Overview

This document provides a step-by-step process for how to assign a Client ID for an individual applying for public assistance. Before starting an application or creating a case, best practice is to complete a thorough search to determine if a person is known to CBMS.

Process in Application Initiation (AI)

In Application Initiation (AI) on the Individual Clearance tab, all household members will be shown in the table labeled 'Uncleared Household Members'.

1) Click on the row for a household member and then click the **Search** button.
2) The **Search Results** will appear 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.
3) If the individual is known to CBMS:
   a) Investigate all potential matches before selecting the individual. The closer the Probability Factor (PF) is to 100, the more likely it is that this person is the customer on the application.
      - Probability Factors (PF) - SIDMOD considers:
        - 0 to 59: No match and assign the person a new ID
        - 60 to 70: Possible match, more research is needed.
        - 71 to 95: Likely a match, more research is needed to confirm.
        - 96 to 100: Likely to be the same person.
   b) Click the **Select** button.
4) If the individual is not known to CBMS:
   a) Click the **New** button.
      - You will receive a message box that asks if you are sure you want to generate a new Client ID. Click 'Yes'.
      - A confirmation box will appear confirming the Client ID was created successfully.

Note: Cross reference the application information with information on this page such as the Name, Date of Birth, Social Security Number, Associated Case Numbers, etc. Scroll all the way across to compare all information.

5) If the individual has duplicate IDs (more than one ID is assigned to them):
   a) The CBMS Client ID Merge Process will need to be completed. Follow your Eligibility Site's process for completing the merge.

Process in Interactive Interview (II)

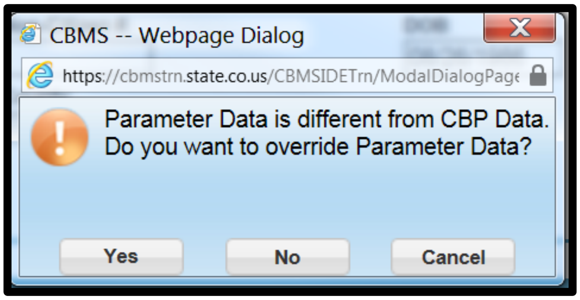
In Interactive Interview (II), enter the Case Number in the Global Search box.

1) Navigate to the **Demographics** page.
2) **Add** a member or select the member you want to update and complete all required fields.
3) Click on the **Clearance** button.
    - Follow the clearance criteria as stated in Application Initiation (AI).

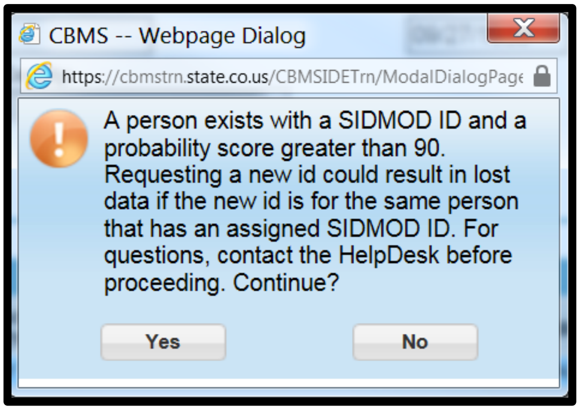
When demographic information is modified, you must Clearance the individual again. Demographic information includes:

- Last Name
- First Name
- Maiden Name
- SSN
- DOB
- Gender

Messages



If you override Parameter Data, the customer's current information is changed to the new information you entered. This could affect the customer's information in other applications (e.g. Trails, CHATS, ACSES). Be sure that you have selected the correct customer if you are overriding data. If you select a different customer and override their data, there could be a negative effect on the other customer's benefits.



If you try to create a new ID for an individual who has a PF score of 90 or higher, you will receive the following message. If you receive this message, click 'No' and contact the Help Desk to determine what the conflict is.

Reference Documents

There are many documents available on the CDHS Portal related to Client IDs. Here are a few for your reference.

- ***Tips for SIDMOD Overrides***
- ***Merge Process - Client ID Webinar***
- ***Merge Process - Desk Aid for Merging IDs***

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