

Process Manual  
**Case Information Page Process Manual**

## Overview

CBMS uses data in the Case Information page to ensure accurate Head of Household and Case Payee information. Information on this page is populated from Application Initiation and may not require any updates. It is best practice to review all information for accuracy.

## Process

- 1) Log into CBMS
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
- 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 II queue
- 6) Navigate to the **Case Information** page
- 7) Review **Last** and **First name** fields to ensure they match information provided during the AI process
  - a) Update any incorrect information as needed
    - i) *Note: if demographic information is changed on this page, it will also need to be changed in the Demographics page and potentially re-cleared to avoid duplicate Client ID information*
- 8) Review **Head of Household** information.
  - a) If this information is incorrect, select the appropriate **household member** from the dropdown list
    - i) *Note: if the Head of Household is changed, the **Designated Case Addressee** field and **Case Payee Related List** will also need to be updated*
- 9) Review **Spoken** and **Written Language** fields to ensure they are accurate
- 10) Review and update **Telephone number(s)** as appropriate
  - a) If there is a message phone, enter the **Type** from the dropdown list in the following field
- 11) Select the appropriate radio button for **Whereabouts Unknown**
  - a) *This field defaults to 'No' and should only be updated to 'Yes' if you have information that the Head of Household is unable to be located*
  - b) If 'Yes' is selected, select the **Reason** from the dropdown list
- 12) Click **Save**
- 13) Review the **Program Requested Summary** Related List for accuracy
  - a) *If there is incorrect **Request Date** information, or the household is requesting a program that is not listed, a new AI may be required to add those programs to this case.*
  - b) Refer to **Online Help** for more information



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- 14) Review **Case Payee** Related List for accuracy
  - a) *The Case Payee defaults to the Applicant/Head of Household*
  - b) *For SNAP or Cash programs, an EBT card may need to be requested to ensure the payee can access their benefits*
  - c) Refer to **Online Help** for more information
- 15) To change the **Case Payee**:
  - a) Enter the Effective Begin Date
    - i) Refer to Online Help for more information
  - b) Select the appropriate member from the **Name** dropdown list
  - c) Select the **Type** from the dropdown list
  - d) Select the **Reason** for the change from the dropdown list
  - e) Select 'Received' from the **Verification** dropdown list
  - f) Select the appropriate **Source** from the dropdown list
  - g) Click **Save**

*Do you have any questions or suggestions regarding this process? Please contact the SDC via email [SOC\\_StaffDevelopment@state.co.us](mailto:SOC_StaffDevelopment@state.co.us)*

