



Your destination for affordable, quality health care, including Medi-Cal



JOB AID: INCOME PAGES

August 14, 2014

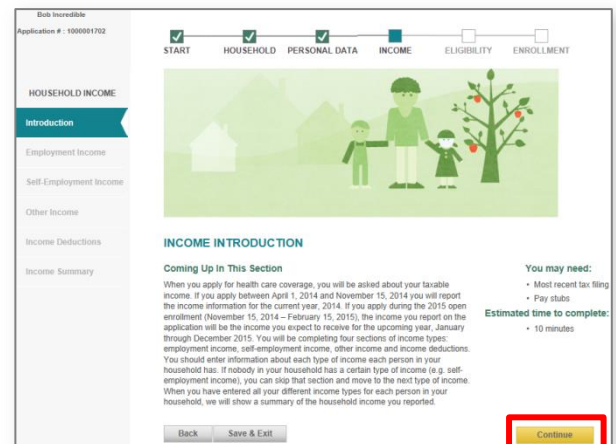
Income Pages

This Job Aid shows how to enter income into the CalHEERS application and modify this information when a consumer reports a change in income. Income is directly related to a consumer's eligibility for financial assistance, so it is important to redetermine eligibility upon completing updates or changes to income pages.

Application Income Pages

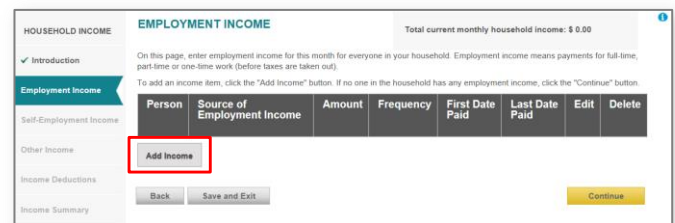
The *Income Introduction* page prepares the applicant for questions about their income and suggests documents to have ready to help gather the information

1. After reading the text on the page, click **Continue** to proceed.



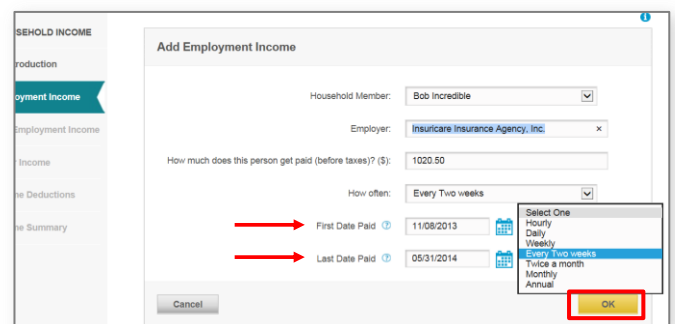
Add an Income Item

2. Whether adding income to *Employment Income*, *Self-Employment Income*, and/or *Other Income* pages, the same steps apply for each screen. To add current income or income history, click the **Add Income** button on the *Income* page.



3. On the *Add Income* page, the consumer will enter all fields, including the first and last dates paid, of the specific income period (if entering current income, the *Last Date Paid* field should be left blank).

- Note, if the consumer reports they are paid hourly or daily, a new field displays to capture the number of Hours or Days per week. If this field is left blank, CalHEERS defaults this value to 1.



4. Click **OK** to submit the income item.

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- On the *Income* page, click the **Add Income** button to enter another income record (e.g., for the same job but at a different rate, or for a different income source). Repeat steps 2 – 5 above to enter all income expected for the year for the entire household.

HOUSEHOLD INCOME

EMPLOYMENT INCOME

Total current monthly household income: \$ 6502.08

Introduction

Employment Income

Self-Employment Income

Other Income

Income Deductions

Income Summary

Person	Source of Employment Income	Amount	Frequency	First Date Paid	Last Date Paid	Edit	Delete
Bob Incredible	Insuricare Insurance Agency, Inc.	\$ 1020.50	Every 2 weeks	11/08/2013	05/31/2014	Edit	Delete

Add Income

Back Save and Exit Continue

Important notes about income:

- Mid-month income entries may not calculate as a user might expect. CalHEERS does not prorate income. If a consumer indicates an income change mid-month, CalHEERS income screens must be updated to capture the transition month's income. This is completed by end-dating the existing record, adding income items for the transition month, and creating a new income item reflecting the ongoing monthly income.

For example (not depicted in screenshots): John received a raise on June 10th. To correctly reflect the income change in CalHEERS, income screens must be completed as follows:

- End-date the original income item to the last day of the month (5/31)
 - Add two new income items for June:
 - 6/1 – 6/9: Enter actual amount received. Use frequency of monthly
 - 6/10 – 6/30: Enter actual amount received. Use frequency of monthly
 - Add another income item for July reflecting the new income amount and frequency.
- Total Current Monthly Household Income** displays only income items with date ranges in the current month.
 - Income can be added under *Employment*, *Self-Employment*, and *Other Income* pages.
 - Income entered on the *Self-Employment* page can only be entered as a monthly amount. Self-employed consumers should list their total net (income after expenses) income.
 - One time, or lump-sum payments are entered on the *Other Income* screen.
 - The Income **First Date Paid** can be any date in the past, but no further than four months into the future. If left blank, CalHEERS defaults to January 1st of the year the income item was created.

