COLORADO
Healthcare & Economic Security
Staff Development Division

Entering a Burial Asset

CBMS | Process Manual | Revised: March 2022

OVERVIEW

This document provides a step-by-step guide for how to enter a Burial Asset in CBMS.

PROCESS

Data Entry

1. Log into **CBMS**
2. Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home Page
3. Click on 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 own or has anybody disposed of resources**
    a. Selecting 'No' will not populate the **Resource** page in the Interactive Interview (II) queue
7. Navigate to the **Resource** page
8. From the **Name** drop-down, select the person who owns the Burial Asset
9. Select the **Burial Asset Summary** page
10. To add a new record, click the **plus (+)** sign in the blue detail header

11. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use
12. Enter the **Resource Name**
    a. This should be something to help you easily identify this property. Avoid using generic terms like Policy #1. Instead use the Company name and policy number or Funeral Home.
13. Select the appropriate **Type** from the drop-down options
14. Select the appropriate **Verification (FMV)** from the drop-down menu
15. Select the appropriate **Source (FMV)** from the drop-down menu
16. Enter the full **Funeral Agreement Amount**
17. Enter the **Fair Market Value** of the asset
18. Enter the **Date Reported**
19. Enter the **Date Verified**
20. Click **Save**

Burial Asset Ownership Related List

1. The information from the record entered under the asset owner will automatically populate in the **Burial Asset Ownership** related list
2. Click on the **pencil** icon to edit/add details to the ownership of the resource
3. Enter the **Date Acquired**
    a. This is the date the client acquired the resource
4. In the **Usage** field, select the appropriate drop-down option
5. Select the appropriate radio button to indicate if the asset is **Revocable** or not
6. Enter the **Percent Owned**
    a. Ex: If they are the sole owner, enter 100, if jointly owned 50 or 33 etc.
7. Select the appropriate **Verification** from the drop-down menu

8. Select the appropriate **Source** from the drop-down menu
9. Enter the **Date Reported**
10. Enter the **Date Verified**
11. Click **Save** if there is only one owner of the resource
    a. If you are adding another owner, click **Save & New** and repeat the above steps for the second owner.

Note: There is no need to enter an additional Resource to the case if there is more than one owner; the additional owner(s) only needs to be added in the liquid asset ownership page.

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.