Entering Unearned Income

CBMS | Process Manual | Revised: December 2025

OVERVIEW

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

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. Select 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, select 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 # (Number)**

    a. Certain types of income require this. Refer to the verification received and enter the applicable Claim # (Number).

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. Select **Save.**

    a. 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**.

    a. 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.

Related List steps start here.

27. Select the appropriate radio button for **Lump Sum** payment.

    a. 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.**

ACCESSIBILITY

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