# 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.
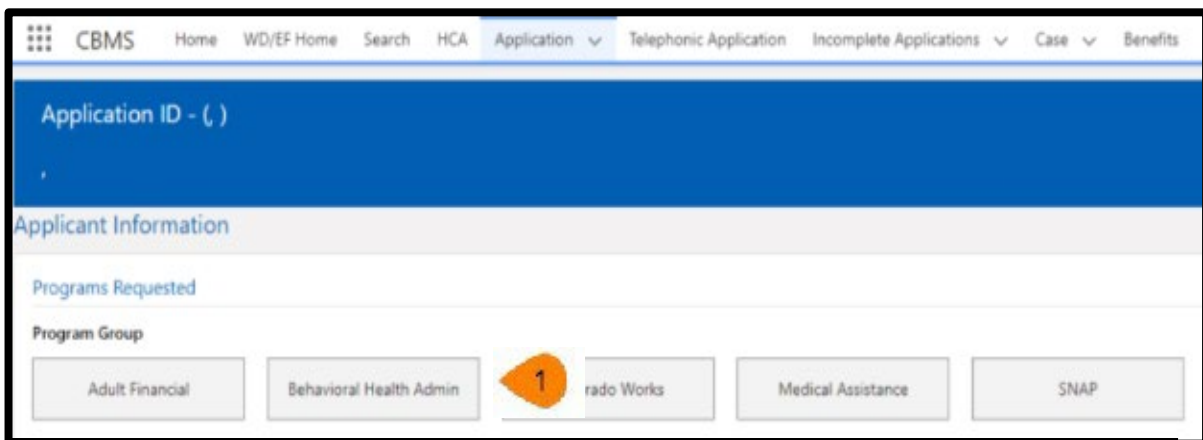
Process

Navigate to Application Initiation by one of the following ways:

- From the Home Screen click Add New Application in the Recent Applications section, or
- Click the Applicant tab in the Navigation bar, then click the New button on the right hand of the screen, or
- Click on the New Application button in the header of the Application Initiation queue
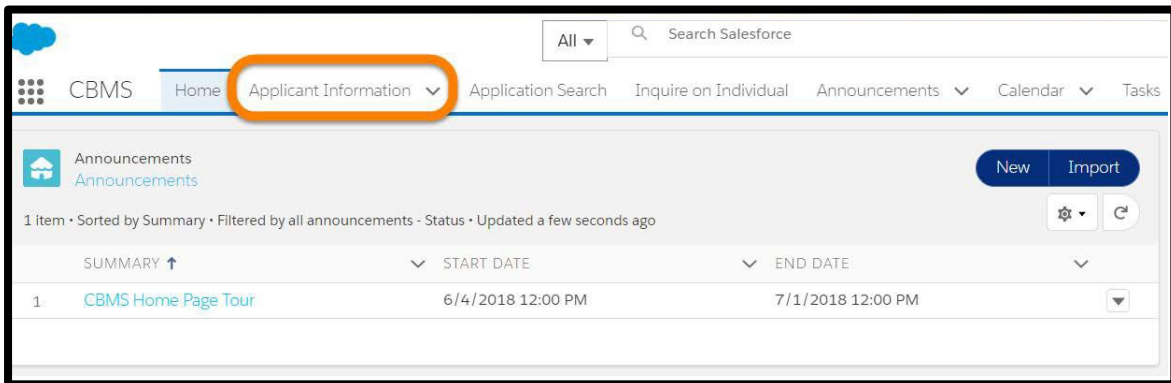
Applicant Information

1) Click the **Programs Requested** boxes that the client is applying for.
   - 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.
   - 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.
   - If the date is a holiday for the programs selected, an error message will appear which will provide information on action required to proceed.
3) Select the appropriate **Type.**
4) Select the appropriate **Source.**
   - If PEAK is selected, the **PEAK Tracking #** field will be enabled and editable.
5) Complete the required fields in the Applicant Details section.
   - **Last Name**
   - **First Name**
   - **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.
   - The **Message/Work** number will automatically add the extension if there are more than 10 digits entered. *Example: 303-333-3333x3333*

9) Complete the **Home Address** section.
- 'Is the Applicant Homeless' radio button.
  - Select 'Yes' if the client is Homeless   , the address fields will disable.
  - Select 'No' and you will be able to complete the address fields.
- Select the appropriate 'Is the Applicant's Home Address Permanent' radio button.
- 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**
- If the Mailing Address is the same as the Home Address, click the 'Yes' radio button and the information will automatically populate 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.
- 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 in the fields.
- 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.**
- Check with your Eligibility Site for which Special Indicators you should select.
- Note: You can use Ctrl+Shift to select multiple indicators at a time.

