
Virtual Instructor- Led Training (VILT)

Adult Financial

Participant Guide for Transformation Phase II VILT

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Acknowledgments

The Health Care and Economic Security Staff Development (SDC) would like to thank all the individuals and agencies that provided assistance during the development of the Phase II training and continue providing feedback to update material as needed.

The SDC would also like to thank staff from the Colorado Department of Human Services (CDHS), the Colorado Department of Health Care Policy and Financing (HCPF), and the Governor's Office of Information Technology (OIT). Their willingness to share their program and systems knowledge with the SDC has been invaluable.

Introduction

The Health Care and Economic Security Staff Development Center (SDC) presents this guide as a framework for the precision delivery of the Phase II Transformation instructor-led training.

In the spirit of the SDC's vision, which is to provide an efficient, non-duplicative, and responsive training array for staff that promotes an integrated and holistic service delivery system, we are offering this guide to standardize and formalize across Colorado the way county staff are trained. Standardization and precision delivery will assure that all staff receives and attains the same high standard of competency through training.



Contents

Contents

Common Terms and Phrases.....	4
Welcome	4
Course Modules.....	4
Adult Financial	4
What Do We Know?	5
Global Search	5
Using Global Search	5
Adult Financial Specific pages	6
Logout	8
Knowledge Checks.....	9
Knowledge Check 1	9
Knowledge Check 1	9
Additional Support	9
Summary	10



Common Terms and Phrases

There are terms and phrases found throughout this Guide that have other common names associated with them. These terms and phrases are used based on accuracy, appropriateness, and general understanding to provide consistency. They are listed below with other associated common names.

- **CBMS:** Colorado Benefits Management System
- **Eligibility Worker or Public Assistance Professional:** User, eligibility technician, program specialist, eligibility professional.

Welcome

Course Modules

Group Expectations/Housekeeping

Introductions: Just the Facts

Participant Note:

- *Introduce yourself and state your experience in CBMS.*
- *What do you want to learn in this training?*

Notes:

Adult Financial


Objectives:

After this section, you will be able to:

- Use Global Search for a case.
- Navigate to the Adult Financial Specific pages in the new CBMS.
- Review and explain all the pages under Adult Financial Specific pages.



What Do We Know?



Goal:

To navigate through Adult Financial pages in the new CBMS.

Global Search

Objectives:

After this section, you will be able to:

- Use Global Search for a case.

Using Global Search

Using Global Search: Here we have an overview of the **Home Page**.

- Log in to the practice environment with the help of **Process Manual** provided to you.
- Copy the URL link from the **Chat Pod**.
- Must use **Google Chrome** browser.
- Make sure you are logged in before moving forward.
- If there is a Resident Expert, he/she will provide support to you while logging in.
- Remember all this information is covered in more detail in the Phase I Transformation Training and in the General Navigation/Read Only Web-Based Training (WBT).
- You do not have to add actual data during this training. training but you are encouraged to do so in order to become familiar with the new look and feel of CBMS.

To use **Global Search**, follow the steps below:

1. Enter the **Case Number** that was assigned to you.
2. In the **Case Information section** of the results, click on the blue link for that Case.
3. Upon opening the case, you are automatically directed to the **Members page**.

Reminder: The F1 key no longer gives us CBMS online help. To access Online Help, click the question mark icon on the CBMS Toolbar.

Notes:

Adult Financial Specific pages

Objectives:

After this section, you will be able to:

- Navigate to Adult Financial Specific pages.
- Review all the pages in this queue.

Navigate to the Adult Financial specific pages

Navigate to and explain the Adult Financial specific pages: Follow the steps below to navigate to the page:

1. Open your assigned case.
2. On the Members screen, click a **Member Card** to view the individual-level screens.
3. Click the **Cash Program** tab.

Let us review the following pages.

- AND-SO Additional Information IM14
- AND-SO Additional Information SSI Status
- Home Care Allowance

Notes:



- **Medical Conditions:** Practice data entry on this screen. Click + to add details.

Able to Work	Disability Type	Begin Date	Effective Begin Date	Effective End Date
No	Permanent	09/01/2007	09/01/2007	
Yes		11/01/2018	11/01/2018	

Medical Conditions

- Ability to Work
- Disability Type
- Begin Date
- Effective Begin Date
- Effective End Date

- **Adult Financial ISM:** Practice data entry on this page.

