Overview

Demographic information must be collected on all household members when applying for Public Assistance Benefits. The Demographics Page in CBMS is where eligibility workers will update this information. If the information is questionable or not received and is required, you must request it using the Verification Checklist (VCL).

This document provides a step by step process for requesting required Demographic information.

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 **Demographics** tab
7) From the **Name** drop-down, select the appropriate person

Pend for a Birthdate

8) Scroll down to the **Birth Information** section.
9) Enter **Date of Birth** or if unknown, use *'1/1/1901'*
10) Select *'Questionable'* from the **Verification** drop-down menu
   a) This will generate a **Verification Checklist (VCL)** asking for verification of the Date of Birth

Pend for a Social Security Number

11) Scroll down to the SSN Details section.
12) If you have received a SSN, but require verification:
   a) Select *'Client Statement'* from the **Verification** drop-down menu to generate a **VCL**
13) If you have not received a SSN but require one, leave the entire **SSN Details** section blank to generate a **VCL** for mandatory members requesting assistance.
14) If the member has applied for a SSN and verification of the application is needed:
   a) Select the *'Yes'* radio button to indicate that they have **Applied** for a SSN
   b) Enter the **Application Date**
   c) Select *'Received'* from the **Verification** drop-down menu
   d) Select *'Client Statement'* from the **Source** drop-down menu to generate a **VCL**

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15) If the member has not applied for a SSN and verification of an application is needed:
   a) Select the 'No' radio button to indicate that they have not **Applied** for a SSN
      i) This will enable the **Attempted to Obtain** radio buttons.
   b) Select the appropriate radio button for **Attempted to Obtain**
      i) If 'No' is selected, this will generate a **VCL**
      ii) If 'Yes' is selected, this will enable the next fields
      iii) Select 'Received' from the **Verification** drop-down menu
      iv) Select the appropriate **Source** from the drop-down menu
         (1) 'Client Statement' will generate a **VCL**

Pend for US Citizenship

16) Scroll down to the **Citizenship Verified By** section
17) Select 'Y' from the **US Citizen** drop-down menu
18) Select the appropriate **Status** from the drop-down menu
19) Select 'Received' from the **Verification** drop-down menu
20) Select 'Client Statement' from the **Source** drop-down menu
   a) Note: Some HLPGs allow for 'Client Statement' as verification so may not generate a VCL
21) Select the appropriate radio button for **Acceptable Doc**
   a) Selecting 'No' for MA programs will trigger **SCHP Interface** to run and will generate a **VCL** if the interface is unsuccessful.
   b) *Refer to the SCHIP Interface Process Manual for triggering the SSA interface for Medical Assistance applicants*
22) Enter **Date Reported**
23) Enter **Date Received**
24) Click **Save**

Pend for Identification

25) Click on the **Identification Details** related list Click on the header of the Identification Details related list to open
26) Add a new record by clicking the plus sign **(+)**
27) Enter the **Effective Begin Date**
   a) Refer to **Online Help** for assistance with which date you should use
28) Complete all required fields *(refer to Entering Identification Details Process Manual)*
29) Select 'Received' from the **Verification** drop-down menu
30) Select 'Client Statement' from the **Source** drop-down menu to generate a **VCL**
31) Enter the **Date Reported**
32) Enter the **Date Verified**
33) Click **Save**

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