Disposing of a Resource

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) Click on the **Resources** Tab
4) Click on the sub-tab that has the Resource needing to be disposed of
5) Click on 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) Click the plus **(+)** sign in the blue detail header
8) Enter the **Effective Begin Date**
   a) Refer to **Online Help** for assistance with which date you should use
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** provided from the drop-down menu
13) Select the applicable verification **Source** provided 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 applicable **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) Click **Save**
21) Once the Resource is disposed of, it will show in red lettering on the main page

Please refer to online help for definitions and clarifications on the values listed for each field.

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