Entering a Medical Expense

Overview

This document provides a step-by-step process for how to enter a Medical 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, be sure the *'Yes'* radio button is selected for *Does anybody have expenses*
    a) Selecting *'No'* will not populate the Expense page in the Interactive Interview (II) queue
7) Navigate to the **Expense** page
8) From the **Name** drop-down, select the person who has the Medical Expense
9) Click on the **Medical Expense** subtab
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 appropriate **Expense Type**
    a) If not provided and verification is required, select Medical
13) Select the appropriate **Frequency** from the drop-down
14) Enter **Provider Name**
    a) Although not mandatory, entering this information is helpful when there are many expenses of the same type reported
15) Enter the **Date of Service**
16) Select the appropriate **Verification** option from the drop-down menu
17) Select the appropriate **Source** option from the drop-down menu
18) Enter the **Date Reported**
19) Enter the **Date Verified**
20) Click **Save**
21) Navigate to the **Billing Related List**
    a) Billing Related List is required for SNAP expenses
22) Enter the **Effective Begin Date**
    a) Refer to **Online Help** for assistance with which date you should use

23) Enter the **Amount** of the expense
24) Enter the **Bill Date**
25) Select the appropriate **Verification** option from the drop-down menu
26) Select the appropriate **Source** option from the drop-down menu
27) Enter the **Date Reported**
28) Enter the **Date Verified**
29) Click **Save**

Repeat steps 10 - 29 for each separate reported expense type.

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