COLORADO
Healthcare & Economic Security
Staff Development Division

Entering Demographics Details in CBMS

CBMS | Process Manual | Revised: January 2021

OVERVIEW

Demographic information must be collected on all household members when applying for Public Assistance Benefits. The Demographics Page in CBMS is where eligibility workers will update this information.

PROCESS

Beginning Data Entry.

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 **Demographics** tab
7. From the **Name** drop-down, select the appropriate person
8. Enter the **Effective Begin Date**
    a. Refer to **Online Help** for assistance with which date you should use

Name

1. Ensure the **Name** is spelled correctly
2. Ensure the correct **Gender** is marked

Birth Information

1. Ensure the **Date of Birth** is correct
2. Select 'Received' from the **Verification** drop-down menu
3. Select the appropriate **Source** from the drop-down menu

Marital Information

1. Select the appropriate **Status** from the drop-down menu
2. Enter the **Status Date** if available
3. Select the applicable radio button to indicate whether or not the client **Marital Status Update** is questionable
4. Select **'Received'** from the drop-down menu
5. Select the appropriate **Source** from the drop-down menu
    a. Refer to **Online Help** for assistance with appropriate source.

Death Information

1. If applicable, enter the **Date of death**
2. Select 'Received' from the **Verification** drop-down menu
3. Select the appropriate **Source** from the drop-down menu.

Social Security Number

1. If the client has an SSN
    a. Ensure the SSN is correct
    b. Select 'Received' from the **Verification** drop-down menu
    c. Select the appropriate **Source** from the drop-down menu
2. If the client does not have an SSN
    a. Option 1
        i. Select the applicable radio button to indicate whether or not the client has **Applied** for SSN

        ii. Enter the **Application Date**

        iii. Select ‘Received’ from the **Verification** drop-down menu

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

    b. Option 2

        i. Select the applicable radio button to indicate whether or not the client has **Attempted to Obtain** an SSN

        ii. Select Received from the **Verification** drop-down menu

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

    c. If there is **Good Cause** for not attempting to obtain an SSN

        i. Select the **Good Cause Date**

            1. Refer to **Online Help** for assistance with which date you should use

        ii. Select the appropriate **Reason** for not attempting to obtain SSN from the drop-down menu

3. **NOTE**: Enter the Taxpayer Identification Number (TIN) - ONLY if MA is on the case and an SSN has not or will not be supplied.

Citizenship Information

1. Select the appropriate choice for **US Citizen** from the drop-down menu

2. Select the appropriate choice for **Status** from the drop-down menu

3. Select ‘Received’ from the **Verification** drop-down menu

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

5. Select the applicable radio button to indicate whether or not the document received is acceptable

    a. Refer to the **SCHIP Interface Process Manual** for triggering the SSA interface for Medical Assistance applicants

Other Information

1. Select the appropriate choice for **Reason for Update** from the drop-down menu
    a. This field will only become enabled if you have made a change to the demographics of an existing client
2. Enter **Date Reported**
3. Enter **Date Verified**
4. Click **Save**

ACCESSIBILITY

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