Begin Date	End Date	Full ISM Amount Applied?	ISM Amount Applied
01/01/2019		No	\$20,000.00

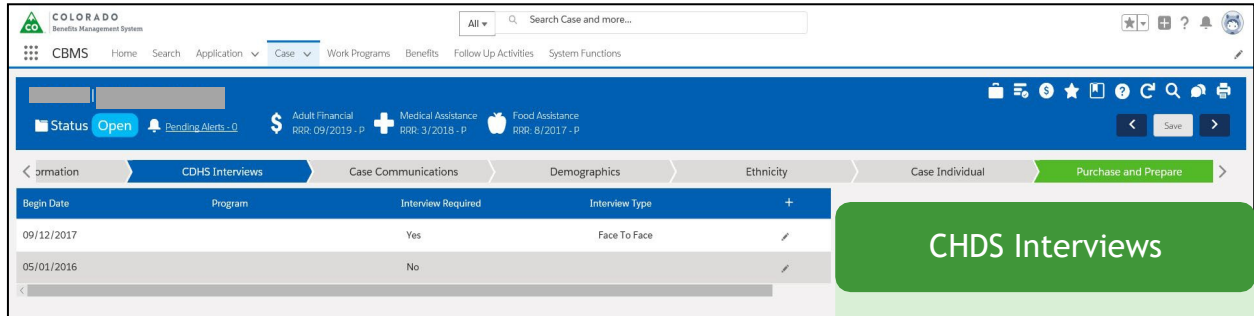
Dependent Care Expense

- Begin Date
- End Date
- Full ISM Amount Applied?
- ISM Amount Applied

- Click the Non-Financial tab and review the Residency screen.
- The last screen to review is the **CDHS Interviews** screen which is in Interactive Interview. Follow the steps below, to navigate to **CDHS Interviews**:
 1. Open a case.
 2. On the Members screen, hover over **Actions** and click **Interactive Interview**.
 3. Scroll the chevrons to the right until you see the **CDHS Interviews** tab.



CDHS Interviews: Practice data entry for a **AF Interview** on this page. Click + to add details under this tab. You must enter the following details under **CDHS Interviews**.



CHDS Interviews

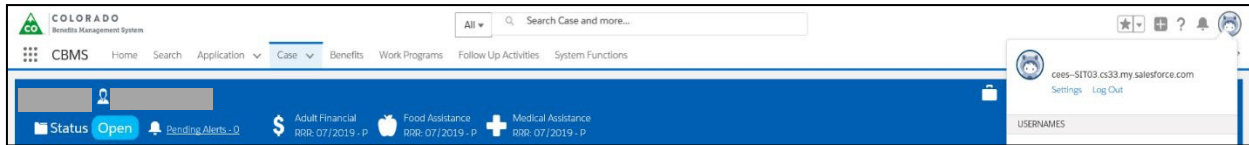
- Begin Date
- Program
- Interview Required
- Interview Type

(Mandatory fields to be entered)

Logout

Before we log out from the tool, let's;

Revisit the learning before logging out.
Any questions that you might have before logging out.



What Did We Learn?

Knowledge Checks



Knowledge Check 1

Q1. How do you navigate to Cash Program Screen?

Ans:



Knowledge Check 1

Q2. Besides the case screens, to where else do you have to navigate to complete an AF case?

Ans:

Additional Support

There will be an ongoing document for FAQs that you can reference at any time.

This document will be located on CO.Learn.

There are Process Manuals available to assist you in specific tasks you would complete in CBMS. Process Manuals are step-by-step guides that walk you through a specific process in CBMS. They can all be located on TrainColorado.com.

There are also additional WBTs they can take when the participants return to their desks that provide more detail for specific topics. Refer to CO.Learn for updated calendar on the upcoming sessions.

Summary

Summary

You have reached the end of the course. By now you should be able to:

- Use Global Search for a case.
- Navigate to the Adult Financial Specific pages in the new CBMS.
- Review and explain all the pages under Adult Financial Specific pages.



