


Process Manual  
**Entering Unearned Income**

## Overview

This document provides a step-by-step process for how to enter Unearned Income.

## 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) Select the appropriate **Type** of Unearned income from the drop-down menu
- 12) Select the appropriate **Frequency** that the income is received
- 13) Enter the appropriate **Application Status** and **Approval Status**
  - a) Certain types of income, such as Title II/XVI and UIB, will require the *Application/ Approval Status*
- 14) Enter the **Claim #**
  - a) Certain types of income require this. Refer to the verification received and enter the applicable Claim #
- 15) Select the appropriate **Verification** from the drop-down menu
- 16) Select the appropriate **Source** from the drop-down menu
- 17) Enter the **Date Reported**
- 18) Enter the **Date Verified**
- 19) Click **Save**



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

- 20) Highlight the appropriate Unearned Income record
- 21) Click on the **Income Received Summary** related list
- 22) Click on the plus (+) sign to add an income record
- 23) 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
- 24) Enter the Pay Period **Begin Date**
  - b) If unknown, use the first of the month that the income is received
- 25) Enter the **Date Received** with the actual date the income was received
- 26) Enter the **Gross Amount** field with the correct amount of income
  - a) This amount should match the pay frequency
- 27) Select the appropriate radio button for **Lump Sum** payment
  - c) Selecting 'Yes' will generate a resource record
- 28) Select the appropriate **Verification** from the drop-down menu
- 29) Select the appropriate **Source** from the drop-down menu
- 30) Enter the **Date Reported**
- 31) Enter the **Date Verified**
- 32) 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 theSDC via email [SOC\\_StaffDevelopment@state.co.us](mailto:SOC_StaffDevelopment@state.co.us)*

