

# Adjusting or Reversing a Period of Ineligibility (POI)

CBMS | Process Manual | Revised: March 2021

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## OVERVIEW

This document provides a step-by-step process on how to complete the data entry to adjust or reverse a Period of Ineligibility (POI) in CBMS.

## PROCESS

1. Log into 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. On the **Case Questions** page, make sure the radio button for ‘Does anybody own or has anybody disposed of resources’ is marked ‘Yes.’
7. Navigate to the **Resource** tab.
8. Click on the appropriate Resource type **sub-tab**.
9. Highlight the record that was disposed to create the initial POI.
  - a. Highlighting the record will populate the Related Lists to the right.
10. Scroll down until you see the **Disposition Details** related list.
11. Click the pencil/edit icon to the right of the disposition record.

a. To REVERSE the POI, select the 'Yes' radio button for **Transfer Resource Returned to Individual in Full**.

i. Enter the **Date Returned**.

b. To ADJUST the POI, update the **Amount Received for Resource** field.

12. Click **Save**.

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## ACCESSIBILITY

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