

Process Manual

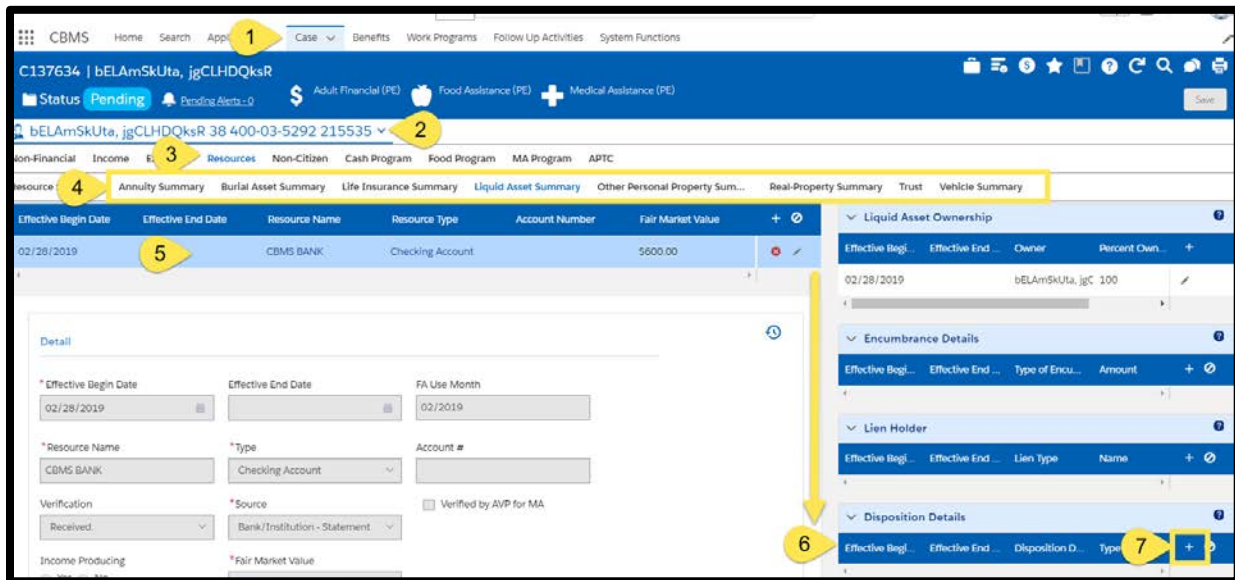
Disposing of a Resource

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



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- 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**

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

- 8**: Title of the form.
- a**: Effective Begin Date (calendar icon)
- b**: Type of Disposition (dropdown menu)
- c**: Disposition Date (calendar icon)
- d**: Adequate Consideration (radio buttons: Yes/No)
- e**: Verification (dropdown menu)
- f**: Source (dropdown menu)
- g**: Amount Received for Resource (text input)
- h**: Disposition Reason (dropdown menu)
- i**: Comments (text area)
- j**: Date Verified (calendar icon)
- k**: Date Reported (calendar icon)
- l**: Save button

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

The screenshot shows the main page with the following information:

- C137634 | bELAmSkUta, jgCLHDQksR**
- Status Pending** (with Pending Alerts - 0)
- Adult Financial (PE), Food Assistance (PE), Medical Assistance (PE)
- Navigation tabs: Non-Financial, Income, Expenses, **Resources**, Non-Citizen, Cash Program, Food Program, MA Program, APTC
- Summary tabs: Resource Summary, Annuity Summary, Burial Asset Summary, Life Insurance Summary, **Liquid Asset Summary**, Other Personal Property Sum..., Real-Prop...

Effective Begin Date	Effective End Date	Resource Name	Resource Type	Account Number	Fair Market Value	
02/28/2019	9	CBMS BANK	Checking Account		\$600.00	

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

