Completing Case Individual Process Manual

Overview

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

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 Individual** page
7) From the **Name** drop-down, 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 drop-down menu
        ii) Select the appropriate **Source** option from the drop-down 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

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