



Entering a Shelter Contribution

CBMS | Process Manual | Revised: January 2022

OVERVIEW

This document provides a step-by-step process for entering a Shelter Contribution in CBMS on an existing shelter expense record.

Note: Shelter Contributions are entered when someone is assisting with a shelter cost and pays the vendor, provider, or landlord directly.

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, select the 'Yes' radio button for **Does the Household have Shelter Expenses**
 - a. If left unmarked the **Shelter Expense** page will not populate in the Interactive Interview (I.I.) queue
7. Navigate to the **Shelter Expense** page
8. Select the existing shelter expense row in the summary table
9. Open the **Shelter Contribution Related List** on the right

10. Select the **plus (+)** icon in the Shelter Contribution related list header to add a new record
 11. Enter the **Effective Begin Date**
 - a. Refer to **Online Help** for the appropriate date to use
 12. Enter the **Contributor Name**
 - a. This is the name of the person contributing towards the shelter
 13. Enter the **Amount Contributed** towards the household's shelter
 14. Select the appropriate **Verification** from the drop-down menu
 15. Select the appropriate **Source** option from the drop-down menu
 16. Enter the **Date Reported**
 17. Enter the **Date Verified**
 18. Select **Save**
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ACCESSIBILITY

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