ADULT FINANCIAL SINGLE PAGE ELIGIBILITY

REFERENCE GUIDE

COLORADO
Healthcare & Economic Security
Staff Development Division

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training.colorado.gov

Disclaimer

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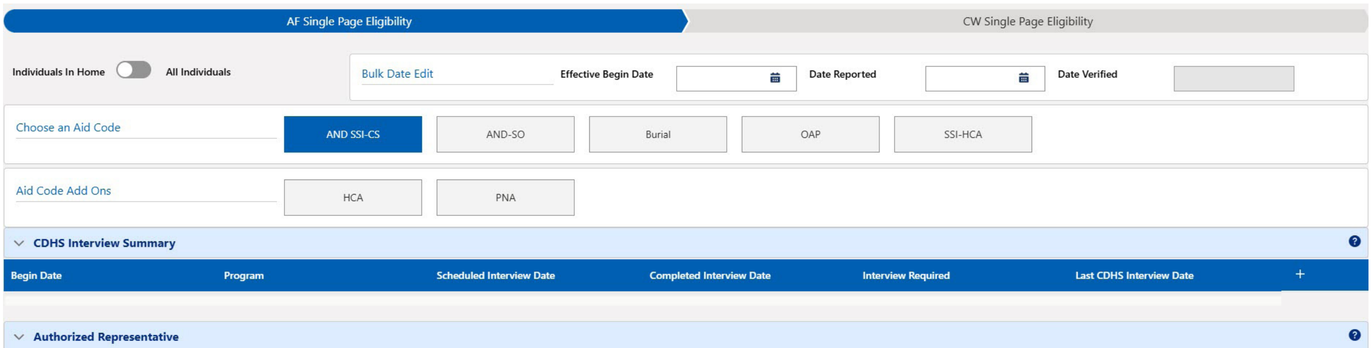
If you have a disability and require accommodations in order to complete this training, please contact the SDD at: SOC_StaffDevelopment@state.co.us.

References

Illustrations Retrieved from https://storyset.com/ on 10/1/2025.

About Adult Financial Single Page



The Adult Financial (AF) Single Page is a single location in CBMS for you to complete Adult Financial data entry. Instead of clicking through multiple screens to enter every piece of information, you can utilize this single page to process a Adult Financial application, change, or RRR.

This page was created for Adult Financial cases, but you can use its features for any program. Feel free to update a case and use any of its sections, even if the case is not related to Adult Financial.

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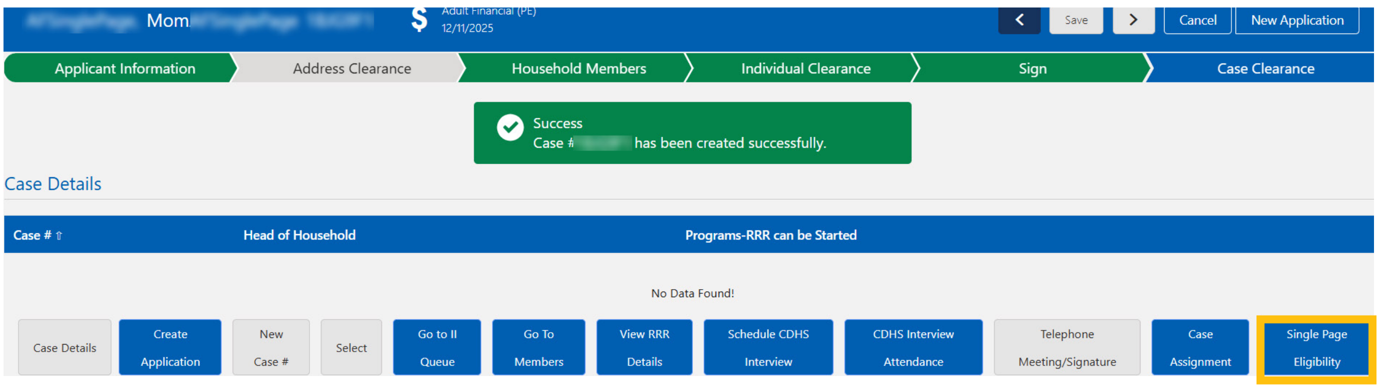
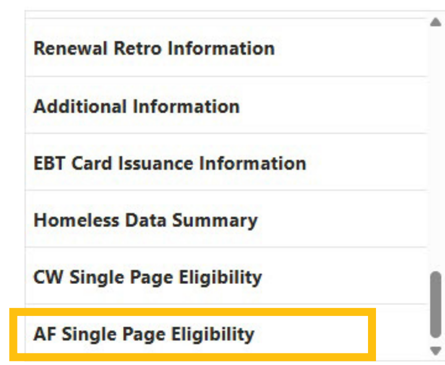
Page Access

There are three ways to access the Single Page:

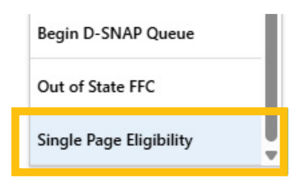
1. During Application Initiation (AI), after attaching the application to a case, you can choose to navigate to Single Page Eligibility via the button on the right on the Case Clearance screen.



2. On the Members screen, click **More** and scroll down to AF Single Page Eligibility.



3. From the Actions drop-down on the Members screen, select **Single Page Eligibility** (you may need to scroll).



When starting an RRR, a pop-up will ask if you want to go to the Single Page.

- Choose Yes to be automatically taken there.
- Choose No to go to the II Queue as you normally would.

Single Page Features & Shortcuts

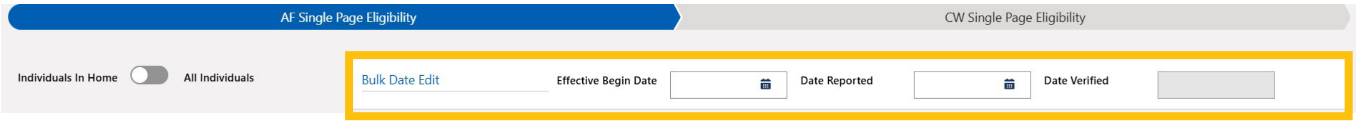
Even though the purpose of this new screen is to help you focus on Adult Financial, its use is not restricted to Adult Financial cases. The sections in this guide can be used to update data on a case for all programs (even if the AF program is not on the case).

All hyperlinks on the Adult Financial Single Page Eligibility screen will open in pop-ups, so you are never navigated away from the screen.

Individuals In Home/All Individuals

- This toggle will allow you to show or hide individuals who are not in the home.
- By default, individuals marked out of the home are hidden. Exception: Due to the delicacy of the Household Composition section logic, individuals will not be hidden in the graphic there.
- To avoid performance issues, you will not be able to show and hide based on the “use month” of the in-home data. However, if someone with a future month is being hidden, you’ll see a warning message letting you know so you can switch the toggle to “All Individuals.”

Bulk Date Edit



This section allows you to optionally set an Effective Begin Date, Date Reported, and Date Verified to autofill as you make changes throughout the Single Page.

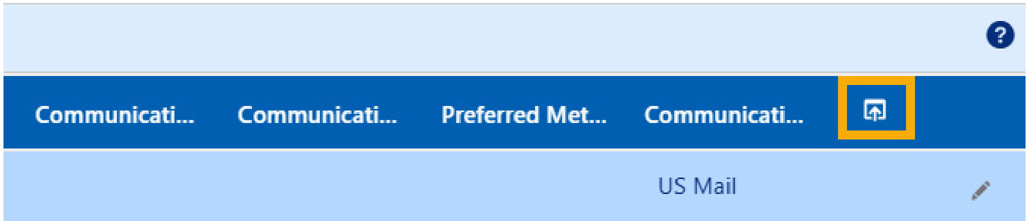
You must have entered a Date Reported to enter a Date Verified, but you may choose to autofill the Effective Begin Date or Date Reported alone or without a Date Verified.

The bulk dates you have entered will only populate after you modify the data in a section that needs verification, and after it updates, you may still modify the date away from the auto-filled date.

Additional Features

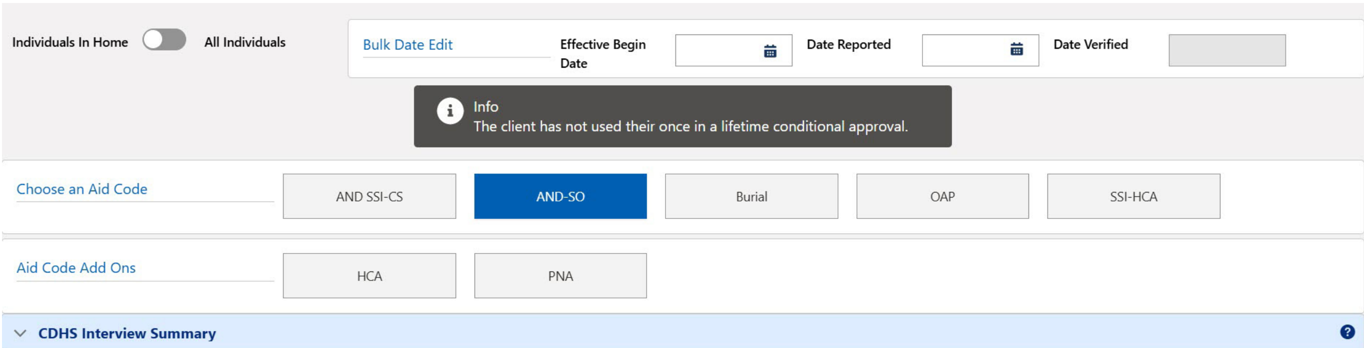
- In CBMS, if you see this symbol  on a screen in II, that means that the last update to this screen was made from the Single Page.

Up Arrow Hyperlink



The "up arrow" serves as a hyperlink to view the corresponding II Queue page in CBMS.

Choose an Aid Code



This section controls how the Adult Financial Single Page looks based on the program you're working on. You'll see a button for each primary aid code.

- If the case already has Adult Financial, the client's current aid code will be selected automatically when you open the page.
- If it is a new case, you'll need to click the button for the aid code you think the client is eligible for. Once you select it, the data entry sections you need will appear below.

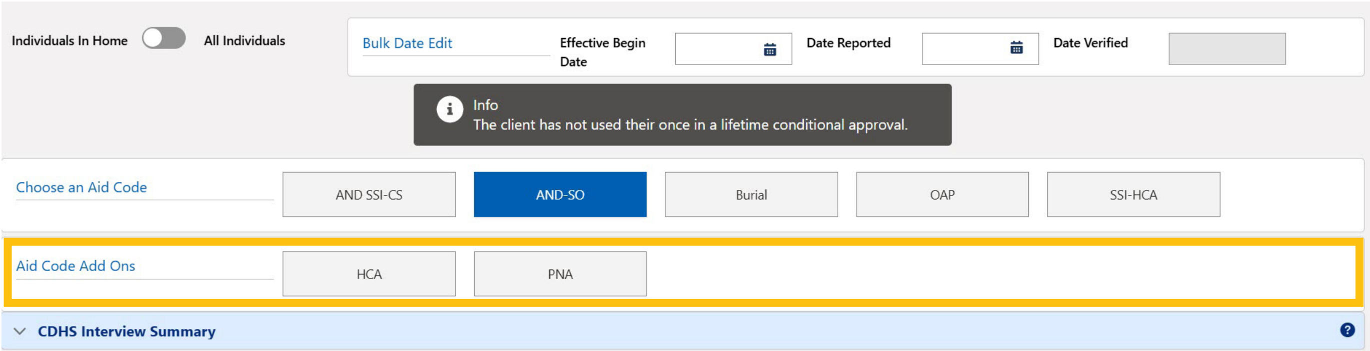
You are not actually determining what aid code the client passes for when you choose a view. It only changes how you see the screen.

