Entering Employment Income in IES

This Job Aid is designed to provide simple instructions and tips for entering a customer's employment income into IES.

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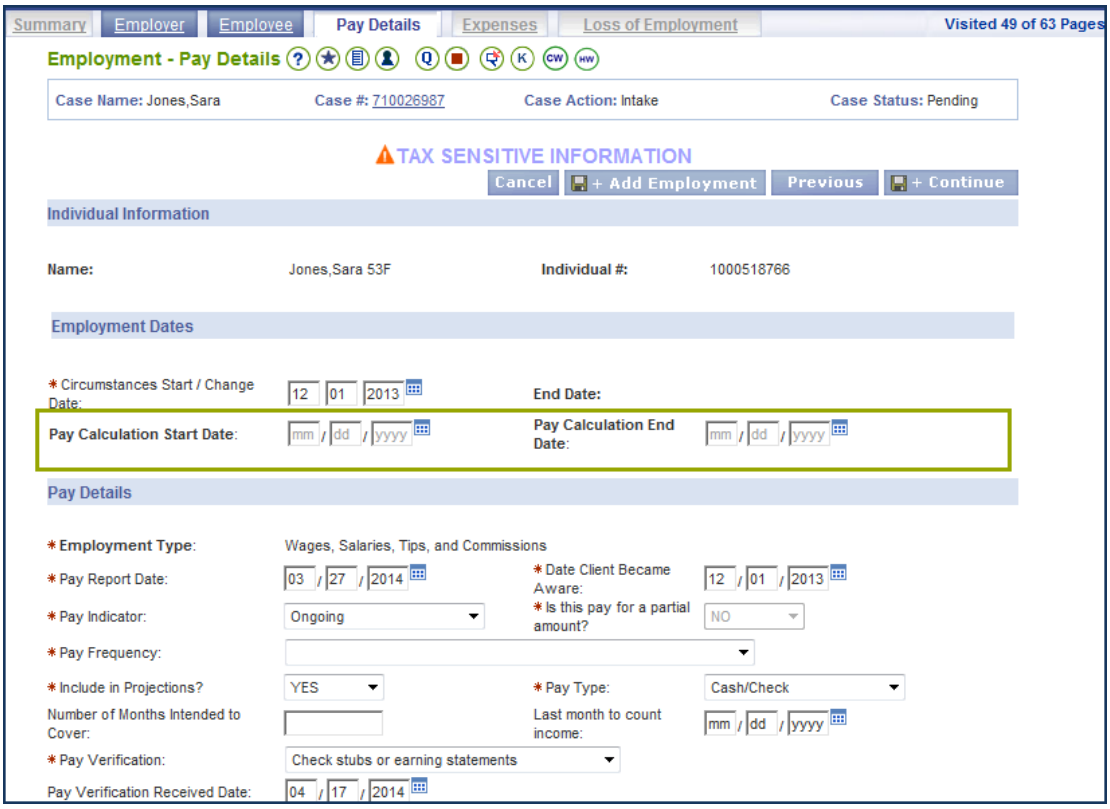
Pay Calculation Start Date

- The **Pay Calculation Start Date** (PCSD) is the first day of the 30-day Income projection period that reflects the best estimate of the customer's future income. This date will be determined based on the customer's pay verifications. IES uses PCSD to project ongoing income.
- On the **Employment – Pay Details** page, you will enter the date the customer received or expected to receive pay. IES will automatically calculate the **Pay Calculation Start Date (PCSD)** to 30 days prior to the selected PCED. You can update these dates if necessary.



Pay Verifications

- The customer will submit pay verifications that determine the PCSD and PCED 30-day period on the **Employment – Pay Details** page. At least one pay verification must be entered in the 30-day period unless a change is expected.

IES uses the pay verifications recorded in the 30-day projection period to determine the projected monthly income. To do this, all pay verifications included in projections are averaged and multiplied by a frequency factor depending on what is selected in the **Pay Frequency** field on the **Employment-Pay Details** page.

