



# Entering Income in IES



Earned Income

## What is different about earned income in IES?

IES has built-in rules that support income policy, which specify:

- The **Circumstances Start/Change Date (CSCD)** is the date a customer's employment started or changed.
- 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 the pay calculation period to project ongoing income.
- On the **Employment - Pay Details** page, you will enter the customer's pay dates and amounts. This could be verified pays and/or anticipated pays, depending on case circumstances.



## What is different about earned income in IES? Cont.

- The time period used to project unearned income is determined differently than for earned income. For earned income, the 30 day period for the **Pay Calculation Start Date (PCSD)** and **Pay Calculation End Date (PCED)** is automatically determined by IES after the worker enters the pay information. The **PCED** defaults to the same date as the latest/most recent pay date entered and calculates the **PCSD** from that. If the worker indicates the pay information should be used in projection, IES will use them to calculate/project ongoing income.
- The Pay Calculation Period updates each time information is saved to the page. If the **PCED** must be manually updated, wait until all pay verifications are added to make the change.
- The sources used to verify income will depend on the policy rules for the type of assistance/benefit program.



## How do I Record Earned Income for Backdated Months?

- If pay verifications are provided for backdated months, enter this information into IES. IES uses this information to calculate eligibility for each backdated month.
- If you do not have verifications for backdated months; IES budgets the backdated months with the information entered during the 30-day Pay Calculation Period.



# Appendix – Self Employment Income

# Earned Income – What’s Different About Self-Employment?



## Self-Employment Income:

- You must work with the customer to select a **Period Start Month** and **Period End Month** that reflects the best estimate of the customers’ future income. The Start/End Month cannot be more than 12 months apart.

## Rules:

- Period Start Month cannot be more than 12 months before the report date.
- Period End Month can be up to 12 months later than the Period Start Month.



# Appendix - Unearned Income



## What is different about unearned income in IES?

- The time period used to project unearned income is determined differently than for earned income. With unearned income, you choose the Pay History/Projection Period (called Pay Calculation Period for earned income), the dates do not default in IES.
- The number of payments you are required to enter to project income, based on how often the client is paid. Example: If a client is paid weekly, the payments must be 7 days apart.



## What you need to know about unearned income

How to establish a Pay History/Projection Period:

- The number of payments you can enter into IES to project income
- How to choose a Pay Verification Start Date

Definitions of the income fields in IES are in the Income Job Aid.



**Use the IES Income Job Aid to get started.**



# Unearned Income Pay History/Projection Period Rules

With IES, you choose a **Pay Verification Start Date (PVSD)**

- The PVSD is the first day of the 30 day period which will be used to project the customer's future income.
- The **Pay Verification End Date (PVED)** will always be 30 days after PVSD. It is defaulted by IES.
- IES Auto fills the Pay Verification End Date (PVED)



Earnings Information	Current	Year to Date
Normal Gross	4,389.30	
Deductions	0.00	
Other Deductions	0.00	
Net Pay	0.00	
<b>EARNINGS TOTAL</b>	<b>4,389.30</b>	<b>5,277.30</b>
Non-Taxable Gross	351.14	418.18
Taxable Gross	3,971.12	4,859.12

  

Statutory & Other Deductions	Current	Year to Date
General Withholding	311.17	311.17
Additional Federal Withholding	0.00	*****
State Withholding	135.96	135.96
Additional State Withholding	0.00	*****
SDI	0.00	55.06
Medicare	0.00	75.55
Medicare Buyout	0.00	0.00
State Disability Insurance	0.00	0.00
RS	351.14	351.14
RS	0.00	0.00
RS	0.00	0.00
Private Retirement	67.04	0.00



# IES Auto fills the Pay Verification End Date (PVED)

**Pay Verification  
Start Date**

**07**

**01**

**2014**

**Number of Days in  
Projection Period**

**30**

**Pay Verification  
End Date**

**07**

**30**

**2014**

# Remember! You MUST Record At Least One Pay Record that Falls Within the 30 Day Projection Period!

Date Received/Expected	Income Type	Income Amount	Frequency	Include in Projections	Verification	Actual Pay Period Hours	Pay Indicator
12/20/2013	Cash/Check	600.00	Bi-weekly	NO	Last 30 days of check stubs or earnings statements	60.00	Ongoing
01/17/2014	Cash/Check	600.00	Bi-weekly	YES	Last 30 days of check stubs or earnings statements	60.00	Ongoing

Summary | Employer | Employee | Pay Details

Case Name: Marley, Lisa    Case #: 710021887    Case Action: Intake

Ⓜ21595: Enter one payment record with 'Include in Projections' field set to Yes

**TAX SENSITIVE INFORMATION**

Individual Information

Name: Marley, James 40M    Individual #: 1000409396

Employment Dates

Circumstances Start / Change Date: 02/01/2010    End Date:

Pay Verification Start Date: 12/10/2013    Pay Verification End Date: 01/09/2014

Because the Date Received/Expected is outside the 30 days of the PVSD and PVED an error message appears and IES will not let you continue until the dates fall within the PVSD and PVED

# PVSD - Example 1

6/6 – Application Date

6/13 – Processing Date

Client is paid weekly on Thursdays

May						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

**\* Always assume that 30 days is a valid projection period**

<b>Earliest Recommended PVSD</b>	5/7
<b>Latest PVSD</b>	6/13
<b>PVSD You Might Choose?</b>	5/9

## PVSD - Example 1 continued

5/09 = PVSD

6/07 = PVED

Which payment will the client have to provide?

May						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

All pays within the Pay History/Projection Period: 5/09 - 6/07.

**Potential Payment Dates: 5/9, 5/16, 5/23, 5/30 – the system will use however many payments are entered by the worker to average income**



## PVSD - Example 2

8/6 – Application Date

8/13 – Processing Date

7/26 – New Job: First Pay Received

7/26, 8/2, 8/9 – Payment provided

July						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**\* Always assume that 30 days is a valid projection period**

<b>Earliest PVSD</b>	<i>7/7</i>
<b>Latest PVSD</b>	<i>8/13</i>
<b>PVSD You Might Choose?</b>	<i>7/26</i>





## PVSD - Example 2 continued

7/26 = PVSD    8/24 = PVED

8/6 – Application Date

8/13 – Processing Date

7/26 – New Job: First Pay Received

7/26, 8/2, 8/9 – Payment provided

July						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Will we have to ask the client to provide additional pay?

**Answer:** IES will count the payments recorded to project income. It will not require the 8/16 and 8/23 pays, because the client hasn't received them yet. You can determine that the 3 payments provided are sufficient to accurately project income, so you would not need to request a 4th payment.

Always use policy to determine if the payments provided are sufficient or if additional payments are needed.

## Back Dated Medical

- Best practice is to enter every payment for all pay received during backdated medical months
- However at a minimum, you must have at least one payment for months that Back Dated Medical is being requested
- *Example: if the customer is requesting medical for two months prior to the application date of February 1, 2014, you would need at least one (if not all) unearned income payment(s) for January and for December.*



# NEXT STOP

