

# Entering a Sponsor in CBMS

CBMS | Process Manual | Revised: July 2021

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## OVERVIEW

All cases that contain a sponsored non-citizen shall add the sponsor to the case in order to request and consider sponsor's information in determining accurate eligibility for the sponsored non-citizen.

**Note:** If the Sponsor is also a Household Member, you will complete ALL applicable pages for that person, including the Sponsor Page. This applies to all HLPGs.

## PROCESS

### Adding a Sponsor to a Case

1. Log into CBMS.
2. Navigate to the Case by entering the Case Number in the **Global Search** bar.
3. Click on **Case Number** in the results table to access the **Members** page.
4. From the **Members** page, hover over the **Actions** button and select **Begin Interactive Interview**.
5. On the **Case Questions** page, be sure the **Sponsor** box is marked in the **Does anybody have/received/need** section.
  - a. If left unmarked, the **Sponsor** page will not populate the in the **Interactive Interview (II)** queue.
6. Navigate to **Add Member** (or you can select the **Add Individual** mini queue from the **Actions** button on the main **Members** page).

7. Follow the queue to add the individual(s) to the case.
  - a. Complete the details for each sponsor on the following pages:
    - i. Add Member, Demographics, Case Individual, Household Relationships and Sponsor (see detailed steps below) as appropriate.
8. Navigate to the **Demographics** page, update any fields that you have for the sponsor.
  - a. SAVE should provide Name and SSN.
  - b. If you do not have a date of birth, use 1/1/1901 as the date of birth.
  - c. If you do not know the marital status, select the appropriate choice from the drop-down menu.
  - d. If you do not know the citizenship status, select unknown.
  - e. **Note:** if the Sponsor is a member of the household, update all pages appropriately for a Household Member.
9. Navigate to the **Case Individual Program Requested** page and update appropriate fields:
  - a. Select the '**No**' radio button for **Requesting Assistance if the Sponsor** is not in the home and not requesting assistance.
  - b. Select '**No**' for **Ancillary Member**.
    - i. **Note:** if the Sponsor is a member of the household, update all pages appropriately for a Household Member.

## Data Entry of the Sponsor Information Page

1. Navigate to the **Sponsor Information Page**.
2. Select the **Sponsor** from the dropdown list above the queue.
3. Click on the **plus (+)** sign in the blue header to add a record.
4. Enter the **Effective Begin Date**.
  - a. Refer to **Online Help** for information.

5. Select the appropriate radio button for **CW/OAP Hardship** (cash programs only to lift the 5-year bar)
  - a. If 'Yes' is marked, select the **Hardship** reason from the drop-down list
6. Select the appropriate radio button for **Abandonment**
  - a. If 'Yes' is marked, complete the **Hardship Date** (date reported to the agency).
  - b. Select appropriate **Verification** from the drop-down menu.
  - c. Select appropriate **Source** from the drop-down menu.
7. Select the appropriate radio button for **Abuse/Mistreatment**.
  - a. If 'Yes' is selected, complete the **Hardship Date** (date reported to the agency).
  - b. Select appropriate **Verification** from the drop-down menu.
  - c. Select appropriate **Source** from the drop-down menu.
8. Enter the circumstances reported by the non-citizen for **Hardship Reason Determination**.
9. Enter the appropriate information for **Number of People in the Sponsor's Household**:
  - a. If unknown and requesting this information, enter 2 (1 for the sponsor, 1 for the sponsored non-citizen).
10. Enter the appropriate information for **Total Number of Non-Citizens Sponsored**.
  - a. If unknown and requesting this information, enter 1.
11. Select appropriate **Verification** from the drop-down menu.
12. Select appropriate **Source** from the drop-down menu.
  - a. If unknown and requesting this information, use **Received - Client Statement** to generate a VCL.
    - i. **Note:** Remember to add a specific note to this item on the VCL asking for the total number of household members, names and ages.

13. Select appropriate radio button for **Sponsor Affidavit of Support is Signed**.
  - a. Select **'Yes'** if SAVE has verified the sponsor or you have received a copy of the Sponsorship document.
14. Enter the **Date** the sponsorship began.
15. Select appropriate radio button for **Sponsor Spouse Affidavit of Support is Signed**.
16. Enter the appropriate number for **Number of People Outside Household**.
  - a. This refers to the number of people sponsored by the sponsor. If you do not have this information, leave blank.
17. Enter the appropriate dollar amount for **Amount Paid**.
  - a. This refers to money paid by the sponsor to people outside the sponsor's household. If you do not have this information, leave blank.
18. Select the appropriate radio button for **Sponsor Address**.
  - a. Selecting **'known'** will enable the address fields.
19. Complete appropriate the **Address** fields.
20. Select **'Received'** from the **Verification** field.
21. Select the appropriate **Source** from the drop-down menu.
22. Click **Save**.

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