

CBMS Case Communication Desk Aid

County workers have the ability to update client communication preferences and contact information within the Case Communications related list on the Case Information page in CBMS.



When a county worker adds E-Mail or Text as the client's preference, CBMS will automatically uncheck the US Mail option. County workers can still re-check the US Mail option if a client still requests communication by US Mail. Clients can also update their correspondence preferences on the PEAK website and in the MyCOBenefits application.

Case Communications Related List

A screenshot of the 'Case Communications' form in the CBMS system. The form has a blue header with the title and navigation icons. Below the header, there are fields for 'Effective Begin Date' (05/22/2016) and 'Effective End Date'. The main section is divided into several parts: 'Communication E-mail' and 'Retype Communication E-mail' (both with empty text boxes); 'Communication Text' (with a '() -' placeholder); 'Preferred Method of Interview' (with radio buttons for 'In office/In person' and 'Phone/Virtual'); 'Communication Preferences' (with checkboxes for 'E-Mail', 'Text', and 'US Mail', where 'US Mail' is checked); and 'MA Correspondence - Large Print' (with radio buttons for 'Yes' and 'No'). At the bottom right, there are 'Cancel', 'Save & New', and 'Save' buttons. A green callout box with an arrow points to the 'Communication E-mail' and 'Communication Text' fields.

The E-Mail and Text check boxes are initially grayed out until a worker enters information in the Communication E-mail or Communication Text fields.

County workers can access the Online Help feature on each page in CBMS for explanations of the data entry fields.

