

# Add New OR Edit Existing

## - Income Edition -

### Add When:

- 1. **New** source of income is reported
  - For example, a customer reports a **new** job or second employer.

Income List

Indicates required fields

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Name	Category	Type	Source	Begin Date	End Date
Kristin, Ossie 62M	Social Security	Social Security Disability	SSA	07/01/2016	
Surwillo, SHEENA 62F	Social Security	Social Security Disability	SSA Award Letter	01/01/2019	

Income Category: \* [dropdown] Add

To add income, users select an Income Category and click **Add**

- 2. **New** amount of income is reported for an existing employer/source
  - For example, a customer reports a decrease in income from their existing employer.

Income List

Indicates required fields

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Name	Category	Type	Source	Begin Date	End Date
Kristin, Ossie 62M	Social Security	Social Security Disability	SSA	07/01/2016	
Surwillo, SHEENA 62F	Social Security	Social Security Disability	SSA Award Letter	01/01/2019	

Income Category: \* [dropdown] Add

To add a **new** income amount on an existing source, users click **Edit** on the appropriate income detail record.

Income Detail

Indicates required fields

Name: \* Kristin, Ossie 62M

Category: Social Security

Type: \* Social Security Disability

Source: SSA

Frequency: \* Monthly

Description:

Shared with RDP

Pickle Eligibility

Income Amounts

Program	Amount	Begin Date	End Date
Cash / CalFresh	1,068.00	06/01/2022	
Medi-Cal	1,066.00	01/01/2022	
Actuals (TMC / Pickle)	1,066.00	01/01/2022	

Add

Then on the **Income Detail** page, users select the appropriate program from the Display Program drop list and click **Add**.

**Note:** Adding income to one program can impact all programs if there is not an income entry for the other program.

### Edit Existing When:

- An existing employer/source or amount has been entered incorrectly
  - For example, a worker accidentally added an extra zero to the income amount.

**Note:** Editing income changes the history of the income and can potentially cause an overpayment/overissuance for prior months.

Income List

Indicates required fields

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Name	Category	Type	Source	Begin Date	End Date
Kristin, Ossie 62M	Social Security	Social Security Disability	SSA	07/01/2016	
Surwillo, SHEENA 62F	Social Security	Social Security Disability	SSA Award Letter	01/01/2019	

Income Category: \* [dropdown] Add

To edit income, users click **Edit** on the appropriate income detail record.

Income Detail

Indicates required fields

Name: \* Kristin, Ossie 62M

Category: Social Security

Type: \* Social Security Disability

Source: SSA

Frequency: \* Monthly

Description:

Shared with RDP

Pickle Eligibility

Income Amounts

Program	Amount	Begin Date	End Date
Cash / CalFresh	1,068.00	06/01/2022	
Medi-Cal	1,066.00	01/01/2022	
Actuals (TMC / Pickle)	1,066.00	01/01/2022	

Edit

Then on the **Income Detail** page, users click **Edit** in the **Income Amounts** section for the program that needs to be corrected.