



*Earn*Benefits® Online
User Guide

Fall 2014

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Introduction

EarnBenefits is a project of [Seedco](#), a national nonprofit organization dedicated to creating opportunities for workers and their families.

WELCOME!

EarnBenefits (EB) is a program that connects low-wage workers to income-enhancing supports and public benefits in order to help them maintain long-term employment and achieve financial security. Community Based Organizations (CBOs) in Georgia, Maryland, New York and Tennessee use a web-based software application called *EarnBenefits* Online to screen individuals for benefits, including SNAP, tax credits, and public health insurance programs such as Medicaid. Our comprehensive network of community-based partners uses the tool to provide assistance in submitting application forms, along with providing case management and counseling services.

The web site for screening clients is: <https://ebo.earnbenefits.org>

The web site for practicing is: <https://training.earnbenefits.org>

The *EarnBenefits* Online User Guide has been created to provide *EarnBenefits* screeners with information on how to understand and navigate the online tool effectively. As you begin working with your clients, you may have questions about how the online tool works, need definitions of eligibility terms within the screening, or require technical support or next step assistance. This guide will teach you about the screening process and provide tips on how to use *EarnBenefits* Online successfully!

For questions that are not answered in this guide, please contact the *EarnBenefits* Online Help Desk at SeedcoEBOSupport@seedco.org or (917) 338-9200.

For Programmatic Questions:

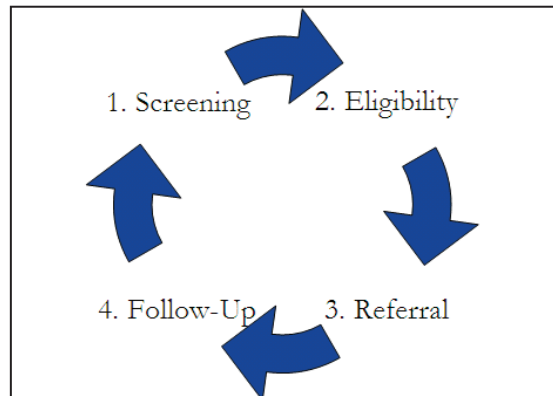
Local Contact Name:

Number:

Email:

How to Use the EBO User Guide

- This manual will use screenshots and instructions to demonstrate all features and processes within *EarnBenefits* Online. The User Guide will walk you through each of the four stages of *EarnBenefits* Online:



- The screenshots found in the User Guide are taken from a New York City screening, but the principles are the same in all localities. Some questions or benefits that appear in the User Guide may not be available in your location, and vice versa.
- You can use this guide in conjunction with your *EarnBenefits* Online training. We recommend that you keep it handy, especially as you begin screening clients, as it can be a useful tool if questions or problems arise.
- You will find a concise outline of the four stages of EBO on the following page. You can use this as a desk reference, especially when screening for the first time.
- See the EBO “[Tips and Tricks](#)” for some helpful hints before you start a screening.



Heads Up!

Throughout the manual, you’ll find helpful hints and warnings in the “Heads Up!” boxes.

- Remember – you can contact the [Helpdesk](#) at any time with questions or problems!

EBO Screening Desk Guide

GETTING STARTED: Use Mozilla Firefox as your internet browser. Refer to the IT Guide (available from the Helpdesk).

Searching for and Creating Client

1. Have Client sign Client Consent Form - keep on file.
2. Login to EBO at <https://ebo.earnbenefits.org> using Username and Password.
3. In the Client Search box, enter First & Last Name, DOB, or SSN. Click **Search Client/Applicant**.
 - a. If new client: You will be asked to “Create client” after trying to search. Click **Create client**.
 - OR**
 - b. If pre-existing client:
 - i. When searching for a pre-existing client, use partial search. Enter just the name (first & last), or just the last name, or the last name and part of the first name. Searching with less information may get you a longer list of clients, but it will help you locate the client you’re seeking.
 - ii. When you have found your client, click on the client’s name.
2. Click **Click here** to begin screening.

Screening

1. Fill in Screening Process page, answering all questions.
 - a. For additional household member(s), click **Add household member**.
 - b. Fill out each additional household member’s profile.
2. Click **Check for benefits** at the bottom of the screening page.

Eligibility

1. Review benefits with client.
2. Select a Referral Status for each benefit:
 - a. **Proceed:** This choice is for any benefits the client chooses to apply for at the current time. You can also select **Remind Me Later, Not Interested, or Already Receiving Benefit**.
3. Click **Update Referral Statuses**.

Referrals

4. For all benefits that are marked **Proceed**, click on those tabs located at top of page:
 - a. Click **Print Draft Application** to complete the application. Type in any missing information and click **Save Form** once you are done.
 - b. Locate a provider for the client. Click on **Select this Provider**. Make sure to write down the provider’s contact information on the Take Away.
 - c. Click **Confirm**, once you are sure that all information on the intake form is correct. You will not be able to make changes to the intake form once you click **Confirm**.
5. Return to the **Eligible Benefits Overview** tab.

6. To print Application and Take Aways, click **Print Applications/Take Aways**. A menu of available applications, Take Aways, and other materials will appear. Select those that you would like to print and click **Print Selected**.

Follow Up

1. Search for client and pull up client's profile.
2. Click on **View Follow Up**.
3. If the status of a client's benefit has changed, select the status from the dropdown next to each benefit:
 - a. **Pending:** Client is still waiting to hear a decision on their application.
 - b. **Benefit received:** Client received the benefit.
 - c. **Application denied:** Client's application was rejected.
 - d. **Hasn't applied – Open case:** Client hasn't applied but still intends to do so.
 - e. **Hasn't applied – Closed case:** Client hasn't applied and doesn't intend to do so. You can also use this option when unlocking the household and rescreening.
 - f. **First/Second attempt – Left message:** You cannot reach the client.
 - g. **Third attempt – Lost contact:** Client cannot be reached on a third try.
 - h. **Recertification –** Client is recertifying for benefit.
4. Click **Update Benefit Statuses** when you have selected the relevant updates.



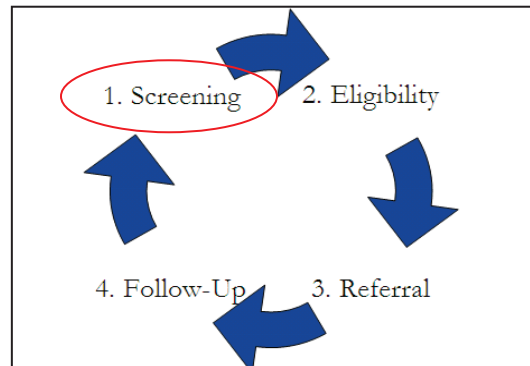
Tips and Tricks

Before you begin, here are some tips to help you work through *EarnBenefits* Online:

1. **EBO is not compatible with Internet Explorer!** You must use Mozilla Firefox.
2. **Make sure your Client signs the Client Consent Form before beginning the screening.** The signed copies should be kept on file at your site.
3. **Make sure you're logging into the right site.** The Training and Live versions of EBO look very similar, but you should never enter real information into Training, and vice versa.
4. **When logging in, do not use capital letters in your username or password.** They are case sensitive.
5. **Do Not Use the Forward and Back buttons in your browser.** This will cause errors and possibly corrupt your data. To remove the temptation, point your cursor at the toolbar at the top of your browser, right-click your mouse, and uncheck 'Navigation Toolbar.'
6. **If you encounter an error, try logging out and then logging back in.** Logging in again will often fix problems you might encounter.
7. **Contact the Helpdesk!** If you are having ongoing issues or have a question, please contact the Helpdesk.
8. **When you Search for Clients, you can enter as little as the first letter of their first name** (e.g. "J"). If you use a partial search, you are more likely to find the client if he/she is already in the system.
9. **Always review the information you've entered for each Household member before you 'Check for Benefits.'**
10. **Don't forget to read the Tool Tips!** If you need help interpreting a question, hover your mouse over the 'i' icon. For example:

Average hours worked per week (Enter 0 if Huck is not working): i	
Full-time student: i	Enter Huck's AVERAGE hours worked per week. If Huck's work schedule changes week to week, take their total hours worked over the last four weeks and divide by 4. E.g., if a person works 40 hours a week for the first two weeks and didn't work any hours the last two weeks, their Average Hours Worked Per Week is 20.
Is Huck currently involved in any job training or employer-sponsored training program ?	

Screening

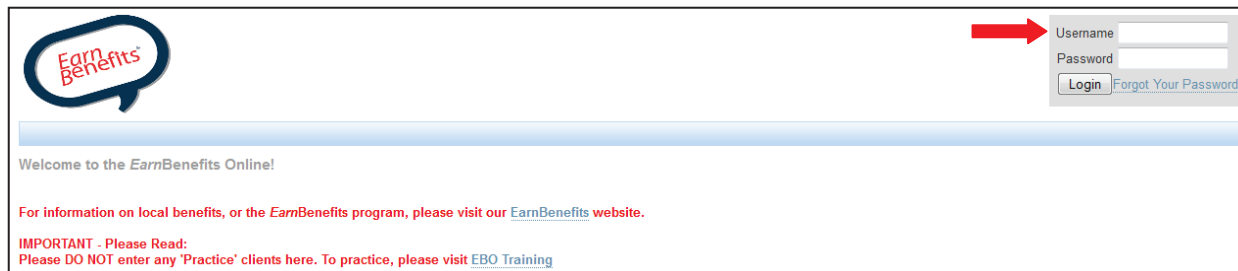


This section of *EarnBenefits* Online entails the input of client information which will be used to ascertain an estimation of eligibility for multiple public benefits.

In this section, you will learn how to accurately and precisely complete the screening form for your client.

EBO Homepage

Start by visiting EBO's website (either Training or Live). Enter your username and password on the log-in page:

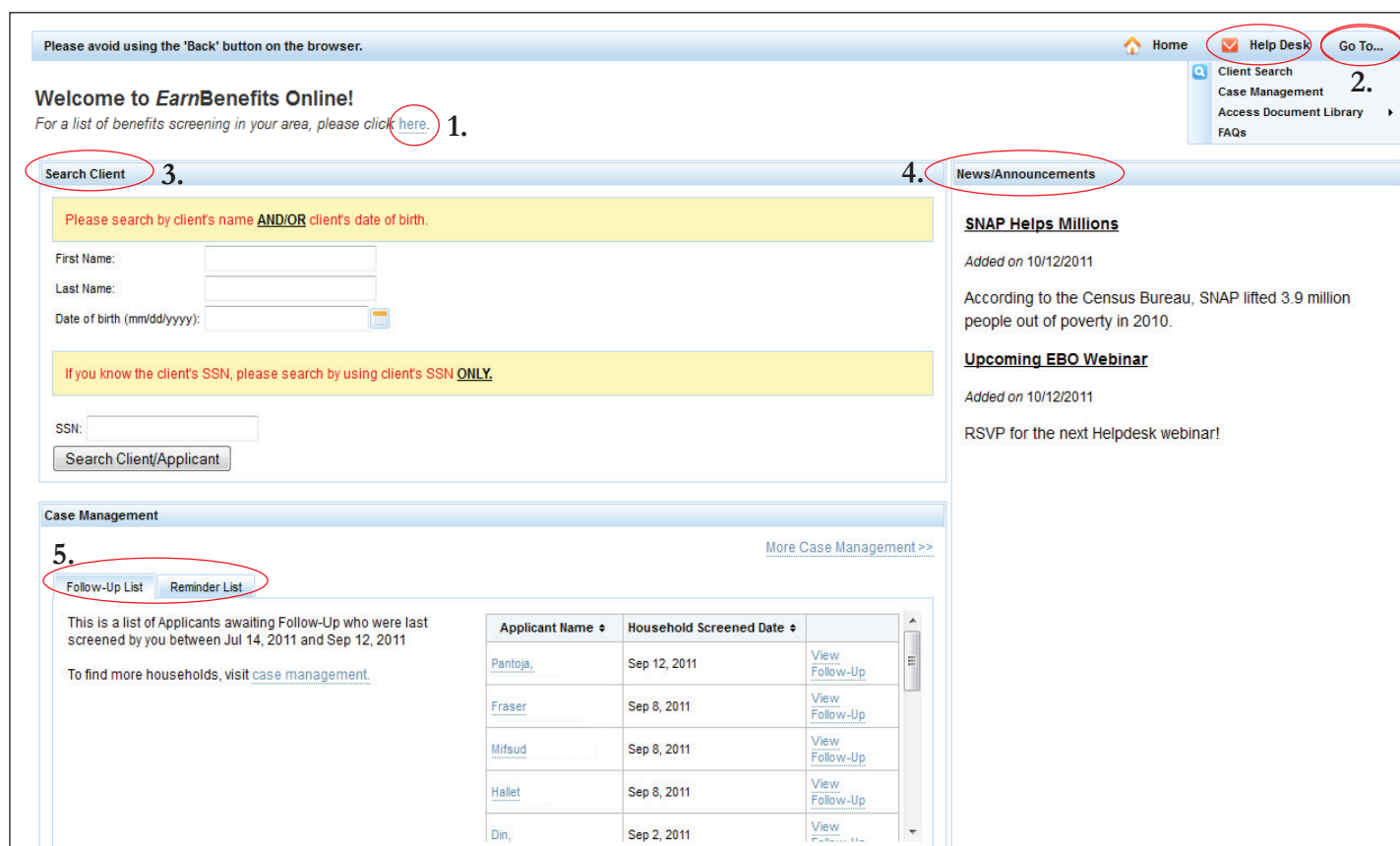


Welcome to the *EarnBenefits* Online!

For information on local benefits, or the *EarnBenefits* program, please visit our [EarnBenefits](#) website.

IMPORTANT - Please Read:
Please DO NOT enter any 'Practice' clients here. To practice, please visit [EBO Training](#)

Remember – your username and password are case sensitive! After logging in, you will be brought to the following page:



Please avoid using the 'Back' button on the browser.

Home **Help Desk** **Go To...**

Client Search **2.**
Case Management
Access Document Library
FAQs

Welcome to *EarnBenefits* Online!
For a list of benefits screening in your area, please click **here** **1.**

Search Client **3.** **4.** **News/Announcements**

Please search by client's name **AND/OR** client's date of birth.

First Name:
Last Name:
Date of birth (mm/dd/yyyy):

If you know the client's SSN, please search by using client's SSN **ONLY**.

SSN:

SNAP Helps Millions
Added on 10/12/2011
According to the Census Bureau, SNAP lifted 3.9 million people out of poverty in 2010.

Upcoming EBO Webinar
Added on 10/12/2011
RSVP for the next Helpdesk webinar!

Case Management [More Case Management >>](#)

5. **Follow-Up List** **Reminder List**

This is a list of Applicants awaiting Follow-Up who were last screened by you between Jul 14, 2011 and Sep 12, 2011
To find more households, visit [case management](#).

Applicant Name	Household Screened Date	
Pantoja	Sep 12, 2011	View Follow-Up
Fraser	Sep 8, 2011	View Follow-Up
Mifsud	Sep 8, 2011	View Follow-Up
Hallet	Sep 8, 2011	View Follow-Up
Din,	Sep 2, 2011	View

- 1. Benefits Screened:** List of benefits currently screened in EBO, links to benefit pages in [public website](#), and benefit level (federal, state, or city).
- 2. Go To...:** Hover your mouse over Go To... to view additional resources. You can link to [Case Management](#), the Documents Library, and the [Helpdesk Request Form](#).

3. **Search Client:** Search to find or create a client. For more info, please refer to the [Client Search/Create](#) chapter.
4. **News and Announcements:** The Helpdesk posts items that you might find helpful or interesting, including webinar announcements, closing and maintenances schedules, and interesting facts and articles.
5. **Case Management:** The Welcome page now includes two Case Management lists that you might find useful. You can use these lists to help get started on your Follow-Up work, but they are not meant to replace the more comprehensive Case Management tools.
 - a. 'Follow-Up List' displays the names of Applicants referred for benefits at least 30 days ago, and who are awaiting Follow-Up for at least one benefit. The first Applicant that appears on the list was referred for benefits 30 days ago; the rest appear backwards chronologically.
 - b. 'Reminder List' displays the names of Applicants who have at least one benefit marked as 'Remind Me Later' on the Eligible Benefits Overview page. The first Applicant that appears was screened two weeks ago.

Client Search/Creation

Search Applicant

Please search by client's name **AND/OR** client's date of birth.

First Name:

Last Name:

Date of birth (mm/dd/yyyy):

If you know the clients SSN, please search by using clients SSN ONLY.

