

# Completing Case Individual

CBMS | Process Manual | Revised: January 2022

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## OVERVIEW

This document provides a step-by-step guide for how to update the Case Individual page in CBMS.

## PROCESS

1. Log in to 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 Individual** page.
7. From the **Name** dropdown, select the appropriate person.
8. The **Effective Begin Date** is automatically populated.
  - a. Refer to **Online Help** for which date you should use if you are updating an ongoing case.
9. Select the appropriate radio button for if the individual is **In Home**.
  - a. If 'Yes' is selected, some fields become enabled and are mandatory.
    - i. Select the appropriate **Verification** option from the dropdown menu.
    - ii. Select the appropriate **Source** option from the dropdown menu.

10. Enter the **Date Reported**.

11. Enter the **Date Verified**.

12. Click **Save**.

13. Repeat steps 7 through 12 for each individual in the household.

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## ACCESSIBILITY

*This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact [SOC\\_StaffDevelopment@state.co.us](mailto:SOC_StaffDevelopment@state.co.us) for assistance.*