

Copying Head of Household

CBMS | Process Manual | Revised: February 2021

OVERVIEW

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

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. 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**.

ACCESSIBILITY

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