

PE Users Only: Completing an Application Initiation

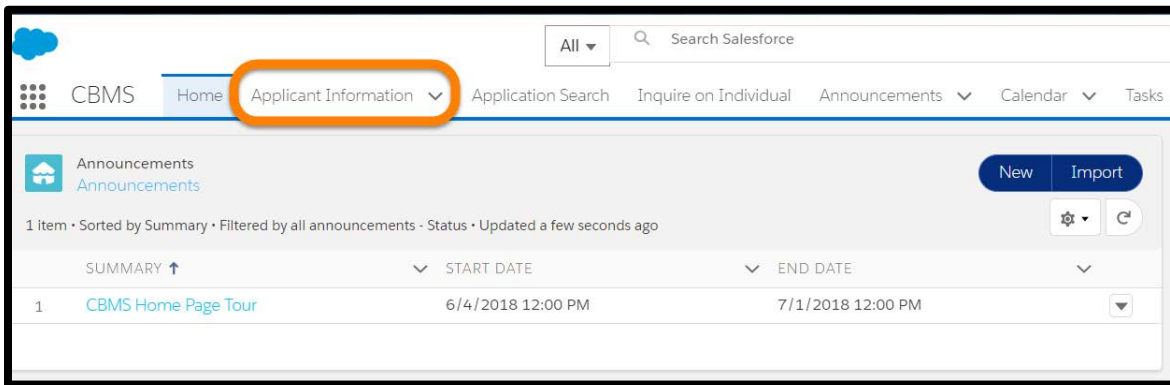
Overview

This document provides a step-by-step process for Presumptive Eligibility (PE) workers on how to complete a new Application Initiation (AI) in CBMS. Each step is detailed below.

Process

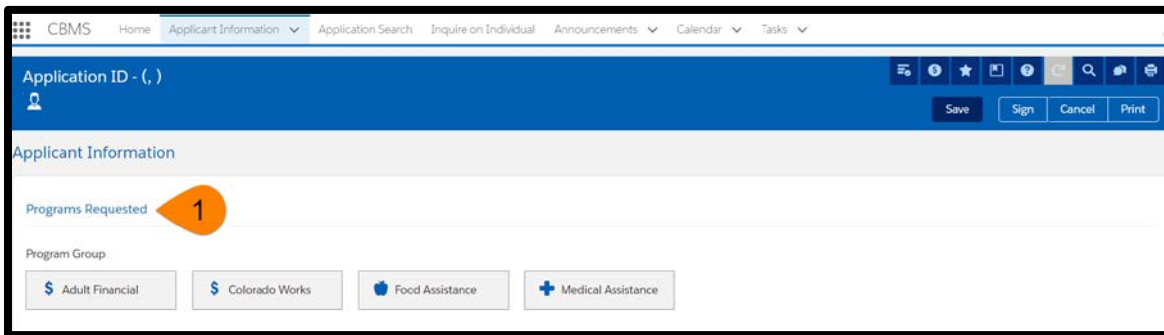
Navigate to Application Initiation by one of the following ways:

- Click the Applicant Information tab in the Navigation bar, then click the New button.
- Click the drop-down arrow on the Applicant Information tab and select **New Applicant Information**.



Applicant Information

- 1) In the Programs Requested section, select the Medical Assistance box.



(Presumptive Eligibility (PE) profile will only show Medical Assistance box)

- 2) Enter the **Application Date** in mm/dd/yyyy format.
- 3) Select 'Initial/New' from the **Type** drop-down menu.
- 4) Select 'PE Site' from the **Source** drop-down menu.
- 5) Complete the required fields in the Applicant Details section.
 - Last Name
 - First Name
 - Gender
- 6) DOB and SSN are not required fields, but the information should be entered in order to prevent duplicate IDs.

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Application

* Application Date: mm/dd/yyyy **2**

* Type: Select Type ... **3**

Input Date: 05/17/2018

* Source: Select Source ... **4**

Location: DENVER/Den\Univ\Hospital

PEAK Tracking #

Applicant Details **5**

* Last Name: []

* First Name: []

Middle Name: []

Suffix: Select Suffix ...

* Gender: Select Gender ...

DOB: mm/dd/yyyy **6**

SSN: []

- 7) Select the **Primary** and **Written Language** the customer declares from the drop-down menu.
- 8) **Contact Information** is not required, but if you have the information it is highly encouraged to complete the fields.
 - The **Message/Work** number will automatically add the extension if there are more than 10 digits entered. *Example: 303-333-3333x3333*

Language

* Primary: Select Primary ... **7**

* Written: Select Written ...

