

Process Manual
Copy Head of Household

Overview

Copy HOH feature in CBMS allows the user to copy Address and Residency Information to any/all Household Members.

- 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) Select **Begin Interactive Interview** to initiate the II queue.
- 5) Navigate to the **Residency** page.
- 6) From the **Name** drop-down, select the **Head of Household (HOH)**.
- 7) Update the Residency information for the HOH.
 - a) Refer to Entering Residency Process Manual.
- 8) Click on the **Individual Address** related list.
- 9) Click the **pencil/edit icon** to update the Address verification for the HOH.
 - a) Address can also be updated in the Demographics Page.
- 10) Click on the **Copy HOH** button -this will open the **Copy Head of Household Residency** window.
 - a) You can also access Copy HOH from the Main Members page after you have updated the HOH information on the required pages (Address Related List, Residency).
- 11) Determine which household members you wish to update with the same address and residency information as the HOH.
- 12) Select a chosen individual in the left hand box.
- 13) Click the right arrow between the boxes - this moves the member to the right hand box.
 - a) Repeat for each individual that you want to copy the information to (all applicable individuals should now be in the right hand box).
- 14) Check the box for each item that you would like to copy to the other household members:
 - a) Individual Residency
 - b) Home address
 - c) Mailing Address
- 15) Click **Save**.

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