

# Entering Pickle

CBMS | Process Manual | Revised: January 2022

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## OVERVIEW

This document provides a step-by-step guide for how to enter details for Pickle.

## PROCESS

1. Log in to 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 **SSI** page.
7. From the **Name** dropdown, select the appropriate person.
8. Enter the **Effective Begin Date**.
  - a. This should be the application date, retro date, or the date the client lost SSI/OAP.
9. Select 'Applied' from the **Status** dropdown menu.
10. Enter the **Status Date**.
11. Select 'Terminated' from the **Result** dropdown menu.
12. Enter the **Result Date**.
13. Select 'Excess Income' from the **Result Reason** dropdown menu.

14. Select 'Received' from the **Verification** option from the dropdown menu.
15. Select the appropriate **Source** option from the dropdown menu.
16. Scroll to the **Pickle Details** section.
  - a. Note: The radio buttons you select in this section will trigger the approval or denial for Pickle.
17. Select the 'Yes' radio button for **Collect Pickle Information**.
18. Select which benefit was terminated for **Did the client become ineligible for SSI or OAP benefits?**
19. Enter the termination date for **What date did the client become ineligible for SSI or OAP?**
20. Select the reason for benefit termination for **Did the client become ineligible for SSI or OAP due to a COLA or SSA Title II initial entitlement?**
21. Select the appropriate radio button for **Did the client become ineligible for SSI or OAP due to entitlement to SSA Title II benefits?**
  - a. Note: This is the member's own entitlement through their own claim number.
  - b. If 'Yes' is selected, enter the **SSA Title II Initial Entitlement Amount**,
22. Select the appropriate radio button for **Did the client become ineligible for SSI or OAP due to a spouse or parent's COLA or SSA Title II initial entitlement?**
  - a. Note: This is for income the member is receiving from another person's claim number.
  - b. If 'Yes' is selected, enter the **Spouse or Parent's SSA Title II Initial Entitlement Amount**.
23. Select the appropriate radio button for **Was the client eligible for concurrent SSA Title II benefits in the same month as either SSI or OAP?**
24. Select 'Received' from the **Verification** option from the dropdown menu.
25. Select the appropriate **Source** option from the dropdown menu.
26. Click **Save**.

## ACCESSIBILITY

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