

Process Manual

Entering a Shelter Contribution

Overview

This document provides a step-by-step process for entering a Shelter Contribution in CBMS. Shelter Contributions are entered when someone is assisting with a shelter cost and pays the vendor directly. For example, the customer's mother is paying her rent but gives a check directly to the landlord. This lowers the allowable shelter amount for the customer. The shelter contribution will be subtracted from the household's total shelter expenses.

Process

- 1) Navigate to the **Shelter Expense** page by initiating the Interactive Interview for the case.
- 2) Click on the shelter expense row in the summary table.
 - This will open all related lists for that expense record.
 - See the *Entering a Shelter Expense* process manual for assistance in adding a new shelter expense.
- 3) The shelter contributions display in the **Shelter Contribution** Related List on the right.
- 4) Click the plus (+) icon in the Shelter Contribution related list header to add a new record.
- 5) The Shelter Contribution detail pop-up window will appear.

- a) Enter the **Effective Begin Date**.
- b) Enter the **Contributor Name**
 - This is the name of the person contributing towards the shelter.
- c) Enter the **Amount Contributed** towards the household's shelter.
- d) Select the appropriate **Verification** from the drop-down menu.
- e) Select the appropriate **Source** option from the drop-down menu.
- f) Enter the **Date Reported**
- g) Enter the **Date Verified**
- h) Click **Save** if you do not have any other records to enter or click **Save & New** to save this entry and enter another Shelter Expense.

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

