

Process Manual  
**Entering a Burial Asset**

## Overview

This document provides a step-by-step guide for how to enter a Burial Asset 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, be sure the 'Yes' radio button is selected for *Does anybody own or has anybody disposed of resources*
  - a) Selecting 'No' will not populate the Resource page in the Interactive Interview (II) queue
- 7) Navigate to the **Resource** page
- 8) From the **Name** drop-down, select the person who owns the Burial Asset
- 9) Select the **Burial Asset Summary** page
- 10) To add a new record, click the plus (+) sign in the blue detail header
- 11) Enter the **Effective Begin Date**
  - a) Refer to **Online Help** for assistance with which date you should use
- 12) Enter the **Resource Name**
  - a) This should be something to help you easily identify this property. Avoid using generic terms like Policy #1. Instead use the Company name and policy number or Funeral Home.
- 13) Select the appropriate **Type** from the drop-down options
- 14) Select the appropriate **Verification (FMV)** from the drop-down menu
- 15) Select the appropriate **Source (FMV)** from the drop-down menu
- 16) Enter the full **Funeral Agreement Amount**
- 17) Enter the **Fair Market Value** of the asset
- 18) Enter the **Date Reported**
- 19) Enter the **Date Verified**
- 20) Click **Save**

## Burial Asset Ownership Related List

- 1) The information from the record entered under the asset owner will automatically populate in the **Burial Asset Ownership** related list
- 2) Click on the **pencil icon** to edit/add details to the ownership of the resource

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- 3) Enter the **Date Acquired**
  - a) This is the date the client acquired the resource
- 4) In the **Usage** field, select the appropriate drop-down option
- 5) Select the appropriate radio button to indicate if the asset is **Revocable** or not
- 6) Enter the **Percent Owned**
  - a) Ex: If they are the sole owner, enter 100, if jointly owned 50 or 33 etc.
- 7) Select the appropriate **Verification** from the drop-down menu
- 8) Select the appropriate **Source** from the drop-down menu
- 19) Enter the **Date Reported**
- 20) Enter the **Date Verified**
- 21) Click **Save** if there is only one owner of the resource
  - a) If you are adding another owner, click **Save & New** and repeat the above steps for the second owner.

Note: There is no need to enter an additional Resource to the case if there is more than one owner; the additional owner (s) only needs to be added in the liquid asset ownership page.

*Do you have any questions or suggestions regarding this process? Please contact the SDC via email [SOC\\_StaffDevelopment@state.co.us](mailto:SOC_StaffDevelopment@state.co.us)*