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# Virtual Instructor- Led Training(VILT)

## Finalization

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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:**

## Finalization

### Objectives:

After this section, you will be able to:

- Use Global Search to find and open a case.
- Navigate through the Benefits screens in the new CBMS as they relate to finalization.
- Navigate to the Correspondence pages as they relate to finalization.
- Navigate through the Eligibility Review pages in the new CBMS as they relate to finalization.

## What Do We Know?

**Goal:**

To learn how to navigate to the key pages required for finalization in the new CBMS.

## Global Search

### Objectives:

After this section, you will be able to:

- Use Global Search to find and open a case.

## Using Global Search

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

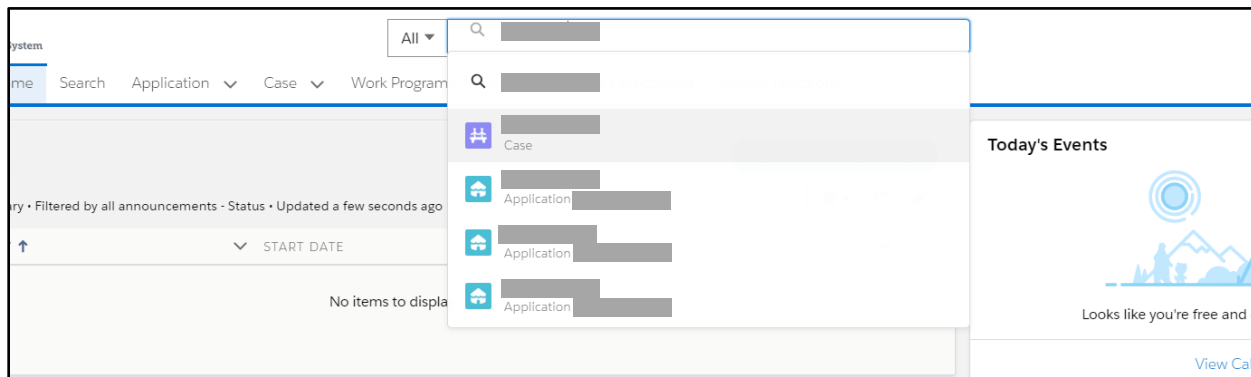
- Log in to the practice environment with the help of **Process Manual** provided to you.
- Copy the URL link from the **Chat Pod**.
- Must use **Google Chrome** browser.
- Make sure you are logged in before moving forward.
- If there is a Resident Expert, he/she will provide support to you while logging 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. However, 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:

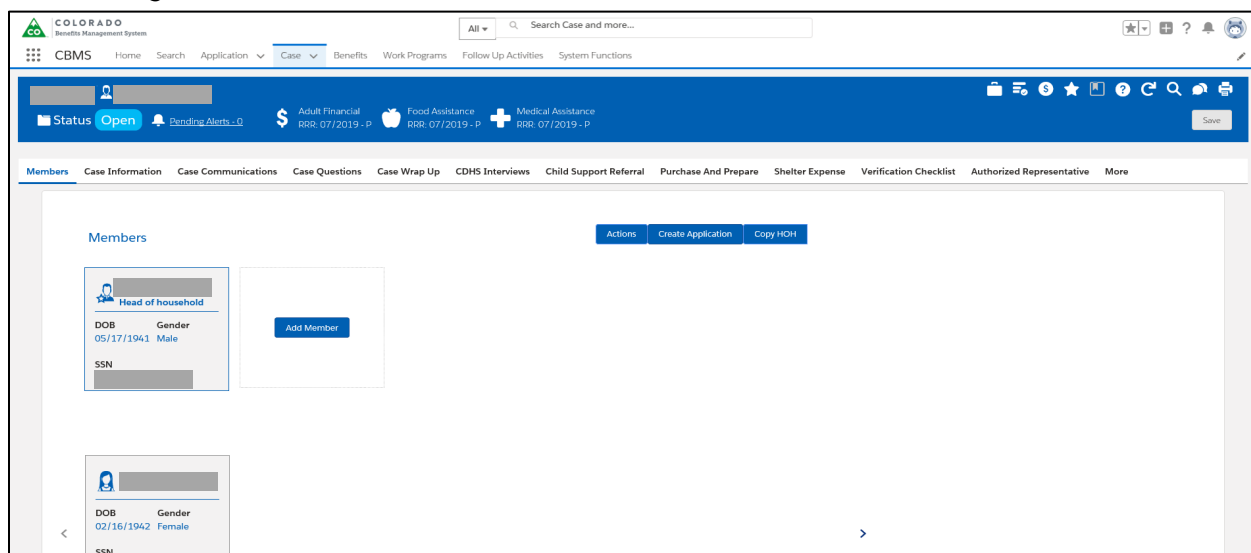
1. Enter the **Case Number** that was assigned to you.
2. In the **Case Information section** of the results, click on the blue link for that Case.
3. Upon opening the case, you are automatically directed to the **Members page**.