Interpreter or Translator Needed: Yes No

Contact Information **8**

Cell: () - []

Home: () - []

Message/Work: () - []

Type: Select Type ...

E-mail Address: []

- 9) Complete the **Home Address** section.
 - a) 'Is the Applicant Homeless' radio button.
 - Select 'Yes' if the customer is Homeless, the address fields will disable.
 - Select 'No' and you will be able to complete the address fields.
 - b) Select the appropriate 'Is the Applicant's Home Address Permanent' radio button.
 - c) The system will validate the address as you are typing, much like Google Maps, so make sure you are selecting the correct address. You can also continue typing the address manually and do not have to choose from the validated list.

Home Address **9**

Is the Applicant Homeless: Yes No **a**

Is the Applicant's Home Address Permanent: Yes No **b**

* Address Line 1: 7800 E. Orchard Rd |

Address Line 2: []

* State: Select State ...

* Zip: []

7800 E Orchard Rd, Arapago CA 95220

7800 E Orchard Rd Ste 100, Englewood C...

7800 E Orchard Rd Ste 125, Englewood C...

7800 E Orchard Rd Ste 150, Englewood C...

7800 E Orchard Rd Ste 152, Englewood C...

7800 E Orchard Rd Ste 155, Englewood C...

c



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10) Complete the Mailing Address

- a) If the Mailing Address is the same as the Home Address, click the 'Yes' radio button and the information will automatically populate in the fields. If the Mailing Address is not the same as the Home Address, click the 'No' radio button and enter the customer's mailing address.
- b) If the customer does not have a mailing address and needs to use the County Office as the mailing address, click the 'Yes' radio button and then select the correct County Office from the drop-down menu. The County Office address will automatically populate in the fields.
- c) Once the page is saved, the **County** field will automatically populate. If it doesn't, you can select the appropriate County from the drop-down menu.

The screenshot shows a form titled "Mailing Address" with a blue header and a yellow callout "10". The form contains the following fields and options:

- Mailing Address Same as Home Address:** Radio buttons for "Yes" and "No". A yellow callout "a" points to the "No" button.
- County Office Used as Mailing Address:** Radio buttons for "Yes" and "No". A yellow callout "b" points to the "Yes" button.
- Office:** A dropdown menu with the text "Select Office ...". A yellow callout "b" points to this dropdown.
- *Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- *City:** A text input field.
- *State:** A dropdown menu with the text "Select State ...". A yellow callout "c" points to this dropdown.
- *Zip:** A text input field.
- County:** A dropdown menu with the text "Select County ...". A yellow callout "c" points to this dropdown.

11) Click the Save button at the top of the page.

- a) Once you Save the page, the Application ID, Date, and Customer Name will appear in the blue header at the top of the page.
- b) You will then be able to move forward to the next tab using the navigation arrows or by clicking on each of the tabs under the blue header. The next tab will be Address Clearance.

The screenshot shows the top navigation bar of the application. It includes the following elements:

- Navigation Menu:** Home, Applicant Information, Application Search, Inquire on Individual, Announcements, Calendar, Tasks.
- Header Information:** Application ID - 346 (Unsigned, 06/15/2018) and Test SDC. A yellow callout "a" points to this information.
- Navigation Arrows:** Left and right arrows. A yellow callout "b" points to the right arrow.
- Save Button:** A blue button labeled "Save". A yellow callout "7" points to this button.
- Tab Navigation:** A row of tabs: Applicant Information, Address Clearance, Household Members, Individual Clearance, Case City. A yellow callout "b" points to the "Address Clearance" tab.



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Address Clearance

- 12) Navigate to the **Address Clearance** page by clicking the next arrow or clicking on the tab.
 - This tab shows you all cases that are associated the address provided for the customer.
 - For PE workers, you can move forward to the next tab, **Household Members**, as nothing else is needed on this page.

Household Members

- 13) The information you entered on the Applicant Information page will show here for your Head of Household (HOH).

- 14) Click the row for the HOH to complete the Race/Ethnicity of the customer.
 - This is not mandatory to complete here on the AI, but it will be required when you get to Interactive Interview (II). If completed here, it automatically carries the information over into Interactive Interview (II).
- 15) Click Save.



