

# Completing Individual Tax Information

CBMS | Process Manual | Revised: January 2022

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## OVERVIEW

This document provides a step-by-step process for entering Tax-Filing information in CBMS. CBMS utilizes data entry on the Individual Tax Information page along with other data entry to determine eligible household composition and income considerations for Medical Assistance (MAGI) categories.

## 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 I. I. queue
6. Navigate to the **Individual Tax Information** page
7. From the **Name** dropdown, select the appropriate individual
8. Enter the **Effective Begin Date**
  - a. Refer to **Online Help** for which date to use
9. Choose the appropriate radio button for **Tax Filer**
  - a. If 'Yes' is selected in the **Tax Filer** section, additional fields will be required to be completed (See steps 10-11)

- b. If 'No' is selected in the **Tax Filer** section, some questions will become mandatory (See steps 12-16)
  - 10. Select the appropriate **Tax Filing Status** from the dropdown list, if applicable
    - a. If 'Married Filing Jointly' is selected, **Filing Jointly with** field is enabled
  - 11. Select the appropriate household member from the **Filing Jointly with** dropdown list
    - a. **Note:** When completing this field for the first spouse, the second spouse will not be available in the dropdown list until their tax filing status is updated. Once the second spouse's page is complete, you will select your first spouse again to complete this field
  - 12. Select the appropriate radio button for **Tax Dependent (person on application)**
    - a. If 'Yes' is selected, the next field is enabled
  - 13. Select the appropriate household member from the **Expects to be claimed...by** dropdown list, if applicable
    - a. **Note:** This is the tax filer in the CBMS case who is claiming the member as a tax dependent
  - 14. Select the appropriate radio button for **Tax Dependent (Person Not on Application)** if applicable
    - a. **Note:** If the member is an adult or a minor child applying on their own, this radio button will trigger a Tax Filer Information Packet to be sent to the member, if applicable
  - 15. Select the appropriate radio button for **Living with both parents, but parents do not expect to file jointly** if applicable
  - 16. Select the appropriate radio button for **Expects to be claimed by a non-custodial parent** if applicable
  - 17. Enter the **Date Reported**
  - 18. Click **Save**
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## ACCESSIBILITY

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