Entering Financial Aid

CBMS | Process Manual | Revised: April 2021

OVERVIEW

The Financial Aid Page is where all financial aid income and expenses for schooling is entered.

Note: Financial Aid income is exempt for Food Assistance (SNAP), Colorado Works (CW), and Adult Financial (AF) programs. However, you may still need to enter data for Medical Assistance (MA) and if Work Study is being used as student eligibility criteria for SNAP.

PROCESS

Financial Aid Period

1. Login to **CBMS**

2. Navigate to the Case by entering the Case Number in the **Global Search** bar

3. Select the 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 **Attending School** box is marked in the **Is anybody in the case** section.

    a. If left unmarked the **Student Detail** page will not populate in the Interactive Interview (II) queue

6. Navigate to the **Student Detail** page

7. From the **Name** drop-down, select the Appropriate Individual

8. Complete the **Student Detail** data entry and select **Save**

   a. Refer to the **Entering Student Detail** process manual for assistance with data entry

9. Select the **Financial Aid** related page at the BOTTOM of the record

10. To add a new record, select the **plus (+)** sign in the blue detail header

11. Enter the **Effective Begin Date**

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

12. Select the appropriate **Aid Paid To** from the drop-down menu (if provided)

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

14. Select the appropriate **Type** from the drop-down menu

15. Select the appropriate **Student Income Usage** from the drop-down menu

16. Select the appropriate **Source** from the drop-down menu (if provided)

17. Enter financial aid **Begin Date**

18. Enter financial aid **End Date**

19. Select 'Received' from the **Verification** field

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

21. Enter **Date Reported**

22. Enter **Date Verified**

23. Select **Save**

The **Income Summary** related page will display once you select the completed row under **Financial Aid.**

Income Summary Related Page

Note: Income Received Summary is not required for CW, AF or SNAP.

1. Select the **Income Received Summary** related page

2. To add a new record, select the **plus (+)** sign in the blue detail header

3. Select the appropriate **Check Type** from the drop-down menu

4. Enter the income period **Begin Date**

5. Enter **Total Number of Hours Worked** for this income (if provided)

6. Enter **Date Received**

7. Enter **Gross Amount** received for this period

8. Select the '**No**' radio button for **Lump Sum**

9. Select '**Received**' from the **Verification** field

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

11. Enter **Date Reported**

12. Enter **Date Verified**

13. Select **Save**

ACCESSIBILITY

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