

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**.

- 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.



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**.
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ACCESSIBILITY

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