Overview

Demographic information must be collected on all household members when applying for Public Assistance Benefits. The Demographics Page in CBMS is where eligibility workers will update this 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 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** tab
7) From the **Name** drop-down, select the appropriate person

Detail

8) Enter the **Effective Begin Date**
   a) Refer to Online Help for assistance with which date you should use

Name

9) Ensure the **Name** is spelled correctly
10) Ensure the correct **Gender** is marked

Birth Information

11) Ensure the **Date of Birth** is correct
12) Select 'Received' from the **Verification** drop-down menu
13) Select the appropriate **Source** from the drop-down menu
14) Select the applicable radio button to indicate whether or not the client **Status Update** is questionable.
15) Select 'Received' from the **Verification** drop-down menu
16) Select the appropriate Source from the drop-down menu
   a) Refer to Online Help for assistance with appropriate source

Marital Information

17) Select the appropriate **Status** from the drop-down menu

18) Enter the **Status Date** if available
19) Select the applicable radio button (Yes/No) to indicate whether or not the client **Marital Status Update** is questionable.
    a) Refer to **Online Help** for assistance with appropriate source

Death Information

20) If applicable, enter the Date of death
21) Select 'Received' from the **Verification** drop-down menu
22) Select the appropriate **Source** from the drop-down menu

SSN Details

23) Ensure the SSN is correct
24) Select 'Received' from the Verification drop-down menu
25) Select the appropriate **Source** from the drop-down menu

If the client is applying and does not have a SSN

1) Select the applicable radio button to indicate whether or not the client has **Applied** for SSN
2) Enter the **Application Date**
3) Select Received from the **Verification** drop-down menu
4) Select the appropriate **Source** from the drop-down menu
       OR

1) Select the applicable radio button to indicate whether or not the client has **Attempted to Obtain** a SSN
2) Select Received from the **Verification** drop-down menu
3) Select the appropriate **Source** from the drop-down menu

If there is Good Cause for not attempting to obtain a SSN

1) Select the Good Cause Date
    a) Refer to Online Help for assistance with which date you should use
2) Select the appropriate Reason for not attempting to obtain SSN from the drop-down menu

NOTE: Enter the Taxpayer Identification Number (TIN) - ONLY if MA is on the case and a SSN has not/will not be supplied.

COLORADO
Health Care & Economic Security
Staff Development Center

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Citizenship Verified By

26) Select the appropriate choice for **US Citizen** from the drop-down menu
27) Select the appropriate choice for **Status** from the drop-down menu
28) Select Received from the **Verification** drop-down menu
29) Select the appropriate **Source** from the drop-down menu
30) Select the applicable radio button to indicate whether or not the document received is acceptable
   a) Refer to the SCHIP Interface Process Manual for triggering the SSA interface for Medical Assistance applicants

Other Information

31) Select the appropriate choice for **Reason for Update** from the drop-down menu
   a) This field will only become enabled if you have made a change to the demographics of an existing client
32) Enter **Date Reported**
33) Enter **Date Received**
34) Click **Save**

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