Even if CBMS automatically selects an aid code for you, you may need to change the view by clicking a different button.

For example, if an active OAP client has died, OAP would be selected when you load the page because that is the client's current program. If you have come to the screen to process the case for Burial, you can switch to the Burial view by clicking the button labeled Burial.

A warning message appears in this section if you choose SSI-HCA or AND-SSI-CS and no SSI income is present for the client, to remind you to either add the SSI income during processing or choose a different aid code.

Aid Code Add-ons:



If you have selected an aid code (above) that can be issued in addition to PNA or HCA, you will be able to choose the HCA or PNA buttons to show fields needed for these add-on programs. Similar to aid codes in general, if the client already has HCA or PNA, the buttons will be pre-selected for you.

Even if CBMS selects an Aid Code Add On for you, you may change the view by selecting different buttons. For example, if an active AND-SO-HCA client enters a nursing facility, and the HCA button is pre-selected because that is the client's current program, you can click the PNA button to change the view.

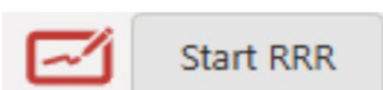
RRR Details

This section will only appear when an RRR has been generated or started for a case, and will allow you to start the RRR and view information about the started RRR.

To start an RRR:

1. Select the row for the program with a generated RRR.
2. Click the edit pencil in the row.
3. Complete the Edit RRR Details screen as you normally would.
4. Save.
5. Click the Start RRR button.

There will be a red symbol next to the Start RRR button that makes it obvious than an RRR is unsigned, and you can also tell because the Signature Date column will be blank.



When an MA RRR is started ex parte, the Signature Date may not be copied into the MA RRR record, which will cause this symbol to appear.

To modify a previously started RRR to show what you have obtained a signature:

1. Select the row for the program with the started RRR that is missing a signature.
2. Click the edit pencil in the row.
3. Change the RRR Signature Provided radio button from No to Yes.
4. For SNAP and MA only, complete the Signature Received Date.
5. Save.

CDHS Interview Summary

This section joins information from different screens so you can easily see if an interview is needed or if one is already scheduled. You can also select an existing interview or record a client's attendance without having to leave the page.

To add CDHS Interview Attendance information:

1. Click the plus icon and choose CDHS Scheduling Interview or CDHS Interview Attendance record as desired and complete the screen just as you would from II.
2. If an interview has been scheduled, but a CDHS Interview Attendance record does not exist, you can also add the CDHS Interview Attendance record by clicking the + in the Begin Date column in the row for the program.

To edit CDHS Scheduling Interview information:

1. The Begin Date column contains a hyperlink to the CDHS Interview Attendance screen. Once this screen is opened, you can update it as normal.
2. The Scheduled Interview Date column contains a hyperlink to the CDHS Scheduling Interview screen; you can update it as normal.

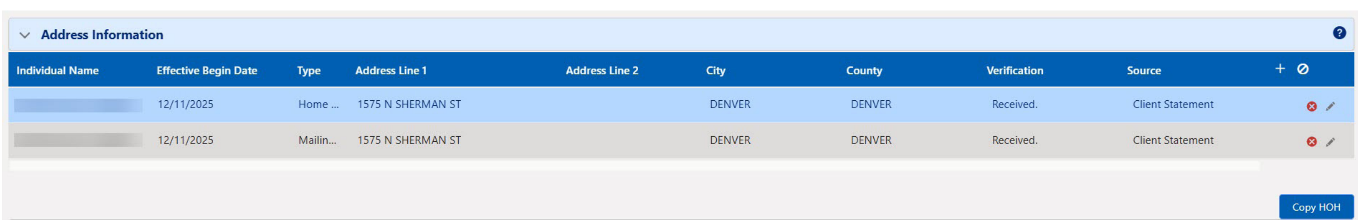
Authorized Representative Summary

This section will show all Authorized Representatives for the case with the program(s) and the role(s) selected for each program.

To add or edit Authorized Representative information to the case at intake:

1. Click the plus icon or the edit pencil icon on an existing record, and complete or modify the Authorized Representative screen just as you would in the II queue.
2. Click Save.

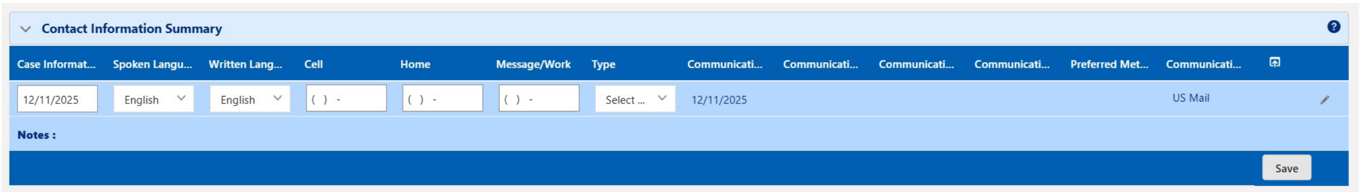
Address Information



This section will show you the address information for household members. Use the plus icon to add an address, or the edit pencil to edit an existing address.

> A warning message will appear below the Individual Demographics Summary if the head of household's home address county doesn't match their residency county. This helps catch possible data entry mistakes, such as updating a client's address but forgetting to update the Residency screen.

Contact Information Summary



This section pulls contact information from the case to ensure you have the correct information to contact clients for their interview and can easily update their details as needed.

To edit Contact Information:

For directly editable fields (sourced from the Case Information screen):

1. In the editable grid part of the row, change the Case Information Effective Begin Date, and then modify any of the editable fields as needed before clicking Save.
2. If you need to modify the contact information notes, click the edit pencil in the row.

For display-only fields (sourced from the Case Communication screen):

1. The Communication Effective Begin Date column is a hyperlink. Click on the link to open the Case Communication screen and add/update information as needed.

Individual Demographics Summary

The Individual Demographics Summary section combines information from four different screens: Individual Demographics, Non-Citizen, Residency, and Identification Details.

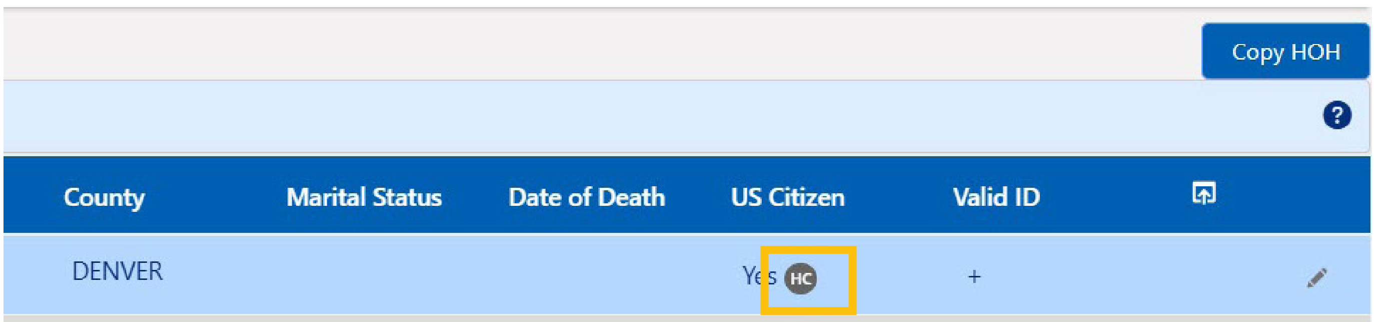
While the way you enter the data does not change, this section provides a single, central place for you to access all of it.

To edit Individual Demographics:

- Demographics
  - Includes Last Name, First Name, Age, State ID, SSN, Date of Death, Marital Status, and Valid ID.
  - Click on the edit pencil for the whole row. This will open the Demographics view from II. Make updates as you normally would, for all programs.
- Residency (CO Resident and County)
  - Click on the hyperlink in the Colorado Resident column to open the Residency screen. Make updates as you normally would, for all programs.
- Non-Citizen
  - Click the icon to open the Non-Citizen screen. Choose the client whose record you would like to modify. Make updates as you normally would, for all programs.

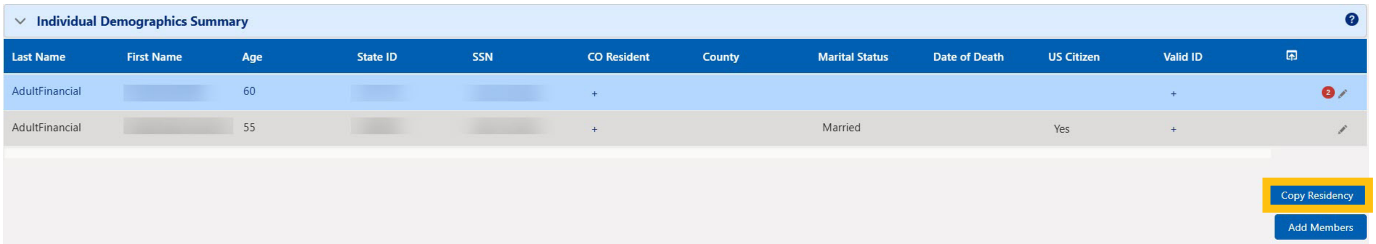
- Identification Details (Valid ID)
  - This new column will show you the type of ID that is verified if the ID is entered in CBMS, has an expiration date on or after the Adult Financial application, and is an acceptable type of ID for Adult Financial.
  - Acceptable values are determined by a backend reference table for Adult Financial, which is why we are able to identify and display the valid ID. Other programs do not use such a table, so if your case has never had a Adult Financial program, this column will display as blank - this does not indicate that you do not have acceptable ID for your other programs, just that we cannot determine whether or not you do for the purposes of this screen for those programs.
  - If there is no Valid ID, a + hyperlink will appear. Click on the hyperlink to open a new identification record for the client. Make updates as you normally would, for all programs.

