

Entering Unearned Income as Committees and Workgroups

CBMS | Process Manual | Revised: October 2023

OVERVIEW

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

PROCESS

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. 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 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 **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. Select 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**

ACCESSIBILITY

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