

Process Manual  
**Entering a Sponsor in CBMS**

## Overview

All cases that contain a sponsored non-citizen shall add the sponsor to the case in order to request and consider sponsor's information in determining accurate eligibility for the sponsored non-citizen.

**Note:** if the Sponsor is also a Household Member, you will complete ALL applicable pages for that person, including the Sponsor Page. This applies to all HLPGs.

## Adding a Sponsor to a Case:

- 1) Log into CBMS.
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar.
- 3) Click on **Case Number** in the results table to access the Members page.
- 4) From the Members page, hover over the Actions button and select **Begin Interactive Interview**.
- 5) On the Case Questions page, be sure the **Sponsor box** is marked in the Does anybody have/received/need section.
  - a) If left unmarked, the Sponsor page will not populate the in the Interactive Interview (II) queue.
- 6) Navigate to Add Member (or you can select the **Add Individual** mini queue from the Actions button on the main Members page).
- 7) Follow the queue to add the individual(s) to the case.
  - a) Complete the details for each sponsor on the following pages:
    - i) Add Member, Demographics, Case Individual, Household Relationships and Sponsor (see detailed steps below) as appropriate.
- 8) Navigate to the Demographics page, update any fields that you have for the sponsor.
  - a) SAVE should provide Name and SSN.
  - b) If you do not have a date of birth, use 1/1/1901 as the date of birth.
  - c) If you do not know the marital status, select **unknown**.
  - d) If you do not know the citizenship status, select **unknown**.
  - e) **Note:** if the Sponsor is a member of the household, update all pages appropriately for a Household Member.
- 9) Navigate to the Case Individual Program Requested page and update appropriate fields:
  - a) Select the '**No**' radio button for Requesting Assistance if the Sponsor is not in the home and not requesting assistance.
  - b) Select "**No**" for Ancillary Member.
    - i) **Note:** if the Sponsor is a member of the household, update all pages appropriately for a Household Member.

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- 10) Navigate to the Case Individual page and update appropriate fields.
  - a) Select '**No**' for In Home field, if the Sponsor is not in the home.
    - i) **Note:** if the Sponsor is a member of the household, update all pages appropriately for a Household Member.
- 11) Navigate to the Household Relationship Details Page, and complete relationship details for the Sponsor to the Sponsored Non-Citizen.
  - a) If the relationship is unknown, use **Unrelated**.
    - i) **Note:** if the Sponsor is a member of the household, update all relationships appropriately for a Household Member.
- 12) Click the checkbox for **Sponsor**.
  - a) **Note:** Remember, this is only for the relationship of the Sponsor to the Non-Citizen(s) they sponsor.

## Data Entry of the Sponsor Information Page:

- 1) Navigate to the Sponsor Information Page.
- 2) Select the **Sponsor** from the dropdown list above the queue.
- 3) Click on the plus (+) sign in the blue header to add a record.
- 4) Enter the Effective Begin Date.
  - a) Refer to Online Help for information.
- 5) Select the appropriate radio button for CW/OAP Hardship (cash programs only- to lift the 5-year bar)
  - a) If '**Yes**' is marked, select the Hardship reason from the drop down list
- 6) Select the appropriate radio button for Abandonment
  - a) If '**Yes**' is marked, complete the Hardship Date (date reported to the agency).
  - b) Select appropriate **Verification** from the dropdown menu.
  - c) Select appropriate **Source** from the dropdown menu.
- 7) Select the appropriate radio button for Abuse/Mistreatment.
  - a) If '**Yes**' is selected, complete the Hardship Date (date reported to the agency).
  - b) Select appropriate **Verification** from the dropdown menu.
  - c) Select appropriate **Source** from the dropdown menu.
- 8) Enter the circumstances reported by the non-citizen for Hardship Reason Determination.
- 9) Enter the appropriate information for # of People in the Sponsor's Household:
  - a) If unknown and requesting this information, enter 2 (1 for the sponsor, 1 for the sponsored non-citizen).
- 10) Enter the appropriate information for Total # of Non-Citizens Sponsored.
  - a) If unknown and requesting this information, **enter 1**.
- 11) Select appropriate **Verification** from the dropdown menu.

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- 12) Select appropriate **Source** from the dropdown menu.
  - a) If unknown and requesting this information, use Received - Client Statement to generate a VCL.
    - i) **Note:** Remember to add a specific note to this item on the VCL asking for the total number of household members, names and ages.
- 13) Select appropriate radio button for Sponsor Affidavit of Support is Signed.
  - a) Select **'YES'** if SAVE has verified the sponsor or you have received a copy of the Sponsorship document.
- 14) Enter the Date the sponsorship began.
- 15) Select appropriate radio button for Sponsor Spouse Affidavit of Support is Signed.
  - a) Select **'YES'** if you have verification of the sponsor's spouse also being a sponsor to the non-citizen, If you do not have this information, leave blank.
- 16) Enter the appropriate number for Number of People Outside Household.
  - a) This refers to the number of people sponsored by the sponsor. If you do not have this information, leave blank.
- 17) Enter the appropriate dollar amount for Amount Paid.
  - a) This refers to money paid by the sponsor to people outside the sponsor's household. If you do not have this information, leave blank.
- 18) Select the appropriate radio button for Sponsor Address.
  - a) Selecting **'known'** will enable the address fields.
- 19) Complete appropriate the Address fields.
- 20) Select **'Received'** from the Verification field.
- 21) Select the appropriate **Source** from the drop down menu.
- 22) Click **Save**.

*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)*

