

# Completing an Application Initiation (AI)

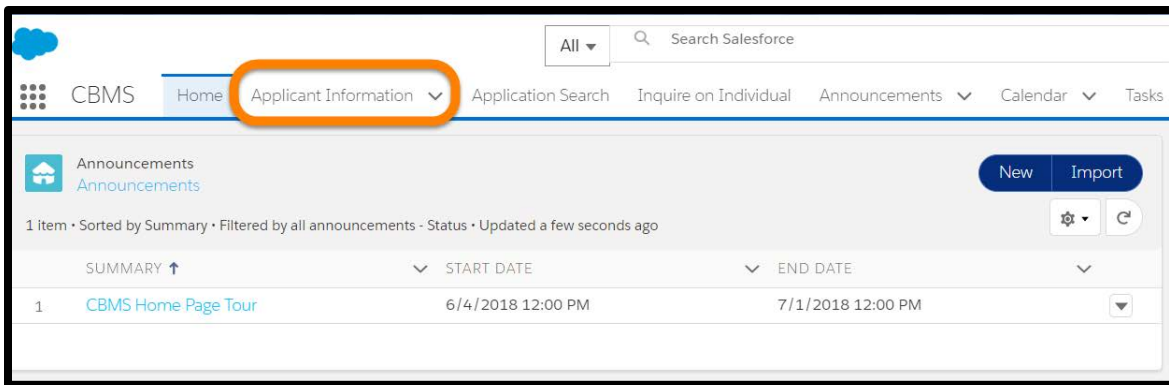
## Overview

This document provides a step-by-step process for how to complete a new Application Initiation (AI) in CBMS from start to finish. There are five tabs with information that need to be completed for the AI. Each tab is sectioned out in the details below. Remember, although the look and feel of CBMS has changed the functionality has not. The eligibility rules that determine who is eligible, the policy or regulations as to how eligibility is determined, and what a customer needs to provide still remains the same.

## Process

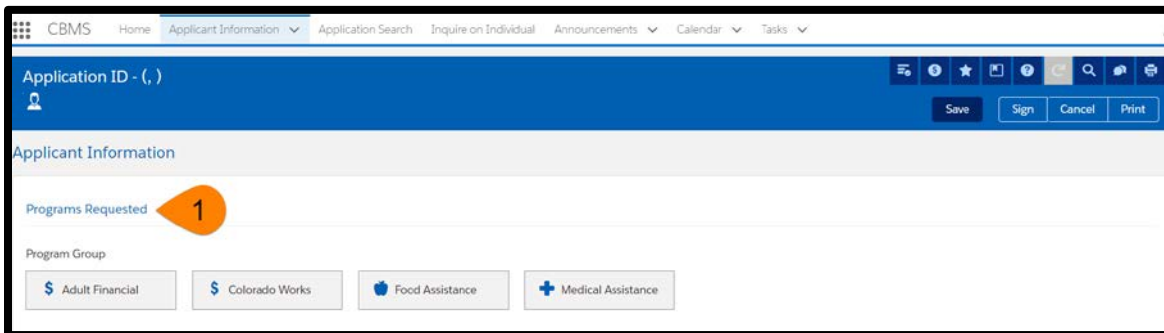
Navigate to Application Initiation by one of the following ways:

- Click the Applicant Information tab in the Navigation bar, then click the New button.
- Click the drop-down arrow on the Applicant Information tab and select **New Applicant Information**.



## Applicant Information

- 1) Click the **Programs Requested** boxes that the customer is applying for.
  - Note: If Adult Financial or Colorado Works is selected, the Food Assistance (FA) box will automatically be selected as well. If the customer does not want FA, simply click the box to unselect it.
  - Note: You can only select one Cash Assistance program. If one is selected, you will not be able to select the other.



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- 2) Enter the **Application Date** in mm/dd/yyyy format.
- 3) Select the appropriate **Type**.
- 4) Select the appropriate **Source**.
  - If PEAK is selected, the **PEAK Tracking #** filed will be enabled and editable.
- 5) Complete the required fields in the Applicant Details section.
  - **Last Name**
  - **First Name**
  - **Gender**
- 6) **DOB** and **SSN** are not required fields, but if you have the information you are encouraged to enter it here.

