Entering Earned Income

Overview

This document provides a step-by-step process for how to enter new earned income on the Earned Income tab within the Income page of CBMS.

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) On the Case Questions page, be sure the **'Yes'** radio button is selected for Does anybody have income.
   a) This will add the Income chevron to the II Queue.
7) Navigate to the **Income** chevron and select the appropriate household member from the drop-down.
8) Select the **Earned Income** tab.
9) Click the plus **(+)** icon to add an employer record.
10) The Earned Income Employment Details pop-up will appear, enter the **Effective Begin Date.**
    a) Refer to Online Help (?) for the appropriate date to use.
11) Enter the **Employment Begin Date.**
    - This is the date the individual actually began working for the employer.
12) Enter the **Employer Name.**
13) Select the **Employment Type** from the drop-down menu.
14) In the **Monthly Amount Earned** field, enter the gross amount the individual will receive or expects to receive for the month.
    - Used for SNAP only.
    - Enter the converted monthly amount.
    - Enter the **Estimated Average Hrs/Week.**
15) If Medical Assistance is attached to the case, select the appropriate **Occupation** from the drop-down menu.
16) Enter the **Date Reported** and **Date Verified.**
17) Click the **Save** button.
18) Once saved, click on the Employer Record to highlight the row.
19) This will enable the **Self Attested Earned Income** Details.
20) To add a new record, click the plus **(+)** icon in the blue header detail.
21) Select the **Employer** from the drop-down menu.
22) Enter the **Effective Begin Date**.
    - Refer to Online Help (?) for the appropriate date to use.
23) Select the **Income Type** from the drop-down menu.

24) Select the **Frequency** from the drop-down menu.
25) Enter the **Date Reported**.
26) **MA Specific Information**
    - These fields appear only when Medical Assistance is attached on the case.
27) Click the **Save** button.
28) In the **Paycheck Summary** Related List, click the plus **(+)** icon to add paycheck details.
29) Enter the **Date Received** as the actual date the individual was paid.
30) Enter the **Total # of Hours Worked** during that pay period.
31) Enter the **Gross Amount** (the amount before any taxes and/or deductions are taken out).
32) Select the **Paycheck Type**.
    - 'Representative' means regular anticipated income that the individual expects to receive. If this is a normal paycheck for the individual, select this option. (Default)
    - 'Non-Representative' means irregular income that is not regularly received, for example: overtime, fewer hours due to illness, vacation, severance pay, etc.
33) Select the appropriate **Verification** from the drop-down menu.
34) Select the appropriate **Source** from the drop-down menu.
35) Enter the **Date Reported.**
36) Enter the **Date Verified.**
37) Click **Save & New** to enter any other paycheck stubs provided following the same process as listed above.
    - If no other paychecks to enter, click **Save**.

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