Entering a Shelter Expense

Overview

This document provides a step-by-step process for entering a Shelter Expense in 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 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, make sure the radio button for *Does the Household have Shelter* expenses is marked '*Yes*'
   a) If left unmarked, the Shelter Expense page will not populate the in the Interactive Interview (II) queue Navigate to the Shelter Expense page
7) To add a shelter expense, click the plus **(+)** sign in the blue detail header
8) Enter the **Effective Begin Date**
   a) Refer to **Online Help** for appropriate date to use
9) Select the appropriate **Shelter Type** from the drop-down menu
10) Select the appropriate **Expense Type** from the drop-down menu
    a) If '*Utility*' is selected, the **Utility Type** will be enabled
11) If '*Utility*' was selected in the previous step, select the Utility Type from the drop-down menu
12) The **Included in Rent** field is not required but should be answered if you know the information
13) The **LTC Allowance** field is not required but will automatically default to '*Actual*'
14) The **HUD Assistance** field is not required but should be answered if you know the information
15) Select the appropriate **Expense Verification** option from the drop-down menu
16) Select the appropriate **Expense Source** option from the drop-down menu
17) Enter the **Amount of Bill**
18) Enter the **Date of Bill**
19) Select the **Frequency** from the drop-down
20) Select the appropriate **Billing Verification** option from the drop-down menu
21) Select the appropriate **Billing Source** option from the drop-down menu
22) Enter the **Date Reported**
23) Enter the **Date Verified**

24) Click **Save**

Note: When an **Expense Type**, **Utility Type** or **Amount of Bill** has changed and the household is still responsible for the expense, you will overwrite the information in the existing record with the new information. Refer to **Online Help** for appropriate dates to use.

Note: When a **Shelter Expense** has ended and the household is no longer responsible for it, you may **Effective End Date** (EED) the main record for the last day of the month in which the information was reported.

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