# FREQUENTLY ASKED 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 10

- **I just screened my client, but what am I supposed to do when I reach the Eligible Benefit Overview?**
- **Are there any "cheat sheets" or guides that can help me use EBO more efficiently?**
- **What do I do if I can't find my client in the system?**
- **I clicked 'Check for Benefits' but nothing happened. What do I do?**
- **Where do I enter a child's expenses and income (e.g., child support, foster care, etc.)?**
- **Where is the Document Library?**
- **I'm having trouble connecting to EBO. Or I'm connected, but EBO is running very slowly. What can I do?**
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## General Questions

- **Which web browsers does EBO support?**
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  - **If I close out a client's case from another site, will I be credited for that client's Follow Up?**
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## Benefit-Specific Questions (LIHEAP, tax credits, etc.)

- **Who is eligible for Expedited Food Stamps?**
- **My client is twenty-two years old or older. He/she lives with his parents, but wishes to apply for Food Stamps separately. How do I screen them in EBO?**
- **If someone does not pay rent but does pay for utilities, can they qualify for LIHEAP (aka HEAP, MEAP, or CEAP)?**

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## General Questions

- **Which web browsers does EBO support?**
  Current supported browsers are either Prism (recommended) or Firefox, version 3.6 – 4.0. Internet Explorer is **NOT** compatible with EBO. To install one of these programs, please follow the corresponding set of instructions:

  **Prism**
  Please refer to Prism Download and Install Instructions or forward this document to your IT staff. If you or they have any questions, don't hesitate to call Helpdesk at 800.411.2291.

  **Firefox**
  Please go to the following website to download Firefox 3.6. After it installs, open the web browser and go to the EarnBenefits Login Page as you normally do while accessing EBO.

  http://www.mozilla.com/en-US/firefox/all-older.html

  For info about using other versions of Firefox (5.0+) please refer to our Browser Compliance Policy.

- **Are there any "cheat sheets" or guides that can help me use EBO more efficiently?**
  All user support materials can be found in the 'EarnBenefits General' folder in the Document Library. The Helpdesk recommends reading the EBO User Guide thoroughly, but other documents can serve as a quick reference:

  - Interview Tips and Tricks – a desktop reference for completing the Screening Intake Form while interviewing your client.
  - EBO Referral Instructions – a detailed walkthrough for recording your referrals in order to receive credit for your work in EBO accurately.
  - Video Tutorials – a step-by-step visual guide for each step in EBO.

  We're constantly thinking of new ways to make using EBO easier and more intuitive. If there's any part of EBO you'd like a guide for or if you've created a "cheat sheet" you'd like to share with other users, please don't hesitate to contact us via the Helpdesk link in EBO or call 800.411.2291.

- **Where is the Document Library?**
  To access the Document Library, first log into EBO. Hover your mouse over Documents Management, then Access Document Library. Click on Search Files.

Select the folder with the document you wish to access. For most documents, see 'EarnBenefits General'. For documents specific to your location, see your state folder (e.g., 'EBO New York').



Click on your document's name to open it in a new window. You can view it as a website or save a copy of it on your computer.

- **How accurate are EBO screenings?**
  EBO is completely accurate with its calculations. However, there are a few factors that can give your client a false eligibility/ineligibility:
    1. Your client withholds or exaggerates info about his/her household as you enter it into EBO
    2. The info is entered incorrectly (for example, adding an extra 0 to your client's income or forgetting to include a child support payment).
    3. EBO misinterprets a particular rule or other part of a benefit's eligibility, and needs to be corrected.
  
  If you ever think EBO has calculated your client's eligibility and found them to be eligible or ineligible for a particular benefit, please contact Helpdesk immediately so we can address the issue.

- **There is a benefit that I think EBO should include in screening. What should I do?**
  Contact the Helpdesk. There might be a reason why the benefit is not included. If not, we can discuss programming it into EBO with those who manage your location.

## Troubleshoot 101

- **I'm having trouble connecting to EBO. Or I'm connected, but EBO is running very slowly. What can I do?**
  Internet connection is a two-way street. We notify all users as soon as we identify any issues with EBO's connection via email. However, it's also possible the network at your own location is running slowly and affecting your experience with EBO.

  If you encounter a slow speed or a time-out error, please try logging into EBO again. If you still experience a slow connection, please try loading a few different websites (such as Google or Yahoo) to confirm that it's an issue with *Earn*Benefits specifically, and not with connecting to the internet at your location.

