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# Virtual Instructor- Led Training (VILT)

## Workforce Development

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### Participant Guide for Transformation Phase II VILT

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**COLORADO**

Health Care & Economic Security  
Staff Development Center



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## Acknowledgments

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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

### 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:**

## Workforce Development Specific pages

**Objectives:**

After this section, you will be able to:

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



## What Do We Know?

**Goal:**

To navigate through Workforce Development Specific 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:**

## Workforce Development Specific pages

**Objectives:**

After this section, you will be able to:

- Navigate to Workforce Development Specific pages.
- Review all pages in this queue.

### Navigation to the Workforce Development specific pages:

Navigation to and explanation of the Workforce Development specific pages: Follow the steps below to access the Workforce Development pages:

1. Open your assigned case.
2. Click the briefcase icon in the case header (see screenshot below).

The screenshot displays the CBMS (Colorado Benefits Management System) interface. At the top, there's a navigation bar with 'CBMS' and various menu items. Below that, a status bar shows 'Status Open' and several icons for 'Adult Financial', 'Food Assistance', and 'Medical Assistance'. The main content area is titled 'Members' and includes a list of members with details like 'Head of household', 'DOB', 'Gender', and 'SSN'. There are also buttons for 'Actions', 'Create Application', and 'Copy HOH'.

Follow along with the instructor to review the following Workforce Development pages:

- Click the **Work Program Summary** tab and walk through this screen
  - The work program summary is a good place to see the customers address and phone number.
  - If Food Assistance and Colorado Works is passing or pending, it also lets the worker know who is in the home and who applied for SSI.
  
- Click the **Work Program Eligibility** tab and explore this screen. Select the Work Program and click **Load**.
  
- Click the **Plan** tab
  - Click the + icon and walk through entering a plan, including:
    - **My Story** text entry box
    - **Long Term Goals/My Life Goals** text entry box
    - **Short Term Goals/My Short-Term Objective** text entry box
    - **Participant Responsibilities/My Next Steps** text entry box
    - **Agency Responsibilities/County Commitments** text entry box
    - **Referrals and Resources** text entry box
    - **Future Action Steps** text entry box
  - Highlight the **Print Roadmap** button.
  - Highlight the **Conditions** button.
  - Once you've entered a plan, click that row in the summary table and the Maintain Participant Activities Related List will appear on the right
    - Click the + sign to add a new activity
  - Walk through closing a plan
  
- Click the **Supportive Services** tab
  - Select the Work Program and click **Load**.
  
- Click the **Search Supportive Services** tab and review the sub-tabs:
  - Explore **Authorize Supportive Services by Provider** sub-heading and page. When searching by provider, click the magnifying glass and show participants they can search by business name or individual name. The search results will be displayed in the summary table below.
  - Explore **Authorize Supportive Services by Participant** sub-heading and page. Inquire on an individual by clicking the magnifying glass and then clicking Search to search for supportive services by provider. The search results will be displayed in the summary table below.
  
- Click the **Conciliation** tab and walk through that screen (this screen was previously called Adverse Action or Non-compliance)
  - If a non-compliance record exists, that information will be shown on this screen, otherwise it will be blank. Note, non-compliance records are added on the Compliance screen under Interactive Interview.
  
- Click the **Attendance** tab and walk through each sub-tab:
  - **Attendance Detail:** Enter the **Calendar Month (MM/YYYY)**, select the **Activity** from the drop-down, and click **Load**.
  - **Attendance Summary by Case** this screen is used view and manage attendance hours for all work program activities that are open for the reporting month on a case. You can click on the Attendance Complete button to close the activity for the reporting month
  - **Attendance History:** Select the **Program Type**, select the **End Date**, and click **Search**.
  
- Click the **Work Program Appointment** tab and explore this screen. Select the **Program** and click **Load**.

## What Did We Learn?

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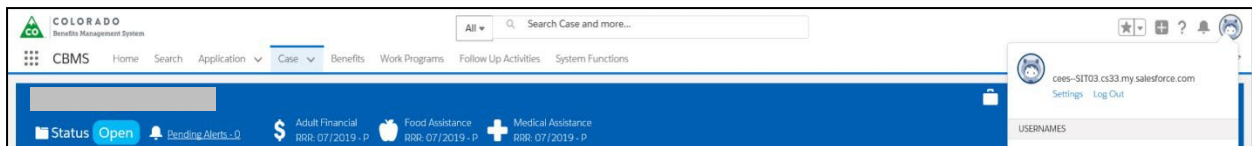
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**Notes:**

## Logout

Before we log out from the tool, lets;

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





## Knowledge Checks



### Knowledge Check 1

Q1. How do you access the Work Program Plan screen?

Ans:



### Knowledge Check 2

Q2. What are the steps to close a plan?

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 Workforce Development Specific pages in the new CBMS.
- Review and explain all the pages under Workforce Development Specific pages.