SSN:

1. **Search Client/Applicant:** Look for the [Client](#) in the EBO database.

- a. You will always need to Search for the Client before creating a new client profile. You can search using name and date of birth, or with a SSN.



Heads Up!

To avoid creating a duplicate of existing clients, start by using a partial search. For example, search for “Huck Finn” or “H Finn” to find any similar clients.

b. If the client is not in EBO’s system, you will see:

This client does not exist in our system. You can create the client OR modify your search

Please search by client's name **AND/OR** client's date of birth.

First Name:

Last Name:

Date of birth (mm/dd/yyyy):

If you know the clients SSN, please search by using clients SSN ONLY.

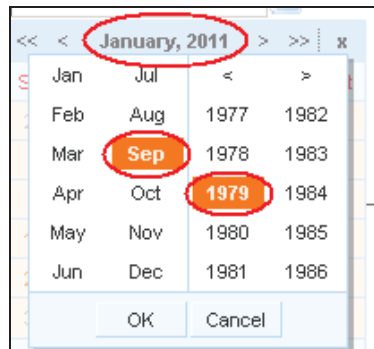
SSN:

2. **Create Client:** Enter a new person into the EBO system.

- a. This is a Client that is not currently in the EBO database, either as an [Applicant](#) or as a Member of another Applicant’s [Household](#).
- b. A Client cannot be a member of two [Active Households](#) at one time
 - To create a new Client in the EBO system, the full first and last names and date of birth are required.

3. **Entering Client’s DOB:**

- a. Type your client's DOB (MM/DD/YYYY), or
- b. Use the calendar tool. To use the calendar tool, click on the calendar icon revealing a drop down calendar. To easily select a month and year for your Client's date of birth, click on the date bar in the top middle of the calendar (i.e. 'January, 2011' in figure below). This will give you month options on the left and year options on the right (see below). The smaller arrows above the years will allow you to move backward or forward through the years quickly. Once you select the appropriate month and year, click 'OK.' When the calendar shows the correct month and year, select the appropriate day. Once the date is selected the Date of Birth field will automatically fill in with the correct date format.



- c. If your Client has a Social Security Number, you can enter it here as well.
- d. When you have confirmed that your Client's name, date of birth, and Social Security Number are correct, click "Create Client."



Heads up!

Once a Client's name, date of birth, and Social Security Number have been entered, they cannot be changed. If they need to be changed, you must contact the Helpdesk.

After creating the new Client, you will be taken to the Client Profile Page:

First Name : Huckleberry	Last Name : Finn
SSN : 999-88-2222	DOB : Sep 19, 1979
Gender :	Ethnicity :
To start a NEW screening process with Finn, Huckleberry as the applicant Click Here	

- 4. **Click Here:** Click to begin the screening process.

Client Intake Form

Personal Information	
Client name:	Finn, Huckleberry
SSN:	999-88-2222
Date of birth (mm/dd/yyyy):	09/19/1979
Gender:	<input type="radio"/> Male <input type="radio"/> Female
Ethnicity:	Please select...
Citizenship ⁱ :	US Citizen
Tax filing status:	Please select...
Household Relationships	
Marital status: ⁱ :	Please select...
Is Huckleberry claimed as dependent by somebody outside household?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Medical Information	
Medically insured: ⁱ :	<input type="radio"/> Yes <input checked="" type="radio"/> No
Permanently disabled or blind:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Employment and Education	
Average hours worked per week (Enter 0 if Huckleberry is not working): ⁱ :	<input type="text"/>
Full-time student: ⁱ :	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is Huckleberry currently involved in any job training programs? ⁱ :	<input type="radio"/> Yes <input type="radio"/> No
Income and Assets	
Gross monthly income: ⁱ :	Add Income
Gross individual income from previous year: ⁱ :	\$ <input type="text"/>
Assets: ⁱ :	Add Asset
Current benefits received: ⁱ :	Add Benefit
Medical, Dependent Care and Other Expenses	
Monthly care costs paid for Huckleberry ⁱ :	\$ <input type="text"/>
Court ordered monthly child support payments paid by Huckleberry ⁱ :	\$ <input type="text"/>
Monthly alimony payments: ⁱ :	\$ <input type="text"/>
Housing Information	
Housing situation: ⁱ :	Please select...
Monthly rent/mortgage: ⁱ :	\$ <input type="text"/>
Monthly utilities: ⁱ :	Add Utility
Does Huckleberry live on tribal lands?	<input type="radio"/> Yes <input type="radio"/> No
Additional Information ⁱ	
Contact Information	
Address:	<input type="text"/>
Apt:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip code:	<input type="text"/>
Phone 1:	<input type="text"/>
Phone 2:	<input type="text"/>
Email:	1. <input type="text"/> 2. <input type="text"/>
<input type="button" value="Add Household Member"/> <input type="button" value="Check For Benefits"/>	

- Add Household Member:** Create a new profile tab for every member in the household.
- Check for Benefits:** After profiles for every Member of the [Household](#) have been filled out, check for eligible benefits for all members of the household.

Client Intake Form Breakdown

A. Personal Information

Personal Information	
Client name:	Finn, Huckleberry
SSN:	<input type="text"/>
Date of birth (mm/dd/yyyy):	10/15/1975
How did Huckleberry hear about this agency's EarnBenefits services?	-- Please select --
Gender:	<input type="radio"/> Male <input type="radio"/> Female
Ethnicity:	Please select ...

- This category is intended for the most basic identifying information about the client like gender, ethnicity, and [Citizenship Status](#). The client's name and DOB should already be filled in based on what you entered in the client creation process.
- **Please note:** Once you enter a client's SSN, the only way to change it afterward is by contacting [Helpdesk](#).

Citizenship:	LPR (Legal Permanent Resident)
Date Cary Received Green Card:	06/15/2010 
Cary's Citizenship Status Prior to becoming a LPR:	Please Select..
Qualified Working Quarters: ?	<input type="text"/>

Many citizenship types will generate additional questions like those pictured above. If you select [LPR \(Legal Permanent Resident\)](#) as a citizenship type, the following questions appear:

- **Date [CLIENT] Received Green Card:** LPRs can qualify for many of the same benefits as US citizens if they received their green card 5 or more years ago. If the date entered is less than 5 years, the next question will appear.
- **[CLIENT]'s Citizenship Status Prior to becoming a LPR:** Depending on your client's Citizenship Status before becoming a LPR, they might already qualify for certain benefits. If your client's prior status is non-US citizen, undocumented, or another type not included on the drop-down menu, or if he/she doesn't wish to disclose this info, please select 'Other'.
- **Qualified Working Quarters:** Working Quarters are 3-month periods in which your income meets or exceeds a certain limit. If your client's income is taxed, it's very likely it will meet the requirements. Your client may also get credit for some quarters earned by a spouse or parent. Click on the '?' mark in EBO for more information.

B. Household Relationships

Household Relationships

Marital Status: Please select... ▾

Is Huckleberry claimed as dependent by somebody outside household? Yes No

The screenshot above is from the [Applicant](#)'s page. For other Members added to the Household, the section looks like this:

Household Relationships

Marital Status: Single ▾

Does Tom have parent(s) in the household: Ma Pa Grandma Uncle John
 None

Does Tom have children in the household? Ruthie
 None

Does Tom have dependent(s) in the household? Ma Pa Grandma Uncle John Noah
 None

Tom is being claimed as a dependent by: Ma Pa Grandma Uncle John Noah
 None

Relation to Ma: Please select... ▾

Is Tom claimed as dependent by somebody outside household? Yes No

Does Tom Share Meals with Ma: Yes No

Does Tom care for a disabled or elderly (60+) person living outside your client's home? Yes No

There are several additional questions not included in the Applicant's tab. These questions ask how this Member is related to the Applicant and other Members of the Household. The following questions are of particular note:

- **Does [MEMBER] have parent(s) in the household:** Notice in the example, Ma & Pa are marked as Tom's parents. Only Members a certain number of years older than Tom will appear in this question.
- **Does [MEMBER] have children in the household:** Notice Tom's field is marked 'None' because he has no children.
- **Does [MEMBER] have dependent(s) in the household:** This question is asking if Tom claims anybody as a dependent on his taxes.
- **[MEMBER] is being claimed as a dependent by:** This question is asking if anybody claims Tom as a dependent. If a child has 2 parents, it's possible only one of them claims him/her as a dependent.
- **Relation to [APPLICANT]:** This question's drop-down menu will be grayed out unless EBO is unable to determine the Member's relationship to the Applicant. If not, you'll need to select the relationship from the options available.

- **Does [MEMBER] share meals with [APPLICANT]:** It calculates which Members are included in determining eligibility and benefit allotment for Food Stamps. If the Member shares food with the Applicant, mark this question as ‘Yes’.

C. Medical Information

Medical Information	
Pregnant:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Medically insured through employer:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Permanently disabled or blind:	<input type="radio"/> Yes <input checked="" type="radio"/> No

Any questions related to medical conditions or insurance are asked here.

Is Clark disabled or blind?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Does Clark receive or has Clark been approved for SSI, SSDI or disability payments from the Veterans's Administration?	<input type="radio"/> Yes <input checked="" type="radio"/> No

If you answer ‘Yes’ to the question, ‘Is [CLIENT] disabled or blind?’ the questions pictured above will appear.

- **Does [CLIENT] receive or has [CLIENT] been approved for SSI, SSDI or disability payments from the Veterans’ Administration:** Certain benefits, including Food Stamps, only consider a client disabled if he/she meets one of these requirements. If you answer ‘No’ to this question, your client will be considered disabled for some benefits, but not all.

D. Employment and Education

Employment And Education	
Average hours worked per week (Enter 0 if Huckleberry is not working):	<input type="text"/>
Full-Time Student:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is Huckleberry currently involved in any job training programs?	<input type="radio"/> Yes <input type="radio"/> No

This category includes questions that relate to employment & education. Please note the following questions:

- **Full Time Student:** Select ‘Yes’ to this question if your client was enrolled as a full time student as defined by their school for at least 5 months in the previous year. Answering ‘Yes’ causes the following question to appear:
 - **Highest Grade Completed:** Select the client’s highest grade completed. Please note this includes all grades from Kindergarten to Graduate School.
- **Is [CLIENT] currently involved in any job training programs:** Job training includes any federal, state or privately run programs that increase your client’s job skills and/or earning potential.

E. Income and Assets

Income and Assets	
Gross Monthly Income:	Add Income
Gross individual income from previous year:	\$ <input type="text"/>
Assets:	Add Asset
Current Benefits Received:	Add Benefit

This section is where you enter any and all sources of income for your client. Please note the following questions:

- Gross Monthly Income:** Click on the ‘Add Income’ link. This will open up the field pictured below. Select an [Income Type](#) from the drop-down menu on the left. Then input the amount of income your client receives from this source in the field to the right.

Wages/Tips/Salary

[Remove](#)

[Add Income](#)

Please note the Calculator icon next to the Income field. If your client doesn’t know his/her monthly income, but brings one paycheck in, you can use this tool to calculate his/her gross monthly income. A new window will pop up:

Calculate Monthly Income ✕

Enter the amount on your paycheck and the frequency that you get paid. The calculated value is your monthly income.

Pay Frequency :

Weekly
 BiWeekly(every other week)
 Twice Per Month

Amount paid per pay frequency :

Your monthly income is : 0.0

Select the frequency your client is paid (weekly, biweekly, or twice per month) and enter the amount on the paycheck BEFORE taxes or deductions are taken out. This calculator takes into consideration most benefits consider a month to contain 4.33 weeks instead of just 4 (An exception to this rule is Maryland, where the month is considered just 4 weeks long). Click ‘Calculate’ to find the monthly amount, and click ‘Close’ to copy the figure into the intake form and close the window.

- Assets:** Click on the ‘Add Asset’ link. This will open up the field pictured below. Select an [Asset Type](#) from the drop-down menu on the left. Then input the amount your client’s asset is worth.

Please select ...
Remove

[Add Asset](#)

- **Current Benefits Received:** Click on the ‘Add Benefit’ link. This will open up the field pictured below. Notice there is no monetary amount asked for this question. However, some benefits will match their corresponding Income Type found in the Gross Monthly Income field (for example, SSI and SSDI).

Please select ...
Remove

[Add Benefit](#)

Heads up!



Some programs require that applicants be receiving particular benefits to qualify. (For example, in some states, you must be receiving a benefit like SNAP or Medicaid to qualify for Lifeline.) As such, it's important to note which benefits the client receives in Current Benefits Received AND the amount received for that benefit (if applicable) in Gross Monthly Income.

- **Monthly foster care assistance received:** Only appears in a child’s tab if he/she has been listed as a foster child.

Monthly foster care assistance received: \$ 600.0

F. Medical, Dependent Care and Other Expenses

Medical, Dependent Care and Other Expenses

Monthly care costs paid for Huckleberry:	\$ <input style="width: 80px;" type="text"/>
Court ordered monthly child support payments paid by Huckleberry:	\$ <input style="width: 80px;" type="text"/>
Monthly Alimony Payments:	\$ <input style="width: 80px;" type="text"/>

Questions that relate to expenses that affect eligibility appear here. Please note the following fields:

- **Monthly Medical Expenses:** Only appears when the client’s age 60 years old or older, or receives SSI or SSDI. Indicate monthly medical expenses your client paid, including ongoing bills for medical treatment received in the past.

Monthly medical expenses: \$

- **Monthly Care Costs for [CLIENT]:** Enter the amount all monthly costs related to child or dependent supervision/care programs for your client. Only enter costs here if a parent/guardian pays for care so they can go to work, look for work, or go to school. **Remember:** If a child attends day care, enter the amount paid for it in the child’s tab, not in a parent or guardian's tab.

Monthly care costs paid for Bobby:

\$

G. Housing Information

Housing Information	
Housing Situation:	<input type="text" value="Please select..."/>
Monthly Rent/Mortgage:	\$ <input type="text"/>
Monthly Utilities:	Add Utility
Total Additional Property Costs:	\$ <input type="text"/>

- **Housing Situation:** Select the Client’s current living situation. Options include Rent, Own, Roomer, Boarder, Free Room, Free Board, Public/Subsidized Housing, Homeless. See EBO Glossary for definitions of [Housing Situation Types](#).
- **Monthly Utilities:** Select the utilities for which your client is directly responsible on a monthly basis. Options include: Electric (Heat), Gas (Heat), Oil (Heat), Electric (Non-heat), Gas (Non-heat), Oil (Non-heat), Water, Telephone, Air Conditioning, Utilities Included in Rent, and Non-Utility Heat.
 - **Please note:** In most localities, the amount paid for utilities is not necessary. As such, you only need to identify the types of utilities for which your client is responsible, not the amounts paid.

H. Tax Questions

You may be asked to answer tax related questions to help determine eligibility for Free Tax Prep and/or various tax credits. Some tax related questions (such as deductions taken) will also impact your eligibility for Medicaid benefits or the Premium Tax Credit for Health Insurance. For more information, please refer to [Tax-Related Terms](#) in the EBO Glossary.

I. Additional Information

Additional questions that are important for benefit eligibility might appear in this category. These questions will be more benefit-specific than previous questions, and it is possible that users in some states might never see any questions appear here.

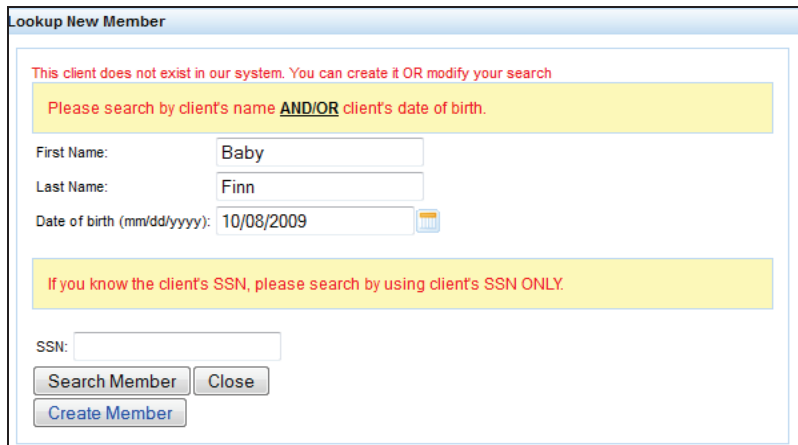
J. Contact Information

Enter the client’s preferred language, home address, telephone numbers, and email address in this category. This information does not, in most cases, affect eligibility, but it will auto-populate on each of the client’s applications in the Eligible Benefit Overview and allow you to select the best providers for your client.

