

Entering a Med-9 Form

CBMS | Process Manual | Revised: June 2025

OVERVIEW

This document provides a step-by-step process for how to enter a completed Med-9 Form into the Medical Conditions page in CBMS.

PROCESS

Part 1: Medical Conditions Page

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 **Medical Condition/Disability** box is marked in the **Does anybody have/received/need** section
7. Navigate to the **Medical Conditions** page
8. From the **Name** drop-down, select the person who is requesting Adult Financial Assistance
9. To add a new record, click the **plus (+)** sign in the blue detail header
10. Enter the **Effective Begin Date**
 - a. Refer to **Online Help** for assistance with which date you should use

11. Select the appropriate option for the **Disability Type**
 - a. Select 'Permanent' if the impairment will last 6 months or longer
 - b. Select 'Temporary' if the impairment will last less than 90 days
 - c. Select 'Undetermined' if you are pending the case for a new Med-9
12. Select the appropriate **Verification** option from the drop-down menu
13. Select the appropriate **Source** option from the drop-down menu
14. Enter the **Date Reported**
15. Enter the **Date Verified**
16. Click **Save**

Part 2: Med-9 Related List

1. Navigate to the **Med-9 related list**
 - a. If you are requesting a new Med-9, click the **Request Med-9** button below the list to generate a VCL/Speed Letter
 - b. If you are entering a Med-9 that you have received, click the **plus (+)** icon to add a new record
2. Enter the **Begin Date**
 - a. Refer to **Online Help** for assistance on what date to use
3. Select the appropriate **Qualifying Disability** from the drop-down menu
4. Select the appropriate **Social Factor** from the drop-down menu
5. Enter the **Med-9 Exam Date**
6. Select the appropriate **Length of Disability** from the drop-down menu
 - a. Example: If the Med-9 indicates a 9-month disability, select 'No Work Cap 9 Months'
 - b. Note: CBMS will add the **Med-9 Re-Exam Date** after the record is saved
7. Select the appropriate **Verification** option from the drop-down menu

8. Select the appropriate **Source** option from the drop-down menu
9. Select the appropriate **Type of Provider** from the drop-down menu
10. Enter the **Name of the Physician**
11. Enter the **Name of their Practice/Facility**
12. Click **Save**

Note: If the information on the Med-9 page does not meet the requirements, CBMS will set an Invalid Med-9 Reason. This field can also be manually updated

ACCESSIBILITY

This document is designed to comply with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standard. If you experience any difficulty accessing the content or have questions regarding the process, please contact SOC_StaffDevelopment@state.co.us for assistance.