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
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

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

Expense		Recurring	Amount	Summary
Facility/Rent: [ ]		[▾]	[$0.00]	[$0]
Address: [ ]				
Personal Needs: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Grocery Funds: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Average Utilities: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Wage Allowance: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Insurance Premiums: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Pharmacy Co-Pays: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Restitution: [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Other (Specify): [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Other (Specify): [ ]		[▾]	[$0.00]	[$0.00]
Address: [ ]				
Other (Specify): [ ]		[▾]	[$0.00]	[$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.
   o   If Recurring = "Weekly", then Amount * 4
   o   If Recurring = "Biweekly" then Amount * 2
   o   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 1st initial and clientlastname 1st 4 characters} *For example, Nick Somoff would be NSomo*