The screenshot shows the 'Application' form with the following fields and callouts:

- Application Date:** Input field with placeholder 'mm/dd/yyyy' and callout 2.
- Type:** Dropdown menu with 'Select Type ...' and callout 3.
- Input Date:** Input field with value '05/17/2018'.
- Source:** Dropdown menu with 'Select Source ...' and callout 4.
- Location:** Input field with value 'DENVER/Den\Univ\Hospital'.
- PEAK Tracking #:** Input field.
- Applicant Details:** Section header with callout 5.
- Last Name:** Input field.
- First Name:** Input field.
- Middle Name:** Input field.
- Suffix:** Dropdown menu with 'Select Suffix ...'.
- Gender:** Dropdown menu with 'Select Gender ...'.
- DOB:** Input field with placeholder 'mm/dd/yyyy' and callout 6.
- SSN:** Input field with placeholder '- -'.

- 7) Select the **Primary** and **Written Language** the customer declares from the drop-down menu.
- 8) **Contact Information** is not required, but if you have the information it is highly encouraged to complete the fields.
  - The **Message/Work** number will automatically add the extension if there are more than 10 digits entered. *Example: 303-333-3333x3333*

The screenshot shows the 'Language' and 'Contact Information' sections with the following fields and callouts:

- Language:**
  - Primary:** Dropdown menu with 'Select Primary ...' and callout 7.
  - Written:** Dropdown menu with 'Select Written ...'.
  - Interpreter or Translator Needed:** Radio buttons for 'Yes' and 'No'.
- Contact Information:** Section header with callout 8.
- Cell:** Input field with placeholder '( ) -'.
- Home:** Input field with placeholder '( ) -'.
- Message/Work:** Input field with placeholder '( ) -'.
- Type:** Dropdown menu with 'Select Type ...'.
- E-mail Address:** Input field.



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- 9) Complete the **Home Address** section.
  - a) 'Is the Applicant Homeless' radio button.
    - Select 'Yes' if the customer is Homeless, the address fields will disable.
    - 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 as 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.

The screenshot shows a web form titled "Home Address" with the following elements:

- Section Header:** "Home Address" with a callout '9' pointing to it.
- Radio Buttons:**
  - "Is the Applicant Homeless": Radio buttons for "Yes" and "No". Callout 'a' points to the "No" button.
  - "Is the Applicant's Home Address Permanent": Radio buttons for "Yes" and "No". Callout 'b' points to the "Yes" button.
- Address Fields:**
  - "\* Address Line 1": A text input field containing "7800 E. Orchard Rd" with a dropdown menu showing suggestions like "7800 E Orchard Rd, Acampo CA 95220", "7800 E Orchard Rd Ste 100, Englewood C...", "7800 E Orchard Rd Ste 125, Englewood C...", "7800 E Orchard Rd Ste 150, Englewood C...", and "7800 E Orchard Rd Ste 152, Englewood C...". Callout 'c' points to this dropdown.
  - "Address Line 2": An empty text input field.
  - "\* State": A dropdown menu with "Select State ..." and a downward arrow.
  - "\* Zip": An empty text input field.



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## 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 drop-down 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 drop-down menu.

The screenshot shows the 'Mailing Address' form. At the top left, there is a blue header 'Mailing Address' with a yellow callout '10'. Below the header, there are two radio button options: 'Mailing Address Same as Home Address' with 'Yes' and 'No' options, and 'County Office Used as Mailing Address' with 'Yes' and 'No' options. A yellow callout 'a' points to the 'No' radio button for the first option. Below these, there is an 'Office' dropdown menu with 'Select Office ...' and a yellow callout 'b' pointing to it. The form includes fields for '\*Address Line 1', 'Address Line 2', '\*City', '\*State' (with a 'Select State ...' dropdown), and '\*Zip'. At the bottom, there is a 'County' dropdown menu with 'Select County ...' and a yellow callout 'c' pointing to it.

## 11) If applicable, select the Special Indicators.

- Check with your Eligibility Site for which Special Indicators you should select.
- Note: You can use Ctrl+Shift to select multiple indicators at a time.

The screenshot shows the 'Special Indicators' form. At the top left, there is a blue header 'Special Indicators' with a yellow callout '11'. Below the header, there is a section titled 'CASE ASSIGNMENT ONLY'. It features a list of indicators on the left: 'Bilingual', 'Bilingual Unit 1', 'Bilingual Unit 10', 'Bilingual Unit 2', 'Bilingual Unit 3', and 'Bilingual Unit 4'. A yellow callout '11' points to the list. To the right of the list is a large empty box for selecting indicators, with a yellow callout '11' pointing to it.



