

# Entering a Shelter Expense

CBMS | Process Manual | Revised: October 2024

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## OVERVIEW

This document provides a step-by-step process for entering a Shelter Expense in CBMS.

## PROCESS

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, make sure the radio button for *Does the Household have Shelter expenses* is marked 'Yes'
  - a. If left unmarked, the **Shelter Expense** page will not populate in the Interactive Interview (II) queue
7. Navigate to the **Shelter Expense** page
8. To add a shelter expense, click the plus (+) sign in the blue detail header
9. Enter the **Effective Begin Date**
  - a. Refer to **Online Help** for appropriate date to use Step 2 Level 1
10. Select the appropriate **Shelter Type** from the drop-down menu
11. Select the appropriate **Expense Type** from the drop-down menu

- a. If *'Utility'* is selected, select the **Utility Type** from the drop-down menu
12. The **Included in Rent** field is not required but should be answered if you know the information
13. The **LTC Allowance** field is not required but will automatically default to 'Actual'
14. The **HUD Assistance** field is not required but should be answered if you know the information
15. Select the appropriate **Expense Verification** option from the drop-down menu
16. Select the appropriate **Expense Source** option from the drop-down menu
17. Enter the **Amount of Bill**
18. Enter the **Date of Bill**
19. Select the **Frequency** from the drop-down
20. Select the appropriate **Billing Verification** option from the drop-down menu
21. Select the appropriate **Billing Source** option from the drop-down menu
22. Enter the **Date Reported**
23. Enter the **Date Verified**
24. Click **Save**

Note: When an **Expense Type**, **Utility Type** or **Amount of Bill** has changed and the household is still responsible for the expense, you will *overwrite* the information in the existing record with the new information. Refer to **Online Help** for appropriate dates to use.

Note: When a **Shelter Expense** has ended and the household is no longer responsible for it, you may **Effective End Date** (EED) the main record for the last day of the month in which the information was reported.

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## ACCESSIBILITY

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