K. Add Other Household Members

When you have completed the screening form for one Household Member, click “Add Household Member” at the bottom of the screening form to add another member.

To add another Client to the Household, you must first search for the Client. Use the search form to **Search Client/Applicant**: Look for the Client in the EBO data base. If the Client is not already in EBO, click “Create Member.”



A tab will be created for every new member of the Household. Scroll to the top of the page to view new members’ tabs.

L. Check for Benefits

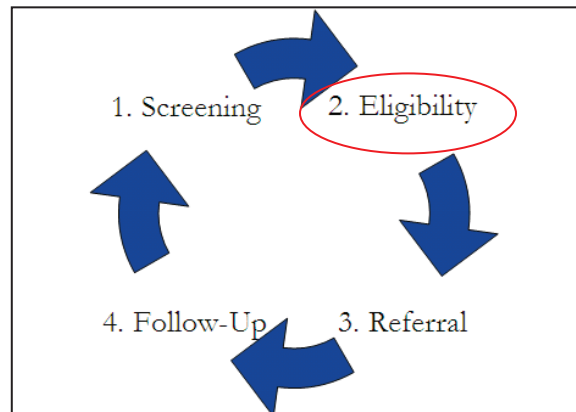
When all Household members have been entered into EBO and questions answered, click “Check for Benefits.”



Heads Up!

EBO estimates eligibility for various benefits based on the information that you enter. The more accurate the information entered, the better the estimation will be. Please make every effort to enter complete and accurate information.

Eligibility



This section of *EarnBenefits* Online reveals your clients' estimated eligibility for multiple benefits.

In this section, you will learn how to interpret the Eligible Benefits Overview page, as well as how to find information about estimated benefit allotments, application procedures, ineligible benefits, and more.

Eligible Benefits Overview Page

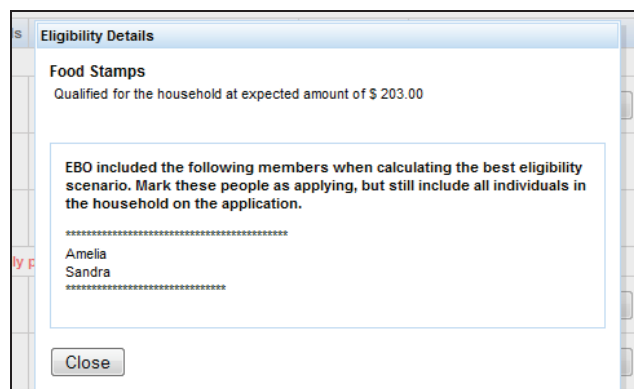
Eligible Benefits Overview

Finn, Huckleberry's household may be eligible for the following benefits.
To see a list of disqualified benefits, please click [here](#).

For help referring your client and printing applications, please read the [EBO Referral Desk Guide](#).

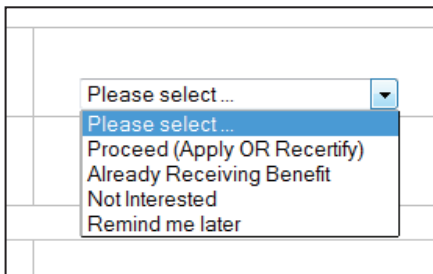
Benefit	Eligibility Details	Referral Status	Latest Referred Provider and Date	Status
		Update Referral Statuses	Print Applications/Take Aways	
Income Supports				
Food Stamps 1.	View 2.	<div style="border: 1px solid black; padding: 2px;"> Please select ... Please select ... Proceed (Apply OR Recertify) Already Receiving Benefit Not Interested Remind me later </div> 3.		5.
Home Energy Assistance Program (HEAP) i	View			×
Health Insurance				
Together Rx Access i	View	Please select ...		×
Other				
Lifeline/Link Up	View	Please select ...		×
		Update Referral Statuses 4.	Print Applications/Take Aways 6.	

- 1. Additional Eligibility Information:** Hover your mouse over the information icon to view additional eligibility requirements that could not be captured in the screening form.
- 2. Eligibility Details:** Displays estimated benefit amounts (if applicable), a list of eligible Household members (if applicable), premium, and/or spenddown amounts.



Eligibility details also contain the individuals included in the benefit calculation, if applicable. In the example above, EBO included Amelia and Sandra in the household when determining the best eligibility scenario for food stamps. Any other household members were excluded.

3. **Referral Status:** Using the dropdown menus, select a referral status for each benefit.



- a. **Already Receiving Benefit:** The client is eligible for the benefit but already receiving.
- b. **Proceed (Apply or Recertify):** Proceed with benefit application and referral for new applications or recertifications.
- c. **Remind me later:** Take no action for now on this benefit, but flag to be investigated later.
- d. **Not Interested:** Decide not to apply for this benefit and take no future action.

4. **Update Referral Statuses:** When a referral status has been selected for each benefit, click 'Update Referral Statuses.' A tab will open for each benefit for which you selected Proceed.

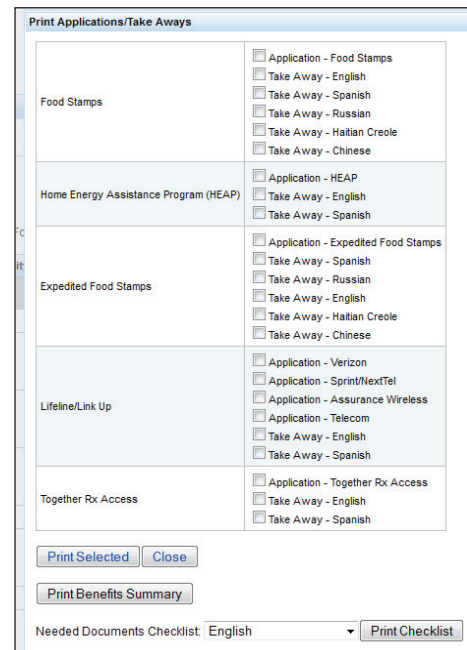
5. **Status Icon:** The status icons represent if the referral process for a particular benefit is complete. A green 'check' will appear if you select 'Already Receiving Benefit,' 'Not Interested,' or 'Remind Me Later.' It will also appear if you successfully complete the referral by selecting a provider and clicking '[Confirm](#).'

Food Stamps	View	Apply	Seamen's Society for Children and Families (SSCF) (Food Stamps POS Program) Oct 3, 2011 14:25 PM	
Home Energy Assistance Program (HEAP)	View	Already Receiving Benefit Update		

6. **Print Applications/Take Aways:** Instead of selecting individual applications and Take Aways to print, you can choose this option to download the applications and Take Aways for several benefits at once. Click 'Print Applications/Take Aways' and you will see the following window (at right). Select all relevant applications and Take Aways and click 'Print Selected.' A pdf will open that includes all materials.

Print Benefits Summary: Click to view a one-page overview of all benefits for which your client is eligible and contact information for all providers to which he/she was referred.

Needed Documents Checklist: Click to view the Needed Documents Checklist in one of five languages.



Disqualified Benefits

You can also view benefits that EBO has disqualified for your clients. Click to view. If you have questions about eligibility or particular Clients who have been disqualified, contact the Helpdesk.

[Finn, Huckleberry](#)'s household may be eligible for the following benefits.
To see a list of disqualified benefits, please click [here](#).

You can refer your client for any disqualified benefits from the Ineligible Benefits Overview table. Referrals for ineligible benefits are very similar to [referrals](#) for eligible benefits. To complete the referral, you must complete a form on the ineligible benefit tab:

You must use [this form](#) to notify Helpdesk why Leonardo Dicaprio is applying for Home Energy Assistance Program (HEAP-NYC) before you can click 'Apply'.

EBO has found Leonardo ineligible for Home Energy Assistance Program (HEAP-NYC). Please tell us why you'd like to refer Leonardo for this benefit.

- Leonardo understands that EBO has found him/her ineligible, but wishes to apply anyway.
- EBO is incorrect. Leonardo should be eligible.
- Other

Please provide an explanation:

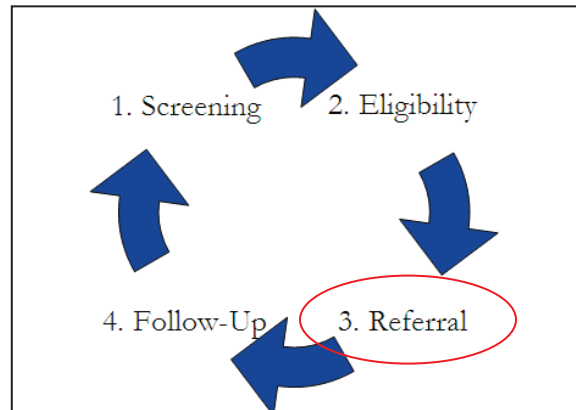
He received the benefit last winter and wanted to apply again this year.



Heads Up!

The *EarnBenefits* Helpdesk investigates all ineligible benefit referrals to ensure that EBO is providing completely accurate screenings. Please provide as much information and as many details as possible when completing this form.

Referrals



This section of *EarnBenefits* Online provides information regarding application processes and providing agencies for benefits, including online applications and state/county social services agencies in your area. It allows you to record referrals to providing agencies.

In this section, you will learn how to view and search for providing agencies, how to view and edit benefits applications, and how to record your progress.

Benefit Tabs

If a client is interested in applying for a particular benefit, select “Proceed (Apply or Recertify)” from the [Eligible Benefits Overview page](#). A new tab will appear for each benefit the client would like to pursue.

Eligible Benefits Overview
Food Stamps
Together Rx Access
Lifeline/Link Up

✖ Incomplete

1. Select a Provider

Here are some recommended providers :

- **Verizon Customer Response Center**
 435 West 50th Street 10th Floor, New York, NY 10019
 Hours :
 Language(s) Spoken :
 Phone : 800-837-4966
 Fax :
 URL :
 Contact Person :
 Contact Position :
 Contact Email :
 Contact Phone :
 Notes : Apply by mail

Select This Provider
- **SafeLink Wireless (NYC)**
 PO Box 220009 , Portland, OR 97269
 Hours :
 Language(s) Spoken :
 Phone : 800-977-3768
 Fax :
 URL : www.safelinkwireless.com
 Contact Person :
 Contact Position :
 Contact Email :
 Contact Phone :
 Notes : Apply online

Select This Provider

----- OR -----

If you want to find other Lifeline/Link Up providers, please enter the address, city, state OR zipcode : Search Providers

2. Application

Application information:

- If your client already has telephone service, he/she should apply with his/her current service provider.
- If your client's telephone provider is not listed, he/she should contact his/her telephone company to find out if they offer Lifeline/Link-Up. If they do not, your company can apply for the benefit with any of the companies listed below. (Cancellation rates may apply.)
- If your client does not already have telephone service, he/she can apply for Lifeline/Link-Up with any of the companies listed. **Please note: rates do vary.**
- Telephone companies that offer Lifeline/Link-Up in this area are listed below.

Applications	Language	Description
Link to Safelink Wireless	Online Application	Click here to apply online! Huzzah!
Link to Assurance	Online Application	Apply online do it now!
Review Telecom Application	English	Mail this application to wherever. BLAH BLAH BLAH.

Take Away

Please select a language : English ▼ View

3. Confirm Referral

Is this a New application, or a Recertification? New ▼

I have reviewed the application (if applicable) and referred the client to a provider. If you select 'Confirm', you can no longer edit the client's screening form.

Confirm

Notes

Note	Written By	Written On
Client has all documentation. Confirmation #987340.	Rosado, SNEAK PREVIEW	2011.10.03 02:40:41 EST

Add Note

1. **Select a Provider:** You must choose a provider where the client can submit their application. Typically, two providers will appear by default: one is closest to the client's address (if entered) and one is closest to your site location.
2. **Applications:** Take note of any instructions related to selecting an application. All available applications will appear in a table in the Application section. Some buttons link to online applications; other buttons will open a pre-populated pdf application.



Heads Up!

EBO can populate a significant number of the questions on benefits' applications, but not all of them. There are some answers, for example, that are not captured during the EBO screening. You and your client should review and complete each benefit application before submitting.

Take Aways: Select a language and click 'View' to preview the Take Away for this benefit.

3. **Confirm Referral:** Select 'Recertification' if you are helping your Client re-check his/her eligibility as part of the recertification process for a particular benefit. All other applications should be marked as 'New.'

Select 'Confirm:' To 'Confirm' means that all applications are ready to print for your client is prepared to apply for the benefit.



Heads Up!

Clicking 'Confirm' will lock a client's profile from being changed until Follow Up is complete and a new Household is created.

4. **Notes:** You can add any notes relevant to the client and/or this benefit. Notes are for internal use; they are not shared or populated elsewhere.

Notes

Add Note

Editing and Saving Applications

EBO allows you to make changes to pre-populated applications. Once these changes have been made, you can save the form to EBO for future access.

1. Once you have reviewed and completed all questions on your client's application, click the red "Save Form" button.
2. A box might appear and ask if you want to allow or block the site. Click "Allow."

LD 55-4826 (Rev. 5/06) **Draft Copy** NEW YORK STATE OFFICE OF TEMPORARY AND DISABILITY ASSISTANCE

FOOD STAMP BENEFITS APPLICATION/RECERTIFICATION

Use this form if Applying For Food Stamp Benefits Only
If you are only applying for Food Stamp Benefits you can use this shorter application. If you would like to apply for other benefits such as Temporary Assistance, Child Care Assistance, Home Energy Assistance or Medicaid please ask for a different application.
This application can only be used to apply for Food Stamp Benefits.

When You Are Applying For Food Stamps Benefits

- You can file an application the same day you receive it. If you are eligible, benefits will be provided back to the filing date of your application.
- You can file your application before you have an interview.
- We must accept your application if, at a minimum, it contains your name, address (if you have one), and a signature. This information will establish your application filing date. However, the application process, including the interview, must be completed and we must interview you for us to determine your eligibility.
- You can apply for and get Food Stamp Benefits for eligible household member(s) even if you or some other members of your household are not eligible for benefits because of immigration status. For example, ineligible alien parents can apply for Food Stamp Benefits for their children and receive benefits for their eligible children.
- You can still apply and be eligible for Food Stamp Benefits even if you have reached your Temporary Assistance time limits.

Need Food Stamp Benefits Right Away?
You May Be Eligible For Expedited Processing of your Food Stamp Benefits Application.

If your household has little or no income or liquid resources, or if your rent and utility expenses are more than your income and liquid resources, or you are a migrant or seasonal farmworker with little or no income or resources when you apply, you may be qualified to receive Food Stamp Benefits within 5 calendar days after the date that you apply for benefits. Your worker will always review your circumstances to see if you are qualified for expedited processing of your Food Stamp Benefits application. A process is in place to issue Food Stamp Benefits to all eligible households who meet the standards for expedited service.

Where You Can Apply For Food Stamp Benefits

If you live outside of New York City, call or visit your local department of social services in the county where you live and ask for an application package. You can get the address and phone number by calling toll free 1-800-342-3009.

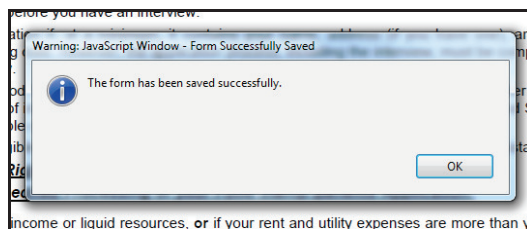
If you live in New York City and you are not also applying for Temporary Assistance, call or visit any Food Stamp Benefits Office and ask for an application package. You can get the address and phone number by calling 1-877-472-8411 or toll free 1-800-342-3009.

Having Problems Coming To Us For A Food Stamp Benefits Appointment?

If it is difficult for you to come in for a Food Stamp Benefits application appointment (reasons may include employment, health issues, or child care problems), you may have someone else apply for you. You also can mail us your application or drop it off and, in some circumstances, we can interview you by telephone.

Please contact your local department of social services if you have any questions, to see if you are eligible for a telephone interview, or if you need to reschedule an interview.

3. When the application has been saved successfully, a message will appear to confirm:



4. A grey box will pop up asking you if you want to save the application. (This would save it to your desktop, not to the EBO). Click "No."
5. You will now be able to access the updated application in EBO at any time.



Heads Up!

A 'Draft' watermark appears on all applications until the Household has been locked. Do NOT print applications before the Household is locked.

Services

Services are programs or benefits for which EBO does not check eligibility. To view available services, click on “View Services” from the Client Profile Page.