  If there's an issue with your connection to the internet, the IT staff at your organization or location will have to address the issue.

  For more info, please consult our EBO IT Suggestions. If you still find EBO running slowly, please contact the Helpdesk so we can investigate the situation.

- **What do I do if I entered my Client's name, date of birth, or Social Security Number incorrectly?**
  Contact EBO Helpdesk. If you make name or SSN typos & you want to be able to continue helping your client apply for benefits, you can make corrections on the actual application forms. You should still contact the Helpdesk to make the corrections.

  **Remember** - If you make a big mistake on DOB – i.e. you entered a parent's DOB as 12/20/2010, contact the Helpdesk right away.

o **How do I change other client info after the HH is locked?**
You can edit your client's contact info from his/her profile whether the household is locked or not. The only info that Helpdesk can edit after the household has been locked is name, DOB, or SSN.

Otherwise, please contact the Helpdesk so we can deactivate the household for you. Once deactivated, you can re-screen the household and update any of the info in the Screening Process.

If you have not locked the household, you can fix that information by clicking "Reset" on the client's profile page (the page that you first see when you click on the client's name after searching for your client). After you click reset, click to "change/modify" the screening. You can then very easily change that information.

**Remember** – If you reset a household, you will have to complete the referrals for benefits again.

- **What do I do if I can't find my client in the system?**
Please make sure you are logged into the live website & you're using Prism or Firefox, not Explorer. Here are some helpful tips for searching for that hard-to-find client:

    1. When searching for a client, please double-check there are no spaces before or after her name since this will affect the search results.
    2. Try searching using only your client's SSN.
    3. Try a partial search. Try searching for only your client's last name and DOB, first name and DOB, last name only, or other variations.
    4. If your client has a middle or second name, don't include his/her this name or its initial in your search.
    5. Try alternate spellings of your client's name. If your client changed his/her name at some point (marriage, divorce, etc.) try searching with his/her former name. Try switching your client's first and last names!

If none of these tips work, you can still find a list of all clients created at your organization in the Case Management section in EBO. To locate the client in your active household list, please follow these instructions:

    1. Click Case Management, and then Case Load, on the top right of your screen.
    2. Select "Household Clients List" on the drop-down menu. Click GO.
    3. On the drop-down menu that appears, select either your name, a coworker's name, or leave it as the default to search under every screener at your site.
    4. Input the date range within which you screened your client.
    5. Click GO.

You should see your client listed in the results that appear. You may find more information about finding a client after the first screening in your [EBO User Guide](#) in the "Case Management" chapter.

- **I accidentally created a duplicate client. What do I do?**
  Please contact the Helpdesk immediately as soon as you discover a duplicate client EBO. Duplicates cause a lot of confusion for clients and other screeners, and they affect EBO's performance reports.

- **I clicked 'Check for Benefits' but nothing happened. What do I do?**
  If you forget to answer a question or otherwise leave the intake form incomplete, EBO will not let you continue to your client's Eligible Benefits Overview. Usually, the system displays a reminder in red text about what you forgot. You'll notice this disclaimer at the top of the page and next to the question itself.

  However, there is a known software issue which sometimes causes this text not to appear. If that's the case, it's always important to review the screening thoroughly to locate any questions left blank. A few common places to check are:

    - Check that there are no extra, blank fields in the Income and Assets section that need to be removed.
    - Look at each member's Household Relations section to see if all questions are answered correctly.
    - Check the Utilities question in Housing Situation section. Make sure there are no extra fields left open and unselected.

  If you still can't continue to your client's Eligible Benefits Overview, please contact Helpdesk so we can review the screening form with you.

- **What if I run into a 'Something Bad Happened' or other error message?**
  Contact the Helpdesk. Let us know what you were doing in EBO at the time you ran into the error, and where the last place you clicked was. It's also helpful to email us a screenshot of the error message. To send us a screenshot, just follow these instructions:
    - While the error message appears on your screen, press the **CTRL** and **PrintScreen** buttons at the same time. You'll find **PrintScreen** button on the top right of your keyboard. You won't receive a confirmation that the process worked, but your mouse icon might flicker slightly.
    - Copy the screenshot into the body of your email. Open up a new email message, right-click on the main section of the email, and select 'Paste'. Alternatively, you can also copy the screenshot into a Microsoft Word or Paint file, and then include it in the email as an attachment.
    - Email the screenshot to the Helpdesk at [ebcrmsupport@seedco.org](mailto:ebcrmsupport@seedco.org).

