

Process Manual

Entering Pickle

Overview

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

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 **SSI** page
- 7) From the **Name** drop-down, 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** drop-down menu
- 10) Enter the **Status Date**
- 11) Select '*Terminated*' from the **Result** drop-down menu
- 12) Enter the **Result Date**
- 13) Select '*Excess Income*' from the **Result Reason** drop-down menu
- 14) Select '*Received*' from the **Verification** option from the drop-down menu
- 15) Select the appropriate **Source** option from the drop-down 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? - *This is the members own entitlement through their own claim number.***
 - a) 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? - *This is for income the member is receiving from another person's claim number.***

Process Manual

Entering Pickle

- a) 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 drop-down menu
- 25) Select the appropriate **Source** option from the drop-down menu
- 26) Click **Save**

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