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- 12) The Emergency Details section will populate only if Food Assistance is selected from the Programs Requested page.
  - a) Complete the mandatory fields appropriately based on what the customer declares.
  - b) If the customer declares expenses, when you enter the rent/utility amounts the **Total Monthly expenses** field will automatically calculate the total.
  - c) The **Eligible for EX-FA** buttons will always be enabled, but are not required to be completed.
    - Select 'No' if a customer on this application was on a case where Food Assistance (FA) denied or discontinued at Intake or RRR within the last 60 days.

The screenshot shows the 'Emergency Details' form. It includes questions about household resources, income, and expenses. There are input fields for 'Total Amount', 'Total Monthly Amount', 'Monthly rent or mortgage', 'Utility Allowance', 'Utility Allowance Amount', and 'Total Monthly expenses'. There are also radio buttons for 'Yes' and 'No' for several questions. Callout '12' is in the top left corner. Callout 'a' points to the 'Does the household have any Resources?' question. Callout 'b' points to the 'Total Monthly expenses' field. Callout 'c' points to the 'Eligible for EX-FA' question.

- 13) 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.

The screenshot shows the application header. It is a blue bar with white text. On the left, it says 'Application ID - 346 (Unsigned, 06/15/2018)'. Below that, it says 'Test SDC'. On the right, there are navigation arrows and a 'Save' button. Callout 'a' points to the application ID. Callout 'b' points to the navigation arrows. Callout '73' points to the 'Save' button.



# Process Manual

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### Address Clearance

- 14) Navigate to the **Address Clearance** page by clicking the next arrow or clicking on the tab.
- If the address is associated with another case in CBMS, you can select the Case Details button to see the associated cases.
  - If the address is not associated with an existing case, you can move forward to the next tab, Household Members, as nothing else is needed on this page.

Case #	Case Name	Case Status	Address Type	Fraudulent	Address
1P		Open	Mailing Address		639 E 18th AVE Denver CO 80203-1412

### Household Members

- 15) The information you entered on the Applicant Information page will show here for your Head of Household (HOH).

Last Name	First Name	Middle Name	Gender	Date of Birth	SSN	Head of Household	
SDC	Test		Female	01/01/1985		Yes	



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- 16) Click the row for the HOH to complete the Race/Ethnicity of the customer.
  - 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).
- 17) Click Save.

- 18) To add more household members, click the plus sign (+) on the far right side of the list header.
  - A pop-out box will appear where you will complete all required fields.
  - Click Save to save the information and close the pop-out box.
- 19) Once you have finished adding all members, click Save and move forward to the next tab, Individual Clearance.

## Individual Clearance

- 20) All household members will be shown in the table labeled Uncleared Household Members.
- 21) Click on the row for a household member and then click Search.

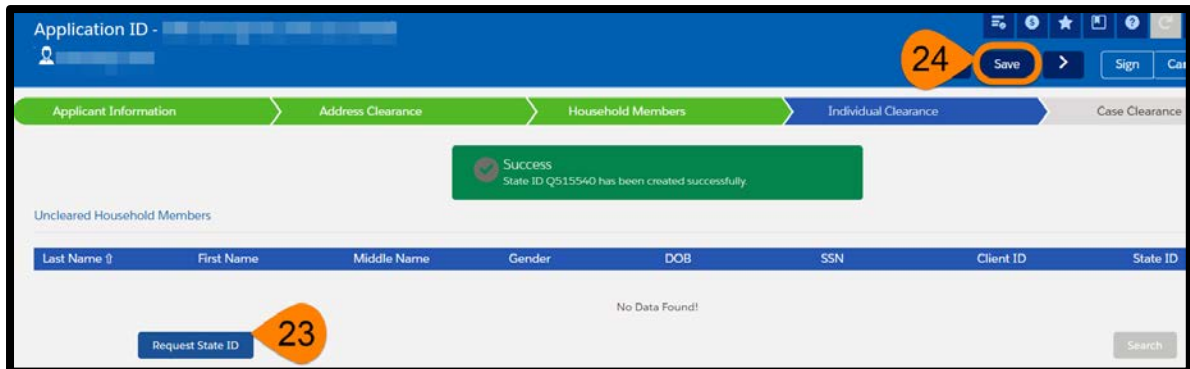


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- 22) The Search Results will show in a table below. To research more about a customer who shows up in the Search Results, click on the row to highlight the customer.
- Click **Individual Detail** to review details about the customer. A pop-out box will appear to show Individual Details, Address, Individual History, etc.
  - 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.
  - Click **Select** if the customer already exists and is showing in the Search Results.
  - Click **New** if your customer does not exist in CBMS and you need to request a New Client ID.
    - 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.



