

Process Manual

Adding an ISM to a Case

Overview

This document provides a step-by-step process for how to enter an In-Kind Support and Maintenance (ISM) on an Adult Financial case. The Adult Financial ISM page must be completed if an ISM of any amount is being applied to an Old Age Pension (OAP) or AND-CS case.

Process

- 1) Login to CBMS
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar
- 3) Click on Case Number in the results table to access the **Members** page
- 4) From the **Members** page, hover over the **Actions** button
- 5) Select **Begin Interactive Interview** to initiate the Interactive Interview (II) queue
- 6) Navigate to the **Adult Financial ISM** chevron
- 7) Click the plus (+) sign in the blue detail header
- 8) A New pop-up window will appear
- 9) Enter the **Begin Date** of the ISM
- 10) Select the appropriate radio button for '**Full ISM Amount Applied?**'
 - a) Select '**Yes**' if the maximum ISM amount will be applied to the case
 - b) Select '**No**' if an ISM less than the current maximum amount will be applied to the case
 - i) If '**No**' is selected, the **ISM Amount Applied** field will become enabled
- 11) Enter the **ISM Amount Applied** as calculated from reported/verified shelter information
- 12) Select the appropriate **Verification** from the drop-down menu
- 13) Select the appropriate **Source** from the drop-down menu
- 14) Enter the **Date Reported**
- 15) Enter the **Date Verified**
- 16) Click **Save**

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us

