Entering a Vehicle Resource

CBMS | Process Manual | Revised: February 2023

OVERVIEW

This document provides a step-by-step guide for how to enter a vehicle as a resource in CBMS.

PROCESS

1. Open the customer's CBMS Case
2. Navigate to the **Resource** tab by either:
    a. Initiating the Interactive Interview (II) queue
    b. Clicking on the Member card who has the resource
3. Click on the **Resources** tab
4. Click on the **Vehicle Summary** tab
5. Click on the **plus (+)** icon to add a new record
6. Enter the customer's declared vehicle information on the Vehicle Resource window
    a. Enter the **Effective Begin Date**
    b. Enter the **Resource Name**
        i. Choose something easily identifiable like 2004 Toyota, etc.
    c. Select the appropriate **Type** of vehicle from the drop-down menu
    d. **Make**, **Model** and **Year** fields are not required, however if you have this information, you should enter it here

7. Enter the vehicle's value in the **Fair Market Value** field
    a. If you do not have the verification of the vehicle's value, query NADA or KBB for the vehicle valuation
        i. National Automobile Dealers Association (NADA)
        ii. Kelley Blue Book (KBB)
    b. If the vehicle is found in KBB or NADA, use the **Fair trade-in** condition value listed
        i. **Note**: For Adult Financial only: If the vehicle is not found on NADA or KBB and the declared value is not questionable, enter $400 for the vehicle value
    c. If the vehicle is not found on NADA or KBB and is questionable
        i. Request verification of appraised value based on written statements from
            1. Assessor's office
            2. Local merchant, internet, or reliable source
8. Select the appropriate **Verification** from the drop-down menu
9. Select the **Source** from the drop-down menu
    a. For situations using the standard $400, use **'Collateral Contact'** as the **Source**
    b. Add Case Comments that reference the standard amount was used.
10. Enter the **Date Reported**
11. Enter the **Date Verified**
12. **Save** the page
13. Once you have saved this page, the **related lists** will appear and be displayed to the right
    a. The information from the record entered under the asset owner will automatically populate in the Ownership related list

14. Click the **pencil** icon to edit/add details to the ownership of the resource
15. Enter/update the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use
16. For the **Legal Owner** field, select the appropriate radio button
    a. **Note**: Use **Online Help** for information on the other Radio Buttons on this page, as applicable
17. Enter the **Percent Owned**
    a. **Example**: If they are the sole owner, enter 100, if jointly owned 50 or 33 etc.
18. Select the appropriate **Verification** from the drop-down menu
19. Select the appropriate **Source** from the drop-down menu
20. Enter the **Date Reported**
21. Enter the **Date Verified**
22. 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

ACCESSIBILITY

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