

Entering Household Relationship Process Manual

Overview

This document provides a step-by-step process for entering Household Relationship information in CBMS.

CBMS utilizes data entry on the Household Relationship page along with other data entry to determine eligible household composition for all High Level Program Groups (HLPGs). Information on this page gathers relationship information for all household members and sponsors if applicable.

Note: The Household Relationship page will only populate when there is more than one individual listed in the case.

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 **Household Relationship** page
- 7) From the **Name** dropdown, select the appropriate individual
- 8) Click on the **Pencil** icon to edit/add details for a selected individual
- 9) The **Effective Begin Date** will already be populated, update this information if applicable
 - a) Refer to **Online Help** for which date to use
- 10) From the dropdown list, select the appropriate **Relationship** of the main individual (*on the left*) to the other individual (*on the right*)
- 11) Select 'Received' from the **Verification** dropdown list
- 12) Select an appropriate **Source** from the dropdown list
- 13) Enter the **Date Reported**
- 14) Enter the **Date Verified**



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- 15) Select the appropriate radio button as applicable for the main individual's role to the other individual- Refer to **Online Help** for more information on the buttons below
 - a) **Parental Care and Control** is used for SNAP
 - b) **Sponsor** refers to whether the main individual is the sponsor of the other individual who is a Non-Citizen
 - c) **Responsible Relative** is used for Medical Assistance and applies to non-parental caretakers
 - d) **Community Spouse** is used for Long Term Care
 - e) **Exercises the Responsibility for** is used for Colorado Works
 - i) This option requires verification:
 - (1) Select '*Received*' from the **Verification** dropdown list
 - (2) Select an appropriate **Source** from the dropdown list
- 16) Click **Save**
- 17) Repeat steps 7 through 15 for each household member
 - a) Note: Some fields may auto populate based on the previous entry
- 18) **Optional:** You may click the **Summary Button** at the bottom of the page to see all individuals and their relationships to everyone in the household.
 - a) This will open up in a new tab
 - b) This may assist with larger households to ensure you have all relationships entered correctly

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