- **Please note:** There may not be Services available in your locality at this time.

Active Household

Household Created Date: Jan 25, 2011

Your latest screening (Active Household) is locked - however, in order to start a NEW screening you must complete the follow up with your client

[View Eligible Benefits](#) :: [View Follow-Up](#) : [View Services](#)

Contact Information

Address : **915 Broadway 10, New York, NY, 10010**

Phone(s) : **(917)338-9252**

Email :

1. Select the appropriate service from the drop down menu.
2. Once selected, click **Add Service**.
3. Fill out the form and give your Client all necessary info. Any available applications and Take Aways will be available for download on this page.

Choose a service from the menu for [Kate Earl](#), and click Add Legal Services Referral Add Service

Legal Services Referral

Is a member of Kate Earl's household facing a legal issue for which they need assistance? Yes No

The following are examples of legal issues for each category :

- Housing--issues on eviction, housing court, issues you may have with your apartment.
- Benefits--were you denied a benefit unfairly? Do you want to challenge a benefit amount?
- Immigration--are you having issues about being a legal resident? Would you like to know your rights regardless of citizenship status?
- Family issues--are you having issues with domestic violence, child support, or family counseling?
- Ex-offender --are you having issues with gaining employment because of your ex-offender status?
- Or other--do you have a question that you feel a lawyer could better answer?

What is the legal issue related to? Housing

Is this a legal housing emergency and therefore Kate Earl's household cannot wait until the next available on-site appointment? Yes No

Go to the Public Folders Calendar in Outlook and open the 'Legal Single Stop Services' Calendar. Set up 30 minutes appointment. Note the customer's first and last name and phone number in the appointment on the calendar. Also put your initials in parentheses.

Enter the date of Kate Earl's Legal Services Appointment (mm/dd/yyyy)

Enter the time of Kate Earl's Legal Services Appointment (e.g. 10AM)

Apply for the service : [Update](#)

Enrollment Status : [Update](#)

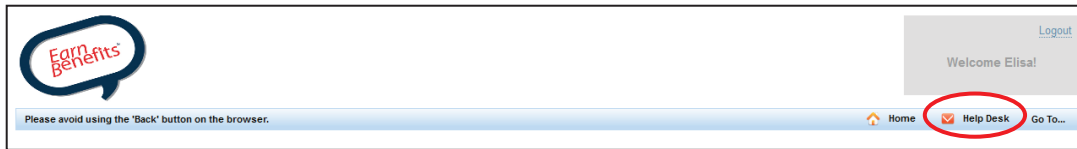
Remove Service Print Form

Help & Support

There are many ways to find assistance while you work with your clients. In this section, you will find information on the EBO Helpdesk, Documents Library, and EBO's FAQ section.

Helpdesk

If you need to communicate with the *Earn*Benefits Online Helpdesk regarding problems or questions, do so via the Helpdesk Request Form. In the upper right hand corner of all pages in EBO, there is a link to the Helpdesk Request form:



Please fill out the form as completely as possible. Provide information regarding the difficulty that you are having, including the client's name (if you were working with a particular client when the question or problem arose).

Your Telephone Number:	<input type="text"/>
Subject:	<input type="text"/>
Category:	<input type="text" value="Please select ..."/>
Client Name:	<input type="text"/>
Client DOB (mm/dd/yyyy):	<input type="text"/>
Description:	<input type="text"/>
<p><small>Please do not enter entire Social Security Numbers in this form. If you are requesting a change to a client's SSN, please hide some of the digits using X. For example, if the first two digits of your client's SSN were entered incorrectly, enter the correct and incorrect numbers in the following format: 12X-XX-XXXX.</small></p>	
<input type="button" value="Submit"/>	

Please fill out:

- **Telephone number:** If a Helpdesk staff member needs to reach you immediately regarding your problem, please enter the telephone number where you can best be reached (including your extension, if applicable).
- **Subject:** This field is optional.
- **Category:** This field is optional. Options include Error Message, Correct Client Info, Change Referral Status, Change Follow Up Status, Client Eligibility, Applications/Take Aways, and Miscellaneous.
- **Client Name:** Please include if the question/problem is related to a particular client.
- **Client DOB:** Please include if the question/problem is related to a particular client.
- **Description:** Please include a thorough description of the problem or question as well as what point in the screening you encountered the issue. The more completely

and clearly you can describe the problem or question, the more quickly Helpdesk staff will be able to assist you.

Heads Up!

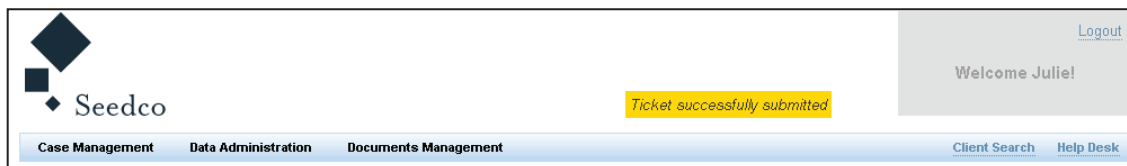


Do not enter entire Social Security Numbers in this form. If you are requesting a change to a client's SSN, please hide some of the digits using X.

For example:

“I entered my client’s SSN incorrectly. It currently reads xxx-xx-xx23. The correct SSN is xxx-xx-xx32.”

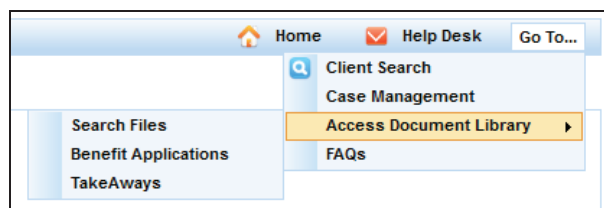
When you have completed the form, click submit. You will see a note to confirm that your request has been successfully submitted:



A Helpdesk staff member will contact you as soon as possible via email or phone regarding the issue.

Documents Library

The Documents Library contains downloadable resources including Video Tutorials, the most recent EBO User Guide, cheat sheets and desk guides, materials in additional languages, blank applications, and more. To access the Document Library, hover your mouse over the ‘Go To...’ menu and select ‘Access Document Library.’



To view available resources, select ‘Search Files.’ From the dropdown menu that appears, you can select ‘EarnBenefits General’ to find all available training materials.

Materials specific to each location can also be found in folders named for each state:

Search Files

EarnBenefits General/

== select from existing folders ==

- EarnBenefits General/
- EarnBenefits Reports/
- EarnBenefits Training/
- EBO Connecticut/
- EBO Georgia/
- EBO Georgia/Health Care Reform Information/
- EBO Illinois/
- EBO Kentucky/
- EBO Maryland/
- EBO Massachusetts/
- EBO New York/
- EBO Tennessee/
- EBO Washington/

File Notes	Document Number
Added 8-9-2011	175
Info & instructions installing intended web browsers for EBO.	142
Added 10.6.2011	208
Suggestions for improving your computer's performance	134
Detailed instructions on how to properly refer clients for benefits	72
Visual guide for screening & following up with clients	5
Uploaded 7-27-2011	169

FAQ

For Frequently Asked Questions, select 'FAQ' from the 'Go To...' menu. A popup window will open, allowing you to find answers and continue your work. You can browse through the available categories of questions or search for terms related to your question.

Frequently Asked Questions

Frequently Asked Questions

Search

Display All Questions

To use this FAQ, find your question under one of the categories below. Clicking on a question will take you to the answer within this document. You may also scroll through this document and read each answer one-by-one. If you don't find the answer to your question in this FAQ, please contact the Helpdesk

Top Ten

- [How do I calculate a client's gross monthly income?](#)
- [I clicked "Check for Benefits" but nothing happened. What do I do?](#)
- [Are there any "cheat sheets" or guides to that can help me use EBO more efficiently?](#)
- [I just screened my client, but what am I supposed to do when I reach the Eligible Benefit Overview?](#)
- [I'm having trouble connecting to EBO. Or I'm connected, but EBO is running very slowly. What can I do?](#)
- [What do I do if I cannot find my client in the system?](#)
- [What is the Follow-Up List for Benefits used for?](#)
- [Where do I enter a child's expenses and income \(e.g. child support, foster care, etc.\)?](#)
- [Where is the Document Library?](#)
- [Which web browsers does EBO support?](#)

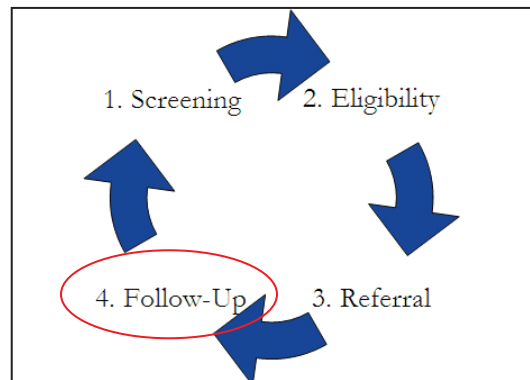
General Questions

- [When is the next Helpdesk webinar?](#)
- [Are there any "cheat sheets" or guides to that can help me use EBO more efficiently?](#)
- [Where is the Document Library?](#)
- [Which web browsers does EBO support?](#)
- [How accurate are EBO screenings?](#)

Troubleshoot 101

- [I clicked "Check for Benefits" but nothing happened. What do I do?](#)
- [I'm having trouble connecting to EBO. Or I'm connected, but EBO is running very slowly. What can I do?](#)
- [What do I do if I cannot find my client in the system?](#)
- [What do I do if I entered my Client's name, date of birth, or Social Security Number incorrectly?](#)
- [How do I change other client info after the HH is locked?](#)

Follow Up



This section of *EarnBenefits* Online allows you to track the status of Clients' applications as well as any case management conducted after the screening is complete.

In this section, you will learn how to generate lists of past clients, enter Follow Up statuses for referred benefits, create new Households using past Household information, and view historical Household information.

Case Management

The Case Management tools allow you to manage your caseload by selecting lists of referred Clients filtered by specific benefits, specific users, and a date range. **You can use these lists to conduct Follow Up**, linking directly from generated lists to Client Follow Up pages.

Getting Started:

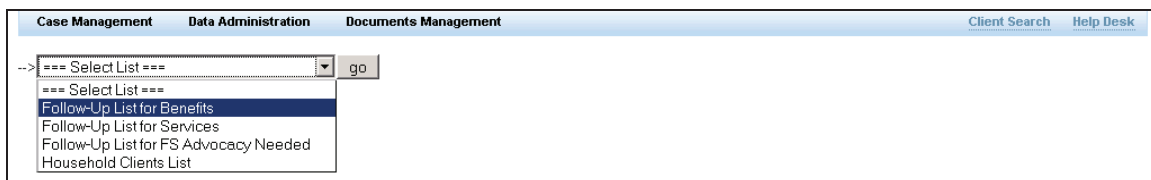
1. Place the cursor over the **Case Management** link at the left of your screen, and click on **Case Load** when it appears.
2. Select either **Household Client List** or **Follow Up List** from the drop down menu.
3. Click “Go”

There are various ways to sort or search for your clients.

- 1) Follow Up List for Benefits: Provides an alphabetical list of all Clients (in Active Households) that were referred for or interested in a particular benefit within a certain date range.

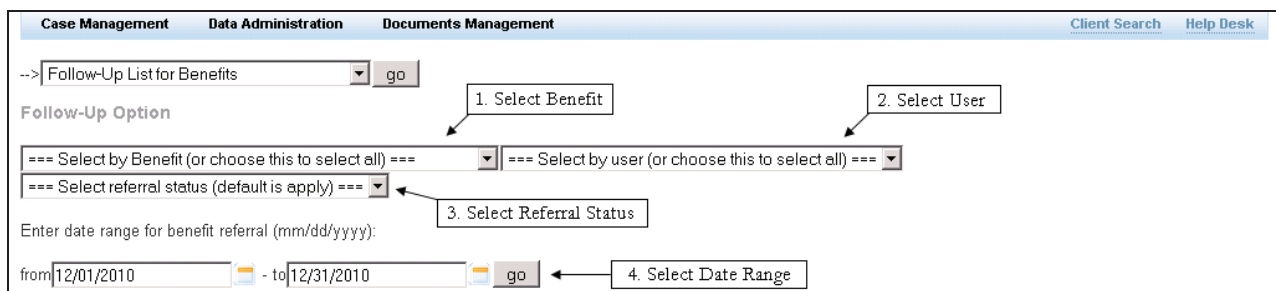
For example, if you’d like to see a list of all Clients who applied for SNAP in the month of September, you can use the Case Management tools to search by benefit.

- When you have entered the Case Management tool by following the steps outlined above, you will see the following dropdown menu:



The screenshot shows the Case Management interface with a dropdown menu open. The menu options are: "Follow-Up List for Benefits", "Follow-Up List for Services", "Follow-Up List for FS Advocacy Needed", and "Household Clients List". The "Follow-Up List for Benefits" option is highlighted.

- Select “Follow Up List for Benefits.” Click “Go.”
- You will see the following menus:



The screenshot shows the Case Management search filters. The "Follow-Up List for Benefits" is selected in the main dropdown. Below it, there are four numbered callouts: 1. Select Benefit (pointing to the "Select by Benefit" dropdown), 2. Select User (pointing to the "Select by user" dropdown), 3. Select Referral Status (pointing to the "Select referral status" dropdown), and 4. Select Date Range (pointing to the date range input fields). The date range is set from 12/01/2010 to 12/31/2010.

- Filter according to:
 1. **Benefit** – Select a specific benefit from the drop down menu to see a list of Clients who have been referred for it. To see Clients who have applied for all benefits during the selected date range, leave the default option.

2. **User** – Select your name if you'd like to see only Clients that you screened within the selected date range. To see Clients in Households created by all users at your site, leave the default option.
3. **Referral Status** – Select a specific referral status from the drop down menu to see a list of Clients with the corresponding status under the Next Step column in the Benefits Overview page. Please note the default option for this filter is 'Apply.'
4. **Date** – Select a date range. The list will include all Households between the two dates that you select.

You will receive results that look like the following:

Follow-Up Option

Food Stamps === Select by user (or choose this to select all) ===

=== Select referral status (default is apply) ===

Enter date range for benefit referral (mm/dd/yyyy):

from 10/01/2010 - to 12/30/2010 go

1. Click on the Applicant name to view his/her Client Profile.

2. Click 'View Applicant Follow-Up' to go directly to his/her Follow-Up page.

Food Stamps

Applicant Name	Qualified Member	Phone	CBO	Last Referral Date	Latest Enrollment Status	User Created	Follow-up Page
Claus, Santa	Household		SeedcoNYC	Dec 23, 2010	Pending	NewYork, SeedcoNy	View Applicant Follow-Up
Cyrus, Billy	Household		SeedcoNYC	Dec 9, 2010		NewYork, SeedcoNy	View Applicant Follow-Up
Finn, Huckleberry	Household		SeedcoNYC	Dec 23, 2010		NewYork, SeedcoNy	View Applicant Follow-Up
Gable, Clark	Household		SeedcoNYC	Dec 23, 2010	Pending	NewYork, SeedcoNy	View Applicant Follow-Up

On this page, you will find:

- a. Applicant Name: A link to the Applicant's Client Profile Page (#1).
- b. Qualified Member: Information regarding the benefit qualification. If the entire household was eligible for the benefit, it will be listed as such. If one individual was eligible for the benefit, the member's name will appear.
- c. Phone: A telephone number for the Household, if available.
- d. CBO: The Community Based Organization that made the referral for the most recent Household.
- e. Last Referral Date: The most recent date when an EBO Counselor referred (i.e., clicked 'Apply') the Client for the selected benefit.
- f. Latest Enrollment Status: If a Follow Up status has been entered for a client, it will be shown here.
- g. User Created: The name of the EBO Counselor that completed the most recent referral.
- h. Follow Up Page: A link to the Client Follow Up Page (#2).

2) Household Client List: Provides an alphabetical list of all Clients screened by your site (or a particular EBO Counselor) within a certain date range.

For example, if you'd like to see a list of all clients that you screened in the month of September, you can use the Case Management tools to search by benefit.

- On the Case Management drop-down menu (see figure above), select “Household Clients List.” Click “Go.”
- You will see the following menus:

- Filter according to:
 - User** – Select a specific user from the drop down menu to see a list of Clients created by that user within the selected date range. To see Clients in Households created by all users at your site, leave the default option.
 - Date** – Select a date range. The list will include all Households created between the two dates that you select.
 - Be aware that the larger the date range you select, the longer EBO will take to generate the list. We recommend pulling data in one month increments to prevent the system from timing you out.