Indicators:



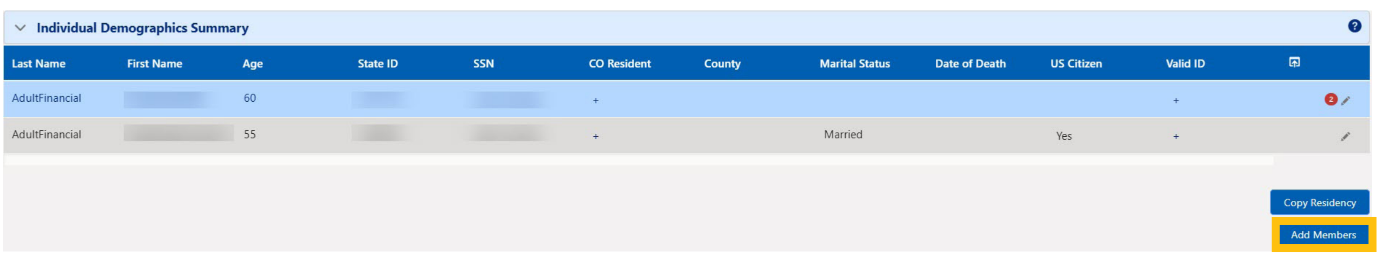
Indicators in this section will help you see at a glance whether SSN and US Citizenship are verified and whether it is verified by SOLQ/SCHIP (a check mark), Collateral Contact (CC), or Hard Copy (HC). These indicators are visuals only and cannot be clicked. They will automatically update if you make changes to the verification Source on the Demographics screen.

Copy Residency Button



You can copy residency information from one household member to another by clicking on the Copy Residency button. In the pop-up, choose the individual you want to copy residency from in the “Copy data from Individual” drop-down. Then, move any individuals you want to copy the residency to from the Unselected list to the Selected List under “Copy data to individuals” by selecting the individuals and using the arrows between the lists. Once you save, the residency information will be copied.

Add Member Shortcut



You can add a new member by clicking the Add Member button. This will open a new screen where you can:

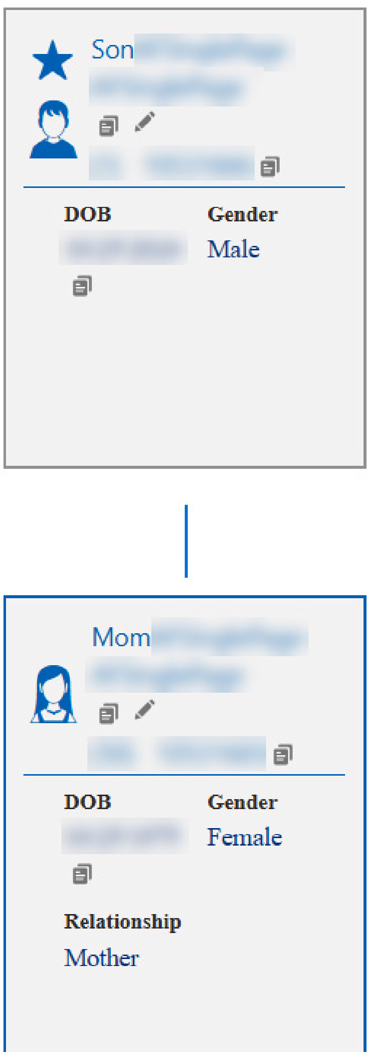
- Click the plus icon to add a new person.
- Perform Clearance just as you would in II.

Once you have added the new member, you can fill in their information using other sections on the screen.

An informational message will display near this shortcut, prompting you to add the client’s spouse if the AF HOH is indicated as married, but a spouse is not yet present on the case, or if the AF HOH is a minor, but parents are not present.

Household Composition Summary

The new Household Composition section will provide a genealogy chart-like view of the household, starting from the Head of Household on the Adult Financial case. The chart orients itself around the Head of Household (HOH), designated by a blue star on the chart. If the HOH is married, the client's spouse will be shown with them in the main area of the chart. If the HOH is a minor, their parents will be shown with them in the main area of the chart. If there are other individuals on the case, they will be displayed in the Other Adults or Other Children sections to the right.



Some information will display directly on the client's card (pictured left).

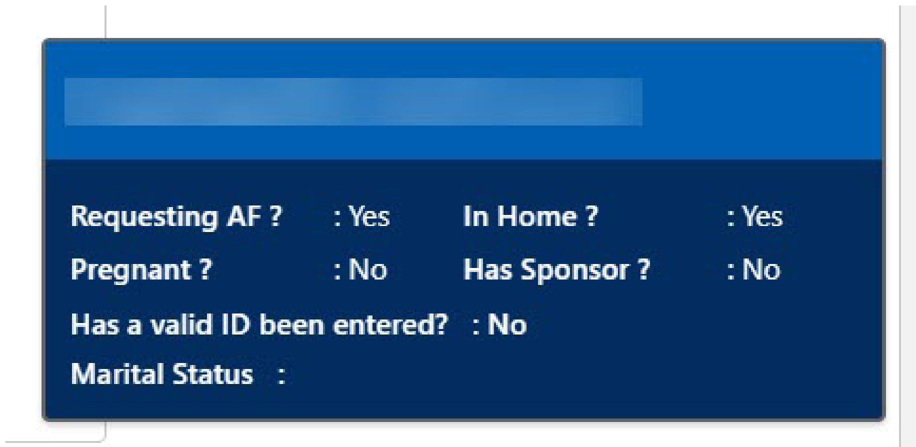
- Basic demographic information
- The individual's relationship to the HOH
- A grey bubble with the letters SP if the individual is marked as the sponsor for the HOH on the Household Relationships screen.

Hovering over an individual's card

When you hover your mouse over an individual, a pop-up window will appear with key information (pictured right). This allows you to quickly view details without having to click.

The following data can be fiewed in the hover at all times from the data within CBMS screens:

- Requesting AF?
- In Home?
- Pregnant?
- Has Sponsor?
- Has Valid ID been entered?
- Marital Status



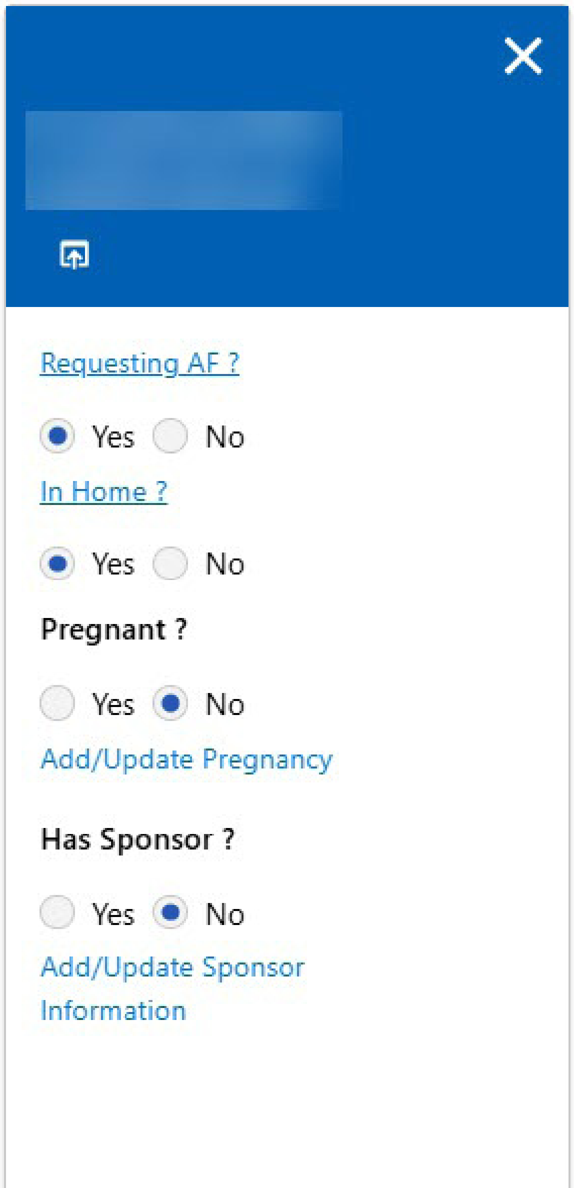
Only after a case has been run and authorized will you also see the following data on the pop-up window:

- Excluded or Ineligible?
- Reason (will display the individual reason the client is excluded or ineligible if Excluded or Ineligible is Yes)
- ID verification (shows whether the individual has met identity verification requirements, has not met them, or is exempt)
- Active POIs (i.e., transfer without fair consideration)

Clicking on an individual's card

Clicking on any individual will open a sidebar (pictured right) where you can see specific information for that individual and modify it. You will be able to access and update:

- Requesting AF?
- In Home?
- Pregnant?
- Has Sponsor?
- Sponsor Information



On a brand new case, you will see only the HOH in the main column, while other members of the case display to the right. The chart will assemble itself more meaningfully after you add relationship data.

Image of chart **before** relationship data is entered:

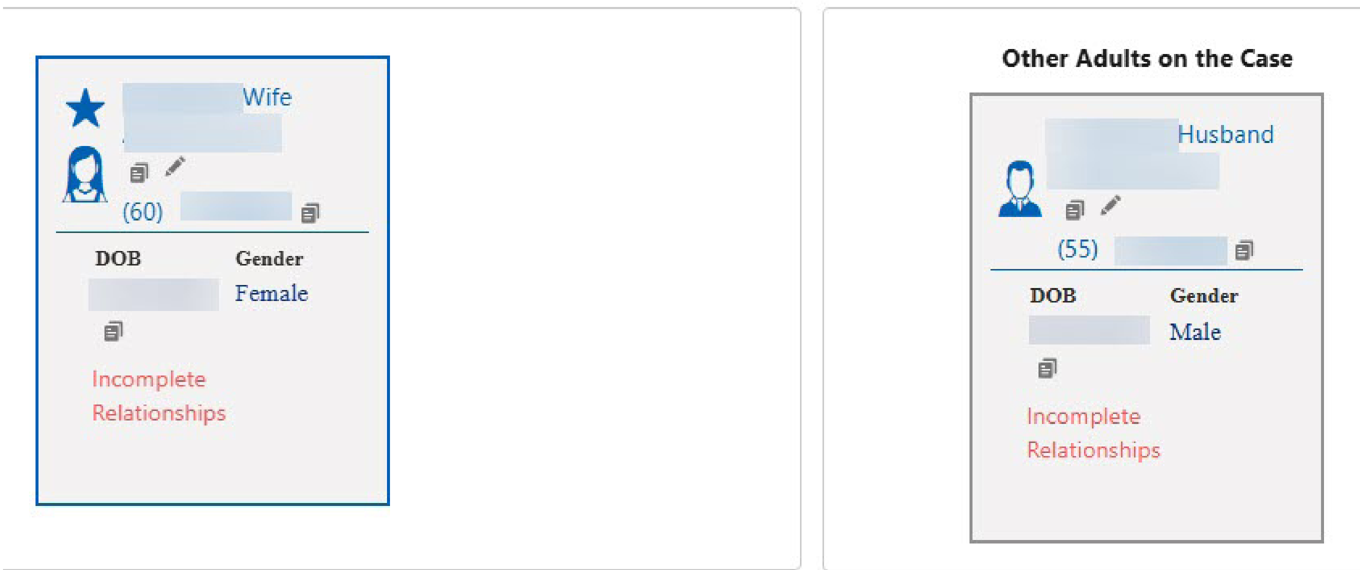
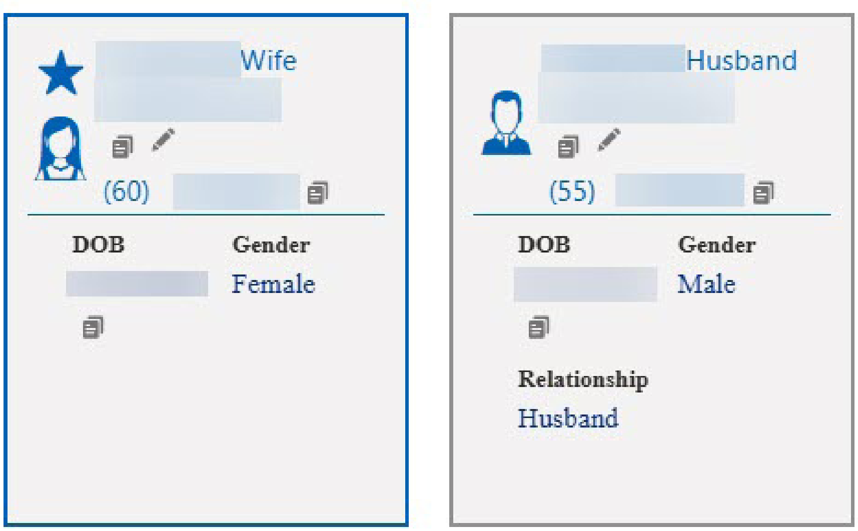


