

Entering a Tax Deduction Expense

CBMS | Process Manual | Revised: September 2021

OVERVIEW

This document provides a step-by-step process for how to complete the data entry of the Tax Deduction tab. This chevron will populate when MA is requested and should be completed when the client has an expense that is not related to Dependent Care, Medical, Medicare, or Child-Spousal expenses.

PROCESS

1. Login to 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
5. Select **Begin Interactive Interview** to initiate the Interactive Interview (II) queue
6. Navigate to the **Tax Deduction** chevron and select the appropriate household member from the drop-down
7. Click the **plus (+)** sign in the blue detail header
8. Enter the **Effective Begin Date**
 - a. Refer to **Online Help** for the appropriate date to use
9. Select the appropriate **Deduction Type** from the drop-down menu
10. Enter the **Amount** of the expense
11. Select the appropriate **Frequency** from the drop-down menu

12. Select the appropriate **Verification** from the drop-down menu

- a. The **Verification** field will only be available when it is applicable for the selected Deduction Type

13. Select the appropriate **Source** from the drop-down menu

- a. The Source field will only be available when it is applicable for the selected Deduction Type

14. Click **Save**

ACCESSIBILITY

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