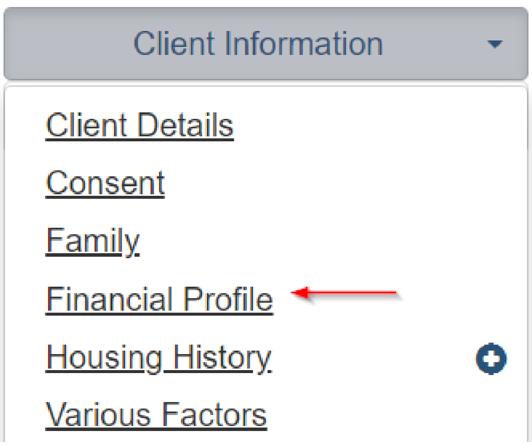
HT27: How to Add a Financial Income Record

1. Search for the client to enter their record.

2. Select Client Information > Financial Profile.



3. From the Incomes tab, click the Add Income button.

4. Enter values on the Add Financial Income screen.
   - If the income type is still being received, do not enter an End Date.
   - If the income type is the client's primary source of income, toggle Primary to Yes.
   - Always leave the Shareable and Editable toggles set to Yes.

5. Click the Save button to save the record.

6. Enter additional income records if the client has multiple income types.