

Add New OR Edit Existing

– Income Edition –

Add When:

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

Income List

* Indicates required fields

Images Continue

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Display From: To: View

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

Remove

Income Category: * Add

Complete Images Continue

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

2. A **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

Images Continue

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Display From: To: View

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

Remove

Income Category: * Add

Complete Images Continue

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

Income Detail

* Indicates required fields

Images Save and Return Cancel

Name: * Kristin, Ossie 62M

Category: Social Security Type: * Social Security Disability

Source: SSA

Frequency: * Monthly

Description:

Shared with RDP

Pickle Eligibility

Income Amounts

Display Program: * From: 03/2023 To: 03/2023 View

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

Remove

Last Updated On 07/14/2022 5:16:59 PM By: 203201 Images Save and Return Add

Then on the **Income Detail** page, select the 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, an extra zero was accidentally added 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

Images Continue

Root Questions

CalHEERS Verifications

Search Results Summary Results 1 - 2 of 2

Display From: To: View

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

Remove

Income Category: * Add

Complete Continue

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

Income Detail

* Indicates required fields

Images Save and Return Cancel

Name: * Kristin, Ossie 62M

Category: Social Security Type: * Social Security Disability

Source: SSA

Frequency: * Monthly

Description:

Shared with RDP

Pickle Eligibility

Income Amounts

Display Program: * From: 03/2023 To: 03/2023 View

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

Remove

Last Updated On 07/14/2022 5:16:59 PM By: 203201 Images Cancel

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