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

### Global Search



### Members Page



## Wrap Up

**Objectives:**

After this section, you will be able to:

- Populate information in Relates Lists.
- Navigate to the Case Wrap Up screen.

### Navigate to Wrap Up

Case Wrap Up tab: To navigate to Case Wrap Up follow the steps below:

1. Open your assigned case.
2. Click the **Case Wrap Up** tab (shown below).

The screenshot shows the CBMS interface with the 'Case Wrap Up' tab selected. The main table displays the following data:

| Program Group               | Data Entry Complete | Effective Begin Date | Actions |
|-----------------------------|---------------------|----------------------|---------|
| Adult Financial             | Yes                 | 07/12/2016           | [Edit]  |
| Medical Assistance          | Yes                 | 07/25/2018           | [Edit]  |
| MS Medicare Savings Program | Yes                 | 03/14/2013           | [Edit]  |
| Food Assistance             | Yes                 | 07/25/2018           | [Edit]  |
| Employment First            |                     | 06/28/2016           | [Edit]  |

The detail view for 'Adult Financial' shows:

- Effective Begin Date: 07/12/2016
- Program Group: Adult Financial
- Data Entry Complete:  Yes  No
- Options:  CW 67 % Earned Income Disregard,  Child Support RRR Mode

Clicking on a row in the Case Wrap Up Summary Table will populate information in the related lists.

- Awaiting Verifications
- Additional Information

Case Wrap Up Signature: To access the Case Wrap Up Signature screen hover over the More tab and scroll down to Case Wrap Up Signatures. There are 2 tabs under Case Wrap Up Signatures:

1. Statement of Facts
2. Rights and Responsibilities

## Eligibility Review pages

### Objectives:

After this section, you will be able to:

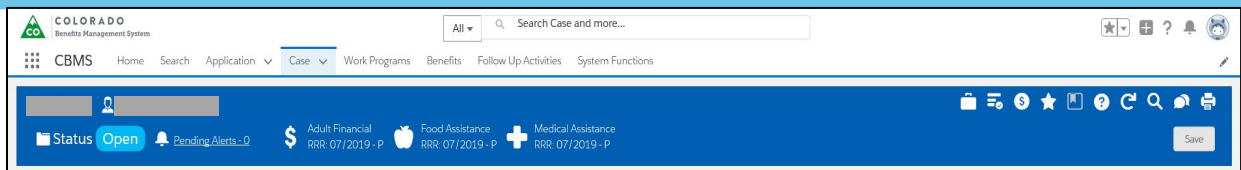
- Navigate to the Eligibility Review Pages in CBMS.
- Review all pages in this queue.

## Navigate to Wrap Up

Follow the steps below, to navigate to the Wrap Up pages:

Once you have opened your assigned case:

1. Click the **Run EDBC** icon in the CBMS toolbar.
2. Clicking the **Run EDBC** icons allows you to conduct a review of all necessary information before the final authorization of benefits.



Below is a brief overview of the eligibility review tabs and sub-tabs included in Wrap Up and Authorizations details. We will go into further details later.

1. Eligibility: There are 3 tabs under Eligibility.
  - Run EDBC
  - Medical Assistance Appeals
  - MA Eligibility Determination Override
  
2. Wrap Up: There are 8 tabs under Wrap Up.
  - Eligibility Summary
  - Initiate Wrap up
  - Adult Financial
  - Medical Assistance
  - Colorado Works
  - Food Assistance
  - Presumptive Eligibility
  - Search NOA for Eligibility Details
  
3. Authorization: There are 8 tabs under Authorization.
  - Authorize Eligibility Program Benefit
  - Authorize Special Payment
  - Capture Timely Notice Waiver information
  - Display CPH + Enrollment Fee Detail
  - Rescind
  - Maintain Transaction Sampling Profile
  - Medicaid Buy-In Premium Summary
  - Medicaid Buy-In Transactional Details

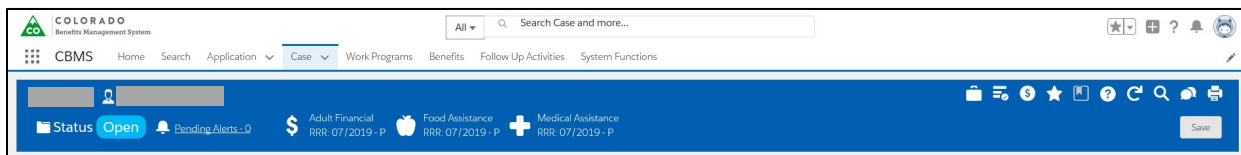
**Notes:**



## Knowledge Check

Let us do a small recap with a few questions.

