

# Entering Income Expenses

CBMS | Process Manual | Revised: September 2021

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## OVERVIEW

This document provides a step-by-step process for how to complete the data entry of Income Expenses. Income Expenses may need to be entered if there are declared or verified expenses from an individual's earned or unearned income.

## PROCESS

1. Login to **CBMS**
2. Navigate to the Case by entering the Case Number in the **Global Search** bar
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 Interactive Interview (II) queue
6. Navigate to the **Income** chevron
7. Select the tab that has the Income record with an income expense
8. Select the record for the Income to highlight that row
  - a. Highlighting the row will populate the Related Lists to the right
9. Expand the **Income Expenses** related list
10. Select the **plus (+)** sign in the blue detail header
11. Enter the **Effective Begin Date**
  - a. Refer to **Online Help** for the appropriate date to use
12. Select the appropriate **Type** from the drop-down menu

13. Enter the **Amount** of the expense
  14. Select the appropriate **Frequency** from the drop-down menu
  15. Enter the **Date Paid**
    - a. This is the date the expense occurred
  16. Select the appropriate **Verification** from the drop-down menu
  17. Select the appropriate **Source** from the drop-down menu
  18. Enter the **Date Reported**
  19. Enter the **Date Verified**
  20. Select **Save**
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## ACCESSIBILITY

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