# Screening and Eligibility

- **Do I need to fill in every field in the intake forms?**
  **Yes**. You should always fill in all the information that your client can give you. EBO is only as good as the information that you enter. In other words, the smallest piece of information that you enter could be the difference in qualifying for a particular benefit.

- **What are Qualified Working Quarters?**
  A work quarter is a quarter (3-month) period of the year in which your income met or
  exceeded a minimum amount. Certain immigrants may be eligible for benefits depending on
  their number of US work quarters. For more info, please read the Qualified Working Quarters Information document.

- **How do I calculate a client's gross monthly income?**

| Wages/Tips/Salary ▾ | | ⊞ Remove |
|---|---|---|

Add Income

Next to the Income Field, click on the Calculator icon. 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 : 0.0
Your monthly income is : 0.0
[ Calculate ] [ Close ]

Select the frequency your client is paid (weekly, biweekly, or twice per month) and enter the amount on the paycheck BEFORE taxes are taken out. Hit 'Calculate' and copy & paste the results to the Income field in the main screening page. This calculator takes into consideration most benefits consider a month to contain 4.33 weeks (The only exception to this rule is Baltimore, which considers the month just 4 weeks long).

- **Where do I enter a child's expenses and income (e.g., child support, foster care, etc.)?**
  All income and expenses related to a child should be entered under the child's tab, **NOT** the parent or guardian's. Here are a few of the more common types of incomes/expenses children might have:
  **Monthly Care Costs**: Located under the 'Medical, Dependent Care, and Other Expenses' category. Enter any monthly costs related to childcare or dependent supervision/care programs for the child so their parents/guardians can work, go to school, or look for a job. Do **NOT** enter this expense under the parent's tab.
  **Child Support**: Located under the 'Income and Assets' category. Enter any child support **RECEIVED** from another parent living outside the household.
  **Foster Care**: Located under the 'Income and Assets' category. The field 'Monthly foster care assistance received:' only appears if the 'Foster Child' option in Relation to Applicant drop-down menu.
  **Adoption Subsidies & other forms of income**: For adoption subsidies or any form of income you can't find on the Screening Intake Form, please contact the Helpdesk.

- **Who can claim a "care cost" deduction?**
  Care costs (i.e., babysitting, daycare, care for an adult with a disability, etc.) are an important deduction for some Households. Care costs can only be deducted if a parent/guardian pays for care so they can go to work, look for work, or go to school.

  **Remember** - All care costs (i.e., daycare, babysitting, and care for an adult with a disability) should be listed in the tab of the person receiving the care. For example, if a parent pays for daycare for her son, the daycare expense should be listed under her son's tab in EBO.

  - **Does someone need to work a minimum number of hours to claim the "care cost" deduction?**
    No, but the caretaker will likely have to prove that he/she is working, looking for work, or attending school.

- **What is the difference between a roomer and boarder?**
  A roomer rents a room in a home or an apartment and is not provided with food. 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.

  - **Are boarders eligible for food stamps?**
    If a person is a boarder and receives two or more meals per day as a part of their rent, they are ineligible for food stamps.

- **My Client does not pay for rent; a family member or friend pays it for them. How do I handle this in EBO?**
  The social services office that handles your client's case will want to know if the rent is first paid to the Client who then pays the landlord, or if it is paid directly to the

landlord. For a list of items that can be used to prove utility bills, see the [Needed Documents Checklist](#).

1. <u>If the rent is paid to the Client first</u>: The money that is given to the Client counts as income, even though it is designated for rent. It should be entered as the income type: "Family Members or Friends." The Client can also deduct the amount of the rent that is paid.

   - Because the money from family or friends is counted as income, it may mean that the Client is over the gross income limit, making him/her ineligible for food stamps, health insurance, or other benefits.

2. <u>If the rent is paid directly to the landlord</u>: The money given directly to the landlord does not count as income. Your client cannot count the rent as an expense, however. The rent should be counted as '0.'

   - Most social services offices will require some documentation of how clients are meeting their basic living expenses. If a family member or friend is paying your client's rent directly to a landlord, they should be prepared to provide a letter from the family member/friend stating this.

**Remember** - if a client lives with the family member/friend who is paying rent, they may be required to apply together, depending on their relationship.

- **What do I do if a client is previously screened, but there's a change in the household (e.g., divorce, baby is born, another member moves out, etc.)?**
  Because your client is already in the system, you will need to close out the "old" household by completing follow-up for them, before you can rescreen the household without him.

