



## Budget

Click on Budget to view a grid of a ward's Budget records

Client: TESTERSON, TEST
Face Sheet: \$0.00
Events
Face To Face
Appointment History
Address History
Contacts
Status History
Transactions
<b>Budget</b>
Assets
Life Insurance
Tasks
Liabilities
MultiPurpose Reports
Diagnoses
Incidents
Reports
Word Doc Forms
PDF Forms
Attachments
Victimization
Child/Pregnant
Release

Click Insert from the Budget grid to insert/update the client's Budget records

**Insert Budget**

Save Save and Re-Insert

Revised Budget:

Name: TESTERSON, TEST Effective Date:

Name of Placement:

Address:

City:  State: KY Zip:  Phone:

Type of Placement:

Private Pay:  Other:

**Income**

Monthly

SSA: \$0.00

SSI: \$0.00

PA: \$0.00

VA: \$0.00

Pension: \$0.00

Other (Specify): \$0.00 Specify:

Estimated Wages: \$0.00

Total Income: \$0.00

**Expenses**

Facility/Rent:  Recurring:  Amount: \$0.00 Summary: \$0

Address:

Personal Needs:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Grocery Funds:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Average Utilities:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Wage Allowance:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Insurance Premiums:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Pharmacy Co-Pays:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Restitution:  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Other (Specify):  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Other (Specify):  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Other (Specify):  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Other (Specify):  Recurring:  Amount: \$0.00 Summary: \$0.00

Address:

Total Expenses: \$0.00

Net Gain: 0.00

Brief Notes:

Submitted By:

Submitted Date:

Approved By:

Approve Date:

Save Save and Re-Insert

**Field Definitions:**

- Revised Budget:** Yes/No dropdown, defaults to blank – required to save
- Client:** view only field of client name
- Effective Date:** date field, defaults to blank– required to save
- Name of Placement:** text field – required to save
- Address:** text field – required to save
- City:** text field – required to save
- State:** text field – required to save
- Zip:** text field – required to save
- Phone:** phone field
- Type of Placement:** dropdown field – required to save

- ✓
- SCL
- Family
- Living with Other
- Assisted Living
- Boarding Home
- Homeless
- CIS
- ABI
- Group Home
- Self

**Private Pay:** Yes/No, default to Blank

**Other:** text vchar 100

**SSA:** dollar amount, defaults to \$0.00

**SSI:** dollar amount, defaults to \$0.00

**PA:** dollar amount, defaults to \$0.00

**VA:** dollar amount, defaults to \$0.00

**Pension:** dollar amount, defaults to \$0.00

**Other (specify):** dollar amount, defaults to \$0.00

**Specify:** text field

**Estimated Wages:** dollar amount, defaults to \$0.00

**Total Income:** view only field that sums the Income fields

**Facility/Rent:** text vchar 100

**Address:** text vchar 100

**Personal Needs:** text vchar 100

**Address:** text vchar 100

**Grocery Funds:** text vchar 100

**Address:** text vchar 100

**Average Utilities:** text vchar 100

**Address:** text vchar 100

**Wage Allowance:** text vchar 100

**Address:** text vchar 100

**Insurance Premiums:** text vchar 100

**Address:** text vchar 100

**Pharmacy Co-Pays:** text vchar 100

**Address:** text vchar 100

**Restitution:** text vchar 100

**Address:** text vchar 100

**Other (specify):** text vchar 100

**Address:** text vchar 100

**Other (specify):** text vchar 100

**Address:** text vchar 100

**Other (specify):** text vchar 100

**Address:** text vchar 100

**Recurring:** dropdown that defaults to blank with Weekly, Biweekly, Monthly

**Amount:** dollar amount, defaults to \$0.00

**Summary:** Calculated dollar amount field based on Recurring and Amount.

- If Recurring = "Weekly", then Amount \* 4
- If Recurring = "Biweekly" then Amount \* 2
- If Recurring = "Monthly" then Amount

**Total Expenses:** view only field that sums the above the Expense fields

**Net Gain:** view only field of the difference between Total Income and Total Expenses – This can be positive or negative.

**Brief Notes:** unlimited text field

**Submitted By:** Username of user who clicked Submit button

**Submitted Date:** Date Submit button was clicked

**Approved By:** Username of user who clicked Approved button

**Approved Date:** Date Approved button was clicked

#### Budget Page Submit Button

View

Edit

## View Budget

Submit Budget

- Clicking the button will populate the view only fields “Submitted By” and “Submitted Date”. A Message is generated to the Supervisor of the client’s assigned GSSW.
  - Subject = Budget submitted for approval
  - Message = Client {clientfirstname clientlastname} has a Budget for approval
    - Clicking on the Message will open the Client/Budget record

#### Budget Page Approve Button

View

Edit

## View Budget <--Pr

Submit Budget Approve Budget

- Clicking the button will populate the view only fields “Approved By” and “Approved Date”. This also generates an email (KY will send the email address).
  - Subject= “New Budget submitted”
  - Body= “Budget submitted for {client 1<sup>st</sup> initial and clientlastname 1<sup>st</sup> 4 characters} *For example, Nick Somoff would be NSomo*