
Virtual Instructor- Led Training (VILT)

Medical Assistance

Participant Guide for Transformation Phase II VILT

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COLORADO
Health Care & Economic Security
Staff Development Center



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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.

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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

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:

Medical Assistance

Objectives:

After this section, you will be able to:

- Use Global Search for a case.
- Navigate to the Medical Assistance page in the new CBMS.
- Review and explain all the pages under Medical Assistance.

What Do We Know?

Goal:

To navigate through Medical Assistance 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:

Medical Assistance Specific Pages

Objectives:

After this section, you will be able to:

- Navigate to the Medical Assistance Specific pages.
- Review all pages in this queue.

Navigate to the Medical Assistance specific pages

Navigate to and explanation of the Medical Assistance 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 navigate to individual-level screens.
3. Click the **MA Program** tab.

Let us review and go through each of the pages. There are 11 tabs under **MA Program**. On each screen, click the + to add details.

- Accident Liability
- Annualized Income Summary
- Benefit
- Estate Recovery
- Ethnicity
- Health Care Coverage
- Long Term Institution
- Long Term Care Level of Care
- MA Presumptive Income
- Reasonable Compatibility
- Tax Information: Practice data entry on this screen (screenshot below).

The screenshot shows the Colorado CBMS system interface. At the top, there is a search bar and navigation tabs for Home, Search, Application, Case, Work Programs, Benefits, Follow Up Activities, and System Functions. Below this, there are icons for Status (Open), Pending Alerts (0), Adult Financial (RRR: 3/2018 - P), Medical Assistance (RRR: 09/2018 - P), and Food Assistance (RRR: 07/2019 - P). The main navigation bar includes tabs for Non-Financial, Income, Expenses, Resources, Non-Citizen, Cash Program, Food Program, MA Program, and APTC. The APTC tab is currently selected, showing a 'Detail' view with the following fields:

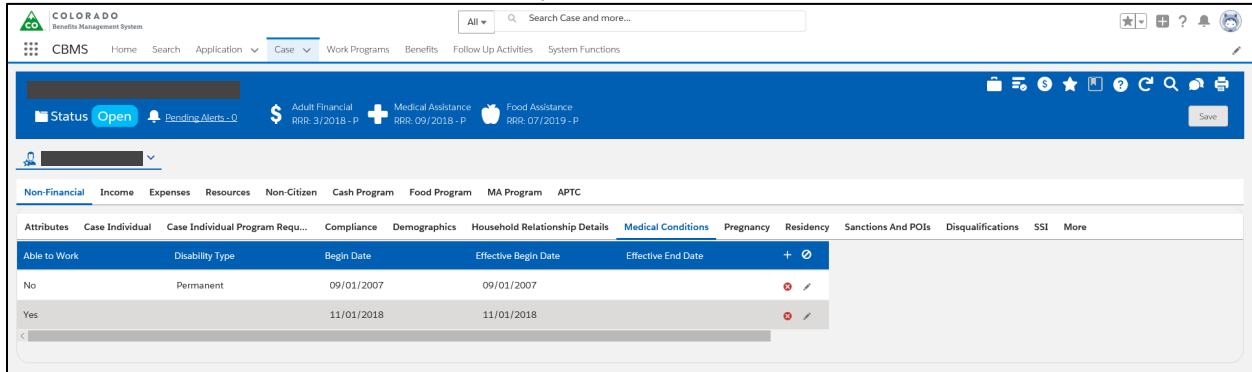
- Effective Begin Date: 08/01/2016
- Effective End Date: (empty)
- Tax Filer: Yes No
- Tax Filing Status: Select Tax Filing Status ...
- Filing jointly with: Select Filing jointly with ...
- Exceptional Circumstances: Yes No
- Tax Dependent (Person on application): Yes No
- Expects to be claimed as a tax dependent by: Select Expects to be claimed as a tax dependent by ...
- Tax Dependent (Person Not on Application): Yes No
- Living with both parents, but parents do not expect to file jointly: Yes No
- Expects to be claimed by a non-custodial parent?: Yes No
- Date Reported: 07/13/2016

Click the **APTC** tab (next to **MA Program**).

Let us review and go through each of the pages. There are 7 tabs under **APTC**. On each screen, click the **+** to add details.

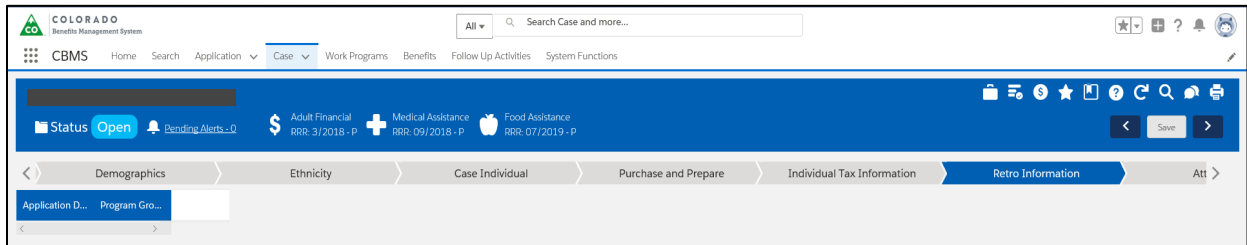
- Annualized Income Summary
- APTC Annual Income Verification
- APTC Expense Summary
- APTC Individual Information
- Health Coverage Eligibility/Enrollment
- Life Change Events
- Reasonable Compatibility

- Click the **Non-Financial** tab (on the same level as **MA Program** to the far left). Click the **Medical Conditions** sub-tab. Practice data entry on this screen.



There is also one screen in Interactive Interview that relates to medical assistance, which is **Retro Information**. Follow these steps to navigate to the **Retro Information** screen:

1. Open your assigned case.
2. On the **Members** screen, hover over the **Actions** button and click **Interactive Interview**.
3. Scroll the chevrons to the right until you see **Retro Information** and click that chevron.

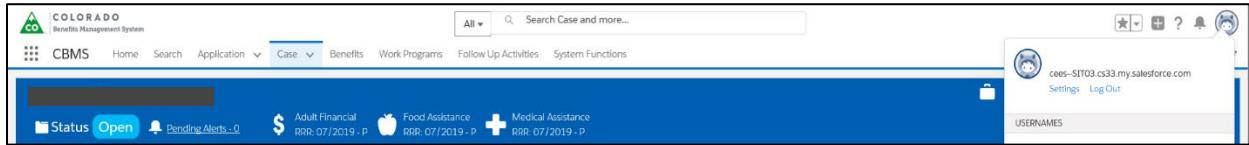


Notes:

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. Where can you locate APTC tab?
Ans:



Knowledge Check 2

Q2. Where can you locate Household Members Cards?
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 Medical Assistance specific pages in the new CBMS.
- Review and explain all the pages under Medical Assistance.