

Process Manual

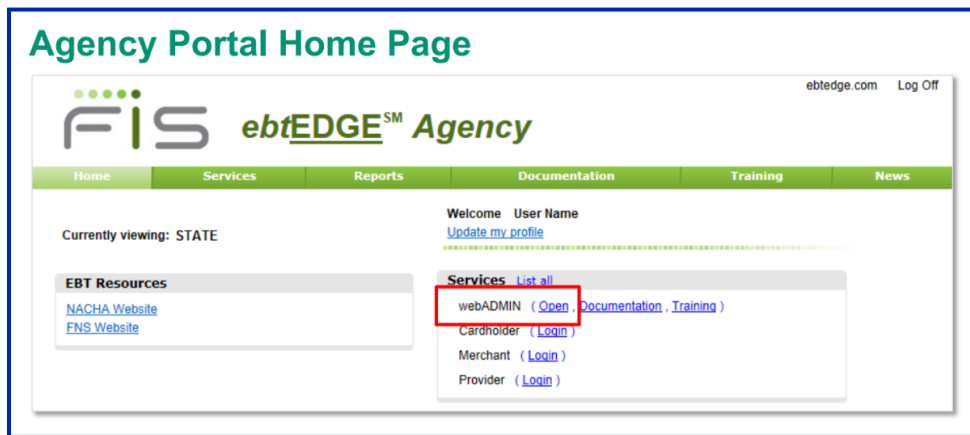
# Verifying EBT Balance for Adult Financial

## Overview

**Effective March 1, 2020:** A customer's EBT balance is considered a countable resource for Adult Financial programs. This document provides a step-by-step process for how to verify an Adult Financial customer's EBT balance, and the correct steps you need to take in CBMS.

## Process

- 1) Call or visit ebtEDGE to verify the customer's EBT balance
  - a) Phone Number Here
  - b) [www.ebtEDGE.com](http://www.ebtEDGE.com)
    - i) Login to the ebtEDGE Agency Portal using your credentials
    - ii) Click the 'Open' link next to webADMIN



*NOTE: webADMIN is the online, real-time administrative terminal that allows you to access cardholder, benefit, and transaction information. Users with the appropriate security access will also be able to make updates to information using webADMIN. For more information, and/or training on EBT contact [cdhs\\_ebt\\_policy@state.co.us](mailto:cdhs_ebt_policy@state.co.us)*

- 2) Login to CBMS and navigate to the customer's case.
- 3) Navigate to the Resources tab by either
  - a) Initiating Interactive Interview (II)
  - b) Click on the Member card for the individual with the resource
- 4) Click the Resources tab
- 5) Click the Liquid Asset Summary tab
- 6) Click the + icon to add a new record
- 7) In the Liquid Asset Resource pop-up window, complete the following information:
  - a) Enter the Effective Begin Date
  - b) In the Resource Name field, enter 'EBT'
  - c) Select the Type from the drop-down menu
  - d) Verification

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- e) Source
- 8) Enter the EBT Balance in the Fair Market Value field
- 9) Save the page.
- 10) Navigate to the Liquid Asset Ownership related list
  - a) Click on the pencil icon to edit the record
- 11) The **Effective Begin Date** and **Owner** fields are auto populated
- 12) In the **Amount of Balance Considered Current Income** field, enter the amount of the AF Grant the customer receives monthly.
- 13) Save the page.

*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)*