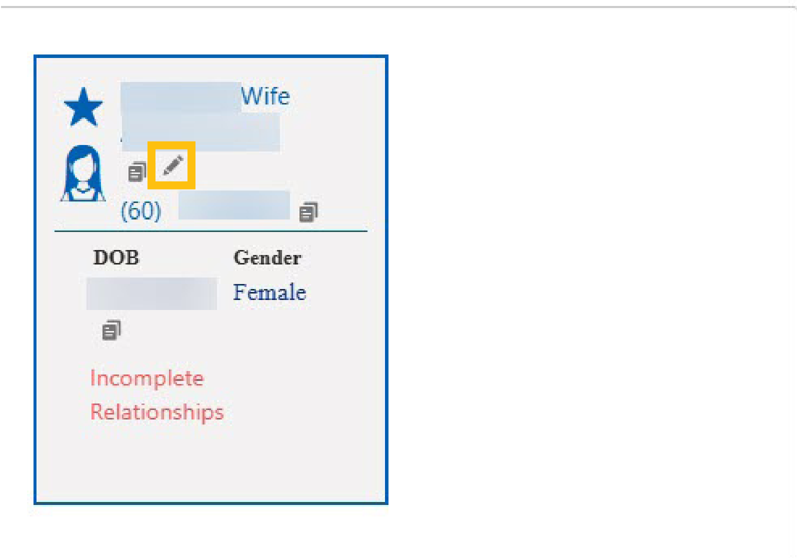
Image of chart **after** relationship data is entered:

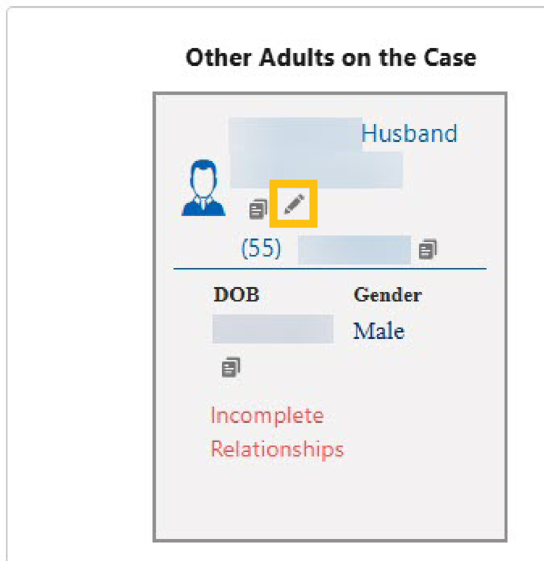


Incomplete Relationships Indicator

In order to aid you in knowing which individuals you have finished completing relationships for and which ones you still need to do, the text “Incomplete Relationships” will display instead of the Relationship to the selected child until the data is completed.

To complete Household Relationship information:

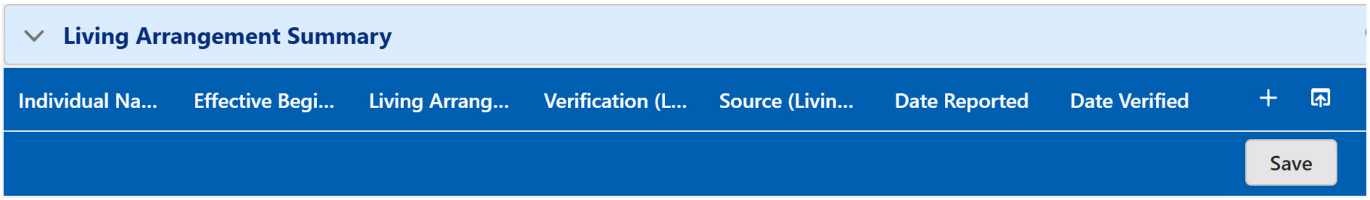




Click the edit pencil on the client card (next to the copy button by their name) in the chart area to open the Household Relationship screen with that individual already in context.

From AF Single Page, the Household Relationship screen only displays Household Relationship checkboxes that apply to AF (Sponsor). If you need additional checkboxes for SNAP and MA (Parental Care and Control, Responsible Relative, Community Spouse), access the II view by clicking on the individual, and then the icon in the side panel that appears.

Living Arrangement Summary

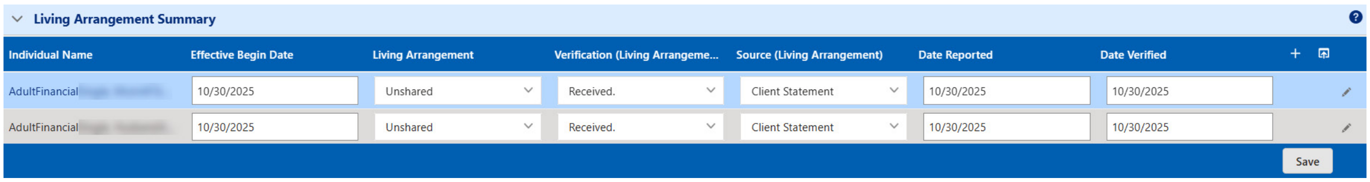


Note: You will be able to add/update living arrangements for clients. This section is not visible in the burial view.

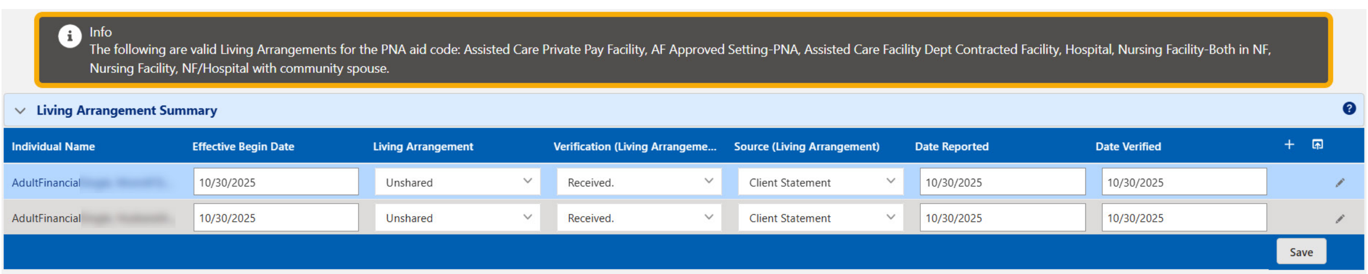
To add new Living Arrangement information to the Attributes screen:

1. Click the plus icon.
2. Choose the person you want to add Living Arrangement information for.
3. Data enter Effective Begin Date, Living Arrangement, Verification, Source, Date Reported, and Date Verified.
4. Save (or use Save and New to immediately start entering the information for the next household member).
5. From AF Single Page, only the Living Arrangement field and associated Verification and Source fields from the Attributes screen are displayed (no other data on the screen is required for AF). If you need to enter Attributes information for other programs (Inmate Match, Health Care Information, SNAP 165% FPL Gross Income Test, etc.), access the II view by clicking on the individual, and then the icon in the side panel that appears.

To edit Living Arrangement information on the Attributes screen:

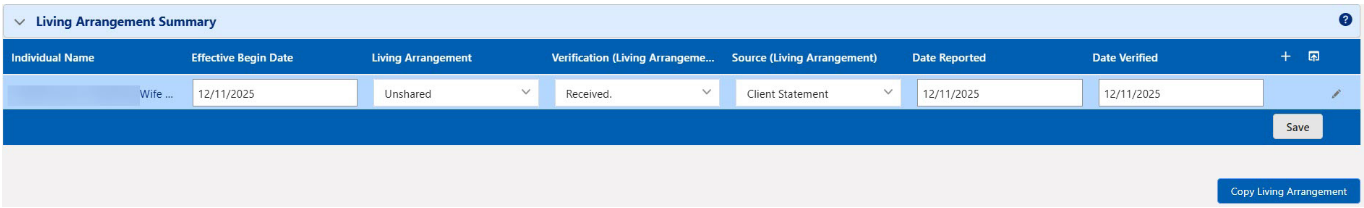


1. In the editable grid, change the Effective Begin Date, Living Arrangement, Verification, Source, Date Reported, and Date Verified, and Save without leaving the screen or opening a pop-up.
   a. This is all the data entry you will need to do on the Attributes screen for AF for all clients.
   b. This is limited (AF-focused) data entry. See information in the “add” section above.



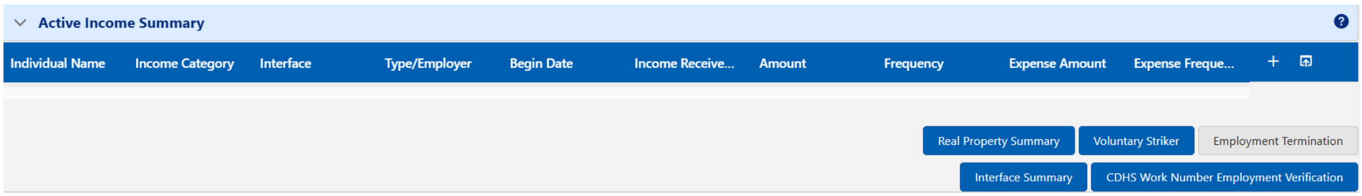
When you are in the PNA view, an informational message will appear and provide a list of valid living arrangements for PNA to aid your data entry.

