

Process Manual
Entering and Updating an IM-14

Overview

This document provides a step-by-step process for how to enter an IM-14 form AND cases to ensure accurate Interim Assistance Reimbursement.

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) Navigate to the **AND-SO IM 14** page
- 7) From the **Name** drop-down, select the appropriate member
- 8) To add a new record, click the plus (+) sign in the blue detail header
- 9) Enter the **Effective Begin Date**
 - a) Refer to **Online Help** for assistance with which date you should use
- 10) Select **'Received'** from the **Verification** drop down-menu
 - a) If not received, select **'Not Received'** and click Save
- 11) Select **'IM-14'** from the **Source** drop-down menu
 - a) If received but not signed, select **'Incomplete'** and click Save
- 12) Enter the **Customer Signature Date**
- 13) Enter the **County Signature Date**
 - a) Note: County Signature Date cannot be prior to the Customer Signature Date
- 14) Click **Save**

Note: A new IM-14 form must be completed and signed by the client and a new record entered as received at each Redetermination and when moving to a new county.

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