You will receive the following results:

Active Household Option

Quendo, Mirtha

Enter date range for active households created (mm/dd/yyyy):
 from 01/01/2010 - to 02/28/2010 go

Client Name	Phone	DOB	CBO	SSN	User Created	Active Household Date Created
Castro, Christopher S	(212)876-2007	May 28, 1985	SeedcoNYC	***-**-6864	Quendo, Mirtha	Jan 7, 2010
Kissi, Abigail	(347)431-1536	Oct 3, 1988	SeedcoNYC	N/A	Quendo, Mirtha	Jan 12, 2010
Kissi, Damien	(347)431-1536	Jul 17, 2007	SeedcoNYC	***-**-0533	Quendo, Mirtha	Jan 12, 2010
Kissi, Michael	(347)431-1536	Jul 31, 1978	SeedcoNYC	***-**-8242	Quendo, Mirtha	Jan 12, 2010
Kissi, Michael	(347)431-1536	Aug 22, 2008	SeedcoNYC	***-**-1433	Quendo, Mirtha	Jan 12, 2010
Sun, Cui Lian	(718)461-8483	Oct 18, 1933	SeedcoNYC	***-**-8895	Quendo, Mirtha	Jan 15, 2010

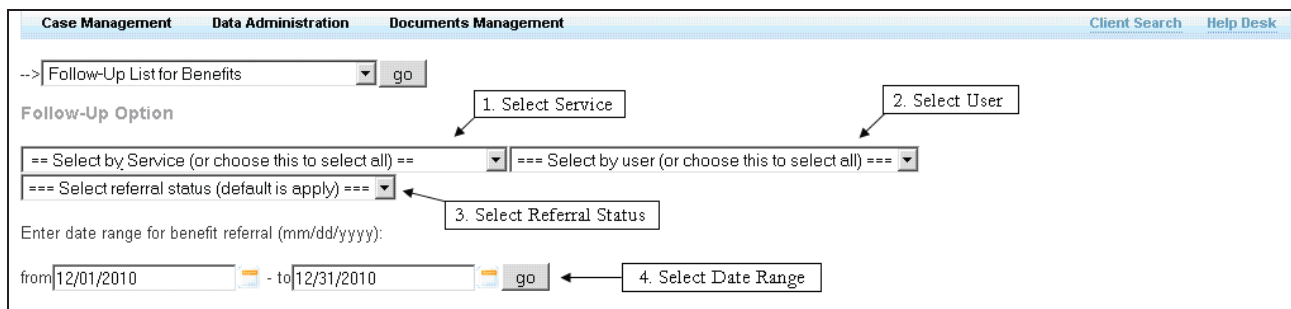
On this page, you will find:

- a. Client name: A link to the Client Profile Page (#1).
- b. Phone: A telephone number for the Household, if available.
- c. DOB: The Client's DOB
- d. CBO: The Community Based Organization that created the most recent Household.
- e. SSN: The last four digits of the Client's SSN (if applicable).
- f. User Created: The name of the EBO Counselor that completed the most recent screening.
- g. Active Household Created Date: The date when the most recent Household (the 'Active Household') was created.

4) Follow Up List for Services: Provides an alphabetical list of all Clients (in Active Households) that were referred for or interested in a particular service within a certain date range.

Note: **Services are not available in all localities.**

To find a list of clients that have been referred for a particular service, use the following menus:



The screenshot shows a web application interface for searching clients. At the top, there are navigation tabs: 'Case Management', 'Data Administration', and 'Documents Management'. On the right, there are links for 'Client Search' and 'Help Desk'. Below the navigation, there is a search bar with the text 'Follow-Up List for Benefits' and a 'go' button. Underneath, the section is titled 'Follow-Up Option'. There are four numbered callouts pointing to specific elements: 1. 'Select Service' points to a dropdown menu with the text '== Select by Service (or choose this to select all) =='. 2. 'Select User' points to another dropdown menu with the text '=== Select by user (or choose this to select all) ==='. 3. 'Select Referral Status' points to a dropdown menu with the text '=== Select referral status (default is apply) ==='. 4. 'Select Date Range' points to a date range input field with the text 'Enter date range for benefit referral (mm/dd/yyyy):' and a 'go' button. The date range is currently set to 'from 12/01/2010 - to 12/31/2010'.

- Filter according to:
 1. **Service** – Select a specific Service from the drop down menu to see a list of Clients who have applied. To see Clients who have applied for all Services during the selected date range, leave the default option.
 2. **User** – Select a specific user from the drop down menu to see a list of Clients created by that user within the selected date range. To see Clients in Households created by all users at your site, leave the default option.
 3. **Referral Status** – Select a specific referral status from the drop down menu to see a list of Clients with the corresponding status under the Next Step column in the Benefits Overview page. Please note the default option for this filter is 'Apply.'
 4. **Date** – Select a date range. The list will include all Households referred for the Services within the date range that you select.

The list generated functions in the same way as the [“Search by Benefit”](#) feature.

Entering a Follow Up Status

To access a Client's Follow Up Page:

1. Follow the steps outlined in pages 33-35 to search for your Client, **or**
2. Click "Client Search" and enter your Client's name, SSN, or DOB.
 - o **Remember:** You can use a partial search to find your client. For example, if you are uncertain of the spelling of a Client's first name, you can enter "A Jones" to find all Clients whose first names start with or contain 'A' and whose last names are Jones.
3. Click on the Client's name to view his/her Profile Page.

First Name : Clark	Last Name : Gable
SSN : 846-84-5563	DOB : Apr 17, 1979
Gender : Male	Ethnicity : Multiracial
1. Click to view Client's Eligible Benefits Overview Page	
Active Household	
Household Created Date: Dec 15, 2010	2. Click to view Follow-Up Page
Your latest screening (Active Household) is locked - however, in order to start a NEW screening you must complete the follow up with your client	
View Eligible Benefits	View Follow-Up
View Services	
Personal Information	
Marital Status : Married	Spouse in the household : Gable, Greta
Tax Filing Status : Married Filing Jointly	Citizenship : LPR (Legal Permanent Resident)
Date Received Green Card : Sep 7, 1988	Qualified Working Quarters : 0
Date Entered US :	Program Violation:
Student : Yes	Highest Grade Completed : Some College(No Degree)




1. **View Eligible Benefits:** After searching for an existing Client, you can return to the Eligible Benefits Overview Page by clicking here.
2. **View Follow Up:** Click here to view the Client's Follow Up Page where you can enter the status of client applications (e.g. Pending, Benefit Received, Application Denied).

The Follow Up Page:

Update Latest Enrollment Statuses


Applicant Name: [Clemente, Maria](#)
 Maria's Preferred Language : Spanish
 Address :915 Broadway Apt. 16, New York, NY, 10010
 Phone(s) : (800)411-2291
 Email :

Eligible Benefits

Benefit Category	Benefit Type	Beneficiary	Latest Screening Date	Latest Enrollment Status 	Amount Actually Received	Benefit Status Date	Status
Income Supports							
	Food Stamps	Household	08/31/2011	Recertification	\$ 316.0	08/31/2011	
Other							
	Lifeline/Link Up	Household	08/31/2011	Pending		08/31/2011	

Ineligible Benefits

If any of the ineligible benefits listed below have been received, then you must complete the explanation form to finish closing the household.

Benefit Category	Benefit Type	Beneficiary	Latest Screening Date	Latest Enrollment Status 	Amount Actually Received	Benefit Status Date	Status
<input type="button" value="Update Benefit Statuses For Disqualified Benefits"/>							

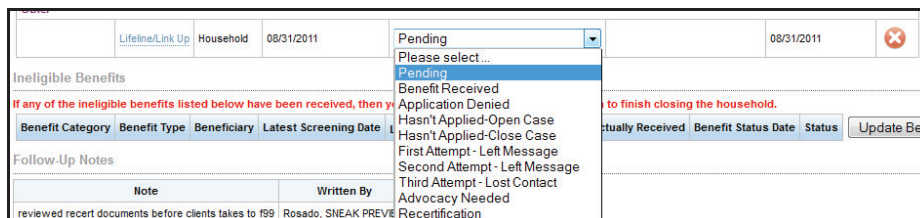
Follow-Up Notes

The Follow Up Page includes:

1. Benefit Type: A list of all benefits for which the client was referred (i.e. you clicked 'Confirm.')
2. Beneficiary: The recipient for each benefit. Some benefits are Household-level benefits (such as SNAP/food stamps, where an entire household is typically included in the same case and receives the benefit together). Other benefits are received by individuals.
3. Latest Screening Date: The most recent date the household was screened.
4. Latest Enrollment Status: If the benefit enrollment status has been updated by an EBO Counselor, the status is reflected here.
5. Amount Actually Received: For benefits for which there is a monetary value, it can be tracked here.
6. Benefit Status Date: When an enrollment status is updated, a timestamp is automatically entered here.

To update an enrollment status:

Select an enrollment status for all relevant benefits:



Select from the following options:

- a. **Pending:** Client is still waiting to hear a decision on their submitted application.
- b. **Benefit Received:** Client received the benefit.
- c. **Application Denied:** Client's application was rejected.
- d. **Hasn't Applied-Open Case:** Client hasn't applied but still intends to do so.
- e. **Hasn't Applied-Close Case:** Client hasn't applied and doesn't intend to.
- f. **First/Second Attempt-Left Message:** Allows you to track attempts to reach your Client.
- g. **Third Attempt-Lost Contact:** Client cannot be reached.
- h. **Advocacy Needed:** This status serves to note that a Client is having difficulty with the enrollment process for a particular benefit.
- i. **Recertification:** Your Client successfully recertified for a benefit they were already receiving, and he/she continues to receive the benefit.

Certain enrollment statuses indicate that the previous screening and enrollment process is complete. These 'Final Enrollment Statuses' allow you to 'close' the Household. When all of the benefits are completed, you can create a new Household and re-screen for benefits.



Final Enrollment Statuses:

- Benefit Received
- Application Denied
- Hasn't Applied – Close Case
- Third Attempt – Lost Contact
- Recertification

When you have selected an enrollment status for all applicable benefits, click 'Update Benefit Statuses for Qualified Benefits.'

Making Changes to Household Composition

EarnBenefits Online maintains a record of screenings and enrollments for clients over time. An existing client may need to be screened by an *EarnBenefits* Counselor again if his/her circumstances have changed or if he/she needs to recertify for benefits.

For example, perhaps your Client has lost their job, so you need to screen their Household without that source of income. Maybe the child in a particular Household moves out and now needs to be screened as a Household of one. EBO can help you manage all of these situations, without having to re-enter any information other than that which has changed.

Getting Started:

A Client can only be in one Active Household at a time. In other words, a client cannot be a part of a new household if he/she has any open or unresolved applications listed in EBO. To create a new screening using existing Clients:

- Complete the Follow Up process for the Active Household.
- Each benefit for which he/she applied must be closed with a final enrollment status.

When the Follow Up process has been completed and a final enrollment status entered for all relevant benefits, you can create a new Household using the previous Household's information.

- **Open the Client's Profile Page** by searching for the Client or using the Case Management tools. At the top of the Client Profile Page, you'll see a message that reads as follows:

First Name : **Clark** Last Name : **Gable**
SSN : **846-84-5563** DOB : **Apr 17, 1979**
Gender : **Male** Ethnicity : **Multiracial**

Active Household

Household Created Date: Dec 15, 2010

Your latest screening (Active Household) is locked - and a follow up was completed.

If you want to start a NEW screening with the SAME household members [Click here](#) # 1

If you want to start a NEW screening with ONLY Gable, Clark in the household [Click Here](#) # 2

[View Eligible Benefits](#) :: [View Follow-Up](#) :: [View Services](#) :: [View Log](#)

There are various ways to create a new Household using existing Client information:

1. **Create a New Household with the Same Members:** Creates a new Household by duplicating the previous Household’s information including household composition, income, resources, contact information, etc.
 - This is the best method if some or most Household information is unchanged.

Click “**If you want to start a new screening with the SAME household members, [Click here](#)**” (see #1 in screenshot).

2. **Create a New Household with Only the Applicant:** Creates a new Household that will contain only the Applicant of the previous Household.

Click “**If you want to start a new screening with ONLY [Gable, Clark] in the household, [Click here](#)**” (see #2 in above screenshot).

3. **Create a New Household with a Different Applicant:** Creates a new Household using a different Household member as the Applicant

Start by viewing the new Applicant’s Profile Page. You can find this by searching for the Client, using the Case Management tools, or from the previous Applicant’s Profile Page.

For example, if Clark Gable’s wife, Greta Gable, moves into a different house and needs to apply for benefits for herself, you can begin by viewing Clark’s profile page:

Clicking on her name will take you to her Client Profile Page, where you will find a link to create a Household with only Greta.

Household Membership and Benefits	
Household Members	Relationship to Applicant
Gable, Clark	Applicant
Gable, Greta	Spouse
Gable, Doris	Child
Bone, Ham	NephewNiece
Tenant, Joe	Friend

At the top of the Client’s Profile Page, you’ll see two options:

Your latest screening (Active Household) is locked - and a follow up was completed.

If you want to start a NEW screening with the SAME household members [Click here](#)

If you want to start a NEW screening with ONLY Gable, Greta in the household [Click Here](#)

Click to use only the new Applicant in the household, as it will then allow her to be the new Applicant.

- You can add any other Household members by clicking “add Household member” within the new screening. Search for the children/family members using their name, DOB, or SSN (if available).
- If he/she was in the old Household, you can easily add the existing Client to the New Household. After searching for the existing client, you will see the following window:

Lookup New Member

First Name:

Last Name:

Date of birth (mm/dd/yyyy):

SSN:

Please select a client

Client Name	DOB	Current Active CBO	SSN
Fana, Baby	Aug 6, 2010		N/A

Click on the Client’s name to add him/her to the new Household. Update any information (income, address, etc.) and add any other household members.

REMEMBER:



If you create a new Household with only one member of the previous Household, only information specific to that Client will be copied. For example, in the example above, information related to Greta’s citizenship status, DOB, income, and resources will be copied, but not information regarding the Household’s previous address or rent amount.

Historical Households

In Clark Gable's profile (below), you can see that there is an Active Household tab as well as a number of other tabs to the right. These additional tabs represent all historical Households for a given Client. The date on each tab indicates when the Household was created.

First Name : Clark	Last Name : Gable
SSN : 846-84-5563	DOB : Apr 17, 1979
Gender : Male	Ethnicity : Multiracial
<hr/>	
Active Household 2009-03-06 2009-02-06 2009-01-26	
<hr/>	
Household Created Date: Dec 15, 2010	
<hr/>	
Your latest screening (Active Household) is locked - and a follow up was completed.	
If you want to start a NEW screening with the SAME household members Click here	
If you want to start a NEW screening with ONLY Gable, Clark in the household Click Here	
<hr/>	
View Eligible Benefits :: View Follow-Up :: View Services :: View Log	

CASE STUDIES

Client Case Study Exercise #1

Please note: Some information for your location may be missing.

Part I: Screening

Amelia is the mother of a young girl. She has an appointment scheduled with you, an EarnBenefits Counselor, to find out if there are benefits or services that might help her make ends meet.

Amelia works approximately 35 hours per week at \$9.50/hour. She shows you her last paycheck: her take-home (net) pay was \$505, and before taxes (gross), it was \$665. She is paid bi-weekly.

She is a Legal Permanent Resident. She received her Green Card on May 5, 2007. She has worked (and paid taxes) in the United States for the past two and a half years. Before she received her Green Card, she was not living in the United States.

She is not pregnant. Her daughter, Sandra, was born in the United States in 2008. No one else can claim Sandra or Amelia as dependents.

They already receive SNAP (food stamps), in the amount of \$90 per month. They do not receive any other benefits, including health insurance. Amelia has \$350 in a checking account; Sandra has no income or assets.

Other Miscellaneous Information:

Name: Amelia [your last name]
SSN: XXX-XX-XXXX (Create a false SSN)
DOB: XX/XX/XXXX (Create a false DOB)
Gender: Female
Ethnicity: Hispanic
Marital Status: Divorced
Veterans: None
Students: None
Disabled or Blind: None
Child Support Received: None
Address: 2511 Main St, Apt. 4R
City: Your city
Zip code: Your zip code
Daytime Phone (Work): 555-555-8569
Evening Phone (Home): None
Email: None
Last year's gross income: \$17,000
Last year's tax refund: \$1,115
Leaseholder: Amelia

Expense	Amount
Rent	\$650
Electric (Non-heat)	\$100
Gas (Heat)	\$140
Telephone	\$40
Food	\$300
Transportation	\$50
Childcare	\$380
Medical Expenses	\$0
Child Support	\$0
Alimony	\$0
Total Expenses	\$1,660



You must complete Referrals and Follow-up (see the next page) for successful completion.

