

Process Manual
Entering a Shelter Expense

Overview

This document provides a step-by-step process for entering a Shelter Expense in CBMS.

Process

- 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) On the **Case Questions** page, make sure the radio button for *Does the Household have Shelter expenses* is marked 'Yes'
 - a) If left unmarked, the Shelter Expense page will not populate the in the Interactive Interview (II) queue
- 7) To add a shelter expense, click the plus (+) sign in the blue detail header
- 8) Enter the **Effective Begin Date**
 - a) Refer to **Online Help** for appropriate date to use
- 9) Select the appropriate **Shelter Type** from the drop-down menu
- 10) Select the appropriate **Expense Type** from the drop-down menu
 - a) If 'Utility' is selected, the **Utility Type** will be enabled
- 11) Select the **Frequency** of the expense from the drop-down menu
- 12) If 'Utility' was selected in the previous step, select the **Utility Type** from the drop-down menu
- 13) The **Included in Rent** field is not required but should be answered if you know the information
- 14) The **LTC Allowance** field is not required but will automatically default to 'Actual'
- 15) The **HUD Assistance** field is not required but should be answered if you know the information
- 16) Select the appropriate radio button for 'Did you get LEAP within the past 12 calendar months?'
- 17) Select the appropriate **Verification** option from the drop-down menu
- 18) Select the appropriate **Source** option from the drop-down menu
- 19) Enter the **Date Reported**
- 20) Enter the **Date Verified**
- 21) Click **Save**
- 22) Select the shelter expense in the summary, then open the **Shelter Billing** related list on the right

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- 23) To add a billing record, click the plus (+) sign in the blue detail header
- 24) Enter the **Effective Begin Date** (EBD)
 - a) Refer to **Online Help** for the appropriate date to use
- 25) Enter the **Amount of Bill**
- 26) Enter the **Date of Bill**
 - a) This date should be the first of the month of the **Effective Begin Date** of the record
- 27) Select the **Frequency** from the drop-down menu
- 28) Select the appropriate **Verification** option from the drop-down menu
- 29) Select the appropriate **Source** option from the drop-down menu
- 30) Enter the **Date Reported**
- 31) Enter the **Date Verified**
- 32) Click **Save**

Note: When an **Expense Type**, **Utility Type** or **Amount of Bill** has changed and the household is still responsible for the expense, you will overwrite the information in the existing record with the new information. Refer to **Online Help** for appropriate dates to use.

Note: When a **Shelter Expense** has ended and the household is no longer responsible for it, you may **Effective End Date** (EED) the main record for the last day of the month in which the information was reported.

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

