Entering Income Expenses

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) Click on 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) Click on the tab that has the Income record with an income expense
8) Click on 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) Click 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) Click **Save**

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