Copy Living Arrangement button:



You can copy Living Arrangement information from one household member to another by clicking on the Living Arrangement button. In the pop-up, choose the individual you want to copy the Living Arrangement from in the “Copy data from Individual” drop-down. Then, move any individuals you want to copy the Living Arrangement to from the Unselected list to the Selected List under “Copy data to individuals” by selecting the individuals and using the arrows between the lists. Once you save the Living Arrangement information will be copied.

Active Income Summary

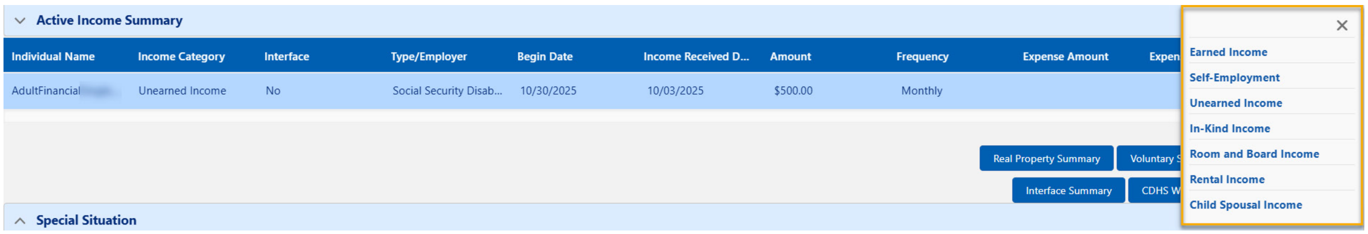


Note: When you select the burial view, this section will move closer to the bottom of the screen. This allows sections that are more relevant to a burial case to be more easily accessed.

The Active Income Summary shows you all the income on the case that does not have an Effective End Date. It will not display income that was interfaced for HCPF purposes (i.e., CDLE, FDSH), but it will display CDHS Work Number Interfaced income, which is treated the same as income you entered yourself.

If there are unconfirmed Work Number records that are active, you'll see a message above the Active Income Summary with a link to the CDHS Work Number screen, where you can review and resolve any issues.

To add new income:



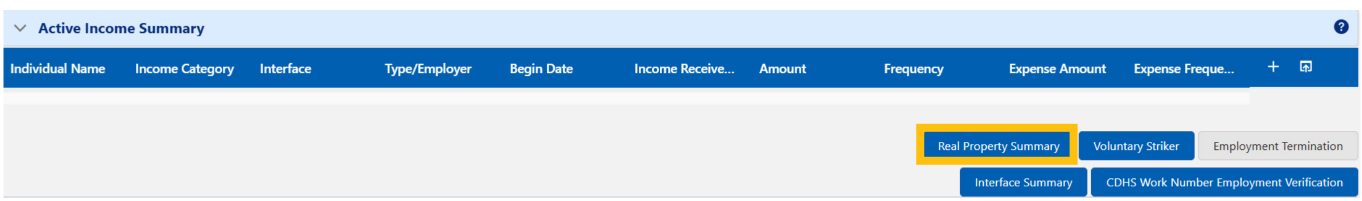
1. Click the plus icon and choose the type of income you want to add from the floating menu.
2. Choose the person you want to add income for.
   a. If income is earned, the Employer field will appear.
   b. Select the Employer (after you pick the person, the drop-down will populate with Employer options) or click the Add Employer button. (If you add an employer, you will be able to do so exactly as you would see it in II, and as soon as you are finished, the new employer will be available in the Single Page employer drop-down).
3. Enter:
   a. Effective Begin Date
   b. Income Type
   c. Frequency
   d. Verification
   e. Source
   f. Date Reported
   g. Date Verified
4. Click Save. Down below, the Paycheck Summary or Income Summary, and Income Expenses related lists will appear. For Unearned income entries, the CDHS Transfer of Income related list will also appear.

5. Add paychecks, income received, S-Corp/LLC draws, transfers, or expenses as needed.
   a. When entering income records, the following fields, which are not necessary for AF, will not be visible on the AF Single Page. Use of these fields is generally rare, even for other programs, but if you need to complete them for SNAP and HCPF programs, please do so from II. You can click the  icon in the section to open the II view of the income area if you need to.
      i. Private Disability Taxable Amount
      ii. Housing Allowance for Minister
      iii. Income from AI/AN test
      iv. Taxable Amount
      v. Americorps Living Allowance Amount (Paychecks only)
      vi. Verification (related to Americorps Living Allowance Amount) (Paychecks only)
      vii. Source (related to Americorps Living Allowance Amount) (Paychecks only)
6. Click Save.

To edit income information, add new paychecks, edit income received records, S-Corp/LLC draws, transfers, or expenses:

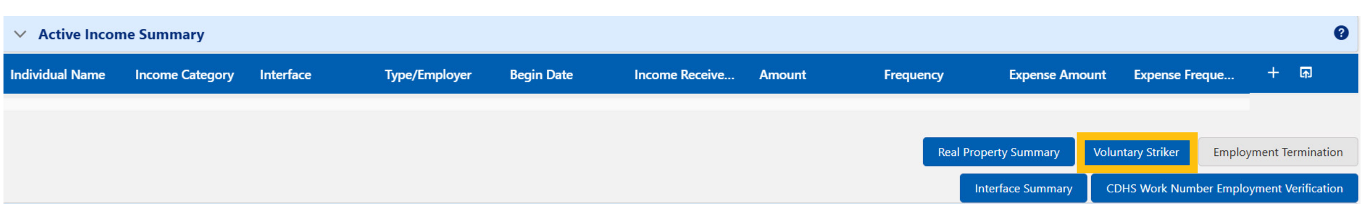
1. Click the pencil icon.
2. Add income, transfers, or expenses as normal on the related lists, which will automatically open in the simplified income view, and save.
    a. When entering a paycheck or unearned income records, you will see limited fields. Please see 5.a, above, to identify the fields that are not present. On some cross-program cases, you will need to data-enter these fields from II. You can click the icon in the section to open the II view of the income area if you need to.

Real Property Summary Shortcut



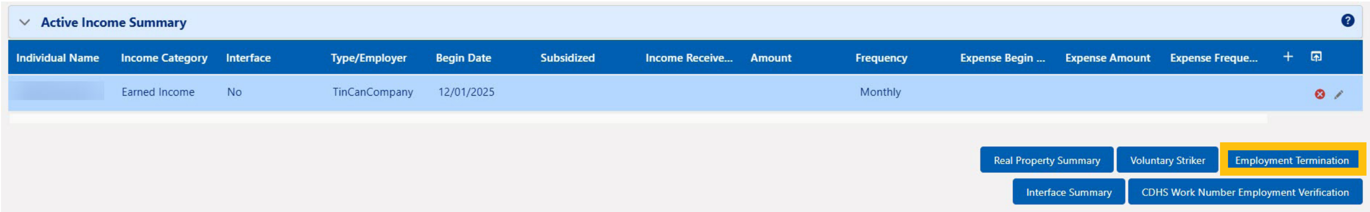
This shortcut opens the Real Property Summary screen so you can add a real property resource. Add/edit functionality on the screen as viewed from Single Page is identical to that in II. You will be returned to the Single Page after clicking Save.

Voluntary Striker Shortcut Button



This shortcut opens a pop-up where you can add/edit voluntary striker information for household members.

Employment Termination Button



If earned or self-employment income has ended, make sure you input any final pay stubs first, and then select the job record in the Active Income Summary and click the Employment Termination button. Fields related to terminating the employment record will be loaded in a pop-up. Complete the fields related to income ending as normal. Remember that the Active Income Summary section only shows income that is not Effective End-Dated, so the employment you end-date will disappear from the screen after you complete the end date.

[Burial Only] End Date Incomes Button

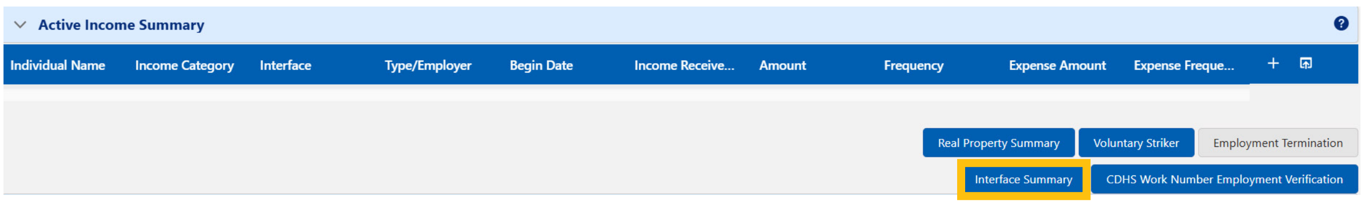
After you have entered the Date of Death, you can use this button to bulk end-date all of the client's income for the last day of the month following the Date of Death.

To take this action:

1. Ensure the Date of Death was already entered for the deceased client.
2. Select an income record belonging to the deceased individual, and click the End Date Income button.
   a. If you have not entered the Date of Death for that individual, you will see an error message: "To end date all incomes for the individual, you must enter the Date of Death."
3. CBMS will take action to Effective End Date all of the client's income for the last day of the month following the Date of Death.

4. CBMS will enter that the income ending was verified by Client Statement
5. Since the Active Income Summary only shows active income, you will then see all of the income disappear after using this function.

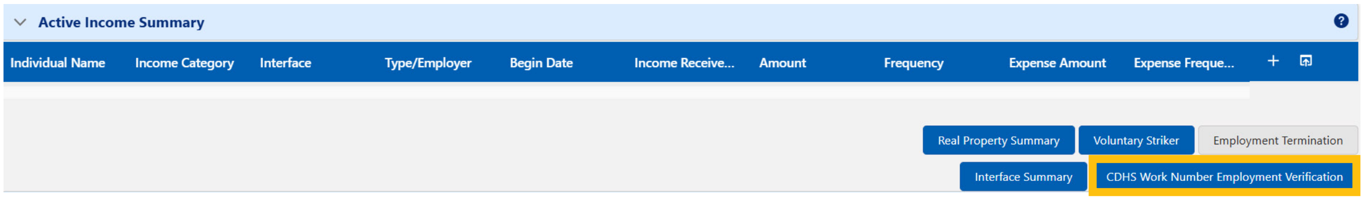
Interface Summary Shortcut



Note: When you select the burial view, this section will move closer to the bottom of the screen. This allows sections that are more relevant to a burial case to be more easily accessed.

This shortcut opens the Interface Summary screen just as you would be able to view it in II, including Interpretation of SVES Data. After reviewing interfaces, you will be returned to the Single Page after clicking Cancel or the X in the right-hand corner.

CDHS Work Number Employment Verification Button

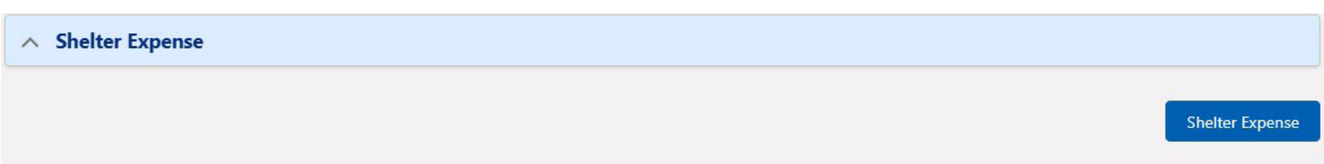


Note: When you select the burial view, this section will move closer to the bottom of the screen. This allows sections that are more relevant to a burial case to be more easily accessed.

