Overview

This document provides a step-by-step process for how to dispose of a resource in CBMS Salesforce.

Process

1) Open the CBMS Case
2) On the Members page, select the Member card that the Resource belongs to
3) Click on the Resources Tab
4) Click on the sub-tab that has the Resource needing to be disposed of
5) Click on the record for the Resource to highlight that row
   • Highlighting the row will populate the Related Lists to the right
6) Scroll down until you see the Disposition Details related list
7) Click the + icon to add a new record
   • A new pop-up window will appear.

8) In the Disposition Details pop-up window, complete the required fields:
   a) Enter the Effective Begin Date
   b) Select the appropriate Type of Disposition from the drop-down menu
   c) Enter the Disposition Date
   d) Adequate Consideration: indicate whether or not the individual received reasonable compensation for the resource.
      o If you select No, CBMS determines if there is a TWFC for Adult Financial and Long Term Care.
   e) Select the appropriate Verification from the drop-down menu
   f) Select the appropriate Source from the drop-down menu
      o The Source field will be enabled only if ‘Received’ was selected in the Verification field.
   g) Enter the Amount Received for Resource
h) Select the appropriate **Disposition Reason** from the drop-down menu i) Although the **Comments** field is not required, you can enter any comments related to the disposition of the resource. Follow your Eligibility Site’s process when using this field. j) Enter the **Date Reported** k) Enter the **Date Verified** o  This field will be enabled only when the Verification is ‘Received’. l) Click **Save**

9) Once the Resource is disposed of, it will show in red lettering on the main page.

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