12) The **Emergency Details** section will populate only if SNAP is selected from the Programs Requested page.
   - Complete the mandatory fields appropriately based on what the client declares
   - If the client declares expenses, when you enter the rent/utility amounts the **Total Monthly expenses** field will automatically calculate the total.
   - The **Eligible for EXSNAP** buttons will always be enabled, but are not required to be completed.
       - Select 'No' if a client on this application was on a case where SNAP was denied or discontinued at Intake or RRR within the last 60 days.

13) Click the **Save** button at the top of the page.
   - Once you **Save** the page, the Application ID, Date, and Client Name will appear in the blue header at the top of the page.
   - You will then be able to move forward to the next tab using the navigation arrows or by clicking on each of the tabs under the blue header. The next tab will be Address Clearance.

Address Clearance

14) Navigate to the **Address Clearance** page by clicking the next arrow or clicking on the tab.
- If the address is associated with another case in CBMS, you can select the Case Details button to see the associated cases.
- If the address is not associated with an existing case, you can move forward to the next tab, Household Members, as nothing else is needed on this page.

Household Members

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

16) Click the row for the HOH to complete the Race/Ethnicity of the customer.
   - This is not mandatory to complete here on the AI, but it will be required when you get to Interactive Interview (II). If completed here, it automatically carries the information over into Interactive Interview (II).
17) Click **Save**.

18) To add more household members, click the **plus sign (+)** on the far right side of the list header.
   - A pop-out box will appear where you will complete all required fields.
   - Click **Save** to save the information and close the pop-out box.
19) Once you have finished adding all members, click **Save** and move forward to the next tab, Individual Clearance.

Individual Clearance

20) All household members will be shown in the table labeled Uncleared Household Members.
21) Click on the row for a household member and then click **Search.**

22) The **Search Results** will show in a table below. To research more about a client who shows up in the Search Results, click on the row to highlight the client.
- Click **Individual Detail** to review details about the client. A pop-out box will appear to show Individual Details, Address, Individual History, etc.
- Click **Case List** to view the cases that are associated with the client. Any associated cases will show in a table below the Search Results in the Case Listing section.
- Click **Select** if the client already exists and is showing in the Search Results.
- Click **New** if your client does not exist in CBMS and you need to request a New Client ID.
  - You will receive a message box that asks if you are sure you want to generate a new Client ID. Click 'Yes'.
  - A confirmation box will appear confirming the Client ID was created successfully.

23) Once the Client ID is successfully assigned, click on the household member and click the **Request State ID** button, if they do not already have one.
- A confirmation box will appear confirming that the State ID was created successfully.
- The household member will be removed from the Uncleared Household Members section.
24) Click **Save**.
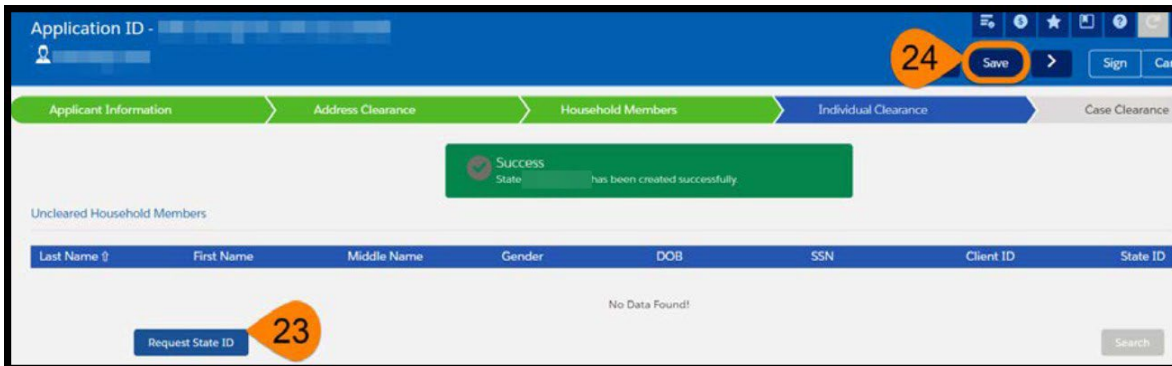
Sign

