

Entering Self-Employment Process Manual

Overview

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

***NOTE:** If the member or client declares the business to be an LLC or S-Corp 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

- 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 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 II 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) Click the + 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) Click **Save**



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Self Employment Details

- 18) Click the + to add a new record
- 19) Select the **Employer** from the drop-down list (the name of the business)
- 20) Enter the **Effective Begin Date**
 - a) Refer to **Online Help** for the appropriate dates to use
- 21) Select the appropriate **Type** from the drop-down list
- 22) Select the appropriate **Frequency** from the drop-down list
- 23) 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.
- 24) Select the appropriate radio button for **Sole Proprietor**
 - a) Selecting ‘No’ will enable the following fields:
 - i) Enter the **Number of Owners**
 - ii) Enter the **% Owned**, if known
- 25) Select ‘*Actual*’ for the **Business Expense Deduction Type**
 - a) **Note:** No HPLPGs use ‘Standard Expense Deductions’
- 26) Select ‘No’ for the **Home Based Business**
- 27) Select the appropriate **Verification** from the drop-down list
- 28) Select the appropriate **Source** from the drop-down list
- 29) Enter the **Date Reported**
- 30) Enter the **Date Verified**
- 31) Click Save

Paycheck Summary Related List

- 32) Click + to add a record
- 33) Enter the **Date Received**
 - a) *This is the date the self-employment income was received*
- 34) Enter the appropriate amount in the **Number of Hours Worked** field
 - a) **NOTE:** This field may be mandatory for SNAP
- 35) Enter the **Gross Amount**
 - a) *Always use the total business income even if there are multiple owners- CBMS will calculate the percentage accordingly*
- 36) Select **Paycheck Type** from the drop-down list
- 37) Select the appropriate **Verification** from the drop-down list
- 38) Select the appropriate **Source** from the drop-down list
- 39) Enter the **Date Reported**
- 40) Enter the **Date Verified**
- 41) Click Save



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Income Expenses Related List

- 42) Click + to add a record
- 43) Enter the appropriate **Effective Begin Date**
 - a) Refer to **Online Help** for the appropriate dates to use
- 44) 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*
- 45) Enter the **Amount** (*of the business expense*)
- 46) Enter the appropriate **Frequency** from the drop-down list
- 47) Select the appropriate **Verification** from the drop-down list
- 48) Select the appropriate **Source** from the drop-down list
- 49) Enter the **Date Reported**
- 50) Enter the **Date Verified**
- 51) Click **Save**

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

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

