Entering Financial Aid Process Manual

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

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 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 the in the Interactive Interview (II) queue
6) Navigate to the **Student Detail** page
7) From the **Name** drop-down, select the Appropriate Invidivual
8) Complete the **Student Detail** data entry, and click **Save**
    a) Refer to the *Entering Student Detail Process Manual* for assistance with Data Entry
9) Click on the **Financial Aid** related page at the BOTTOM of the record
10) To add a new record, click the plus **(+)** sign in the blue detail header

Details

1) Enter the **Effective Begin Date**
    a) Refer to **Online Help** for assistance with which date you should use
2) Select the appropriate **Aid Paid To** from the drop-down menu (if provided)
3) Select the appropriate **Frequency** from the drop-down menu
4) Select the appropriate **Type** from the drop-down menu
5) Select the appropriate **Student Income Usage** from the drop-down menu
6) Select the appropriate **Source** from the drop-down menu (if provided)

Financial Aid Period

1) Enter financial aid **Begin Date**
2) Enter financial aid **End Date**
3) Select '*Received*' from the **Verification** field
4) Select the appropriate **Source** from the drop-down menu
5) Enter **Date Reported**
6) Enter **Date Verified**
7) Click **Save**

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

1) Click on the **Income Received Summary** related page
2) To add a new record, click the plus **(+)** sign in the blue detail header

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

Detail

1) Select the appropriate **Check Type** from the drop-down menu

Pay Period

1) Enter the income period **Begin Date**
2) Enter Total **# of Hours Worked** for this income (if provided)
3) Enter **Date Received**
4) Enter **Gross Amount** received for this period
5) Select the '*No*' radio button for **Lump Sum**
6) Select '*Received*' from the **Verification** field
7) Select the appropriate **Source** from the drop-down menu
8) Enter **Date Reported**
9) Enter **Date Verified**
10) Click **Save**

Do you have any questions or suggestions regarding this process? Please contact the SDC via email SOC_StaffDevelopment@state.co.us