COLORADO
Healthcare & Economic Security
Staff Development Division

PE Users Only: Completing an Application Initiation

CBMS | Process Manual | Revised: April 2019

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

1. Navigate to Application Initiation by one of the following ways:
    a. Click the Applicant Information tab in the Navigation bar, then click the **New** button.
2. Click the dropdown arrow on the Applicant Information tab and select **New Applicant Information**.

Applicant Information

1. In the **Programs Requested** section, select the Medical Assistance box.
    a. Note: 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** dropdown menu.
4. Select ‘PE Site’ from the **Source** dropdown menu.
5. Complete the required fields in the Applicant Details section.
    a. **Last Name**
    b. **First Name**
    c. **Gender**

6. **DOB** and **SSN** are not required fields, but the information should be entered in order to prevent duplicate IDs.
7. Select the **Primary** and **Written** language the customer declares from the dropdown menu.
8. **Contact Information** is not required, but if you have the information, it is highly encouraged to complete the fields.
    a. The **Message/Work** number will automatically add the extension if there are more than 10 digits entered. Example: 303-333-3333 x3333
9. Complete the **Home Address** section.
    a. ‘Is the Applicant Homeless’ radio button.
        i. Select ‘Yes’ if the customer is homeless; the address field will disable.
        ii. 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 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.
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 dropdown 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 dropdown menu.
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.

Address Clearance

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

Household Members

1. The information you entered on the Applicant Information page will show here for your Head of Household (HOH).
2. Click the row for the HOH to complete the Race/Ethnicity of the customer.
   a. 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).
3. Click **Save**.
4. To add more household members, click the **plus sign (+)** on the far right side of the list header.
   a. A pop-out box will appear where you will complete all required fields.
   b. Click **Save** to save the information and close the pop-out box.
5. Once you have finished adding all members, click **Save** and move forward to the next tab, **Individual Clearance**.

Individual Clearance

1. All household members will be shown in the table labeled ‘Uncleared Household Members’.
2. Click on the row for a household member and then click **Search**.

3. 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 the search results.
    d. Click **New** if your customer does not exist in CBMS and you need to request a New Client ID.
        i. You will receive a message box that askes if you are sure you want to generate a new Client ID. Click 'Yes'.
        ii. A confirmation box will appear confirming the Client ID was created successfully.
4. 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. A confirmation box will appear confirming that the State ID was created successfully.
    b. The household member will be removed from the 'Uncleared Household Members' section.
5. Click **Save**.

Sign

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

Case Clearance

1. 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.
2. A confirmation box will appear with the CBMS Case # showing it was created successfully.

The Application Initiation (AI) is now complete.

ACCESSIBILITY

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