

# Entering Identification Details

CBMS | Process Manual | Revised: February 2021

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## OVERVIEW

This document provides a step-by-step process for entering the identification documentation for some or all the household members into CBMS.

## PROCESS

1. Log into **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
5. Select **Begin Interactive Interview** to initiate the Interactive Interview (II) queue
6. Navigate to the **Demographics** page
7. From the **Name** drop-down, select the appropriate person
8. Complete data entry on the **Demographics** page
  - a. Refer to the **Entering Demographic Details in CBMS** process manual for detailed information
9. Select **Save**
10. Select the header of the **Identification Details** related list to open
11. Add a new record by selecting the **plus sign (+)** icon
12. Enter the **Effective Begin Date**
  - a. Refer to **Online Help** for assistance with which date you should use

13. Select the **'Yes'** radio button for **Identification**

14. Select the appropriate **Identification Type** from the drop-down list.

- a. Note: Birth Certificates can only be used as a form of identification for Food Assistance, and is not recognized as a valid type of identification for any other program

15. Select the appropriate radio button for **Photo**

16. Select the appropriate **Issuing Agency** from the drop-down menu

17. Select the appropriate radio button for **Acceptable Doc**

18. Enter **ID Issue Date**

19. Enter **ID Expiration Date**

- a. Required for Cash Programs

20. Enter the **Driver's License/ID Number (#)**

- a. Only required if the Identification Type is a Driver's License

21. Enter the **Date Reported**

22. Enter the **Date Verified**

23. Select **Save**

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## ACCESSIBILITY

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