COLORADO
Healthcare & Economic Security
Staff Development Division

Entering Earned Income

CBMS | Process Manual | Revised: August 2024

OVERVIEW

This document provides a step-by-step process for how to enter new earned income on the Earned Income tab within the Income page of CBMS.

PROCESS

Beginning Data Entry

1. Log in to **CBMS**
2. Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
3. Select the Case Number in the results table to access the **Members** page
4. From the Members page, hover over the **Actions** button
5. Select **Begin Interactive Interview** to initiate the I.I. queue
6. On the case **Questions** page, be sure the 'Yes' radio button is selected for **Does anybody have income**
    a. This will add the Income chevron to the I.I. queue
7. Navigate to the **Income** chevron and select the appropriate household member from the drop-down
8. Select the **Earned Income** tab
9. Select the **plus (+)** icon to add an employer record

10. The Earned Income Employment Details pop-up will appear, enter the **Effective Begin Date**
    a. Refer to **Online Help (?)** for the appropriate date to use
11. Enter the **Employment Begin Date**
    a. This is the date the individual actually began working for the employer
12. Enter the **Employer Name**
13. Select the **Employment Type** from the drop-down menu
14. In the **Monthly Amount Earned** field, enter the gross amount the individual will receive or expects to receive for the month
    a. Used for SNAP only
    b. Enter the converted monthly amount
    c. Enter the estimated **Average Hrs/Week** (Hours Per Week)
15. If Medical Assistance is attached to the case, select the **Occupation** from the drop-down menu
16. Enter the **Date Reported** and **Date Verified**
17. Select the **Save** button
18. Once saved, select the **Employer Record** to highlight the row
19. This will enable the **Self-Attested Earned Income** details.
20. To add a new record, select the **plus (+)** icon in the blue header detail
21. Select the **Employer** from the drop-down menu
22. Enter the **Effective Begin Date**
    a. Refer to **Online Help (?)** for the appropriate date to use
23. Select the **Income Type** from the drop-down menu
24. Select the **Frequency** from the drop-down menu
25. Enter the **Date Reported**

MA Specific Information

These fields appear only when Medical Assistance is attached on the case.

1. Select the **Save** button
2. In the **Paycheck Summary** related list, click the **plus (+)** icon to add paycheck details
3. Enter the **Date Received** as the actual date the individual was paid
4. Enter the **Total (#) Number of Hours Worked** during that pay period
5. Enter the **Gross Amount** (the amount before any taxes and/or deductions are taken out)
6. Select the **Paycheck Type**
    a. 'Representative' means regular anticipated income that the individual expects to receive. If this is a normal paycheck for the individual, select this option. (Default)
    b. 'Non-Representative' means irregular income that is not regularly received, for example: overtime, fewer hours due to illness, vacation, severance pay, etc.
7. Select the appropriate **Verification** from the drop-down menu
8. Select the appropriate **Source** from the drop-down menu
9. Enter the **Date Reported**
10. Enter the **Date Verified**
11. Select **Save & New** to enter any other paycheck stubs provided following the same process as listed above
    a. If there are no other paychecks to enter, select **Save**

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.