Part II: Eligibility

Questions to consider:

1. What benefits are Amelia and her daughter eligible for?
2. How much should their monthly SNAP (food stamps) allotment be?
3. What benefits (if any) does Amelia NOT qualify for?
 - a. Why would they have been disqualified from those benefits, if any?

Part III: Referral

1. Amelia and her daughter already receive SNAP.
2. She would like to apply for health insurance for both her daughter & herself. (Depending on your location, this might involve referring for more than one benefit.)

Part IV: Enrollment/Follow Up

Amelia and her daughter call you six weeks after their applications were submitted. She successfully received all benefits.

Part I: Re-Screening (For re-certification or if circumstances change)

Six months later, Amelia comes back in for assistance in re-certifying for SNAP (food stamps). Her Household, expenses, and income are the same, except her child care costs have been raised to \$400 per month.

Questions to consider:

1. Is Amelia still eligible for SNAP? In what amount?

Complete the screening, eligibility, and referral processes for Amelia's SNAP re-screening.

Client Case Study Exercise #2

Please note: Some information may be missing.

Part I: Screening

Samuel is an unemployed adult taking care of his four-year-old nephew. He has an appointment scheduled with you, an *EarnBenefits* Counselor, to find out if there are benefits or services that might support him and his nephew.

Samuel started receiving unemployment on April 5, 2010. He receives \$249 per week; no taxes are withheld. He does, however, pay child support for a child that does not live with him. Every week, \$45 is withheld from his Unemployment for the child support.

Samuel is a U.S. Citizen. His nephew, Robert, is also a U.S. Citizen. Robert is disabled, and receives \$467 per month in SSI. Samuel is claiming Robert as a dependent, but he has not been legally adopted. No one else can claim Samuel or Robert as dependents.

They live in public housing. Robert has health insurance through Medicaid, but Samuel doesn't have health insurance. They do not receive any other benefits. Samuel has a checking account but it is empty.

Expense	Amount
Rent	\$225
Electric	\$29
Gas (Heat)	\$60
Telephone	\$35
Food	\$420
Transportation	\$0
Childcare	\$0
Medical expenses (for Robert)	\$55
Child Support	\$180
Alimony	\$0
Total Expenses	\$1,004

Other Miscellaneous Information:

Name: Samuel [your last name]
SSN: XXX-XX-XXXX (Create a false SSN)
DOB: XX/XX/XXXX (Create a false DOB)
Gender: Male
Ethnicity: White
Marital Status: Single, never married
Veterans: None
Students: None
Disabled or Blind: Robert
Protective or Preventative Services: None
Child Support Received: None
Address: 79 Seventh Ave., Apt. 409
City: Your city
Zip code: Your zip code
Daytime Phone (Work): 555-645-4123
Evening Phone (Home): None
Email: None
Last year's gross income: \$40,000
Leaseholder: Samuel



You must complete Referrals and Follow-up (see the next page) for successful completion.

Part II: Eligibility

Questions to consider:

1. What benefits are Samuel and his nephew eligible for?
2. How much should their monthly SNAP (food stamps) allotment be?
3. What benefits (if any) does Samuel NOT qualify for?
 - b. Why might they have been disqualified?

Part III: Referral

1. Samuel and his nephew would like to apply for SNAP.
2. He would like to apply his nephew for WIC.

Part IV: Enrollment/Follow Up

You call Samuel six weeks after their applications were submitted. He tells you that he was approved for SNAP, in the amount of \$149 per month. He was also approved for all other benefits.

Part I: Re-Screening (for re-certification or changes in circumstances)

Eight months later, Samuel comes in for another appointment. His nephew has moved out of his Household. He would like to find out if he still qualifies for utility assistance, and would like to find out how to apply.

Questions to consider:

1. Is Samuel still eligible for assistance?

Complete the screening, eligibility, referral, and re-screening processes for Samuel.

Client Case Study Exercise #3

Please note: Some information may be missing.

Part I: Screening

Arthur is a 55-year-old man living with his girlfriend. He has an appointment scheduled with you, an *EarnBenefits* Counselor, to find out if there are benefits or services that might be available to him. He is not married to his girlfriend, but they would like to apply for benefits together.

Arthur is a U.S. Citizen. He is disabled and does not work; he receives SSI in the amount of \$697 per month. He has no other income. He has no assets. He did not work last year. Other than SSI, he and his girlfriend do not receive any benefits.

His girlfriend, Pamela, is 50 years old and works part-time. She works 15 hours every week and makes \$10.00 per hour. She is White; she is a U.S. Citizen. She is not pregnant and has never been married. Last year, she earned \$22,000 (before taxes). She has a checking account with approximately \$100 and a savings account with \$2,000.

Arthur and Pamela share all household expenses, including food, but the lease and utility bills are in her name.

Other Miscellaneous Information:

Expense	Arthur's Amount	Pamela's Amount
Rent	\$200	\$800
Electric (Heat)	\$60	\$60
Gas (Non-Heat)	\$15	\$15
Telephone	\$45	\$35
Food	\$150	\$150
Transportation	\$80	\$125
Childcare	\$0	\$0
Medical expenses	\$90	\$0
Child Support	\$0	\$0
Alimony	\$0	\$0
Total Expenses	\$640	\$1,185

Name: Arthur [your last name]
SSN: XXX-XX-XXXX (Create a false SSN)
DOB: X/XX/XXXX (Create a false DOB)
Gender: Male
Ethnicity: White
Marital Status: Single, never married
Veterans: None
Students: None
Disabled or Blind: Yes, Arthur
Protective or Preventative Services: None
Child Support Received: None
Address: 702 Green St.
City: Your city
Zip code: Your zip code
Daytime Phone (Work): 555-216-6825
Evening Phone (Home): None
Email: arthur@wolf.com
Last year's gross income: \$8,280
Last year's tax refund: \$640
Leaseholder: Pamela



You must complete Referrals and Follow-up (see the next page) for successful completion.

Part II: Eligibility

Questions to consider:

1. Who should be included in the “household” screened in EBO?
2. What benefits are Arthur and Pamela eligible for?
3. How much should their monthly SNAP (food stamps) allotment be?
4. What benefits (if any) do they NOT qualify for?
 - c. Why might they have been disqualified?

Part III: Referral

1. They would like to apply for SNAP.
2. They would like to apply for health insurance.

Part IV: Enrollment/Follow Up

Arthur contacts you to inform you that his SNAP application has been approved and that he received his health insurance benefit.

Part I: Re-Screening (For re-certification or if circumstances have changed)

Arthur stops by your office six months later because he needs assistance re-certifying for food stamps. His situation is the same, except their rent has gone up from \$1,000 to \$1,100.

Questions to consider:

1. Are they still eligible for SNAP?

Complete the screening, eligibility, and referral processes for Arthur.

Training Exercises

Activity 1: Calculating Earned Income

Julie works in a retail store and gets paid every other Friday. She shows you her last two paystubs. What income information should you enter in EBO?

Income Type: _____

Amount: \$ _____

DANCE-O-RAMA 915 BROADWAY NEW YORK, NY 10010							Earnings Statement
EMPLOYEE NO.	EMPLOYEE NAME		SOCIAL SECURITY NO	PERIOD BEG.	PERIOD END	CHECK DATE	
	SANDRA DOE		xxx-xx-9988	11/16/2011	11/29/2011	12/02/2011	
EARNINGS	HOURS	RATE	CURRENT AMOUNT	WITHHOLDINGS/DEDUCTIONS	CURRENT AMOUNT	YEAR TO DATE	
REGULAR PAY			384.62	STATE TAX AMT	14.62	350.77	
				OASDI	16.15	387.69	
				FED TAX AMT	46.92	1126.15	
				HI TAX	5.58	133.85	
CURRENT AMOUNT	CURRENT DEDUCTIONS	NET PAY	YTD EARNINGS	YTD DEDUCTIONS	YTD NET PAY	CHECK NO.	
384.62	83.27	301.35	9230.77	1998.46	7232.31	69439	

DANCE-O-RAMA 915 BROADWAY NEW YORK, NY 10010							Earnings Statement
EMPLOYEE NO.	EMPLOYEE NAME		SOCIAL SECURITY NO	PERIOD BEG.	PERIOD END	CHECK DATE	
	SANDRA DOE		xxx-xx-9988	11/30/2011	12/13/2011	12/16/2011	
EARNINGS	HOURS	RATE	CURRENT AMOUNT	WITHHOLDINGS/DEDUCTIONS	CURRENT AMOUNT	YEAR TO DATE	
REGULAR PAY			461.54	STATE TAX AMT	17.54	438.46	
				OASDI	19.38	484.62	
				FED TAX AMT	56.31	1407.69	
				HI TAX	6.69	167.31	
CURRENT AMOUNT	CURRENT DEDUCTIONS	NET PAY	YTD EARNINGS	YTD DEDUCTIONS	YTD NET PAY	CHECK NO.	
461.54	99.92	361.62	11538.46	2498.08	9040.38	28513	

Activity 2: Calculating Earned Income

Timothy works part-time in a doctor's office. He does not have his paystubs, but he tells you that he makes \$9.00 per hour and works 25 hours per week. His hours do not fluctuate.

What income information should you enter in EBO?

Income Type: _____ Amount: \$ _____

Activity 3: Calculating Unearned Income

John gets unemployment every week. He also pays child support, which is automatically deducted from his unemployment checks. He shows you his unemployment benefits statement. You see:

Weekly benefit amount: \$246.00

Weekly child support contribution: \$38.00

You will receive a check for \$208 every Friday beginning Friday, December 9th.

What income information should you enter in EBO?

Income Type: _____ Amount: \$ _____

Activity 4: Expenses

Jason is 20 years old and living with his mother while he looks for a better job. He pays her \$100 each month for rent and utilities. His mother pays the landlord \$650 each month; she also pays gas and electric. Last month, their utility bills totaled \$95. Jason also gives his daughter's mother \$100 every month to help out; he isn't court ordered to pay her, but he tries to help anyway.

What expenses should you enter into EBO?

Expense: _____	Who: _____	How much: \$ _____
Expense: _____	Who: _____	How much: \$ _____
Expense: _____	Who: _____	How much: \$ _____
Expense: _____	Who: _____	How much: \$ _____

Activity 5: Working Quarters

Dawn is a Legal Permanent Resident. She has worked and paid taxes in the United States for six years. She lives alone and is not married.

How many working quarters should you enter in Dawn's screening form? _____

Activity 6: Working Quarters

Robert is a Legal Permanent Resident. He has worked and paid taxes in the United States for four years. His wife Rachel is U.S. Citizen; she has worked and paid taxes for the past 12 years. Robert and Rachel were married eight years ago.

How many working quarters should you enter in Robert's screening form? _____

Training Exercise Answers

Activity 1: Calculating Earned Income

The income should be entered as Wages/Tips/Salary. Starting with his gross income, find the average of the last two paychecks: $(\$384.62 + \$461.54) \div 2 = \$423.08$. Use the calculator in EBO to find his monthly amount. The amount should be **\$913.85** (except in Maryland - \$846.16).

Activity 2: Calculating Earned Income

Multiply his hourly wage by the number of hours he works per week. $\$9.00 \times 25 \text{ hours} = \225 . Use the calculator in EBO to find his monthly amount. The amount should be **\$974.25** (except in Maryland - \$900.00).

Activity 3: Calculating Unearned Income

The income should be entered as “Unemployment.” Enter the amount received before any deductions, using the calculator in EBO to find his monthly amount. $\$246 \times 4.33 = \mathbf{\$1,065.18}$ (except in Maryland - \$984.00).

Activity 4: Expenses

You should include both Jason and his mother in the screening. Be sure to enter their entire rent, not just Jason’s share. The support he pays to his daughter cannot be counted because it is not court-ordered. Their expenses are as follows:

Expense: <u>Rent</u>	Who: <u>Applicant</u>	How much: \$ <u>650</u>
Expense: <u>Gas & Electric</u>	Who: <u>Applicant</u>	How much: \$ <u> </u>

Activity 5: Working Quarters

To estimate Dawn’s working quarters, multiply the numbers of years she has worked and paid taxes in the United States by four: $6 \text{ years} \times 4 \text{ quarters in a year} = \mathbf{24 \text{ working quarters}}$. For an exact estimate, call the Social Security Administration at 1-800-772-1213.

Activity 6: Working Quarters

Robert’s total working quarters should include any that his wife earned while they were married. If he worked and paid taxes in the United States for three years, he has 12 working quarters of his own ($4 \text{ years} \times 4 \text{ quarters per year} = 16 \text{ quarters}$). They have been married for eight years, so he can count eight years of her working quarters, or 32 quarters ($8 \text{ years} \times 4 \text{ quarters per year} = 32 \text{ quarters}$). The sum of Robert’s working quarters and his wife’s is the amount you should enter in EBO. $32 + 16 =$ a total of **48 working quarters**.

EARNBENEFITS ONLINE
GLOSSARY

EBO Key Terms

(Listed alphabetically)

- Active Household:** The most recent set of individuals (the Applicant and other Household members) and the information about their circumstances as captured in the most recent screening.
- Once all benefits for which the Applicant has applied are Closed (when a Final Enrollment Status has been entered), you can create a new Household for that Client.
 - If no benefits have been applied for, you can alter information and screen again.
 - When you create a new Household, all the information for the current Household will be copied, & then you can make any necessary changes.
 - Older Households will be accessible for review, for re-printing applications, etc.
- Applicant:** An Applicant is the primary member of a Household screened. He/she is entered first when beginning a screening for a new Household. His/her name will be listed as the casehead on all pre-populated benefits applications. The Applicant is most often present for the EBO screening and must be willing to sign applications; he/she should be 18 years old or older.
- Assets:** Assets are resources available to a person that can be converted to cash to meet daily living expenses. For example, cash on hand, money in checking accounts, and vehicles are considered assets.
- Client:** Any individual in the EBO database, including Applicants and members of their Households.
- All Applicants are Clients, but not all Clients are Applicants.
- CBO:** A Community Based Organization.
- Confirm:** You should only click “**Confirm**” when you’re certain that information entered is correct, that the Client is prepared and committed to apply for the benefit.
- In other words, if the Client is unsure whether or not he/she will complete the application process, do not click “**Confirm**.”
 - “**Confirm**” counts towards your Referral or Application Assistance milestones.
 - If you are helping your Clients gather documentation, it should be prepared before clicking “**Confirm**.”
- Clicking “**Confirm**” in a benefit tab will lock the Household, preventing the Client information entered in the screening form from being changed. This

allows EBO to maintain a record of a Household's composition, income, expenses, etc. at that moment in time.

Eligible: EBO determines if a Household is eligible for benefits based on the information entered in the screening form. EBO considers a variety of factors, including Household size, income, and expenses to determine whether or not the Household, or any of the Clients in the Household, qualify for a number of benefits. If one or more people in the Household qualify for a benefit, the Household is considered eligible. This information is presented on the 'Eligible Benefits Overview Page.'

Eligible Benefits Overview Page: The page in EBO that lists the benefits for which a Household or Client is likely eligible.

Enrollment: A Client or Household is counted as 'enrolled' in a particular benefit if and when you note him/her as such on the Follow Up page. If any member of the Household is enrolled in a benefit, the Household is considered to be enrolled.

Final Enrollment Status: An benefit enrollment status that, when entered in the Follow Up Page, will 'close' a Household's most recent screening and allow you to create a new one. Final enrollment statuses include: Benefit Received, Application Denied, Hasn't Applied – Close Case, Third Attempt – Lost Contact, and Recertification.

Follow Up: The Follow Up section of every Household's case within EBO is used to track Client's progress and success in enrolling for benefits. Completing Follow Up allows you to create a new Household and re-screen for benefits if any information has changed.

Historical Households: Historical Households are past versions of your Client's Household composition and information, as captured in previous screenings. Historical Households and all corresponding information can be viewed at any time from the Client's Profile Page.

Household: An EBO Household includes the Applicant and all the members of their home included in an EBO screening. The Household should usually include every person that lives at a particular address. (There are some exceptions, including roomers and boarders.)

Income: Income is money received, either unearned or earned, on a recurring or one-time basis.

