


Entering Unearned Income as Committees and Workgroups

Overview

This document provides a step-by-step process for how to enter Unearned Income as Committees and Workgroups.

Process

- 1) Login into **CBMS**
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
- 3) Click on 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 II 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 II Queue
- 7) Navigate to the **Income** chevron and select the appropriate household member from the drop-down
- 8) Select the **Unearned Income** tab
- 9) To add a new record, click the plus (+) sign in the blue detail header
- 10) Enter the **Effective Begin Date**
 - a) Refer to Online Help () for the appropriate date to use
- 11) Click on the **Type** drop-down menu
- 12) Select **Committees and Workgroups**
 - a) Selecting Committees and Workgroups will enable the **Establishment Gift Card** radio buttons to indicate whether payment was in the form of a gift card
- 13) Select the appropriate **Frequency** that the income is received
- 14) Select the appropriate **Verification** from the drop-down menu
- 15) Select the appropriate **Source** from the drop-down menu
- 16) Enter the **Date Reported**
- 17) Enter the **Date Verified**
- 18) Click **Save**

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Once you have saved this page, the related lists will appear and be displayed on the right.

- 19) Highlight the appropriate Unearned Income record
- 20) Click on the **Income Received Summary** related list
- 21) Click on the plus (+) sign to add an income record
- 22) The **Check Type** will automatically be set to Representative
 - a) If this income record is not representative of the normal income amount, this can be changed to *'Not Representative'* as applicable
- 23) Enter the Pay Period **Begin Date**
 - a) If unknown, use the first of the month that the income is received
- 24) Enter the **Date Received** with the actual date the income was received
- 25) Enter the **Gross Amount** field with the correct amount of income
 - a) This amount should match the pay frequency
- 26) Select the appropriate radio button for **Lump Sum** payment
 - a) Selecting 'Yes' will generate a resource record
- 27) Select the appropriate **Verification** from the drop-down menu
- 28) Select the appropriate **Source** from the drop-down menu
- 29) Enter the **Date Reported**
- 30) Enter the **Date Verified**
- 31) Click **Save**

IMPORTANT: When Unearned Income changes (i.e., during COLA) the entire record (not just the related pages) must be effective end dated. A new record reflecting the change must be added following steps 9-32.

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