This shortcut opens the CDHS Work Number screen. From this screen, you can view data from prior calls to Work Number (Action Taken is filtered to Unconfirmed by default, but you can adjust this). At the bottom of this screen, click the Employment Verification button to send a new request to Equifax for all household members with just one click, just as you would be able to in II. After making any new requests or reviewing and taking action on unconfirmed records, you will be returned to the Single Page after clicking Close or the X in the right-hand corner.

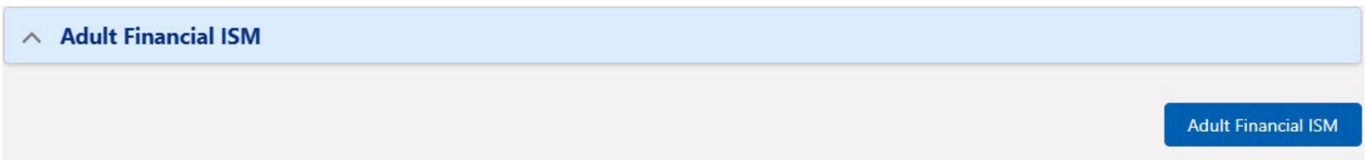
[OAP and AND-SSI-CS Views Only] Shelter Expense Summary

This shortcut provides the ability to quickly view/edit the client's shelter expense records via a shortcut to the screen. More advanced integration into the screen will be added in a later build.



[OAP and AND-SSI-CS Views Only] ISM Shortcut

This shortcut provides the ability to quickly view/edit the client's AF ISM record via a shortcut to the screen. More advanced integration into the screen will be added in a later build.

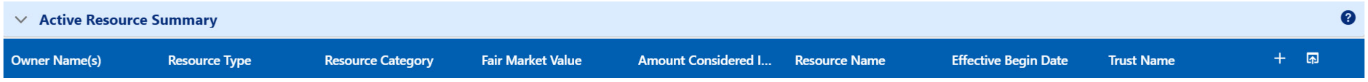


Special Situation

Not available. Anticipated in a later build.

Active Resource Summary

The Active Resource Summary will show you all of the resources on the case without an Effective End Date.



> Red records in this area belong to household members who are not in the home, as it means in all of the other sections on this screen. It does not indicate that the record has been disposed of, as it means in II. Disposed resources will not be visible in this summary at all.

To add new resources:

1. Click the plus icon and choose the type of resource you want to add from the floating menu.
2. You can click the in the section to open the II view of the resource area and add/update Burial Asset, Other Personal Property, and Trust resources from there.
3. Choose the person you want to add the resource for. *Once you initially save, this individual will automatically be entered as the resource owner on the Ownership related list, but you still need to more fully complete that related list later.*
4. Enter details of the resource (different depending on resource type).
   a. When adding resource records, you will see limited fields (which are the only fields mandatory on the screen or used by eligibility calculation logic for Adult Financial). Use of the hidden fields is generally rare, even for other programs, but if you need to complete them for SNAP and HCPF

programs, please do so from II. You can click the in the section to open the II view of the income area if you need to.

- On Liquid Asset, the following fields are not displayed:
  - The Verification and Source associated with the account number. Note that these fields are not mandatory, though the Source will become mandatory if Verification is optionally entered.
  - Income Producing Y/N
  - Telephone #
- On Vehicle Resource, the following fields are not displayed:
  - Countable for SNAP Y/N
  - VIN#
  - Exemption Reason
  - The Verification and Source associated with the Exemption Reason.
- On Real Property Resource, the following fields are not displayed:
  - Effective End Date
  - SNAP Use Month
  - Assessed Value
  - Utilization Due Date
  - Listed for Sale Date
  - Listed for Sale Verification
  - Listed for Sale Source
  - The Life Estate section
- On Annuity Resource, the following fields are not displayed:
  - Effective End Date
  - SNAP Use Month
  - Established Value
  - Verified by AVP for MA
  - Established With Funds From
  - Exemption Reason
  - The Verification and Source associated with the Exemption Reason

  - Deferred Y/N (Payments)
  - Balloon Y/N (Payments)
  - Payment Amount (Payments)
  - Frequency (Payments)
  - Part of Retirement Fund (Additional Information)
  - Prohibits Cancellations (Additional Information)
- On Life Insurance Resource, the following fields are not displayed:
  - Effective End Date
  - SNAP Use Month
  - Is the Insured Person Different from Owner Y/N
  - Insured Person's Name
  - Policy #
  - Assigned to Funeral Home
  - Name (Insurance Company)
  - Telephone # (Insurance Company)
- On Burial Asset, the following fields are not displayed:
  - Effective End Date
  - SNAP Use Month
  - Verified by AVP for MA
  - Exemption Reasons
  - Verification
  - Source
- On Other Personal Property Resource, the following fields are not displayed:
  - Effective End Date
  - SNAP Use Month
  - Purchase Price
- On Trust Resource, the following fields are not displayed:
  - Effective End Date
  - Verified by AVP for MA

- Under UTMA or CUTMA Y/N
- Restricted Access Y/N
- Principal Provisions for Distribution Y/N
- Principal Amount Distribution
- Income Provisions for Distribution
- Income Amount Distribution
- Payments to be made other than Spouse or Individual Y/N
- Entire Gain Access section
- Entire Addition or Augmentation section

5. Save. Down below, related lists will load, such as Ownership, Encumbrance, Lien Holder, Disposition, etc.
   a. You MUST enter data in the Ownership related list.
6. When you have completed all of the related lists you need to, choose the X to close the pop-up and return to the Single Page.

To edit resource information:

1. Click the pencil icon.
2. Modify the resource record as normal on the related lists, which will automatically open in the simplified income view, and save.
   a. When editing resource records, you will see limited fields. Please see 4a, above, to identify the fields that are not present. On some cross-program cases, you will need to data-enter these fields from II. You can click the in the section to open the II view of the income area if you need to. When Burial is selected, an informational message above this section will remind you that resources must be verified as of the Date of Death, and CBMS has automated functionality to request new verification if the most recent Date Verified is before the Date of Death without any further county data entry.

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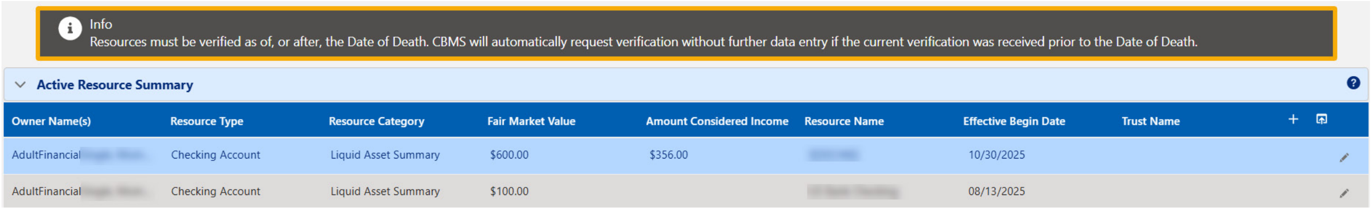
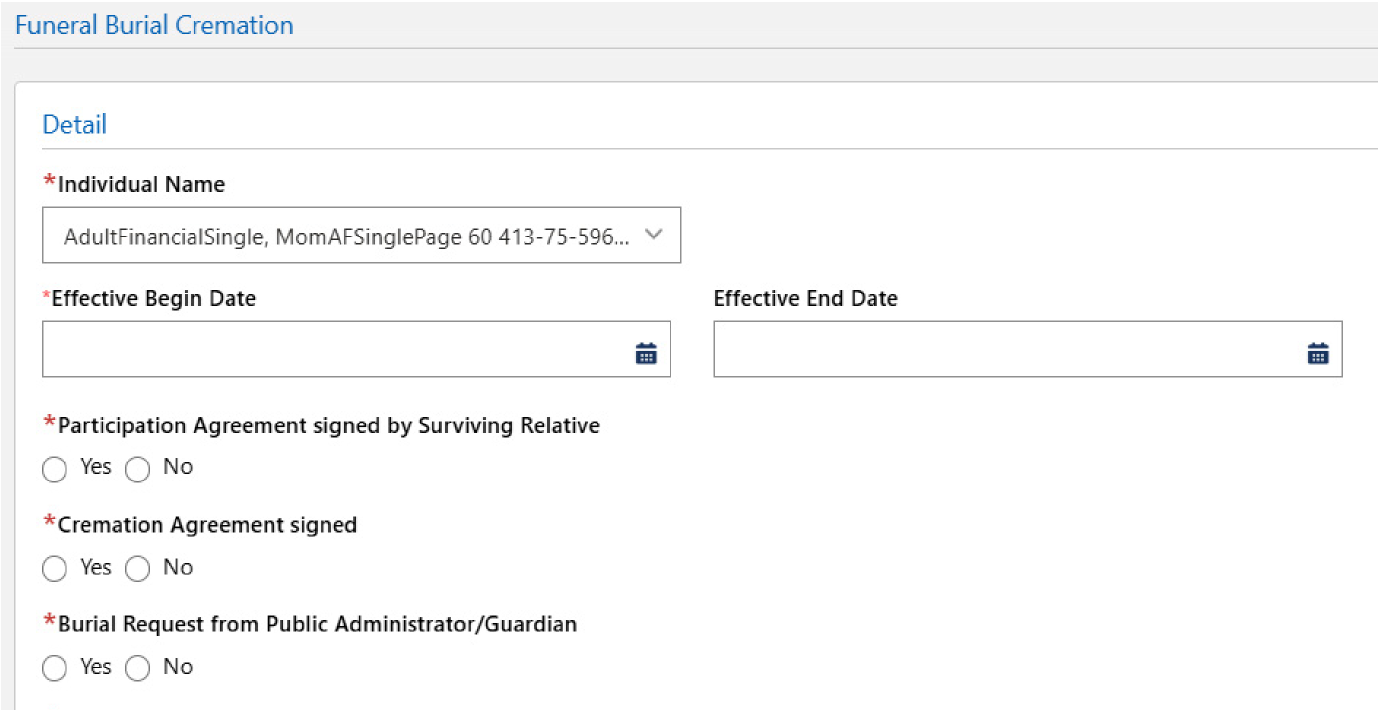
When Burial is selected, an informational message above this section will remind you that resources must be verified as of the Date of Death, and CBMS has automated functionality to request new verification if the most recent Date Verified is before the Date of Death without any further county data entry.