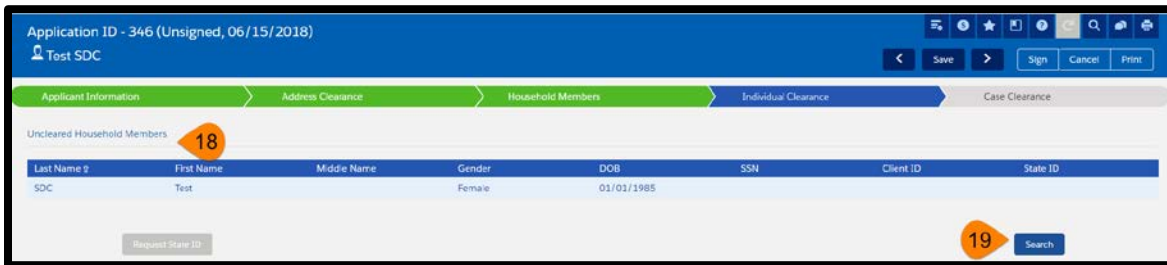
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- 16) To add more household members, click the **plus sign (+)** on the far right side of the list header.
 - A pop-out box will appear where you will complete all required fields.
 - Click **Save** to save the information and close the pop-out box.
- 17) Once you have finished adding all members, click **Save** and move forward to the next tab, Individual Clearance.

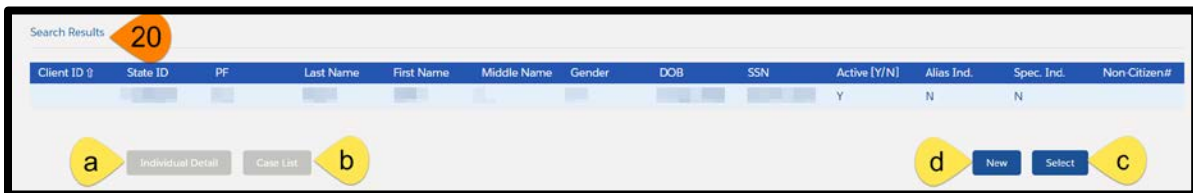


Individual Clearance

- 18) All household members will be shown in the table labeled 'Uncleared Household Members'.
- 19) Click on the row for a household member and then click **Search**.

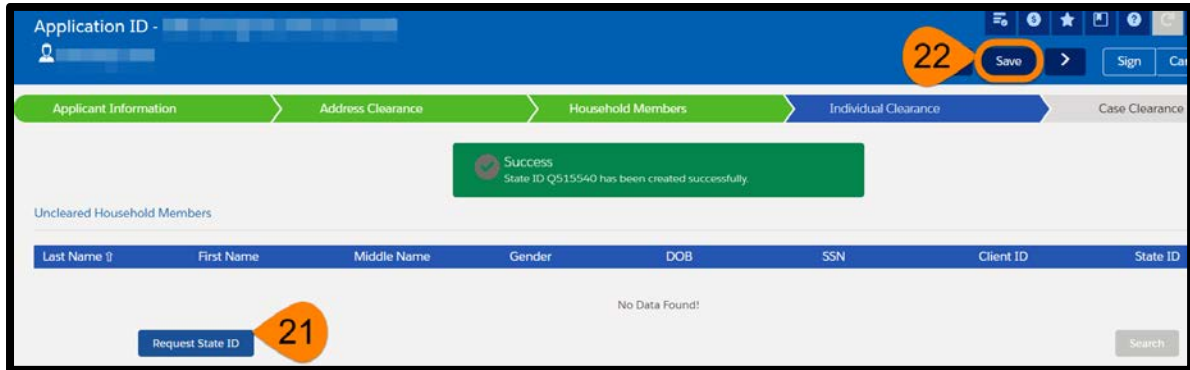


- 20) The **Search Results** will show in a table below. To research more about a customer who shows up in the Search Results, click on the row to highlight the customer.
 - a) Click **Individual Detail** to review details about the customer. A pop-out box will appear to show Individual Details, Address, Individual History, etc.
 - b) Click **Case List** to view the cases that are associated with the customer. Any associated cases will show in a table below the Search Results in the Case Listing section.
 - c) Click **Select** if the customer already exists and is showing in the Search Results.
 - d) Click **New** if your customer does not exist in CBMS and you need to request a New Client ID.
 - o You will receive a message box that asks if you are sure you want to generate a new Client ID. Click 'Yes'.
 - o A confirmation box will appear confirming the Client ID was created successfully.