Locked Household: A Household is 'Locked' once you click 'Apply' in one or more benefit tabs. From that point forward, you will not be able to alter any of the information

entered in the screening for that Household. To change information or create a new Household, complete the Follow Up process and create a new Household.

Milestones: Milestones are significant points during the *Earn*Benefits Online process that mark a Household's/Client's movement through the process of accessing benefits. We track them closely for reporting and funding purposes. The standard EB milestones that we track are Households Screened, Households Referred, Households Eligible, and Households Enrolled.

Providers: Providers are the agencies or organizations that provide and administer benefits. To receive SNAP, for example, a Client might be referred to a provider such as a state SNAP office or an online benefits application portal. Using EBO, you will refer clients to these providers to receive benefits.

Recertification: Most benefits require that recipients complete a recertification to verify that they are still eligible for the benefit. Clients might have to recertify for a benefit every three to 24 months; the certification period duration varies by benefit.

Refer: Click 'Refer to this provider' in the tab of each benefit for which a Client would like to apply. Clicking 'Refer' allows you and other EBO Counselors at your organization to track the providers (i.e., Social Services Offices or online benefits applications) to which Clients were sent to apply for benefits.

Screening: The process of creating a Client in EBO and gathering information about your Client and his/her Household.

Take Away: The document that informs Clients precisely how to complete the application process for a particular benefit. The Take Away is available for download from the Eligible Benefits Overview Page.

Housing Situations

(Listed alphabetically)

Housing Situation Type	Definition	Documentation Used to Verify
Boarder	A boarder receives two or more meals per day and a room in exchange for rent. Common examples of boarders are people that live in halfway homes, some shelters that charge rent, or boarding homes.	Rent receipt, letter from landlord or person with whom the boarder is living.
Free board	A boarder who receives two or more meals per day and a room in exchange free of charge.	Rent receipt, letter from landlord or person with whom the boarder is living.
Free room	A roomer who receives a room in a home or an apartment free of charge, and is <u>not</u> provided with food.	Rent receipt, letter from landlord or person with whom the boarder is living.
Homeless	An individual who lacks a fixed, regular, and adequate nighttime residence, who lives in a shelter, or who has been living in transitional housing (motels, etc.) for less than three months.	Letter from a shelter or caseworker; rent receipts from shelter, motel, etc. (if paid)
Own	A person owns their home or is paying a regular mortgage to purchase their home.	Mortgage statement or receipts; property tax and homeowners' insurance statements
Public/Subsidized Housing	Includes public housing (i.e., New York City Housing Authority), Section 8 subsidies, or other state and federal vouchers.	Rent receipts or lease
Rent	Occupancy or use of another's property in return for regular payments. Excludes any federally subsidized housing.	Rent receipts, letter from a landlord, or lease (if signed within the last three months)
Roomer	A roomer rents a room in a home or an apartment and is <u>not</u> provided with food.	Rent receipt, letter from landlord or person with whom the boarder is living.

Citizenship and Immigration Statuses

(Listed alphabetically)

Citizenship/ Immigration Status Type	Definition	USCIS Documentation Used to Verify Status
Amerasian immigrant	People of Asian and American parentage who were born to Vietnamese mothers between January 1, 1962, and January 1, 1976, if their father was a U.S. citizen. Accompanying spouses and minor children also qualify for this status.	I-95annotated AM1, AM2, AM3 I-551 annotated AM6, AM7, AM8 Vietnamese Exit Visa, Vietnamese Passport, U.S. Passport stamped AM1, AM2, AM3
Asylees	An alien in the U.S. or at a port of entry who is unable to return to his or her country of nationality because of persecution based on the alien's race, religion, nationality, membership in a particular social group, or political opinion.	I-94 annotated Section 208 I-688B annotated 274a.12(a)(10) USCIS documents with asylum codes AS1, AS2, AS3, AS6, AS7, AS8 I-766 annotated A10
Cuban or Haitian entrant	Cubans who entered illegally or were paroled into the United States between April 15, 1980, and October 10, 1980, and 2) Haitians who entered illegally or were paroled into the country before January 1, 1981.	I-94 annotated paroled as a refugee section 207 I-551 annotated with codes CU6, CU7, CH6
Deportation withheld (PRUCOL)	An immigration judge has ordered deportation to be withheld	I-94 annotated Section 243(h) or 241(b)(3) Order from a Judge showing deportation withheld I-688B annotated 274a.12(a)(10) I-766annotate A10
Iraqi and Afghan Immigrants granted special immigrant status	Refugees from Iraq and Afghanistan granted admission to the U.S. with a particular designation	Afghan or Iraqi passport Immigrant Visa category SI1, SI2, SI3, SQ1, SQ2, SQ3 I-551 showing Afghan or Iraqi Nationality with codes SI6, SI7, SI9, SQ6, SQ7, SQ9
Legal Permanent Resident (LPR), Green Card Holders	Anyone with a Permanent Resident Card regardless of previous immigration status	Passport, Visa, I-94-annotated, I-181, DHS AR-3a, Processed for I-551

Non-Citizen National	People born in US territories including Puerto Rico, Guam, American Samoa, the US Virgin Islands, the Northern Mariana Islands, or US Minor Outlying Islands.	Any document that establishes place of birth or U.S citizenship such as records from SSA, VA, local government agencies, hospitals, and a clinic's record of birth or parentage.
Nonresident Alien / Nonimmigrant / Temporary Resident	Any noncitizen admitted to the US with a nonimmigrant visa, e.g. students and government workers.	N/A
Parolee	An alien allowed into the United States for urgent humanitarian reasons or when that alien's entry is determined to be for significant public benefit.	I-688B annotated 274a.12(a)(4) or c(11) I-94 annotated 212(d)(5an) I-512 annotated 212(d)(5)
Refugee	Any person who is outside his or her country who is unable return to that country because of persecution based on the alien's race, religion, nationality, membership in a particular social group, or political opinion.	I-94 annotated section 207 or paroled as a refugee I-688B annotated 274a.12(a)(3), (a)(4), (a)(10) I-551 or USCIS documents with code
U.S. Citizen	Anyone born within the territory of the United States or to U.S. citizen parents, anyone Naturalized in the United States, any child under the age of 18 who is adopted by a U.S. citizen and immigrates to the United States.	<ul style="list-style-type: none"> ▪ Birth certificate ▪ U.S. Passport ▪ Naturalization certificate (N-550) (N-570) ▪ Report of Birth Abroad of U.S. Citizen (Form FS-240, FS 545, DS 1350) ▪ A document that establishes place of birth or citizenship such as records from SSA, VA, hospitals, or clinic's record of birth or parentage.
Undocumented	A person residing in the United States without legal or current documentation	N/A
Victim of a severe form of trafficking under the Trafficking Victims Protection Act of 2000	Victims of human trafficking who are willing to assist law enforcement in the investigation or prosecution of acts of trafficking	Visas code T-2, T-3, T-4, and T-5

Income Types

(Listed alphabetically)

Income is money received, either unearned or unearned, on a recurring or one-time basis.

Income Type	Definition	Example
Alimony	Also known as spousal support, alimony is money received by the lower-income spouse for living expenses after a divorce.	Nicole divorced her husband, Kenneth, two years ago. Kenneth was the primary breadwinner and now pays Nicole \$100 per month in alimony, as ordered by their divorce settlement.
Annuities	Annuities are a series of payments made at regular intervals, often to a retired person. These payments are usually made under a contract from an insurance company, a trust company, or an individual.	Joseph withdraws money several times per year from an accumulating savings account through his life insurance company.
Boarder Income	Income received from a boarder living in someone's primary residence in exchange for room <i>and</i> meals.	Michael rents his basement to a friend for \$200 per month. Michael also provides meals to his friend.
Child Support	Money that a non-custodial parent is legally obligated (court-ordered) to pay in support of his or her child and that child's family	Nicole divorced her husband, Kenneth, two years ago. Their daughter lives with her. Kenneth is court-ordered to pay her \$80 per month for her support.
Child Support Received for Children Living Outside Household	Income received from a parent that is legally obligated to financially support a child while the child is not living with the person receiving the income.	Jean receives \$150 per month from the father of her son for his support. He recently moved in with his grandmother, but Jean continues to receive the child support payments.
Disability Insurance (non-SSDI)	Income received through a private disability insurance as a result of injury, illness, or another condition that renders a person unable to work.	Nancy struggles with a disability that prevents her from working. Prior to developing the disability, she worked for a company that had short-term disability insurance. She now receives cash payments from that insurance.
Dividends	Dividends are earnings paid from stock investments.	Althea bought shares of stock from Company X several years ago, and now she receives quarterly dividend payments from the company.
Family Members or Friends	Money that friends or family members provide directly to a Client to help make ends meet. If the money is a loan, it is not counted as income.	Joan lost her job and her sister gives her \$200 a month to help pay for food and clothing. Her sister does not expect her to repay this money.
Income from Property Owned (managed less	Income received from any property owned such as an apartment, house or business. This does not include	Roy receives money each month from someone renting an apartment that he owns but is not his primary residence.

than 20 hours per week)	income from a boarder or lodger living in your apartment or home.	He spends less than 20 hours per week managing the property.
Income from Property Owned (managed at least 20 hours per week)	Income received from any property owned such as an apartment, house or business. This does not include income from a boarder or lodger living in your apartment or home. here.	Martin receives money each month from a business renting an office he owns. The property requires him to spend 25 hours a week working to maintain it.
Interest	Interest is money received from financial accounts in which you have money stored.	Morris accrues money each month, gained on a large sum he has in a savings account.
		Carl cashes in a savings bond and receives more money back than he paid for it.
Jury Duty Pay	Income received in exchange for time spent serving on a jury.	Emily spent ten days in the last month as a juror for a county trial. She received \$40 per day.
Lodger Income	Income received from a lodger living in someone's primary residence in exchange for room.	Marjorie rents a spare room to a college student. He pays her \$75 per week for the room.
Military Benefits	Income from deployed military family members.	Deb receives military benefits, including cash, while her husband is deployed abroad.
Pensions	Pensions are regular payments made to an employee or survivor after the employee retires from work.	Robert receives a monthly pension payment from the Millwrights' Local 740 Union.
Refugee Cash Assistance	Cash provided to needy refugees who do not have minor children in the home. These benefits, which are federally funded, are available for the first eight months after a refugee arrives in the country.	Mary is a single adult who arrived as a refugee from Liberia. She has very low-income but does not qualify for TANF (Welfare). She receives Refugee Cash Assistance.
Royalties	Royalties are cash payments made to the creators of art for use of that art, or to those with copyrights, patents, trademarks, or licenses.	Terrell modeled in several advertisements when he was a baby. Whenever his photo campaign is used, he receives small royalty payments.
Self-Employment	Income received as a result of working for oneself rather than another person or company.	Ray sells clothing and other goods out of his house. He does not work for a company; it is his own small business.
SSA	Benefits from the Social Security Administration (SSA) include Social Security Retirement benefits for those 65 and over and survivors' benefits.	Irene retired at age 65. She now receives "Social Security," monthly payments from the Social Security Administration.
SSDI	Social Security Disability Insurance includes payments made to individuals who have worked in recent years (5 out of the last 10 years	Melissa worked for the past fifteen years but was recently injured. She was determined to be disabled by the Social Security Administration (SSA) and was

	in most cases) who are now disabled. Benefits are based on a Social Security earnings record rather than current income.	approved for SSD.
SSI	Supplemental Security Income includes payments from the federal, state, and local welfare agency to low-income individuals who are 65 or older; or blind or disabled individuals of any age. It provides cash to meet the basic needs for food, clothing, and shelter	Lisa is 19 years old and has never worked. She has low-income and, due to an injury, was determined to be disabled by the Social Security Administration (SSA) and was approved for SSI.
Unemployment	Temporary income for eligible workers who become unemployed through no fault of their own and who are ready, willing, and able to work. Recipients must have sufficient work and wages in covered employment. <i>Note:</i> Taxes can be withheld from Unemployment checks.	Samuel was laid off from his job at a local bank because of cutbacks. He now receives a weekly check while he looks for another job.
Veterans' Benefits	Includes cash assistance the government provides to those individuals and their families discharged from active military service.	You are an injured or disabled veteran and you receive a monthly check from the government to help with living expenses or tuition costs.
Wages/Tips/Salary	The income received from a job, whether by cash or paycheck. Wages, tips and salary is counted regardless of if it is taxed or not. Wages, tips, and salary should always be considered before any taxes or deductions.	Robert works at a barber shop. He makes \$7.25 per hour and works 40 hours per week, plus tips. Last month, he earned \$250 in tips. His gross monthly income includes his hourly wage and all tips.
Welfare	Also known as Cash Assistance or Temporary Assistance for Needy Families, which are cash payments made to very low-income families with children or disabled adults. It was formerly known as Aid to Families with Dependent Children (AFDC).	<ul style="list-style-type: none"> ▪ In Tennessee, Welfare is called Families First. ▪ In Maryland, Welfare is called Temporary Cash Assistance (TCA). ▪ In Connecticut, Welfare is called Temporary Family Assistance (TFA). ▪ In Massachusetts, Welfare is called Transitional Aid to Families with Dependent Children (TAFDC).
Workers' Compensation	Workers' compensation provides cash assistance to individuals who have been injured while working at their jobs.	Tim was working on a construction site until he was injured while on the job. He now receives workers' comp.
Work/Study Program	Income earned by students through part-time employment to assist in	Patricia is a full-time student who qualified for financial aid and a work-

	financing the costs of postsecondary education, as funded by Title IV of the Higher Education Act of 1965.	study job; she now works as a clerk at her college library.
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Asset Types

(Listed alphabetically)

Assets are resources available to a person that can be converted to cash to meet daily living expenses.

Asset Type	Definition
Bonds	A certificate of debt (usually interest-bearing or discounted) that is issued by a government or corporation in order to raise money; the issuer is required to pay a fixed sum annually until maturity and then a fixed sum to repay the principal. Report value of the bonds if they were sold today.
Buildings and land (not home)	Any non-income producing property owned by Client that is not the Client's primary residence.
Cash Lottery Prizes	Winnings from a contest in which tickets are distributed or sold, the winning ticket secretly predetermined or ultimately selected in a random drawing.
Cash on hand	Cash held that is not verifiable in a bank or other holding institution.
Cash value of pension plans or funds, EXCEPT for KEOGH plans and IRA's	A fund established by an employer to facilitate the investment of employees' retirement funds contributed by the employer and employees. Report cash value of plan/fund minus penalty for early withdrawal.
Certificate of deposit	A savings certificate entitling the bearer to receive interest. CDs are generally issued by commercial banks and are insured by the FDIC. Report entire amount of the eventual value of the certificate of deposit.
Checking or Savings account	A deposit account held at a financial institution that allows for withdrawals and deposits. Money held in a checking/savings accounts is very liquid, and can be withdrawn using checks, automated cash machines and electronic debits, among other methods.
Disaster-related loans and grants	Monetary loans or grants given to victims of natural disasters such as tornadoes or flooding.
Household goods and personal effects	Clothing, furniture, furnishings, equipment, etc. found commonly in or about a house and used in connection with the operation, maintenance, and occupancy of the home. Includes jewelry, kitchen items, Household appliances, books, musical instruments, and hobbies, etc. Report current value of Client's Household goods and personal effects.
Income producing property	Real property held by an individual or business for investment potential or in order to earn income by leasing or letting it, rather than for its own use. Report current value.
Income tax refunds rebates, or credits	Rebates and credits received from filing your taxes. Includes city, state, and federal taxes.
Individual development funds (if not TANF recipient)	A special matched savings account developed for low income workers. Participants make regular deposits that are matched by funds from banks, grants, faith-based organizations and/or other public and private sources. The funds can then be used to help purchase an agreed-upon asset such as a home, college education, or small business. Report value