Circumstances Change/Start Date

- The ***Circumstances Start/Change Date*** (CSCD) is the date a customer's employment started or changed.
- You may receive the following error message on the **Employment – Pay Details** page: *"Begin Date cannot be a future date without changing application data."* This error will appear if the date entered in the **Pay Verification Received Date** field (the date the verification of a particular income was received) comes before the CSCD. It is important to ensure that all pay verifications dates fall after the CSCD.

Put the Puzzle Together:

John began his employment as a Sales Associate on August 4, 2013. John and his caseworker submitted an application on September 30

John is paid Bi-Weekly and between September 2 and October 2, John earned two pay verifications – on September 6 and September 20. Both of these pay verifications should be recorded on the **Employment – Pay Details** page. September 20 in generated as his PCED because it is the most recent pay verification recorded. August 22 automatically defaults to 30 days before as his PCSD. The PCSD and PCED are IES generated dates of a 30-day projection period which is the best reflection of his regular income. This date was also viable because the application date fell within the PCSD and PCED. The pay verification amounts will be averaged and multiplied by 2.15.

Entering Employment Income - Frequently Asked Questions

Important Note: The below details how a missing pay verification is factored into income calculation in IES, however please refer to policy rules on how many pay verifications should be collected and recorded. Policy should drive how many pay verifications you collect from the customer.

Q. What if my customer is missing a pay verification?

A. A missing pay verification will automatically be calculated in IES. The average of the submitted pay verification would be applied to the missing pay verification. The total number of pay verifications, including the missing one, would be averaged and multiplied by a frequency factor depending on the customers pay frequency.

Frequency Factors:

- Weekly = x4.3
- Bi-Weekly = x2.15
- Twice a Month = x2
- Monthly = x1

Example: John is paid weekly, and in the 30-day pay verification period (between September 2 and October 2), he submitted 3 pay verifications for September 6th, 13th, and 20th. He did not submit a pay verification for the 4th week – September 27th. You should enter the 3 pay verifications, and IES will average these 3 verifications, and assume the 4th week amount is the average.

- Week 1: $300,
- Week 2: $400
- Week 3: $350
- Week 4 (missing): IES averages weeks 1-3 to equal $350

Q. What if the customer has requested backdated Medical Assistance, will I have to enter the pay for the backdated months?

A. No, IES will project the income for the prior months based on the pay verifications entered. Workers will not be required to enter any pay verification for the prior months if it is not available. Continue to follow policy to determine if prior month pay verifications are necessary.

Q. What if the customer lost their income between the application date and the interview date – Should I still enter in the Employment Income?

A. Yes, you will still enter the income and on the **Pay Details** page, enter *Final* as the **Pay Indicator**.

Q. What happens if a customer submits a pay verification that is not within the pay verification dates?

A. You will receive the following error message on the **Employment - Pay Details** page: *"Enter one payment record with 'Include in Projections' field set to Yes*" if at least one date entered in the **Date Received/Expected** field is not between the PCSD and the PCED. In order to avoid this, one date in this field must be after the PCSD and before the PCED because it must be within the 30 day projection period.

If you click [Cancel] the information recorded already for the Logical Unit of Work will not be saved. Instead, follow the steps below to enter corrected dates.

1. Click Edit icon next to the pay verification that does not fall between the PCSD and PCED entered.
2. Change **Date Received/Expected** to be a date that is between the PCSD and PCED (30 day projection period).
3. Click **[Update]**.
4. Click the **Employer** tab to change the PCSD under **Employment Dates**.
5. The PCED will automatically update to 30 days past the PCSD.
6. Click **[Next]**.
7. Click **[Next]** past the **Employment – Employee** page.
8. On **Employment – Pay Details** page, update the existing record to change the **Date Received/Expected** to the correct pay verification date.
9. Click **[Save + Continue]** to save the Logical Unit of Work.

Helpful Wizards:

- Complete Income Questions
- Record Earned Income