

Entering a Tax Deduction Expense

Overview

This document provides a step-by-step process for how to complete the data entry of the Tax Deduction tab. This chevron will populate when MA is requested and should be completed when the client has an expense that is not related to Dependent Care, Medical, Medicare, or Child- Spousal expenses.

Process

- 1) **Login** to 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
- 5) Select **Begin Interactive Interview** to initiate the Interactive Interview (II) queue
- 6) Navigate to the **Tax Deduction** chevron and select the appropriate household member from the drop-down
- 7) Click the plus (+) sign in the blue detail header
- 8) Enter the **Effective Begin Date**
 - a) Refer to Online Help for the appropriate date to use
- 9) Select the appropriate **Deduction Type** from the drop-down menu
- 10) Enter the **Amount** of the expense
- 11) Select the appropriate **Frequency** from the drop-down menu
- 12) Select the appropriate **Verification** from the drop-down menu
 - a) The Verification field will only be available when it is applicable for the selected Deduction Type
- 13) Select the appropriate **Source** from the drop-down menu
 - a) The Source field will only be available when it is applicable for the selected Deduction Type
- 14) Click **Save**

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