  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 your Client's Profile Page by searching for her (or using the Case Management tools). At the top of the Client Profile Page, you'll see several options. You have the option of creating the household with the same information, or only using your client (without her husband or any other household members).
  - You MUST click to use only your client in the new household, as it will then allow her to be the applicant (or casehead). You can then add any other

household members by clicking "add household member" and searching for the children/family members.

- Update any information (income, address, etc.) and add any other household members.

- **My client does not pay for rent; a family member or friend pays it for them. How do I handle this in EBO?**
  The social services office that handles this client's case will want to know if the rent is first paid to the client who then pays the landlord, or if it is paid directly to the landlord. For a list of items that can be used to prove utility bills, see the "Needed Documents" sections of earnbenefits.org.

  (1) <u>If the rent is paid to the client first:</u> The money that is given to the client counts as income, even though it is designated for rent. It should be entered as the income type: "Family Members or Friends." The client can also deduct the amount of the rent that is paid.
    - Because the money from family or friends is counted as income, it may mean that the client is over the gross income limit, making him/her ineligible for food stamps, health insurance, or other benefits.

  (2) <u>If the rent is paid directly to the landlord:</u> The money given directly to the landlord does not count as income. The client cannot count the rent as an expense, however. The rent should be counted as '0.'
    - Most social services offices will require some documentation of how clients are meeting their basic living expenses. If a family member or friend is paying your client's rent directly to a landlord, they should be prepared to provide a letter from the family member/friend demonstrating this.

  **Remember** - if a client lives with the family member/friend who is paying rent, they may be required to apply together, depending on their relationship.

## Eligible Benefit Overview

- **I just screened my client, but what am I supposed to do when I reach the Eligible Benefit Overview?**
  After finishing the Screening Process, you must explain which benefits your client is eligible for, refer them to a provider, and print any applications or Take Aways they need. For help with the Eligible Benefit Overview, please read the EBO User Guide.

  If you need a quick refresher or a "cheat sheet," please see the EBO Referral Instructions. You can also watch our Video Tutorials.

- **How does EBO build combinations of household members to find the best scenario for applying for food stamps?**
  EBO must build combinations of household members around the first person entered (i.e., the Applicant). All possible combinations will include the Applicant. In calculating the best scenario for food stamps, EBO considers the following:

  - <u>Spouses that are legally married and living together must always apply together.</u> The only exception to this rule is in cases of documented domestic abuse.
  - <u>People that are under 22 and living with their parents must apply with their parents.</u> No exceptions.
  - <u>Children under 18 must apply with an adult,</u> unless he/she is a foster child or legally emancipated.
  - Other than the three rules stated here, the only factor that determines household composition is whether or not individuals buy and share food together.

- **Can I refer my client to a provider not listed in EBO?**
  If a provider does not appear in EBO, please contact the Helpdesk so we can add it promptly.

- **When do I hit the 'Apply' button in the Benefit Tab?**
  The 'Apply' button only appears after you select a provider for your client in EBO. This step confirms with EBO that you have reviewed the application (if there is one) with your client and referred him/her to a provider. It's important to remember to hit this button to receive credit for your referral.

  After you hit 'Apply' for each benefit your client is interested in, you can then print any applications & Take Aways. For more info, please see the [EBO Referral Instructions](#).

- **What should I do if I think a Client is eligible for a benefit, but EBO has determined that he/she is not, or vice versa?**
  You can view disqualified benefits by going to the Eligible Benefits Overview page, and clicking here: "To see a list of disqualified benefits, please click <u>here.</u>" You can make a referral, review the application, make changes to it, save the updated application in EBO, and print it, just like you can if the client was eligible for the benefit.

- **EBO found that my client is not eligible for a particular benefit. Can he/she apply anyway?**
  **Yes**, your client always has the right to apply for any benefit even if EBO screens him/her ineligible. EBO is a screening tool that calculates probable eligibility based on the information you enter in the Screening Intake Form. We are **NOT** a government agency, and therefore do not have the authority to tell anybody whether they're truly eligible or ineligible for a benefit.