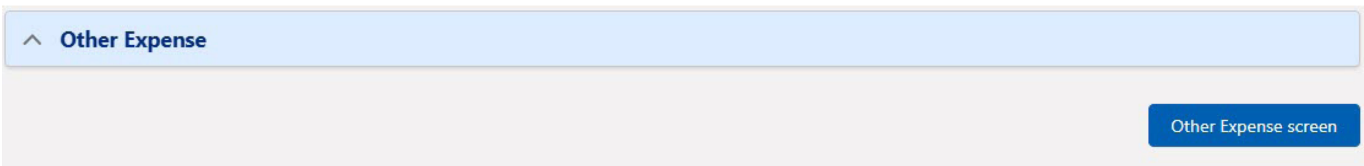
[Burial Only] Funeral Burial Cremation

This screen is embedded into the screen and does not require shortcuts or pop-ups to complete. The record on the screen is the record belonging to the Head of Household on the Adult Financial case. The individual you are processing Burial for must be the Head of Household, but if, for some reason, you need to enter this screen for additional individuals on the case, you can access the II view by clicking the in the section.

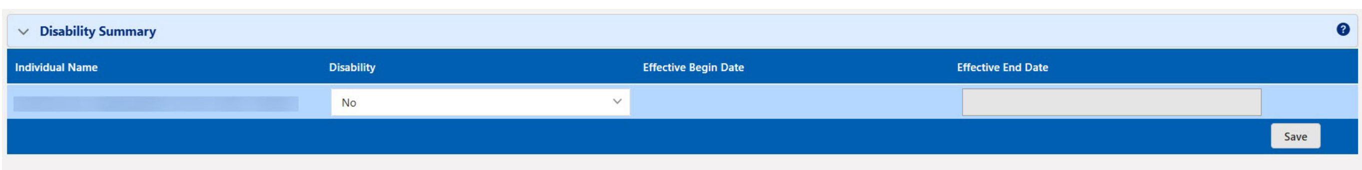


[Burial Only] Other Expense

This section provides the ability to quickly add the client's burial/funeral/cremation expense record via a shortcut to the screen. More advanced integration into the screen will be added in a later build.



Disability Summary



The Disability Summary is designed to allow you to see at a glance and indicate quickly if a client is disabled. (CBMS must reflect that the client is declaring to be disabled to refer them to pursue disability related income on the Potential Income - AF/SSA screen.

This section is not visible in the burial view.

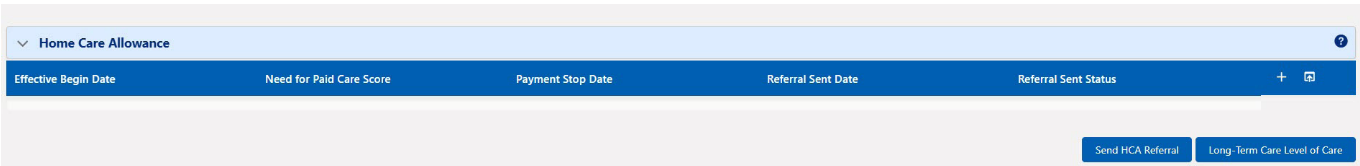
All individuals on the case will be listed with Disability as Yes or No (you will never need to add a row from scratch). CBMS will automatically set Disability to Yes if the client has a Med-9 with a future Re-Exam Date, a Disability Determination with a future Diary Date, or a Medical Conditions record with no Effective End Date. If none of these are true, a No will be displayed.

To edit existing Disability information:

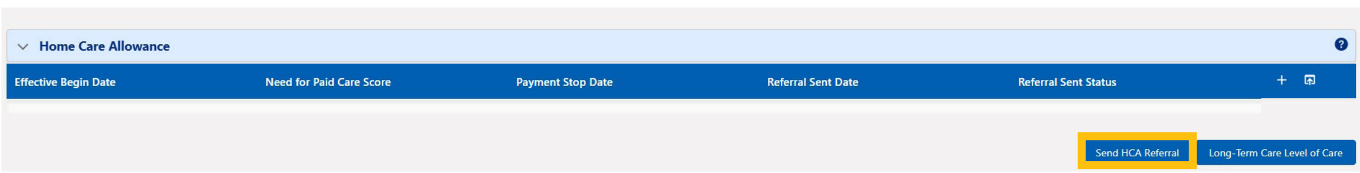
1. If the client shows as Disabled Yes, but is no longer disabled:
   a. Review whether there is an active Med-9 or Disability Determination in the Active Med-9/Disability Determination Summary section just below.
      i. If there is, do not take action in the Disability Summary. Instead, you should end-date the current Med-9 or Disability Determination from the other section, and the Disability Summary will update automatically. If you attempt to mark the client as not disabled in this section manually in the scenario, a red message will remind you to modify the Med-9 or Disability Determination instead.
      ii. If there is not, change Yes to No in the grid, enter an Effective End-Date, and Save.
2. If the client shows Disabled No, but is now disabled:
   a. Change No to Yes in the editable grid and Save. CBMS will automatically create a Medical Conditions record for you, with today's date as the Effective Begin Date and Date Reported, and Disability Type as Undetermined.
   b. This automation is limited (AF focused) data entry, focused only on ensuring the Potential Income AF/SSA screen determines what type of income the client should pursue. The screen itself is not read for eligibility purposes for AF. Even for other programs, additional data on the Medical Conditions screen is only needed in very rare cases - please visit the screen directly in II if further data entry is required on the screen.

[HCA Only] Home Care Allowance Summary

This section will allow you to view and update Home Care Allowance information. It is only visible if the aid-code selected is SSI-HCA, or the HCA program view has been added to another aid-code view.



Send HCA Referral Button:



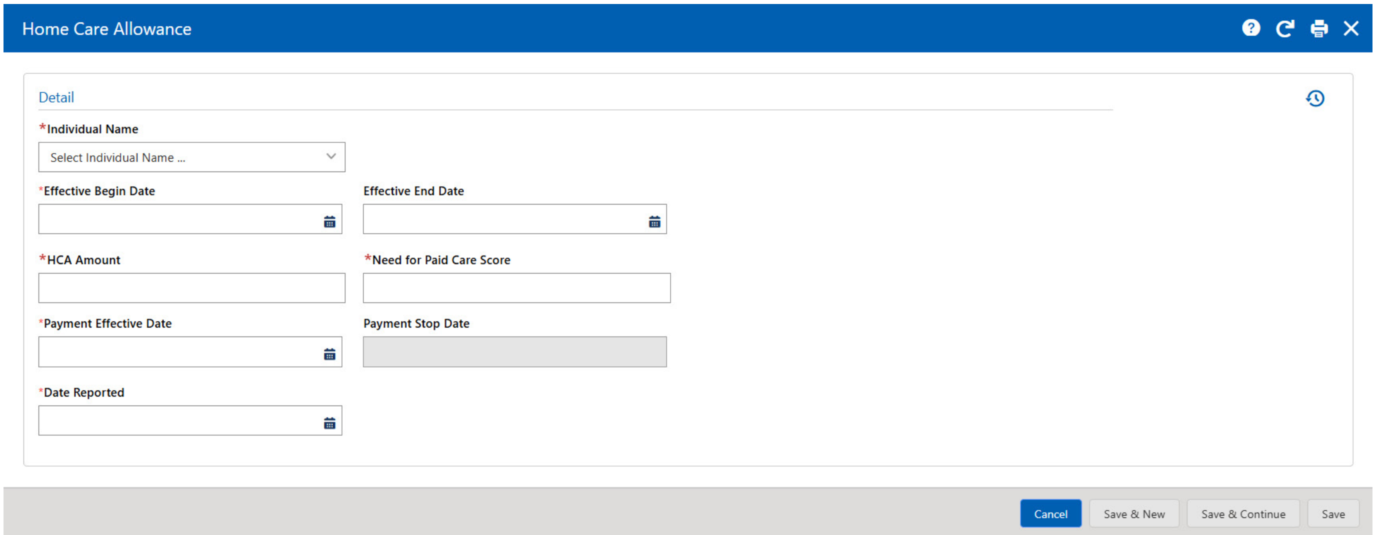
To request that a Case Management Agency (CMA) evaluate the client's functional eligibility, click the Send HCA Referral button. In the pop-up, choose the appropriate CMA from the dropdown and click Send. The summary view will then reflect the Referral Sent Date and Referral Sent Status.

Generally, you should not need to manually add a new Home Care Allowance record because this should be automatically received from the CMA via CBMS; however, if a CMA provides this to you via paper instead of through CBMS:

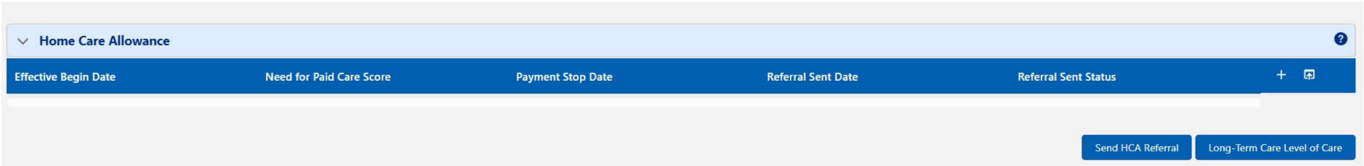
1. Click the plus icon.
2. Complete the screen like you normally would from II.
3. Save.

To edit the Home Care Allowance Summary:

1. Click the plus icon.
2. Complete the Home Care Allowance screen as you normally would.
3. Click Save.



Long Term Level of Care Shortcut Button:



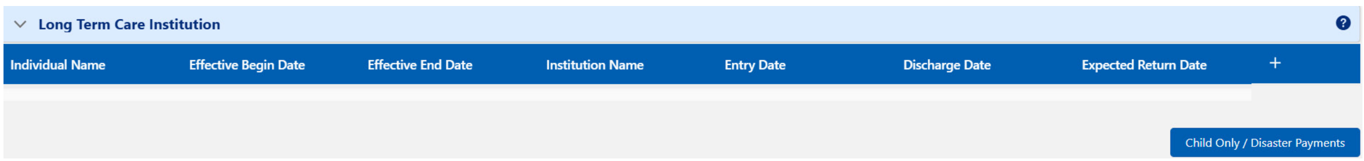
Clients who have Home Care Based Services or PACE cannot also have HCA.

You will see a message near this button if a client has an open Long Term Care Level of Care (LTC LOC) record: “This individual has an open MA Long Term Care Level of Care record for HCBS or PACE and will not be eligible for HCA. Please review.”

This shortcut button is present so that if you see the above message, you can review the LTC LOC information in the event that you receive this message. From the shortcut, you can view and update the LTC LOC screen.

[PNA Only] Long Term Care Institution Summary

This section will allow you to view and update Long Term Care Institution information. It is only visible if the PNA program view has been added to another aid code view.



To add a Long Term Care Institution Record:

1. Click the plus icon.
2. Complete the screen as you normally would from II.
3. Save.

To edit the Long Term Care Institution Summary:

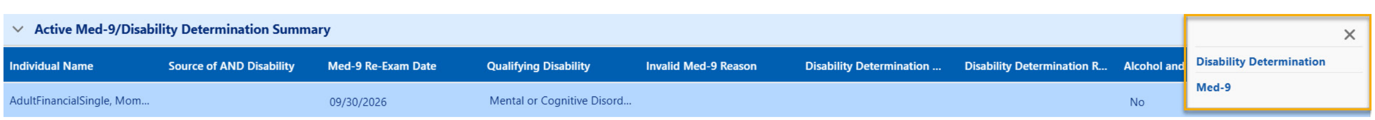
1. Click the edit pencil.
2. Modify the screen as you normally would from II.
3. Save.

