is selected.
- 3) Click on the **Income** tab
- 4) Select the **Earned Income** tab.
- 5) Click the plus (+) icon to add an employer record.



- 6) The Employment Details pop-up will appear, enter the **Effective Begin Date**.
- 7) Select 'Yes' or 'No' to indicate whether or not the individual is self-employed.
 - If 'Yes', the Self Employment Details data group is added to this page.
 - If 'No', the Earned Income Details data group is added to this page.
- 8) Enter the **Employment Begin Date**.
 - This is the date the individual actually began working for the employer.
- 9) Enter the **Employer Name**.
- 10) Select the **Employment Type**.
 - a) This choice determines the funding that Employment First (EF) will receive. It also determines the EF exemption.
 - Permanent (Over 90 days)
 - Temporary (30-90 days)
 - Temporary (Under 30 days)

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- 11) In the **Monthly Amount Earned** field, enter the gross amount the individual will receive or expects to receive for the month.
 - Use the *Income Frequency Calculation Desk Aid* to determine the monthly amount earned.
 - Enter the converted amount, not the amount that was reported on the application.
- 12) Enter the **Estimated Average Hrs/Week**.
- 13) If Medical Assistance is attached to the case, select the **Occupation** type.

- 14) Enter the **Date Reported**
- 15) If available, enter the employer's **Address**.
- 16) Click the **Save** button.



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17) Once saved, click on the Employer Record to highlight the row

Employer Name	Self Emp?	Employment Begin Date	Employment End Date	
job1	No	03/01/2019		17

18) This will enable the Earned Income Summary Details

19) Click the plus (+) icon to add the details.

Income Type	Income Frequency	Income Begin Date	Income End Date	
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20) Enter the Effective Begin Date.

- This date determines when the income will begin to count for the individual.

21) Select the Income Type from the drop-down menu.

22) Select the Frequency to specify how often the individual is paid.

23) Enter the Date Reported.

24) MA Specific Information

- These fields appear only when Medical Assistance is attached on the case.

Earned Income

Detail

* Effective Begin Date **20** Effective End Date * Income Type **21**
Select Income Type...

* Frequency **22** Subsidized * Date Reported **23**
Select Frequency... Yes No

MA Specific Information **24**

HCA recipient residing in same home as provider? Yes No
HCA recipient temporarily absent from home? Yes No
HCA Recipient

Commission-based Income Yes No
Seasonal Income Yes No

Cancel Save **25** Save

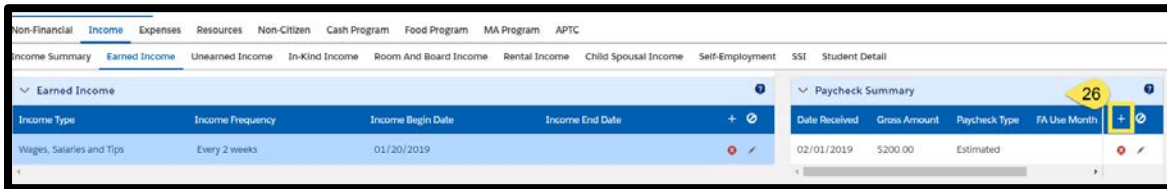
25) Click the Save button.



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26) In the Paycheck Summary Related List, click the plus (+) icon to add paycheck details.



27) Enter the Date Received as the actual date the individual was paid.

28) Enter the Total # of Hours Worked during that pay period.

29) The Gross Amount is the amount before any taxes and/or deductions are taken out.

30) Select the Paycheck Type.

- 'Representative' means regular anticipated income that the individual expects to receive. If this is a normal paycheck for the individual, select this option.
- 'Non-Representative' means irregular income that is not regularly received, for example: overtime, fewer hours due to illness, vacation, severance pay, etc.

31) Select the appropriate Verification from the drop-down menu.

32) Select the appropriate Source from the drop-down menu.

33) Enter the Date Reported.

34) Enter the Date Verified.

35) Click Save & New to enter any other paycheck stubs provided following the same process as listed above.

- If no other paychecks to enter, click Save.

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us