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 tab, Case Clearance.
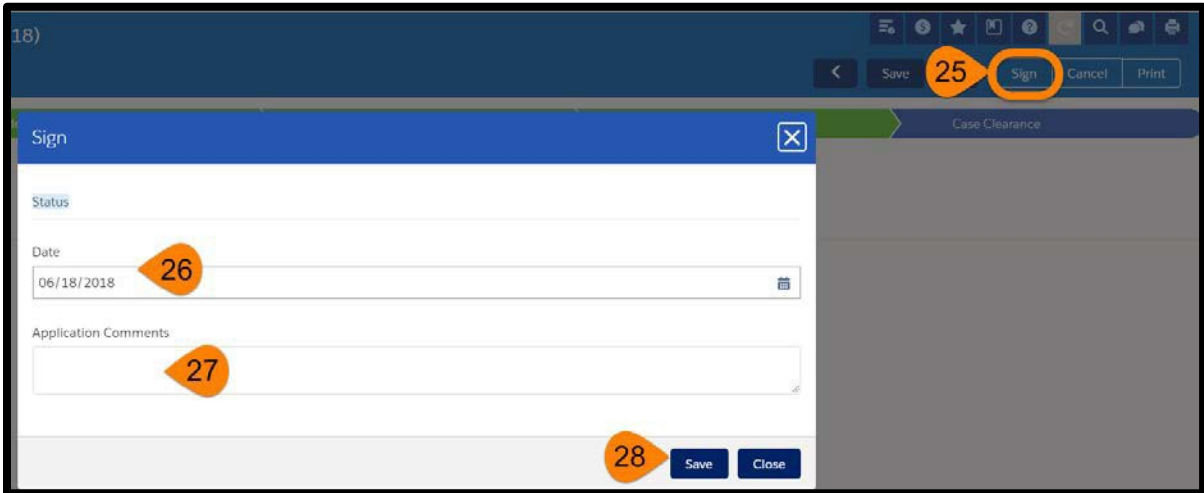
Case Clearance

29) After the application is signed, you can assign a Case Number to the application on the Case Clearance tab.
   - 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.
   - 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.
      - 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.
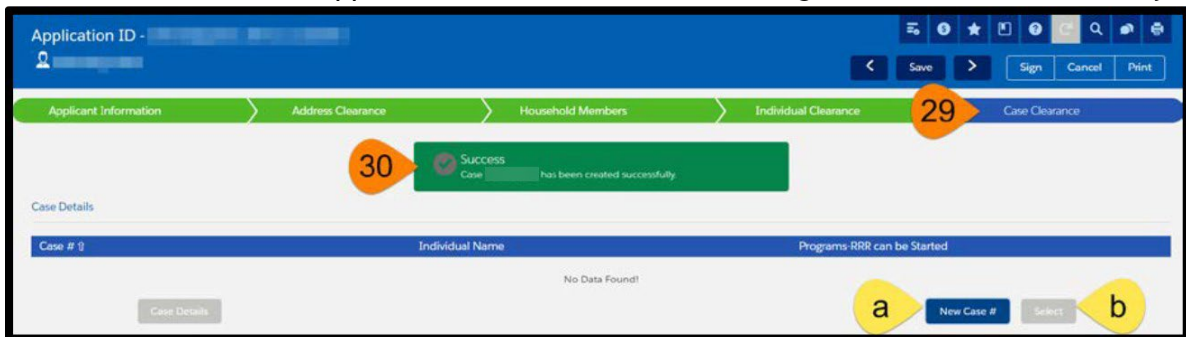
The Application Initiation (AI) is now complete.

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