

Excel Prospective budgeting Form

Directions...

Step 1: Complete the case specific information at the top of the form using the drop-down menu to select the action (intake/renewal/SMRF/change) IF none of these items apply select the (-) also showing in the drop-down.

Employee Name: _____ Employer: _____ Case #: _____ Worker: _____
 Action: _____ Date: _____ 30 day period: _____

2020 Calendar

February 2020							March 2020							April 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
5	6	7	8	9	10	11	1	2	3	4	5	6	7	5	6	7	8	9	10	11

Step 2: Mark the pay frequency that applies to the documents provided with an X. ** Please make sure to check this as the form depends on it to properly calculate. **

Frequency (x)

Weekly	<input type="checkbox"/>
Bi-weekly	<input checked="" type="checkbox"/>
Semi-monthly	<input type="checkbox"/>

Step 3:

A. Enter the pay dates in the column listed Date Paid

16								Salary or	Comm/
17	Date Paid	Source	Gross wage	Reg hours	OT hours	Other pay type	Tips	Bonus	
18									
19		-							
20		Paystubs							
21		Work#							
22		Employer Record							
		FDSH							

B. Select from the drop-down menu in the Source column what type of verification has been received (paystubs, work#, FDSH, employer record). If none of these sources apply you can select the (-) also showing in the drop-down.

16								Salary or	Comm/
17	Date Paid	Source	Gross wage	Reg hours	OT hours	Other pay type	Tips	Bonus	
18									
19		-							
20		Paystubs							
21		Work#							
22		Employer Record							
		FDSH							

C. Complete the wage information for each pay date on the corresponding line.

Date Paid	Source	Salary or				Comm/	
		Gross wage	Reg hours	OT hours	Other pay type	Tips	Bonus
9/4/2020	Paystubs		40	4	10		
9/18/2020	Paystubs		32	0	10		

** If there are weeks that do not have a pay time and others that do for example OT hours make sure to enter 0 in the weeks that don't have any earnings for this pay type.

D. Enter the rate per hour for each pay type listed on the documents. No rate is entered on the salary or gross wage column.

Date Paid	Source	Salary or				Comm/	
		Gross wage	Reg hours	OT hours	Other pay type	Tips	Bonus
9/4/2020	Paystubs		40	4	10		
9/18/2020	Paystubs		32	0	10		
Average hours per pay period			36.00	2.00	10.00	0.00	0.00
Rate of per hour			12.50	18.75	1.25		
Subtotals:		0.00	450.00	37.50	12.50	0.00	0.00
Total per pay period		500.00					

*** IF there are no pretax deductions than skip step 4***

Step 4:

A. Select the type of pretax deductions listed on the verification from the drop-down menu.

Pretax deductions					
Type					
Amount					
Frequency: bi-weekly, weekly, semi, monthly					
Individual deductions per month		0.00	0	0	0
Total deductions per month					

B. Enter the amount of the deduction per pay period.

Pretax deductions					
Type	Health Ins	Retirement	Flex		
Amount	125.00	46	25		
Frequency: bi-weekly, weekly, semi, monthly					
Individual deductions per month	0.00	0.00	0	0	0
Total deductions per month	0.00				

C. Select the frequency for each pretax deduction from the drop-down menu.

Pretax deductions					
Type	Health Ins	Retirement	Flex		
Amount	125.00	46	25		
Frequency: bi-weekly, weekly, semi, monthly					
Individual deductions per month		0.00	0	0	0
Total deductions per month					

-
 bi-weekly
 weekly
 semi
 monthly

Deeming Calculations:

Enter the shelter costs listed in CWW	Enter the total household members listed in CWW	Enter the eligible household members in CWW
Deeming Calculations Shelter costs <input type="text"/> Total HH members <input type="text"/> Eligible HH members <input type="text"/> FS Income - 20% <input type="text" value="0.00"/> FS Deemed income <input type="text" value="0.00"/> Deemed shelter <input type="text" value="0.00"/>	Deeming Calculations Shelter costs <input type="text"/> Total HH members <input type="text"/> Eligible HH members <input type="text"/> FS Income - 20% <input type="text" value="0.00"/> FS Deemed income <input type="text" value="0.00"/> Deemed shelter <input type="text" value="0.00"/>	Deeming Calculations Shelter costs <input type="text"/> Total HH members <input type="text"/> Eligible HH members <input type="text"/> FS Income - 20% <input type="text" value="0.00"/> FS Deemed income <input type="text" value="0.00"/> Deemed shelter <input type="text" value="0.00"/>

Missing Stub Calculations:

Enter the year to date on the stub received after the missing stub	Enter the gross total from the same stub	Enter the year to date on the stub received just before the missing stub
Missing Stub Calculations YTD on stub received after missing <input type="text"/> Gross from same stub <input type="text"/> Subtract #1-#2= YTD on stub received before missing <input type="text"/> Subtract #3-#4= Missing pay stub gross= 	Missing Stub Calculations YTD on stub received after missing <input type="text"/> Gross from same stub <input type="text"/> Subtract #1-#2= YTD on stub received before missing <input type="text"/> Subtract #3-#4= Missing pay stub gross= 	Missing Stub Calculations YTD on stub received after missing <input type="text"/> Gross from same stub <input type="text"/> Subtract #1-#2= YTD on stub received before missing <input type="text"/> Subtract #3-#4= Missing pay stub gross=