



# Entering a PNA

CBMS | Process Manual | Revised: March 2024

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## OVERVIEW

This document provides a step-by-step guide for how to enter an Adult Financial PNA for Long Term Care recipients.

## PROCESS

1. Log in to **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. If applicable - On the **Case Questions** page, mark the 'Yes' radio button for "Does anybody have income?" (This will be used if SSI PNA has decreased to \$30 and AF PNA will be a supplement).
  - a. If the member has no income, select 'No'.
  - b. Remember, if 'Yes' was previously selected, you will not change this.
7. From the **Name** dropdown, select the applicant's name.
8. Navigate to the pages listed below and take appropriate actions.
  - a. Complete the applicable fields on the **SSI** page.
  - b. Complete all applicable fields on the **Potential Income - AF/SSA** page.

9. Navigate to the **Attributes** page.
10. Complete the appropriate fields on the **Attributes** page.
  - a. Select the appropriate option from the **Living Arrangements** dropdown menu.
    - i. The following options will trigger eligibility for Adult Financial PNA:
      1. Hospital
      2. Nursing Facility
      3. Nursing Facility - Both in NF
      4. Nursing Facility with Community Spouse, or
      5. AF Approved Setting - PNA
11. Navigate to the **Long-Term Care Institution** page.
  - a. Complete the appropriate fields on the **Long-Term Care Institutions** page.
12. Navigate to the **Long-Term Care Level of Care** page.
  - a. Complete the appropriate fields on the **Long-Term Care Level of Care** page.
13. Navigate to the **Income** page.
  - a. Complete appropriate fields and related lists for all income received.

Note: If the institution will be the payee of the Adult Financial PNA benefit, the **Authorized Representative** page should be completed with applicable information for the agency. This will transfer over to the **Authorization Eligibility Program Benefit** page as the 'First Payee'.

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## 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](mailto:SOC_StaffDevelopment@state.co.us) for assistance.*