Overview

This document provides a step-by-step process for entering a Shelter Expense in CBMS. Even though some High Level Program Groups (HLPGs) may not require shelter expenses in the eligibility determination, an Eligibility Worker should always data enter everything that the customer declares.

Process to Add a Shelter Expense

1) Navigate to the Shelter Expense page by initiating the Interactive Interview queue for the case.
2) Select the **Shelter Expense** tab.
   - This tab will only be visible if the worker answers 'Yes' to the Shelter Expense question on the Case Questions screen.
3) To add a shelter expense, click the plus **(+)** sign in the blue detail header.
4) The Shelter Expense Detail pop-up window will appear.

   a) Enter the **Effective Begin Date**.
   b) Select the appropriate **Shelter Type** from the drop-down menu.
   c) Select the appropriate **Expense Type** from the drop-down menu.
      - If 'Utility' is selected, the **Utility Type** will be enabled.
      - Select the appropriate option from the drop-down menu.
   d) Select the **Frequency** that the expense is paid.
   e) The **Included in Rent** field is not required, it can be left blank but should be answered if you know the information.
      - For Food Assistance, if 'Yes' is selected the rules engine will not allow a utility expense, even if a utility expense is entered.
   f) The **LTC Allowance** field is not required, but will automatically default to 'Actual'.

- Indicate whether or not the utility allowance for Long-Term Care (LTC) is the actual amount or the SUA amount.

g) The **HUD Assistance** field is not required, it can be left blank but should be answered if you know the information.
- Select 'Yes' or 'No' if the customer receives Housing and Urban Development (HUD) assistance.

h) Select the appropriate radio button for '**Did you get LEAP within the past 12 calendar months?**'
- Select 'Yes' if the customer declares they received LEAP assistance.
- Select 'No' if they did not received LEAP assistance.

i) Select the appropriate **Verification** option from the drop-down menu.

j) Select the appropriate **Source** option from the drop-down menu.

k) Enter the **Date Reported**

l) Enter the **Date Verified**

m) Click **Save** if you do not have any other records to enter or click **Save & New** to save this entry and enter another Shelter Expense.

Process to Edit a Shelter Expense

1) Navigate to the Shelter Expense page by initiating the Interactive Interview queue for the case.

2) Select the **Shelter Expense** tab.

3) To edit an existing shelter expense:
   a) Click on the shelter expense row that you want to edit.
   - This will open up all the Related Lists for that row.
   b) Click on the pencil icon for the detail you want to edit.
   - The pencil icons are located in the Summary Details and the Related Lists, so be sure to select the correct record you need to edit.
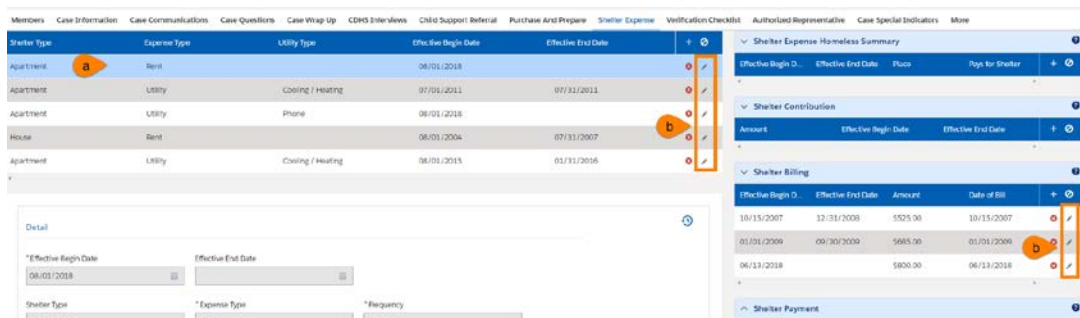
   c) The detail pop-up window will appear that will allow you to edit the details of that shelter expense.

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