	of actual savings to date excluding potential matched funds.
Insurance Settlements	The payment of proceeds by an insurance company to the insured to settle an insurance claim within the guidelines stipulated in the insurance policy.
Interest in non-home place real property	Value of interest accumulated on any tangible (real) property excluding home.
IRA	A custodial account or trust in which individuals may set aside earned income in a tax-deferred retirement plan. There is typically a penalty if the funds from the account are withdrawn prior to a designated age. Report the value of the plan today minus the penalty for early withdrawal.
Jointly Owned Resource (only what is accessible to Household member(s))	Personal property resources which an assistance group member owns together with a non-assistance group member. Enter the amount that Client would receive if the resource is liquidated.
Keough	a pension plan subject to tax advantage for somebody who is self-employed or has an interest in a small company. Report the value of the plan today minus the penalty for early withdrawal.
Life insurance policy cash surrender value (CSV)	The sum of money an insurance company will pay to the policyholder or annuity holder in the event his or her policy is voluntarily terminated before its maturity or the insured event occurs. This cash value is the savings component of most permanent life insurance policies, particularly whole life insurance policies.
Non-essential personal property	Items such as collectibles.
Nursing home patient fund/refund	Report value of fund minus any penalty.
Personal needs allowance accounts	An account or petty cash fund that holds the money of a resident at an adult care facility or home and which the facility or home manages for the resident.
Pre-need funeral agreements	Individuals prepay for funerals and burials by entering into a pre-need agreement, or contract, to pay in advance for goods or services they will receive upon death. Generally, this agreement is between the individual and the funeral director or cemeterian, and is funded through a funeral trust, annuity, or insurance policy. Report current value minus any penalties if applicable.
Profit Sharing Plans that permit early withdrawal (like 401K)	A compensation plan funded by employer contributions, based on a share of the company's profits. Compensation can be in the form of stocks, bonds or cash, and can be immediate or deferred to a future date. Report the value of the plan today minus the penalty for early withdrawal.
Recreational or unlicensed vehicle	A vehicle, portable structure, trailer or watercraft that can be towed, hauled, carried on a vehicle or trailer, or driven. It is designed to be used for travel or recreational purposes, and includes a motor home (class A or C), travel trailer, fifth wheel trailer, tent trailer, truck camper, boat, canoe, kayak, snowmobile, all-terrain vehicle, jet ski, or other similar vehicle. A trailer designed to carry an item listed above is not a

	recreational vehicle.
Recreational property	Various areas such as fishing property, mountain property, lakefront homes, waterfront property, vacation homes, horse property timeshare properties or any other kind of recreational property. Report value of Client's shares of the property.
Refunds of rent or utility deposits	Money returned that is given to a landlord to provide some protection for damage to the rented premises or for some other failure of a tenant, e.g. security deposit. Report entire amount that Client has access to.
Retroactive benefit payments	Benefit payments received from a past award.
Savings certificates	A document that is evidence of ownership of a savings account, typically an account in which a stated amount of funds is deposited for a fixed term. Report the amount in the Client's account that is available today.
Stocks	The capital raised by a corporation through the issue of shares entitling holders to an ownership interest (equity). Report value of the stocks if they were sold today.
The home and surrounding property	A residential home and surrounding property if owned. Report the current appraisal value.
Trust funds	A trust fund is a fund comprised of a variety of assets intended to provide benefits to an individual or organization. The trust fund is established by a grantor to provide financial security to an individual, most often a child, or organizations, such as a charity or other non-profit organization.
Vehicle	Mode of transportation that the Client owns (car, motorcycle, bicycle etc). Report Kelley Blue Book value.
Welfare Avoidance Grant	A lump-sum payment of cash assistance to meet an immediate need which social services will give an individual in order to keep them from going on TCA (Temporary Cash Assistance). Usually, the payment will equal three months worth of monthly cash assistance. Report value of lump-sum payment only if it was received within the last month.

Tax Related Terms

(Listed alphabetically)

** Many of these terms have different definitions in different contexts. Please remember that the definitions below refer only to tax related credits and programs. **

Term	Definition
Dependent	<p>Dependents include:</p> <ul style="list-style-type: none"> • Qualifying children (see definition) • Qualifying relatives (see definition)
Head of Household	<p>You can file as Head of Household if:</p> <ul style="list-style-type: none"> • You are unmarried or “considered unmarried” on the last day of the year (see definition of “married.”) • You paid more than half the cost of keeping up a home for the year. • A “qualifying person” lived with you in the home for more than half the year (except for temporary absences, such as school). However, if the “qualifying person” is your dependent parent, he or she does not have to live with you.
Married	<p>You are considered “married” if any of the following applies:</p> <ul style="list-style-type: none"> • You are married and living with your spouse as husband and wife. <ul style="list-style-type: none"> ○ For federal tax purposes, a marriage means only a legal union between a man and a woman as husband and wife. • You are living together in a common law marriage that is recognized in the state where you now live or in the state where the common law marriage began. • You are married and living apart, but not legally separated under a decree of divorce or separate maintenance. • You are separated under an interlocutory (not final) decree of divorce. For purposes of filing a joint return, you are not considered divorced.
Married Filing Jointly	<p>You can file as Married Filing Jointly if:</p> <ul style="list-style-type: none"> • You are married and your spouse agrees to file a joint return. <ul style="list-style-type: none"> ○ Spouses do not need to live together to file as Married Filing Jointly. ○ If you divorced your spouse at any point in the previous tax year, you cannot file as Married Filing Jointly.
Married Filing Separately	<p>You should file as Married Filing Separately if:</p> <ul style="list-style-type: none"> • You are married. This filing status may benefit you if you want to be responsible only for your own tax or if it results in less tax than filing a joint return. • If you and your spouse do not agree to file a joint return, you have to use this filing status unless you qualify for head of

	household status (see definition).
Qualifying Child	<p>A qualifying child must meet the following five requirements:</p> <ol style="list-style-type: none"> 1. A qualifying child must be: <ul style="list-style-type: none"> • Your son, daughter, stepchild, foster child, or a descendant (for example, your grandchild) of any of them, or • Your brother, sister, half brother, half sister, stepbrother, stepsister, or a descendant (for example, your niece or nephew) of any of them. 2. The child must also be: <ul style="list-style-type: none"> • Under age 19 at the end of the year and younger than you (or your spouse if filing jointly), • A full-time student under age 24 at the end of the year and younger than you (or your spouse if filing jointly), or • Permanently and totally disabled at any time during the year, regardless of age. 3. The child must also have lived with you for more than half of the year. There are exceptions for temporary absences, children who were born or died during the year, kidnapped children, and children of divorced or separated parents. 4. The child cannot have provided more than half of his or her own support for the year. 5. The child cannot file a joint return for the year.
Qualifying Relative	<p>Unlike a qualifying child, a qualifying relative can be any age. A qualifying relative must meet the following four requirements:</p> <ol style="list-style-type: none"> 1. A child is not your qualifying relative if the child is your qualifying child or the qualifying child of any other taxpayer. 2. Live with you all year as a member of your household, or be related to you in one of the following ways: <ul style="list-style-type: none"> • Your child, stepchild, foster child, or a descendant of any of them (for example, your grandchild). (A legally adopted child is considered your child.) • Your brother, sister, half brother, half sister, stepbrother, or stepsister. • Your father, mother, grandparent, or other direct ancestor, but not foster parent. • Your stepfather or stepmother. • A son or daughter of your brother or sister. • A brother or sister of your father or mother. • Your son-in-law, daughter-in-law, father-in-law, mother-in-law, brother-in-law, or sister-in-law. 3. A qualifying relative's gross income for the year must be less than \$3,750. 4. You generally must provide more than half of a qualifying relative's total support during the calendar year.
Qualifying Widow(er)	<p>You can file as a Qualifying Widow(er) if:</p> <ul style="list-style-type: none"> • You were entitled to file a joint return with your spouse for the

	<p>year your spouse died. It does not matter whether you actually filed a joint return.</p> <ul style="list-style-type: none"> • Your spouse died in either of the two years prior to the current tax year. For example, you are filing for tax year 2010 and your spouse died in 2008 or 2009. • You did not remarry before the end of the tax year. • You have a child or stepchild for whom you can claim an exemption. This does not include a foster child. <ul style="list-style-type: none"> ○ This child lived in the home all year, except for temporary absences. • You paid more than half the cost of keeping up a home for the year.
<p>Single</p>	<p>You should file as Single if:</p> <ul style="list-style-type: none"> • On the last day of the year, you were unmarried or legally separated from a spouse under a divorce or separate maintenance decree, and you do not qualify for another filing status.

Medicaid and APTC Related Terms

(Listed alphabetically)

Term	Definition
Educator Expenses	<p>Eligible educators can deduct up to \$250 (\$500 if married filing jointly if both spouses are educators) of any unreimbursed expenses you paid for books, supplies, computer equipment, other equipment, and supplementary materials that you use in the classroom. You can only claim these expenses if you are a qualified educator, you are a qualified educator if you meet the following requirements:</p> <p>Client is a kindergarten through grade 12:</p> <ul style="list-style-type: none"> • Teacher • Instructor • Counselor • Principal • Aid
Health Saving Account Deduction	<p>Contributions made by a Health Savings Account (HSA) holder can be deducted from their yearly income. Employers are allowed to contribute to their employee's Health Savings Account, however, the employee cannot claim employer contributions as a deduction. Employer contributions are tax exempt in most cases.</p> <p>Important limitations and conditions: There is a limit to how much a client can contribute each year to their Health Savings Account. Clients can only contribute \$3,300 for the 2014 tax year and families are limited to \$6,550. Individuals and families qualify for Health Savings Account deductions if they meet the following criteria:</p> <ul style="list-style-type: none"> • Must be covered under a high deductible health plan (HDHP). • Have no other health coverage except for a high deductible health plan (HDHP). • Client is not enrolled in Medicare. • Cannot be claimed as a dependent on someone else's tax return. <p>Source: http://www.irs.gov/publications/p969/ar02.html#en_US_2013_publink1000204020, http://taxes.about.com/od/deductionscredits/p/HSA.htm</p>

<p>IRA Deduction</p>	<p>Any contribution made towards a traditional IRA can be tax deductible. In most cases, a client’s entire contribution can be tax deductible but each case varies by earned income, marital status, and whether the client and spouse are covered by a retirement plan at work. Note: Only traditional IRAs are tax deductible, a Roth IRA is not tax deductible.</p> <p>Each case varies so a client can deduct entire contribution towards taxes, partial contribution, or they cannot deduct any contribution at all. For a comprehensive chart of deduction limits click the links below.</p> <p><u>2013 IRA Deduction Limits - Effect of Modified AGI on Deduction if You Are Covered by a Retirement Plan at Work</u></p> <p><u>2013 IRA Deduction Limits - Effect of Modified AGI on Deduction if You Are NOT Covered by a Retirement Plan at Work</u></p> <p>Source: <u>http://www.irs.gov/Retirement-Plans/IRA-Deduction-Limits</u></p>
<p>Moving Expenses</p>	<p>Clients can deduct their moving expenses only if they moved for employment related reasons. This means clients can only deduct their moving expenses if they had a job transfer or if they found new employment in the new area they moved to. The deduction cannot be claimed if the client moved less than 50 miles from their old residential area. Clients can only claim their expenses if they were not reimbursed by employer.</p> <p>Tax payers must also meet the following requirements:</p> <ul style="list-style-type: none"> • Client must have worked in a full-time position for at least 39 weeks during the first 12 months after you arrive in the general area of new job. • Client must have full-time employment, they cannot claim the deduction if it is for self-employment work. • Clients do not have to work 39 consecutive weeks nor do they have to work for the same employer for 39 weeks.

	<p>What can clients claim?</p> <ul style="list-style-type: none"> • Traveling costs (except for meals). • Gas and oil used during move (i.e. traveling by car). • Shipping of personal items and/or car. • Lodging. • Fees for disconnecting or connecting utilities. • Rental truck. • Storage. <p>What cannot be claimed?</p> <ul style="list-style-type: none"> • Any costs involving purchase/rental of new home. • New Drivers License or ID. • Car registration, title, and tag fees. • Pre-move house hunting expenses. • Home improvements to help sell your home or improvements to rental homes. • Real estate taxes. • Security deposits. • Return trips to your former home. <p>Source: http://www.irs.gov/pub/irs-pdf/p521.pdf</p>
<p>Penalty on Early Withdrawal of Savings</p>	<p>Clients will generally have to pay a penalty if they withdraw funds from their Certificate of Deposits (CDs) or other time-deposit savings accounts before the account's maturity date. The amount clients pay in fees can be deducted from their income. A taxpayer will receive form 1099-INT and the penalty they paid will be displayed on Box 2. They must enter that figure on Line 30 of Form 1040 tax return.</p> <p>In other cases, clients who withdraw funds from their Traditional and ROTH IRAs before they turn 59½ will be charged a 10% penalty by the Federal Government. If the client withdrew funds due to a disability, having to pay medical premiums while unemployed, or had medical expenses that are more than their adjusted gross income they do not have to pay the penalty. If the client dies before 59½ and the money is given to the beneficiary, the 10% fee is waived.</p> <p>Sources: http://www.irs.gov/taxtopics/tc557.html, http://taxes.about.com/od/deductionscredits/qt/earlywithdrawal.htm, http://taxes.about.com/od/retirementtaxes/a/early_penalty.htm</p>

<p>Self-Employed Health Insurance Deduction</p>	<p>Self-employed clients can deduct premiums for medical and dental insurance as well as qualified long-term care insurance for themselves, their spouse, and their dependents. Clients can only deduct their insurance premiums if they reported a net profit for the year on Schedule C from Form 1040, they were a partner with net earnings from self-employment for the year and was reported on Schedule K-1, or received wages during the tax year from an S corporation in which they were more than a 2% shareholder.</p> <p>Source: http://www.irs.gov/publications/p535/ch06.html#en_US_2013_publication1000208843</p>
<p>Self-Employed Retirement Plan Deduction</p>	<p>Self-employed clients may contribute to a qualified retirement account and deduct their contributions each tax year. Clients can only deduct a certain amount of their contributions which varies on their contributions and income. In order to calculate the allowable tax deduction, client must refer to the worksheets found on IRS Publication 560. Only Simplified Employee Pension (SEP), 401(k), and Savings Incentive Match Plan for Employees (SIMPLE IRA Plan) are eligible. The following are the three qualified accounts and their contribution limitations.</p> <ul style="list-style-type: none"> • Simplified Employee Pension (SEP): Clients can contribute as much as 25% of their net earnings from self-employment up to \$52,000 per year. You must file Form 5305-SEP when filing tax return. • 401(k) Plan: Clients can make tax-deferred contributions up to \$17,500 (\$23,000 if over 50) each year. Clients may also contribute up to 25% of their net income up to \$52,000 including salary deferrals. • Savings Incentive Match Plan for Employees (SIMPLE IRA Plan): Clients can make tax-deferred contributions of their net earnings from self-employment in this plan (only up to \$12,000 per year and an additional \$2,500 if they are 50 or older). Clients can also make an additional 3% matching contribution. • Sources: http://www.irs.gov/Retirement-Plans/Retirement-Plans-for-Self-Employed-People, http://www.irs.gov/pub/irs-pdf/p560.pdf
<p>Self-Employment Tax Deduction</p>	<p>Clients can deduct the employer-equivalent portion of their self-employment tax when they are figuring out their adjusted gross income. The deduction only affects their income tax and not their earnings from self-employment or self-employment tax. Self-employment tax refers to Social Security and Medicare taxes and does not include any other taxes that self-employed individuals may be required to file.</p> <p>Source: http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Self-Employment-Tax-Social-Security-and-Medicare-Taxes</p>

<p>Student Loan Interest Deduction</p>	<p>Clients who paid for student loans during the tax year can benefit by deducting the interest paid on that student loan. The loan must have been used to pay for a qualified higher education institution as recognized by state law. Clients who earn \$75,000 (\$150,000 if married filing jointly) or less can deduct up to \$2,500.</p> <p>Source: http://www.irs.gov/uac/Tax-Benefits-for-Education-Information-Center</p>
<p>Tuition and Fees</p>	<p>Clients may deduct expenses paid during the year for themselves, their spouses, and/or their dependents. Clients can deduct up to \$4,000 in qualified education expenses when filing a tax return. Clients who earn less than \$80,000 (\$160,000 if married filing jointly) can take advantage of this tax credit.</p> <p>What are qualified education expenses? Qualified education expenses are anything needed to attend a higher education institution such as:</p> <ul style="list-style-type: none"> • Student-activity fees. • Course-related books. • Supplies. • Equipment. • And any expenses that must be paid to the institution as a condition of enrollment or attendance. <p>Note: Clients cannot take advantage if any of the following applies:</p> <ul style="list-style-type: none"> • Client’s filing status is married filing separately. • The client can be claimed as a dependent on someone else’s tax return. The client cannot take advantage of the deduction even if the other person does not actually claim the client as a dependent. • Client’s modified adjusted gross income (MAGI) is more than \$80,000 (\$160,000 married filing jointly). • The client was a nonresident alien for any part of the year and did not choose to be treated as a resident alien for tax purposes. • The client cannot take advantage of this deduction if they claimed an education credit for the expenses.

