

Process Manual  
**Entering a Disability Determination**

## Overview

This document provides a step by step process for how to enter a Disability Determination into CBMS. This is typically used for Long-Term Care and includes details on when and how to complete the data entry to get the appropriate results.

## Process

- 1) Log into CBMS
- 2) Navigate to the Case by entering the Case Number in the **Global Search** bar
- 3) Click on the 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 Interactive Interview (II) queue
- 6) On the **Case Questions** page, be sure the *Medical Condition/Disability* box is marked in the *Does anybody have/received/need* section
  - a) If left unmarked the Disability Determination page will not populate in the II queue
- 7) Navigate to the **Disability Determination** page
- 8) From the **Name** drop-down, select the person with the Disability Determination
- 9) To add a new record, click the plus (+) sign in the blue detail header
- 10) Enter the **Effective Begin Date**
  - a) Refer to Online Help for assistance with which date you should use

The next steps to take are dependent on which phase of Disability Application the applicant is on:

- Has not yet applied for a Disability Determination
- Has returned the packet and the application is pending with the State Disability Determination Vendor
- Determination has been received from State Disability Determination Vendor

## Has Not Yet Applied for a Disability Determination

To the Disability Application:

- 1) Select 'Pending' from the **Status** field
- 2) Select 'Undetermined' from the **Result** field
- 3) Select 'Received' from the **Verification** field
- 4) Select 'Client Statement' from the **Source** field

*CBMS will automatically mail the packet to the applicant along with a VCL*



## Entering a Disability Determination

### Has Returned the Packet; Disability Application is Pending Determination

- 1) Click on the **pencil icon** to edit/add details
- 2) Select 'Pending' from the **Status** field
- 3) Select 'Undetermined' from the **Result** field
- 4) Select 'Received' from the **Verification** field
- 5) Select 'State Disability Determination Vendor' from the **Source** field
- 6) Enter **Date Packet sent To Vendor**
  - a) Packet should be sent to ARG during this step:  
Arbor E&T, Action Review Group  
P.O. Box 340 Olyphant, PA 18447  
Actionreviewgroupmrt@arboret.com  
Phone (877) 265-1864  
Fax (877) 672-2077

### Disability Determination has been received from the State Disability Determination Vendor

Enter the information from the approval notice:

- 1) Click on the **pencil icon** to edit/add details
- 2) Select the appropriate **Status** option from the drop-down menu
- 3) Enter the **Status Date**
  - a) This is the date the status was last changed
- 4) Select the appropriate **Result** option from the drop-down menu
- 5) Enter the **Diary Date**
  - a) This is the date the case will be re-reviewed for ongoing disability (always a future date)
- 6) Enter the **Disability Onset Date**
  - a) Retro date for ARG
  - b) Onset date for SSA
- 7) Enter the **Result Date**
  - a) This is the date the last decision on disability was made
- 8) Select 'Received' from the **Verification** field
- 9) Select 'State Disability Determination Vendor' from the **Source** field
- 10) 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)*

