# Completing an Application Initiation (AI)

## Overview

This document provides a step-by-step process for how to complete a new Application Initiation (AI) in CBMS from start to finish. There are five tabs with information that need to be completed for the AI. Each tab is sectioned out in the details below.

## Process

Navigate to Application Initiation by one of the following ways:

- Click the Application tab in the Navigation bar, then click the **New** button.
- Click **Add New Application** in the Recent Applications Section of the Home Page.

### Applicant Information

1) Click the **Programs Requested** boxes that the client is applying for.
   a) Note: If Adult Financial or Colorado Works is selected, the SNAP box will automatically be selected as well. If the client does not want SNAP, simply click the box to unselect it.
   b) Note: You can only select one Cash Assistance program. If one is selected, you will not be able to select the other.
2) Enter the **Application Date** in mm/dd/yyyy format.
   a) If the date is a holiday for the programs selected, an error message may appear which will provide information on action required to proceed.
3) Select the appropriate **Type**.
4) Select the appropriate **Source**.
   a) If PEAK is selected, the **PEAK Tracking #** field will be enabled and editable.
5) Complete the required fields in the Applicant Details Section.
   a) Last Name
   b) First Name
   c) Gender
6) **DOB** and **SSN** are not required fields, but if you have the information you are encouraged to enter it here.
7) Select the **Primary** and **Written** Language the client declares from the drop-down menu.

8) **Contact Information** is not required, but if you have the information, it is highly encouraged to complete the fields.
   a) The **Message/Work** number will automatically add the extension if there are no more than 10 digits entered. Example: 303-333-3333 x3333
9) Complete the **Home Address** section.
   a) Select the appropriate **'Is the Applicant Homeless'** ratio button.
      i) Select **'Yes'** if the client is Homeless, the Home Address fields will disable. Select **'No'** and you will be able to complete the address fields.
   b) Select the appropriate **'Is the Applicant's Home Address Permanent'** radio button.
   c) The system will validate the address as you are typing, much like Google Maps, so make sure you are selecting the correct address. You can also continue typing the address manually and do not have to choose from the validated list.
10) Complete the **Mailing Address**
   a) If the Mailing Address is the same as the Home Address, click the **'Yes'** radio button and the information will automatically update in the fields. If the Mailing Address is not the same as the Home Address, click the **'No'** radio button and enter the client's mailing address.
   b) If the client does not have a mailing address and needs to use the County Office as the mailing address, click the **'Yes'** radio button and then select the correct County Office from the drop-down menu. The County Office address will automatically populate the fields.
   c) Once the page is saved, the **County** field will automatically populate. If it doesn't, you can select the appropriate County from the drop-down menu.
11) If applicable, select the **Special Indicators**.
   a) Check with your Eligibility Site for which Special Indicators you should select.
12) The **Emergency Details** section will populate only if SNAP is selected from the Programs Requested page.
   a) Complete the mandatory fields appropriately based on what the client declares.
   b) The Eligible for EXSNAP buttons will always be enabled but are not required to be completed.
13) Click the **Save** button at the top of the page.
   a) Once you **Save** the page, the Application ID, Date, and Client Name will appear in the blue header at the top of the page and the **Application Initiation Queue** will begin.

14) **Start AI Queue**

   a) You will then be able to move through the AI Queue by using the navigation arrows or by clicking on the next chevron in the queue. The next chevron will be Address Clearance.

## Address Clearance

15) Navigate to the **Address Clearance** page by clicking the next arrow or clicking on the chevron.

   a) If the address is associated with another case in CBMS, you can select the **Case Details** button to see the associated cases.

      i) Check your site process for actions needed.

   b) If the address is not associated with an existing case, you can move forward to the next chevron.

## Household Members

16) The information you entered on the Applicant Information page will show here for your Head of Household (HOH).

17) Click the **edit** (pencil) icon for the HOH to correct any information and to complete the Race/Ethnicity fields.

   a) This is not mandatory to complete here on the AI, but it can be updated during Interactive Interview (II). If completed here, it automatically carries the information over into Interactive Interview (II).

18) Click **Save**.

19) To add more household members, you can click **Save and New** or **Save** and click the **plus sign (+)** on the far-right side of the list header.

   a) A pop-out box will appear where you will complete all required fields.

   b) Click **Save** to save the information and close the pop-out box.

20) Once you have finished adding all members, click **Save** and move forward to the next chevron, Individual Clearance.

## Individual Clearance

21) All household members will be shown in the table labeled Uncleared Household Members.

22) Click on the row for a household member and then click **Search**.

23) The **Search Results** will be shown in a table below. To research more about a person who shows up in the Search Results, click on the row to highlight the person.

   a) Click **Individual Detail** to review details about the person. A pop-out box will appear to show Individual Details, Address, Individual History, etc.

   b) Click **Case List** to view the cases that are associated with the person. Any associated cases will be shown in a table below the Search Results in the Case Listing section.

   c) Click **Select** if the member you are clearing already exists and is showing in the Search Results.

   d) Click **New** if the member you are clearing does not exist in CBMS and you need to request a New Client ID.

      i) You will receive a message box that asks if you are sure you want to generate a new Client ID. Click **'Yes'**.

      ii) A confirmation box will appear confirming the Client ID was created successfully.

24) Once the Client ID is successfully assigned, click on the row for the same household member and click the **Request State ID** button, if they do not already have one.

   a) A confirmation box will appear confirming that the State ID was created successfully.

   b) The household member will be removed from the Uncleared Household Members section.

## Sign

25) Before you can assign a CBMS Case Number, you must first click the **Sign** button in the upper right corner of the screen.

26) Enter the **Signed Date** as the date the client actually signed the application.

27) Add **Application Comments** that pertain to the application.

28) Click **Save** and move forward to the final chevron, **Case Clearance**.

## Case Clearance

29) After the application is signed, you can assign a **Case Number** to the application on the Case Clearance tab.

   a) If the client does not have an existing CBMS Case Number, or you want to create a new Case Number for them, click the **New Case #** button.

   b) If the client already has an existing Case Number that you want to attach this application to, highlight the Case Number, then click the **Select** button.

   c) Refer to the desk aid titled Existing Case vs. New Case if further guidance is needed.

30) A confirmation box will appear with the **CBMS Case #** showing it was created successfully.

The Application Initiation (AI) is now complete.

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