Client Disbursements Transactions – New – PNA Screen

Updated on February 2017

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Business Purpose:

The **Disbursements Type Detail** – PNA page displays a screen for entering Personal Needs Allowance Details for one client member for a new PNA transaction.

How to:

1. In the **Personal Needs Allowance Details** tab, check the **Calendar Months** dates to make sure all the paid and eligible dates are correctly colored coded on the calendar, especially the <mark>Stayed, Eligible</mark> dates, which are the possible dates to be paid in this transaction.

2. For business reasons, when it becomes necessary to hold back payment for any number of stayed and eligible days, then under the **Number of Days** column, uncheck the **Date To Be Paid** for the dates that you don`t want to pay the client. Note that the *Stayed and Eligible* count will remain the same, but the *To Be Paid* count will vary if any of the boxes are unchecked.

3. Enter **Note**(**s**) regarding this PNA disbursement, up to a maximum of 4000 characters.

4. Click on the 🖫 Save action button to save the PNA details.

5. Click on the ⟲ Reset action button to reset the details back to the original defaults.

Important Notes:

1. For information only, the top **Disbursement Type Details** tab shows the **Client** name, **Program** and **Disbursement Type**.

2. The **Calendar Legend** explains the different colour codes in terms of stayed and eligibility scenarios.