HOUSEHOLD INCOME

EMPLOYMENT INCOME

Total current monthly household income: \$ 5417.50

Introduction

Employment Income

Self-Employment Income

Other Income

Income Deductions

Income Summary

Person	Source of Employment Income	Amount	Frequency	First Date Paid	Last Date Paid	Edit	Delete
Bob Incredible	Syndrome Defence Strategy, LLC	\$ 2500.00	Every 2 weeks	07/11/2014		Edit	Delete
Bob Incredible	Insuricare Insurance Agency, Inc.	\$ 1530.75	Monthly	06/13/2014	06/20/2014	Edit	Delete
Bob Incredible	Insuricare Insurance Agency, Inc.	\$ 1020.50	Every 2 weeks	11/08/2013	05/31/2014	Edit	Delete

Add Income

Back Save and Exit Continue

- Once all income items for a page have been entered, review the page for accuracy. When completed, click **Continue**.
- Navigate through all the income pages, entering on the *Income Deductions* page any deductions the consumer expects to claim on next year's tax return.

HOUSEHOLD INCOME

- Introduction
- Employment Income
- Self-Employment In...
- Other Income
- Income Deductions
- Income Summary**

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- On the *Income Summary* page, carefully review all income items and projected annual household income before continuing through the application.

Note: Make sure monthly income records reflect the household's actual total monthly income—this is what the system will use to calculate **Total Projected Annual Household Income**.

Report a Change Income Pages

This section walks consumers through the **Report a Change** process to update their income information. After submitting an application the consumer's home page shows the **Report a Change** button.

- Click the **Report a Change** button.
- On the *Report a Change Summary* page, click on the **Income** box across the top of the screen.
- From the *Income Introduction* page, click the income type in the left navigation panel to access the income pages and make changes.

The following steps are the same for each income type (Employment, Self-Employment, Other Income, or Deductions). Always be aware when changing the income CalHEERS uses to calculate Monthly and Annual projections (whether editing or deleting an existing income item, or adding a new one), that income impacts eligibility.

Edit

- To make changes to existing income, click the **Edit** link on the income item.
- Make updates on the *Add Income* screen to change Employment Source, Amount, Frequency, or First and Last Paid dates.
- Review the page for accuracy, and click **OK** to save changes.

Income Type	Amount
Employment Income	\$ 5417.50
Self-Employment Income	\$ 0
Other Income	\$ 0
Subtotal	\$ 5417.50
Deductions	\$ 0

Total Current Monthly household income: \$ 5417.50
Total Projected Annual Household Income: \$ 45092.85

WELCOME BACK, BRUCE
Are you moving? Changing jobs? Expecting a child? We'll keep you covered.

Report a Change

REPORT A CHANGE SUMMARY
To make changes, click Edit or click next to the number you want to change.

INCOME INTRODUCTION
Coming Up In This Section
When you apply for health care coverage, you will be asked about your taxable income. If you apply between
You may need:
• Most recent tax filing
• Pay stubs

Person	Source of Employment Income	Amount	Frequency	First Date Paid	Last Date Paid	Edit	Delete
Bruce Wayne	Enigma Training Svcs	\$ 750.00	Weekly	02/03/2014		Edit	Delete

Add Employment Income
Household Member: Bruce Wayne
Employer: Enigma Training Svcs
How much does this person get paid (before taxes)? (\$): 3810.00
How often: Monthly
First Date Paid: 06/01/2014
Last Date Paid: 06/30/2014

OK

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Add Income

1. To add income, click the **Add Income** button on the *Income* page.
2. Enter new income details, and once all information is entered, click **OK**.

Review all income screens to verify records have been entered so that CalHEERS will calculate actual monthly incomes for every month. This is important as CalHEERS uses monthly incomes to project annual income for eligibility determinations.

3. When finished adding income, click **Income Summary** on the left navigation panel to review Total Projected Annual Household Income. Verify the Projected Annual Income is correct.
4. Click the **Continue** button on the Income Summary page to rerun eligibility results, and proceed to **Choose a Health Plan**, if applicable.

HOUSEHOLD INCOME

Please review the information below and/or update as necessary Cancel all changes

EMPLOYMENT INCOME

Total current monthly household income: \$ 4424.93

On this page, enter employment income for this month for everyone in your household. Employment income means payments for full-time, part-time or one-time work (before taxes are taken out).
To add an income item, click the "Add Income" button. If no one in the household has any employment income, click the "Continue" button.

Person	Source of Employment Income	Amount	Frequency	First Date Paid	Last Date Paid	Edit	Delete
Bruce Wayne	Enigma Training Svcs	\$ 750.00	Weekly	02/03/2014	05/31/2014	Edit	Delete

1. **Add Income**

HOUSEHOLD INCOME

Please review the information below and/or update as necessary Cancel all changes

Add Employment Income

Household Member: Bruce Wayne

Employer: Enigma Training Svcs

How much does this person get paid (before taxes)? (\$): 750.00

How often: Weekly

First Date Paid: 02/03/2014

Last Date Paid: 05/31/2014

Cancel **2. OK**

HOUSEHOLD INCOME

Please review the information below and/or update as necessary Cancel all changes

INCOME SUMMARY

Income Type	Amount	Edit
Employment Income	\$ 4416.80	Edit
Self-Employment Income	\$ 0	Edit
Other Income	\$ 8.33	Edit
Subtotal	\$ 4424.93	
Deductions	\$ 0	Edit
Total Current Monthly household income	\$ 4424.93	
Total Projected Annual Household Income	\$ 43389.56	

Income Summary **3.**

Back Save and Exit Return To Summary **4. Continue**