Entering Prior Aid

CBMS | Process Manual | Revised: January 2022

OVERVIEW

This document provides a step-by-step process for how to enter a Prior Aid record in CBMS. Prior Aid should be verified with the other State.

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 **Demographics** page

7. From the **Name** drop-down menu, select the person who has prior aid

8. Click on the **Prior Current Aid Details** related list

9. To add a new record for Out-of-State benefits, click the plus (+) sign in the blue detail header

10. Enter the **Effective Begin Date**

    a. Refer to **Online Help** for assistance with which date you should use

11. Select the appropriate **Program Group** option from the drop-down menu

12. If appropriate, select the **Aid Code** from the drop-down menu

13. Enter the **Begin Date**

14. If reported as ending, enter the **End Date** of benefits in the other State

    a. If applicable, select the appropriate **Reason for Stopping Aid** from the drop-down menu

15. Select the **State** where prior aid was received

16. Select the appropriate **Verification** option from the drop-down menu

17. Select the appropriate **Source** option from the drop-down menu

18. Click **Save**

ACCESSIBILITY

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