

FINL - Financial Information List

This screen displays a list of total resources, total unearned income and total income for a specific client in reverse chronological order by service month.

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CAFSFINL          FINANCIAL INFORMATION LIST          07/08/2016    16:25
USER ID : C74142SW          PAGE NO: 1
CAPS ID : 00001654    00    NAME: DOE, ANNETTE

TO SELECT, ENTER I=INQUIRE OR M=MODIFY
STARTING SERVICE MONTH :

SEL    SERVICE MONTH    TOTAL RESOURCES    TOTAL UNEARNED    TOTAL EARNED
      -      06/2016          6,575.00           INCOME           INCOME
                        275.00

PATH: _
```

Field Descriptions (F12) indicates code lookup is available.

CAPS ID (F12)

Enter the CAPS ID of the client you wish to add or view financial information for.

NAME

This field will display the name of the client whose ID is entered in the CAPS ID field.

STARTING SERVICE MONTH

Enter a date in this field (MM/YYYY) and only financial information from that date to current date will display on the list.

SEL

Enter "I" if you want to inquire on financial details for a specific service month or "M" if you want to modify financial details for a specific service month.

SERVICE MONTH

This field will display the service month the financial information was entered for.

TOTAL RESOURCES

This field will display the total value of resources entered for the service month.

TOTAL UNEARNED INCOME

This field will display the total amount of unearned income entered for the service month.

TOTAL EARNED INCOME

This field will display the total amount of earned income entered for the service month.

Additional Information

Financial information can be manually entered on the FIND (Financial Information Detail) screen. Unearned income details will also automatically be created when income is posted to the client's trust account.