COLORADO
Healthcare & Economic Security
Staff Development Division

Entering and Updating an IM-14

CBMS | Process Manual | Revised: January 2022

OVERVIEW

This document provides a step-by-step process for how to enter an IM-14 form AND cases to ensure accurate Interim Assistance Reimbursement.

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. Navigate to the **AND-SO IM-14** page
7. From the **Name** drop-down, select the appropriate member
8. To add a new record, click the **plus (+)** sign in the blue detail header
9. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use
10. Select **'Received'** from the **Verification** drop down-menu
    a. If not received, select **'Not Received'** and click **Save**
11. Select **'IM-14'** from the **Source** drop-down menu
    a. If received but not signed, select **'Incomplete'** and click **Save**

12. Enter the **Customer Signature Date**
13. Enter the **County Signature Date**
    a. **Note: County Signature Date** cannot be prior to the **Customer Signature Date**
14. Click **Save**

Note: A new IM-14 form must be completed and signed by the client and a new record entered as received at each Redetermination and when moving to a new county.

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.