# Follow Up and Case Management

- **I need to re-screen my client, but it says the current Household is locked. How do I complete the follow up with my client?**
  You need to complete the follow up before you can re-screen the client for more benefits. Please refer to the 'Entering a Follow Up Status' section in the EBO User Guide or watch the Video Tutorials.
  - o **If I close out a client's case from another site, will I be credited for that client's Follow Up?**
    No, enrollment (i.e., follow up) credit is attributed to the site the client's current case is first screened at. Completing another client's follow up will allow you to re-screen the client, but you won't receive any credit for the enrollment. However, the new case created by your screening will be attributed to your site.

- **I want to work with a client but they still have an open case from a previous screening. How can I begin a brand new screening with the client?**
  If your client has been screened by a different site **AND** no referrals were made (i.e., the client did not apply for any benefits) please contact the Helpdesk. We'll need to deactivate your client's household so you can receive the proper credit for the screening.

- **What is the Follow Up List for Benefits used for?**
  The Follow Up List for Benefits is used to find clients from your site that have applied for a benefit and still require follow up. You can also search for clients with a Benefit Status of 'Remind Me Later' or those stuck at 'Proceed'. For detailed instructions for how to use this list, please refer to the 'Case Management' section in the EBO User Guide or watch the Video Tutorials.

- **Why can't I find my client in the Follow Up List for Benefits?**
  As long as your client was first screened at your site, he/she will appear somewhere in the Follow Up List for Benefits. Try modifying your search in one of the following ways:

  - Leave the 'Select User' drop-down menu on its default, so you will search all clients screened by all users at your site. This tip will help if your client was first screened by one of your coworkers.
  - Change the 'Referral Status' to 'Stuck at Proceed'. This option will help you find any clients you forgot the 'Apply' button for.
  - Widen your search's date range. You may have seen your client last week, but it's possible the referral was made months ago or even last year.

  If none of these suggestions work, you can always run a Client Search if you know your client's name, DOB, or SSN. You can also use the Household Client List.

- **What the Household Client List used for?**
  The Household Client List provides an alphabetical list of all clients screened by your site (or a particular EBO screener) within the date range entered. It's intended

to help you locate those hard-to-find clients after looking for them in a Client Search or the Follow Up List for Benefits. Since this includes all your clients, you can find your client even if his/her name is misspelled or no referrals were made.

# Benefit-Specific Questions (LIHEAP, tax credits, etc.)

- **Who is eligible for Expedited Food Stamps?**
  Some people can get Food Stamp benefits within five days of the date they apply. To qualify for Expedited Food Stamps person must:

  - Have income less than $150 per month and assets of $100 or less.
  - **OR** have monthly rent/mortgage and utility expenses that are more than total monthly income plus liquid assets.

  Please note ID is the only documentation required for the first month of Expedited SNAP.

- **My client is twenty-two years old or older. He/she lives with his parents, but wishes to apply for Food Stamps separately. How do I screen them in EBO?**
  Children 22 years-old or older do not have to apply with their parents if they live in the same household, as long as they don't buy, prepare, or share meals together. If your client is in this situation, please contact the Helpdesk for more info.

- **If someone does not pay rent but does pay for utilities, can they qualify for LIHEAP (aka HEAP, MEAP, or CEAP)?**
  Yes. The client must prove that he/she is responsible for paying for heating utilities. For a list of items that can be used to prove utility bills, see the "Needed Documents" sections of earnbenefits.org.
  - **Remember - All members of a physical household must apply for LIHEAP together.** For example, if a person is staying with a family member for free but is paying the gas bill, he/she must apply with the family members also living in the house. Their income must therefore be counted.

- **Can a client qualify for LIHEAP if heat is included in their rent?**
  Yes, but they must prove that heat is explicitly included in their rent. A copy of the current lease or a letter from a landlord will suffice.

- **How do I refer my client for tax credits?**
  Tax credits work just like any other benefit in EBO, and providers listed for these credits are VITA sites that offer. VITA Tax Preparers can help clients with all the necessary paperwork for EITC and the Child Tax Credit. Therefore, please **refer** (don't forget to hit apply too!) your client to the **same provider for each tax credit**.

  Free Tax Prep can save your clients up to $100, sometimes more, that they might spend on getting their taxes prepared privately. For more info, please read the Tax Credit section in [www.earnbenefits.org](http://www.earnbenefits.org) for your city.

o **How do I complete follow up for tax credits?**

If you have a VITA team on-site:

- You can immediately select "Benefit Received" for all tax credits if your client is going to have his/her taxes prepared at your site

If you are referring to another agency for Free Tax Prep:

- You should contact your client to find out if he/she filed a tax return at a VITA site and then complete the Follow Up page