Q1. Circle the Run EDBC icon from the screenshot below:



Notes:

## Benefits Page

Objectives:

After this section, you will be able to:

- Navigate to the Benefits screens.
- Review all the pages under Benefits related to finalization.

### Navigation to Benefits Page

- Click the **Benefits** tab.
- You will reach **Benefit Issuance** screen by default.
- Let us review all the pages in this category.
- Each **Benefit** screen has its own search section. To locate records on these screens, you must navigate to the screen directly and search, rather than using the **Global Search** bar.
- You can navigate to the other **Benefit Issuance** screens by selecting the desired tabs.

There is a full WBT related to Benefit Issuance and Benefit Recovery that you can go through for further details.

## What Did We Learn?

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Notes:

## Correspondence Page

Objectives:

After this section, you will be able to:

- Navigate to the Correspondence page.
- How to search for a notice and print/view it.

### Navigation to Correspondence Page

Navigation to the Correspondence Page: Let us navigate to **Correspondence** on the case.

1. Select **Follow Up Activities** in the **Main Navigation**.
2. Click the **Client Correspondence** tab to view and print the related correspondences.

Here we see how to search for correspondences and how to view/print them.



Client Correspondence has four sub tabs.

- Correspondence in the Print Queue
  1. Select the **Correspondence in the Print Queue** sub tab to search for and view correspondences that have been requested and are waiting to be formatted for printing.
  2. The search results display summary information about the correspondences in the print queue, based on the search criteria.
  3. Click any desired row to view additional information about the correspondence.
  4. Click the **Online Print** button to open the correspondence in a PDF format and print to a local printer.
  5. Click the **Batch Print** button to submit that document for batch printing (printed once a day).

The screenshot shows the Salesforce interface for the 'Client Correspondence' section. At the top, there is a navigation bar with the 'COLORADO Benefits Management System' logo and a search bar. Below this, a breadcrumb trail indicates the current location: '1095B - Health Coverage > Print A Form Manually > Correspondence In The Print... > Printed Client Correspondence'. The main area is titled 'Search' and contains several input fields: 'Correspondence Type' (a dropdown menu), 'Program' (a dropdown menu), 'Action' (a dropdown menu), 'Case #' (a text input field), 'Case Name' (with sub-fields for 'Last', 'First', 'MI', and 'Suffix'), and a 'Search' button.

The screenshot shows the search results table and a detail view. The table has columns: 'Case #', 'Program', 'Type', 'Action', 'Reason Descr...', 'Elig Month', 'Corresponde...', 'Corresponde...', and 'Li Actions'. Below the table, there are two buttons: 'Online Print' and 'Batch Print'. To the right, there is a detail view for a selected row, showing 'NOA/Form Info' and 'NOA Reason' sections.

| Case # | Program | Type | Action | Reason Descr... | Elig Month | Corresponde... | Corresponde... | Li Actions |
|--------|---------|------|--------|-----------------|------------|----------------|----------------|------------|
| <      |         |      |        |                 |            |                |                |            |

**Notes:**

Printed Client Correspondence

1. Select the **Printed Client Correspondence** sub tab to search for and view printed Client Correspondences.

1095B- Health Coverage

- Select the **1095B - Health Coverage** sub tab, enter the search criteria and click **Load** to view the correspondences related to the health coverage for the selected case.

- Print a Form Manually.
  - Select the **Print a Form Manually** sub tab, enter the search criteria, click the **Load** button.

The screenshot shows the 'Print a Form Manually' search form in the Colorado Benefits Management System. The form includes several input fields for search criteria: Correspondence Type, Case ID, Claim ID, Program, Individual Name, Liab Individual, Provider, \*Form Name, and Form #. There are search buttons for the Provider and \*Form Name fields. Below the form is a table header with columns: Form Name, Form #, Correspondence Type, Case ID, Program, Variable Number, Value, Description, and Actions. At the bottom right of the form area are 'Batch Print' and 'Online Print' buttons.

**Notes:**

## Logout

Before we log out from the tool, lets;

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

The screenshot shows the user profile and navigation menu in the Colorado Benefits Management System. The user profile includes the name 'cees-SIT03.cs33.my.salesforce.com' and options for 'Settings' and 'Log Out'. The navigation menu includes 'Status Open', 'Pending Alerts 0', 'Adult Financial RRR: 07/2019 - P', 'Food Assistance RRR: 07/2019 - P', and 'Medical Assistance RRR: 07/2019 - P'.





## Knowledge Check 3

Q3. Where is the Case Wrap Up tab located?

Ans:

## Additional Support

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

This document will be located at 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 a calendar of upcoming VILT 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 through the Benefits screens in the new CBMS.
- Navigate to the Correspondence pages.
- Navigate through the Eligibility Review pages in the new CBMS.