

Entering Unearned Income

CBMS | Process Manual | Revised: September 2021

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**
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ACCESSIBILITY

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