Terminating Earned Income

Overview

This document provides a step-by-step process for how to terminate earned income on the Income Summary page of CBMS.

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 the **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 **Income** chevron and select the appropriate household member from the drop-down list at the top of the page.
7) Select the **Earned Income** tab.
8) In the summary details table, click to highlight the row for the **Employer Name** for the employment that has ended, and click the pencil icon to edit the details.
9) In the **Employment Details** pop-up window and scroll down to the **Employment Termination** section on the page.
10) Enter the **Employment End Date** as the actual date the employment ended.
11) Select the **Termination Reason** from the drop-down
12) Select the **Verification** from the drop-down menu.
13) Select the **Source** from the drop-down menu.
14) Enter the **Date Verified**.
15) Click **Save.**
16) In the **Summary Details** table, click to highlight the row for the same **Employer Name** for the employment that has ended, and click the pencil icon to edit the details.
17) In the **Employment Details** pop-up window, enter the **Effective End Date** as the last day of the month when the last check was received. Note: If the job is ongoing but the **Frequency** has changed, **DO NOT Effective End Date** the **Employer Record**.
18) Click **Save**.
19) If the individual received or expects to receive any last paycheck stubs from the terminated employer, enter them in the **Paycheck Summary** related list.
20) In the Summary Details table, click to highlight the row for the Employer Name for the employment that has ended, to populate the associated related lists.
21) In the Paycheck Summary related list, click the **(+) icon** to add a new paycheck.
22) Enter the paycheck details in the **Paycheck Summary** pop-up window
    a) Enter the **Date Received** as the actual date the individual was paid.
    b) Enter the **Total # of Hours Worked** during that pay period.
    c) The **Gross Amount** is the amount before any taxes and/or deductions are taken out.
    d) Select the **Paycheck Type**.

- ‘Representative’ means regular anticipated income that the individual expects to receive. If this is a normal paycheck for the individual, select this option.
- ‘Non-Representative’ means irregular income that is not regularly received, for example: overtime, fewer hours due to illness, vacation, severance pay, etc.

e) Select the appropriate **Verification** from the drop-down menu.
f) Select the appropriate **Source** from the drop-down menu.
g) Enter the **Date Reported**.
h) Enter the **Date Verified**.
i) Click **Save**, or **Save & New** to add more paychecks.

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