[AND-SO Views Only] Med-9 and Disability Summary

The section is designed to provide a summary of the data needed for determining disability for the AND-SO program.

From this section, you can see whether a prior eligibility authorization used a Med-9 or a Disability Determination to determine that the client met disability requirements for the program (Source of AND Disability). You can also see the data associated with the most recent Med-9 (Med-9 Re-Exam Date, Qualifying Disability, and Invalid Med-9 Reason) or Disability Determination (Diary Date, and Result). Finally, the Alcohol and Controlled Substance Column shows a Yes or No depending on whether an Alcohol and Controlled Substance Abuse related is active.

To add a new Med-9 or Disability Determination:



1. Click the plus icon.
    a. If you do not have the Med-9 yet and just want to request a new one from the client, use the Request Med-9 Button below this section.
2. Choose Med-9 or Disability Determination from the drop-down.
3. Complete the selected screen like you normally would from II.
4. Save.

To edit a Med-9 Record:

1. Click the hyperlinked date in the Med-9 Re-Exam Date column.
2. Update the Med-9 like you normally would from II.
3. Save.

To edit a Disability Determination Record:

1. Click the hyperlinked date in the Disability Determination Diary Date column.
2. Update the Disability Determination like you normally would from II.
3. Save.

To add an Alcohol/Controlled Substance Use Addition Summary Record:

1. Click on the hyperlink in the Alcohol/Controlled Substance Use Addiction Summary column that says No.
2. Data-enter the screen like you normally would from II.
3. Save.

To edit an Alcohol/Controlled Substance Use Addition Summary Record:

1. Click on the hyperlink in the Alcohol/Controlled Substance Use Addiction Summary column that says Yes.
2. Update the data-entry screen like you normally would from II.
3. Save.

[AND-SO Views Only] Request Med-9 Button

Just like its counterpoint in II, this button allows you to quickly create a new Med-9 record with data entry automatically completed for you in such a way that a VCL will be created for the client.

[AND-SO Views Only] Time Limit Clock Summary

This section will only display when the client has Adult Financial time clocks for alcohol and controlled substance use, which is a time-limited disability status for the program (rare). There is generally no need to edit this information, but it is present for your review, so you can advise a client who is receiving time-limited aid.

[AND-SO Views Only] Additional Information IM-14

This section will allow you to view and edit the client's IM-14 information.

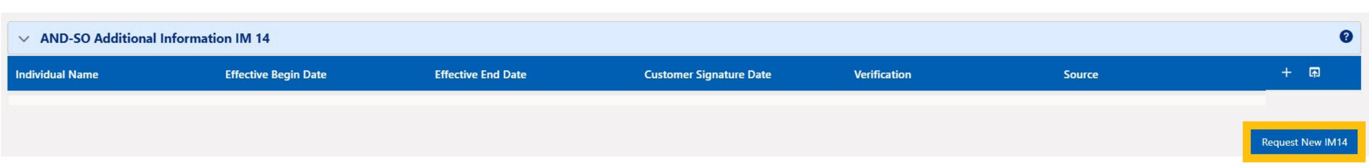
To add a new IM-14 record:

1. Click the plus icon.
2. Complete the screen like you normally would from II.
3. Save.

To edit an IM-14 record:

1. Click the edit pencil.
2. Complete the screen like you normally would from II.
3. Save.

Request IM-14 Shortcut:



Just like its new counterpoint in II, this button allows you to quickly create a new IM-14 record with data entry automatically completed for you in such a way that a VCL will be created for the client.

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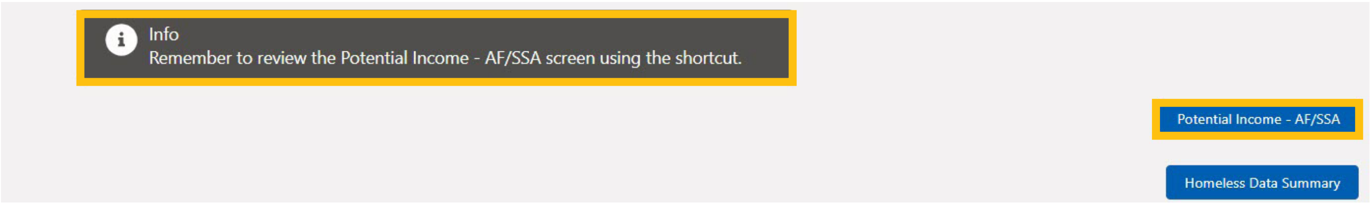
Potential Income - AF/SSA Summary

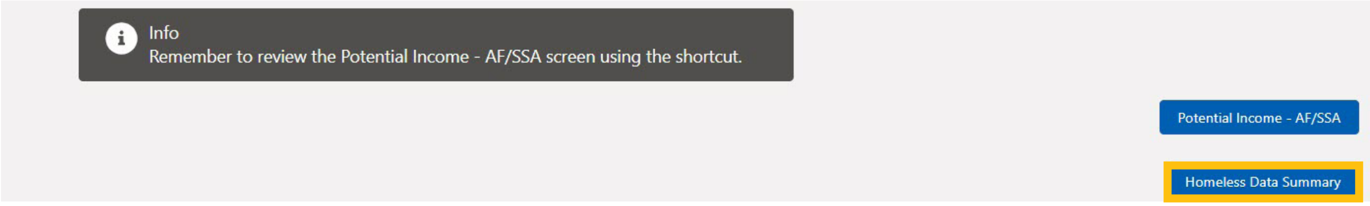


A shortcut will be provided to the Potential Income - AF/SSA screen.

An informational message will remind you to review this screen and make sure the client is being referred to the appropriate SSA income types according to your data entry in other screens.

This section is not visible in the burial view.

Homeless Data Summary Shortcut



This shortcut will open the Homeless Data Summary screen.

An informational message will display to the left of the button if there is a conflict on the screen that needs review.

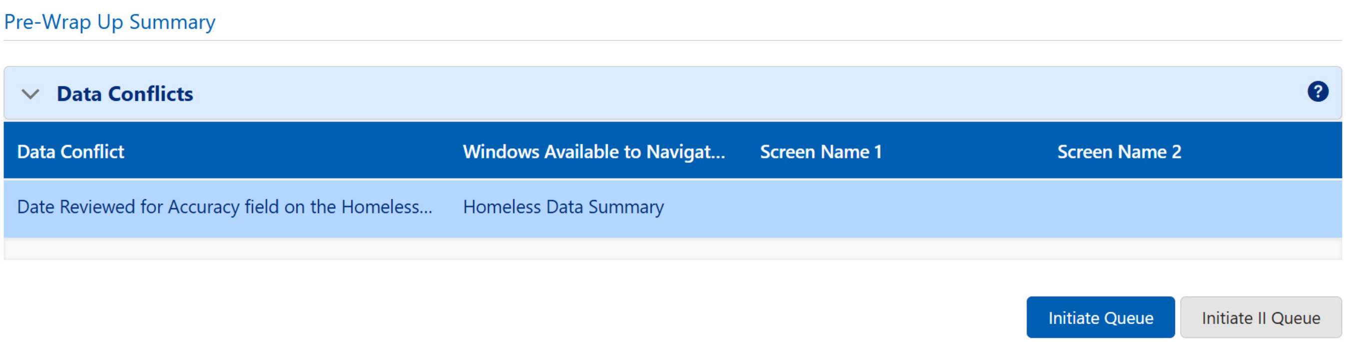
This section is not visible in the burial view.

Child Only/Disaster Payments Shortcut

This shortcut will only appear on the screen if there is an active disaster in the county, to enable Adult Financial disaster payments to be made from the Child Only / Disaster Payments screen. Click on the shortcut and complete the screen as normal to issue a disaster payment.

This section is not visible in the burial view.

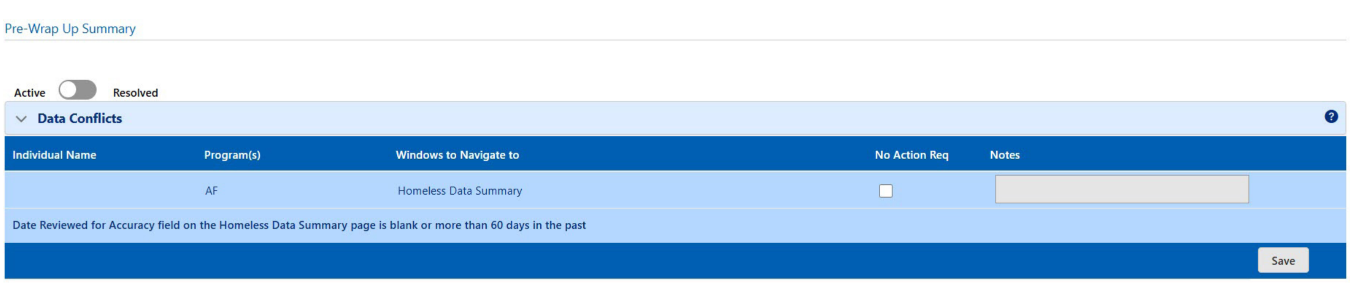
Pre-Wrap Up Summary



You will be able to view data conflicts, mark the AF program complete, and then either proceed to II to process other programs or proceed directly to run EDBC.

Data Conflicts

If your case has data conflicts, you will be able to see them in this section, below the Pre-Wrap Up Summary.



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Case Wrap Up Signatures

The full Case Wrap Up Signatures screen is present here for you to complete without leaving the screen or opening a pop-up. Enter it for the first time, or update it, just like in II, and click Save.

Case Complete Y/N

You can mark Data Entry Complete for Adult Financial only from this section. Update it for the editable grid, just like in II, and click Save.

Process SNAP/MA from II Shortcut

This shortcut will take you to the Interactive Interview queue so you can continue processing the case for other programs after finishing with the AF Single Page.

Run EDBC

If you do not have any other programs to data-enter for, you can initiate your EDBC run right from here (EDBC runs are not program-specific). Clicking this button will open the Run EDBC screen for your review, so you can initiate your run, just like in II, and you will land on the Eligibility Summary.

In-CBMS Feedback

When you authorize a case, after using Single Page, a pop-up will ask you if you are willing to rate your experience. You will be asked to rate on a scale of 1-5 how much easier/more difficult the Single Page is to use vs the standard experience. You can skip the survey if you'd like. If your experience was poor, make sure to leave us a comment on what we can improve. Feel free to skip the survey if you don't think you have anything new to share. (NOTE: the survey responses are linked to your user ID, so we can follow up with you if we need more information about what happened. The survey is not anonymous.)

ACCESSIBILITY

If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.