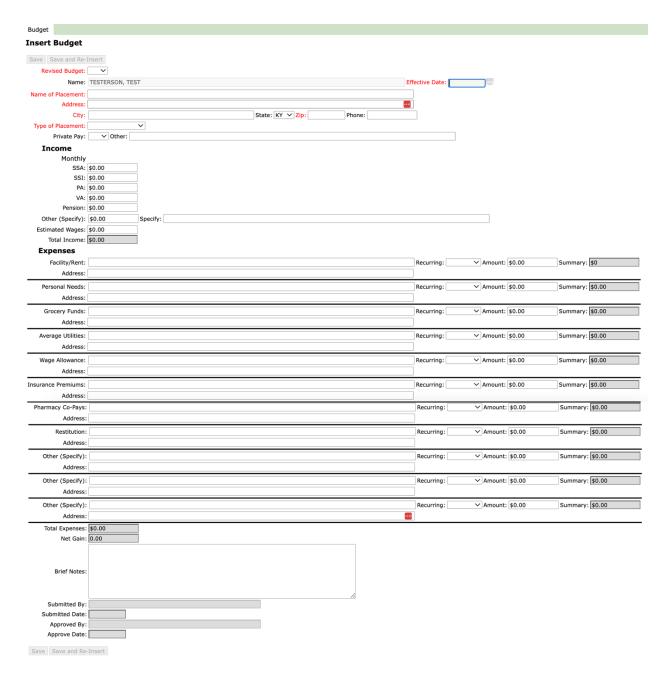


Budget

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

click off Budget to vi
Client: TESTERSON, TEST
Face Sheet: \$0.00
Events
Face To Face
Appointment History
Address History
Contacts
Status History
Transactions
Budget
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



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
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 <--Pro

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 1st initial and clientlastname 1st 4 characters} For example, Nick Somoff would be NSomo