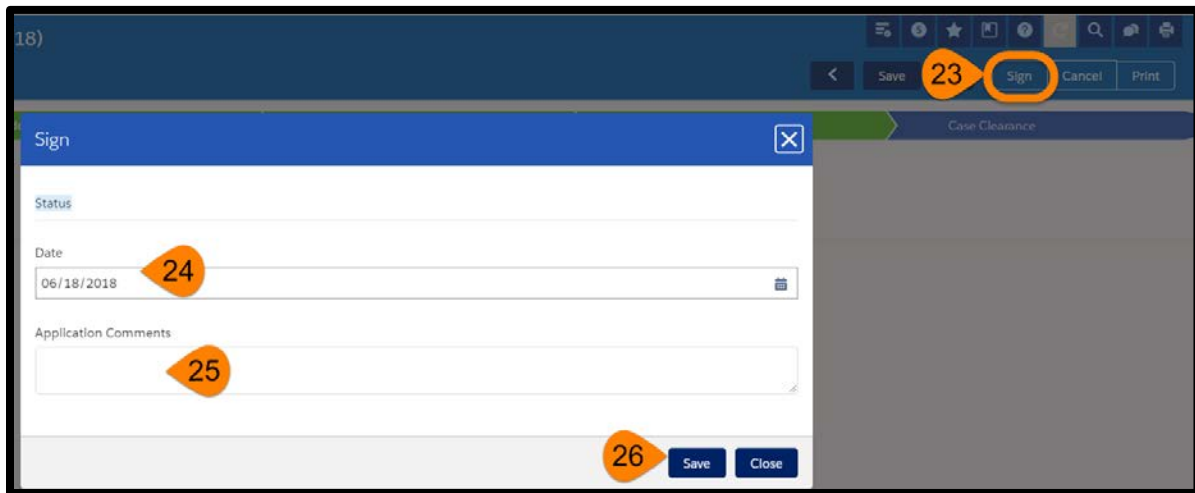
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- 21) Once the Client ID is successfully assigned, click on the household member and click the **Request State ID** button, if they do not already have one.
 - A confirmation box will appear confirming that the State ID was created successfully.
 - The household member will be removed from the 'Uncleared Household Members' section.
- 22) Click **Save**.



Sign

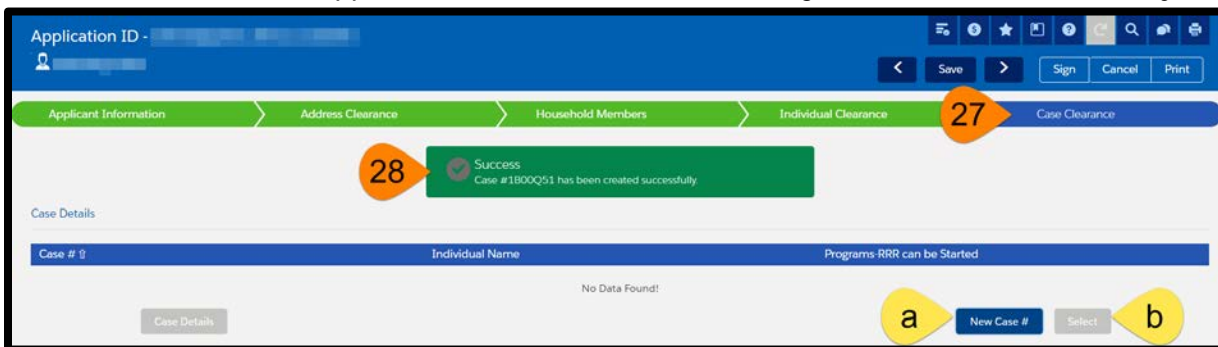
- 23) Before you can assign a CBMS Case Number, you must first click the **Sign** button in the upper right corner of the screen.
- 24) Enter the **Signed Date** as the date the customer actually signed the application.
- 25) Add **Application Comments** that pertain to the application.
- 26) Click **Save** and move forward to the final tab, Case Clearance.



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Case Clearance

- 27) After the application is signed, you can assign a Case Number to the application on the Case Clearance tab.
 - a) Click the New Case # button.
- 28) A confirmation box will appear with the CBMS Case # showing it was created successfully.



The Application Initiation (AI) is now complete.

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

