

Entering Self-Employment

CBMS | Process Manual | Revised: April 2025

OVERVIEW

This document provides a step-by-step process for how to enter Self-Employment income into CBMS.

Note: If the member or client declares the business to be an LLC or SCorp and is applying for or receiving a CDHS benefit(s) (SNAP, CW or AF), refer to the **Entering LLC/S-Corp Income** process manual for additional information.

PROCESS

Beginning Data Entry

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. 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 I.I. Queue
6. Navigate to the **Income** page
7. Select the **Self-Employment** sub-tab
8. Select the appropriate individual from the **Name** drop-down list
9. Select the **plus (+)** sign to add a record in the first section
10. Enter the **Effective Begin Date**
 - a. Refer to **Online Help** for the appropriate dates to use

11. Select **'Yes'** radio button for **Self-Employed**
12. Enter the **Employment Begin Date**
13. Enter the **Employer Name** (the name of the business)
14. Select the appropriate **Employment Type** from the drop-down list
15. Enter the **Date Reported**
16. Enter the **Date Verified**
17. Select **Save**

Self-Employment Details

1. Select the **plus (+)** sign to add a new record
2. Select the **Employer** from the drop-down list (the name of the business)
3. Enter the **Effective Begin Date**
 - a. Refer to **Online Help** for the appropriate dates to use
4. Select the appropriate **Type** from the drop-down list
5. Select the appropriate **Frequency** from the drop-down list
6. Select the appropriate radio button for **S-Corp LLC**
 - a. **Note:** This field is informational only for MA programs, but if marked 'Yes' for SNAP/Cash programs, additional data entry is required. The fields 'Client uses income minus expenses as Draw?' and 'Draw Frequency' are only used for S-Corp/LLC income. See **Entering LLC/S-Corp Income** process manual for more information.
7. Select the appropriate radio button for **Sole Proprietor**
 - a. Selecting 'No' will enable the following fields:
 - i. Enter the Number of Owners
8. Enter the % (Percentage) Owned, if known

9. Select '**Actual**' for the **Business Expense Deduction Type**
 - a. **Note:** No HLPGs use 'Standard Expense Deductions'
10. Select the appropriate option for **Home-Based Business**
11. Select the appropriate **Verification** from the drop-down list
12. Select the appropriate **Source** from the drop-down list
13. Enter the **Date Reported**
14. Enter the **Date Verified**
15. Select **Save**

Paycheck Summary Related List

1. Select the **plus (+)** sign to add a record
2. Enter the **Date Received**
 - a. This is the date the self-employment income was received
3. Enter the appropriate amount in the **Number of Hours Worked** field
 - a. **Note:** This field may be mandatory for SNAP
4. Enter the **Gross Amount**
 - a. Always use the total business income even if there are multiple owners – CBMS will calculate the percentage accordingly
5. Select **Paycheck Type** from the drop-down list
6. Select the appropriate **Verification** from the drop-down list
7. Select the appropriate **Source** from the drop-down list
8. Enter the **Date Reported**
9. Enter the **Date Verified**
10. Select **Save**

Income Expenses Related List

1. Select the **plus (+)** sign to add a record
2. Enter the appropriate **Effective Begin Date**
 - a. Refer to **Online Help** for the appropriate dates to use
3. Select the appropriate **Type** from the drop-down list (based on the business expense)
 - a. **Note:** If the expense type does not appear in the list, refer to program area policy for guidance on what option to select
4. Enter the **Amount** (of the business expense)
5. Enter the appropriate **Frequency** from the drop-down list
6. Select the appropriate **Verification** from the drop-down list
7. Select the appropriate **Source** from the drop-down list
8. Enter the **Date Reported**
9. Enter the **Date Verified**
10. Select **Save**
11. Repeat for each separate business expense

NOTES ON EXPENSES:

- Always enter all business expenses separately. CBMS will determine if they are allowable in the calculation of the Self-employment net income.
- Always use the full business expense amount even if there are multiple owners – CBMS will calculate the percentage accordingly
- Some expenses may be calculated based on the percentage used for business vs personal use – enter the amount calculated for the business for these expenses

ACCESSIBILITY

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