

Process Manual

Entering Residency/Address

Overview

Colorado residence and County of residence must be documented in CBMS for all household members.

- 1) Log into **CBMS**.
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar on the Home page.
- 3) Click on **Case Number** in the results table to access the Members page.
- 4) From the Members page, hover over the **Actions** button.
- 5) Select **Begin Interactive Interview** to initiate the II queue.
- 6) Navigate to the Residency page.
- 7) From the **Name** drop-down, select the HOH or appropriate person to update or add a residency.
- 8) Enter the **Effective Begin Date**.
 - Refer to **Online Help** for assistance determining which date you should use
- 9) Select the appropriate radio button for **CO Resident**.
- 10) Select 'Received' from the **Verification** field.
- 11) Select the appropriate choice from the **Source** field.
 - **Client Statement** is acceptable for all programs.
- 12) Enter **Date Reported**.
- 13) Enter **Date Verified**.
- 14) Click **Save**.

The related lists are displayed to the right.

- 15) Click on **Individual Address Details** related list.
 - The **Individual Address Details** related list can also be updated from the Demographics page.
- 16) Click on the **pencil** to edit/update the Home Address record.
- 17) Select 'Received' from the **Verification** field.
- 18) Select the appropriate choice from the **Source** field.
 - **Client Statement** is acceptable for all programs.
- 19) Repeat steps 16-18 for the Mailing Address if this is different from the Home Address.

Repeat all steps for each person in the Household or use the Copy HOH feature (**See Copy HOH Process Manual**).