- 23) 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 confirmation box will appear confirming that the State ID was created successfully.
  - The household member will be removed from the Uncleared Household Members section.
- 24) Click **Save**.

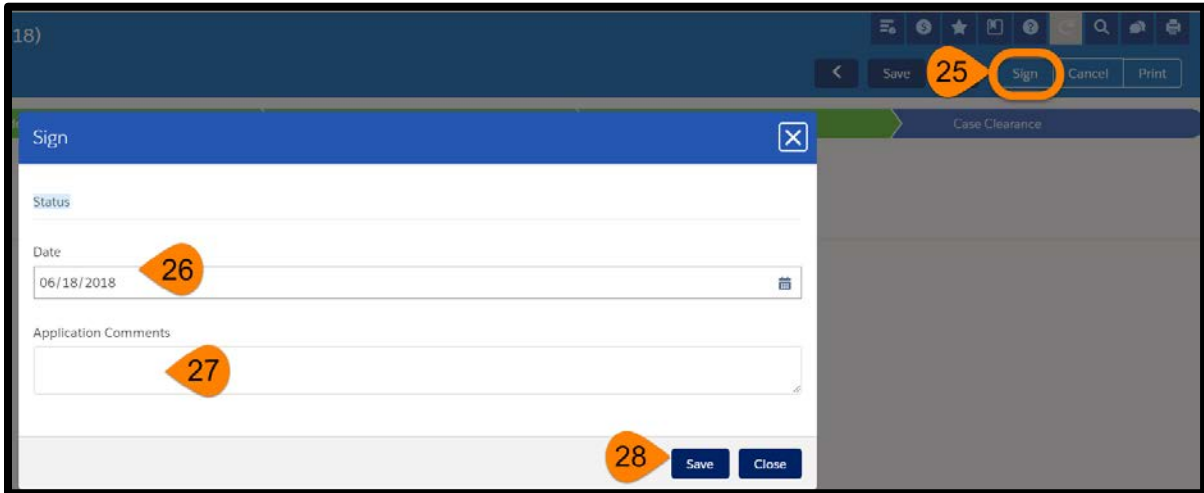




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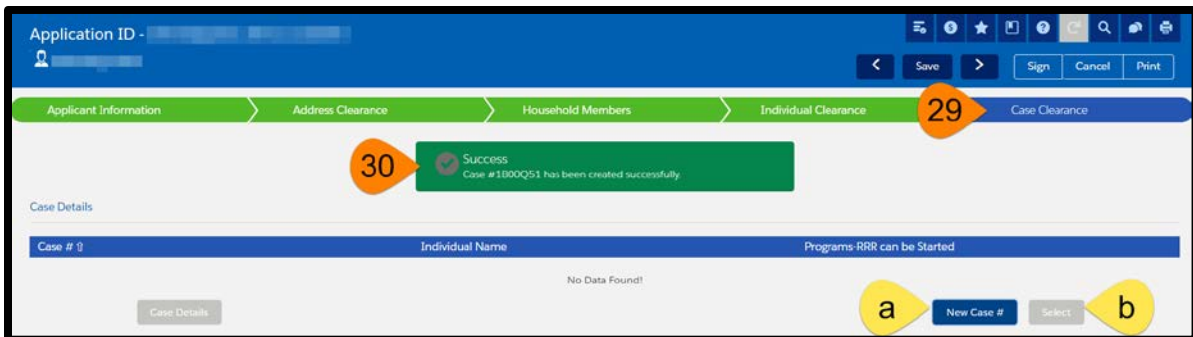
## Sign

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



## Case Clearance

- 29) After the application is signed, you can assign a Case Number to the application on the Case Clearance tab.
  - a) If the customer does not have an existing CBMS Case Number, or you want to create a new Case Number for them, click the **New Case #** button.
  - b) If the customer already has an existing Case Number that you want to attach this application to, highlight the Case Number, then click the **Select** button.
    - Refer to the desk aid titled *Existing Case vs New Case* if further guidance is needed.
- 30) A confirmation box will appear with the CBMS Case # showing it was created successfully.



The Application Initiation (AI) is now complete.

*Do you have any questions or suggestions regarding this process? Please contact the SDC via email [SOC\\_StaffDevelopment@state.co.us](mailto:SOC_StaffDevelopment@state.co.us)*

