

# Pending for Demographic Information

CBMS | Process Manual | Revised: February 2023

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## 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 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. Navigate to the **Demographics** tab.
7. From the **Name** dropdown, select the appropriate person.

## Pend for a Birth Date

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

## Pend for a Social Security Number

1. Scroll down to the SSN Details section.
2. If you have received an SSN, but require verification:
  - a. Select 'Client Statement' from the **Verification** dropdown menu to generate a **VCL**.
3. If you have not received an SSN but require one, leave the entire **SSN Details** section blank to generate a **VCL** for mandatory members requesting assistance.
4. 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** dropdown menu.
  - d. Select 'Client Statement' from the **Source** dropdown menu to generate a **VCL**.
5. 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** dropdown menu.
    - iv. Select the appropriate **Source** from the dropdown menu. 'Client Statement' will generate a **VCL**.

## Pend for US Citizenship

1. Scroll down to the **Citizenship Verified By** section.
2. Select 'Y' from the **US Citizen** dropdown menu.

3. Select the appropriate **Status** from the dropdown menu.
4. Select 'Received' from the **Verification** dropdown menu.
5. Select 'Client Statement' from the **Source** dropdown menu.
  - a. Note: Some HLPGs allow for 'Client Statement' as verification so may not generate a VCL.
6. Select the appropriate radio button for **Acceptable Doc.**
  - a. Selecting 'No' for MA programs will trigger **SCHIP 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.
7. Enter **Date Reported**.
8. Enter **Date Received**.
9. Click **Save**.

## Pend for Identification

1. Click on the **Identification Details** related list. Click on the header of the Identification Details related list to open.
2. Add a new record by clicking the plus sign (+).
3. Enter the **Effective Begin Date**.
  - a. Refer to **Online Help** for assistance with which date you should use.
4. Complete all required fields.
  - a. Refer to Entering Identification Details process manual.
5. Select 'Received' from the **Verification** dropdown menu.
6. Select 'Client Statement' from the **Source** dropdown menu to generate a **VCL**.
7. Enter **Date Reported**.
8. Enter the **Date Verified**.
9. Click **Save**.

## ACCESSIBILITY

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