

Process Manual

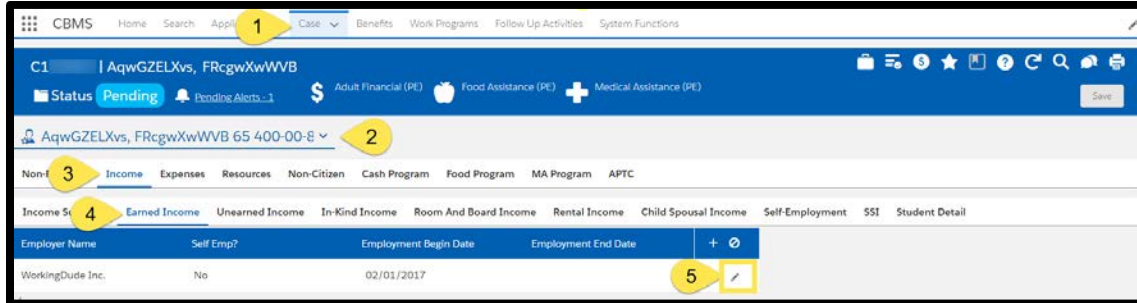
Terminating Earned Income

Overview

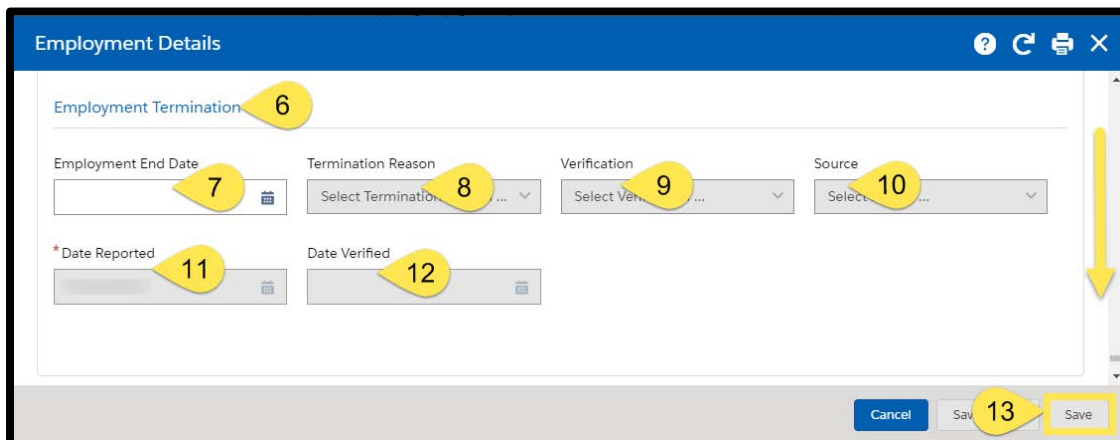
This document provides a step-by-step process for how to terminate earned income on the Income Summary page of CBMS Salesforce.

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, make sure that the individual who you are terminating income for is selected.
- 3) Click on the **Income** tab.
- 4) Select the **Earned Income** tab.
- 5) In the summary details table, click to highlight the row for the Employer Name for the employment that has ended, and click the pencil icon to edit the details.



- 6) In the **Employment Details** pop-up window, enter the **Effective End Date** and scroll down to the **Employment Termination** section on the page.
- 7) Enter the **Employment End Date** as the actual date the employment ended.
- 8) Select the **Termination Reason** from the drop-down
- 9) Select the **Verification** from the drop-down menu.
- 10) Select the **Source** from the drop-down menu.
- 11) Enter the **Date Reported**.
- 12) Enter the **Date Verified**.
- 13) Click **Save**.

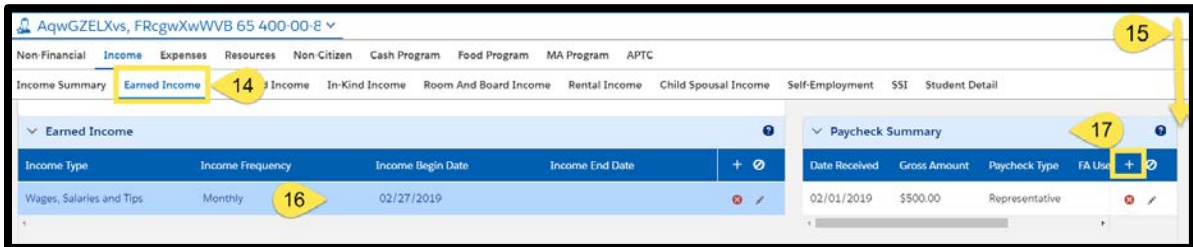


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If the individual received or expects to receive any last paycheck stubs from the terminated employer, enter them in the **Paycheck Summary** related list. If not, skip to step #19.

- 14) Navigate back to the **Earned Income** tab in the Case queue.
 - a) Click on the **Employer** record row to populate the details below.
- 15) Scroll down to the **Earned Income** summary details.
- 16) Click on the record row to populate the associated related lists.
- 17) In the **Paycheck Summary** related list, click the (+) icon to add a new paycheck.



- 18) Enter the paycheck details in the **Paycheck Summary** pop-up window
 - a) Enter the **Date Received** as the actual date the individual was paid.
 - b) Enter the **Total # of Hours Worked** during that pay period.
 - c) The **Gross Amount** is the amount before any taxes and/or deductions are taken out.
 - d) 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.
 - e) Select the **Verification** from the drop-down menu.
 - f) Select the **Source** from the drop-down menu.
 - g) Enter the **Date Reported**.
 - h) Enter the **Date Verified**.
 - i) Click **Save**, or **Save & New** to add more paychecks.

The screenshot shows a 'Paycheck Summary' pop-up window with a 'Detail' section. It contains several input fields and dropdown menus, each labeled with a letter from a to i. The fields include:

- *Date Received (a)
- *Total # of Hours Worked (b)
- *Gross Amount (c)
- *Paycheck Type (d)
- Private Disability Taxable Amount
- Housing Allowance for Minister
- Income from AI/AN test
- Taxable Amount
- Verification (e)
- Source (f)
- FA Use Month
- CW Use Month
- *Date Reported (g)
- Date Verified (h)
- Good Cause Reason
- CW Processed Date
- CW Use Month Action
- CW Timely Reported (checkbox)
- FS Override Sw (checkbox)

 At the bottom right, there are buttons for 'Save & New' and 'Save'.



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- 19) Navigate back to the Earned Income tab.
 - a) Click on the pencil icon for the Employer that has been terminated

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Status Pending Pending Alerts - 1 Adult Financial (PE) Food Assistance (PE) Medical Assistance (PE)

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Non-Financial Income Expenses Resources Non-Citizen Cash Program Food Program MA Program APTC

Income S 19 Earned Income Unearned Income In-Kind Income Room And Board Income Rental Income Child Spousal Income Self-Employment SSI Student Det

Employer Name	Self Emp?	Employment Begin Date	Employment End Date	
WorkingDude Inc.	No	02/01/2017		a

- 20) In the pop-up window for Employment Details, enter the Effective End Date.

Employment Details

Detail

* Effective Begin Date: 02/27/2019 Effective End Date: 20

* Self-Employed: Yes No

* Employment Begin Date: 02/01/2017 * Employer Name: WorkingDude Inc.

* Employment Type: Permanent (over 90 days) Telephone #: () - Email Address:

FA Specific Information

* Monthly Amount Earned: \$500.00 * Estimated Average Hrs/Week: 40

MA Specific Information

Occupation:

Cancel Save 21 Save

- 21) Save the page

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