COLORADO
Healthcare & Economic Security
Staff Development Division

Disposing of a Resource

CBMS | Process Manual | Revised: March 2023

OVERVIEW

This document provides a step-by-step process for how to dispose of a resource in CBMS Salesforce.

PROCESS

1. Open the CBMS Case
2. On the **Members** page, select the **Member** that the Resource belongs to
3. Select the **Resources** tab
4. Select the sub-tab that has the Resource needing to be disposed of
5. Select the row of the Resource to be disposed of
    a. Highlighting the row will populate the **Related Lists** to the right
6. Scroll down until you see the **Disposition Details** related list
7. Select the **plus (+)** icon in the blue detail header
    a. A new pop-up window will appear
8. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should choose
9. Select the **Type of Disposition** applicable to the case from the drop-down menu
10. Enter the **Disposition Date** – this is the actual date the resource was sold, given away, etc.

11. Select the appropriate radio button for Adequate Consideration and refer to the applicable Program Area policy for a definition or clarification of what Adequate Consideration is
    a. If you select **No**, CBMS determines if there is a TWFC for Adult Financial and Long-Term Care
12. Select the applicable **Verification** from the drop-down menu
13. Select the applicable verification **Source** from the drop-down menu
14. Enter the **Amount Received for Resource**. This is the actual dollar amount the client/member received for the resource. If the client/member did not receive anything in return, enter $0.
15. Select the appropriate **Disposition Reason** from the drop-down menu
16. Transferred Resource Returned to Individual in Full – do not select when initially disposing a resource. If the resource is later returned to the individual (car is given back, money is returned, etc.) select Yes. Otherwise leave blank.
    a. If Yes, then for Date Returned enter the date the resource/funds were returned to the individual
17. Please enter **Comments** even though field is not required. Please enter any comments related to the disposition of the resource. Follow your Eligibility Site's process when using this field.
18. Enter the **Date Reported** – this is the date the client/member told the Eligibility Site that the resource was no longer in their possession
19. Enter the **Date Verified** – this is the date the client/member provided verification that the resource was no longer in their possession
20. Select **Save**
21. Once the Resource is disposed of, it will show in red lettering on the main page

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.