
Virtual Instructor- Led Training(VILT)

Income

Participant Guide for Transformation Phase II VILT

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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

Course Modules

Group Expectations/Housekeeping

Introductions

Participant Note: this is optional depending on the trainer

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

Notes:

Income Pages

Objectives:

After this section, you will be able to:

- Use Global Search to find and open a case.
- Navigate to Income pages in CBMS.
- Review all the tabs under Income pages.

What Do We Know?

Goal:

To navigate to the Income 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, 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.

Income pages

Objectives:

After this section, you will be able to:

- Navigate to the Income pages in CBMS.
- Review all the tabs under Income pages.

Navigation to Income pages

Navigation to the Income pages: Follow the steps below, to navigate to the Income related pages:

There are income screens in Interactive Interview and in the individual-level screens. We'll first review the Interactive Interview screen. Below are the steps to navigate to the Income Summary screen in Interactive Interview:

1. Open your assigned case.
2. On the Members screen (default screen when first opening a case), hover over **Actions** and select **Interactive Interview** to view the queue.
3. Scroll the chevrons to the right and click the **Income Summary** tab.

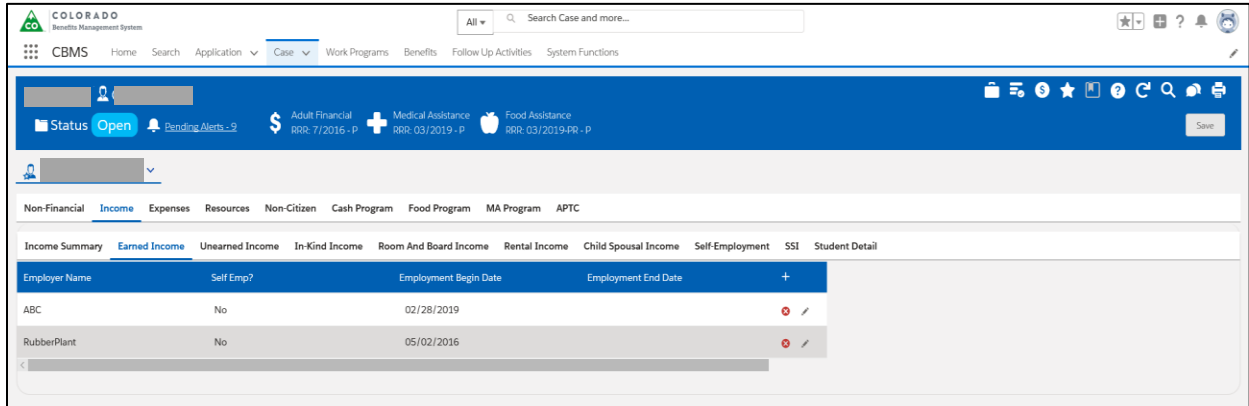
Notes:

Next, we'll review how to navigate to the individual-level income screens. Below are the steps to navigate to the individual-level Income screens:

1. Open your assigned case.
2. On the Members screen (default screen when first opening a case), click on a **Member Card**.
3. The Attributes screen under Non-Financial will be displayed by default. Click on the **Income** tab.

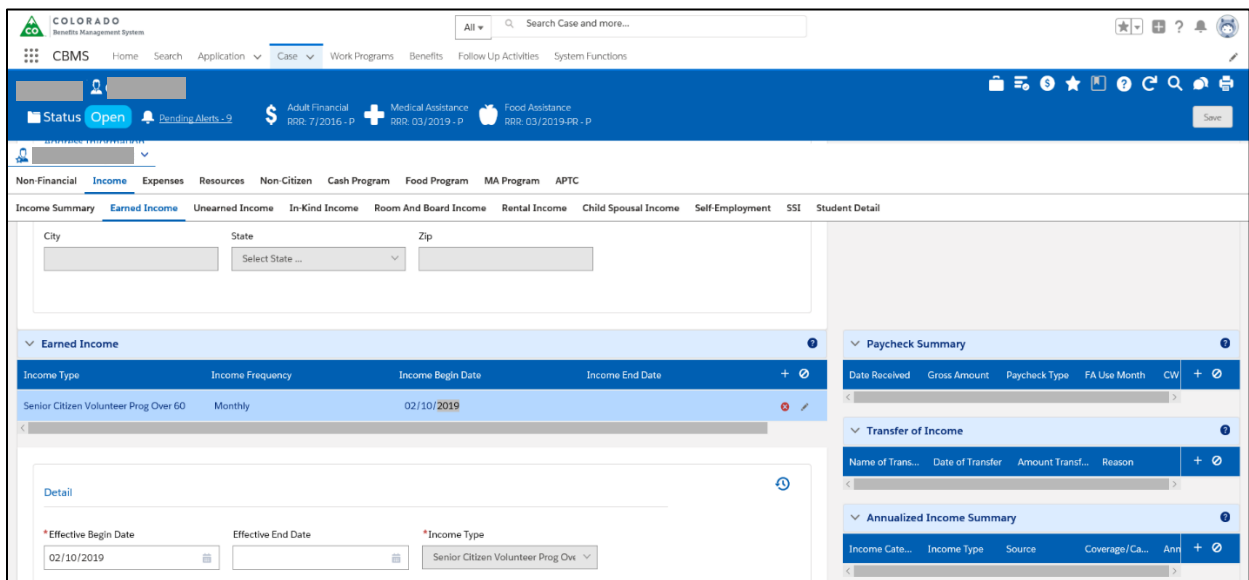
For this session, we'll review the following income screens:

- Income Summary
- Earned Income (see screenshot below)



Below are the steps to add a new **Check Stub** (see screenshot below).

1. Select an employment record in the **Employer** summary table to associate with the check stub.
2. Scroll down to the bottom of the screen and select an **Earned Income** record to associate with the check stub.
3. Then, click the + button in the **Paycheck Related List** (on the right side of the screen) to add a new record.



- Complete the required fields in the **Paycheck Summary** pop-up window (screenshot below) and click **Save** to record the check stub.

The screenshot shows a 'Paycheck Summary' pop-up window with the following fields:

- *Date Received**: Text input field with a calendar icon.
- *Total # of Hours Worked**: Text input field.
- *Gross Amount**: Text input field.
- *Paycheck Type**: Dropdown menu labeled 'Select Paycheck Type ...'.
- Private Disability Taxable Amount**: Text input field.
- Housing Allowance for Minister**: Text input field.
- Income from All/AN test**: Text input field.
- Taxable Amount**: Text input field.
- Verification**: Dropdown menu labeled 'Select Verification ...'.
- Source**: Dropdown menu labeled 'Select Source ...'.
- FA Use Month**: Text input field with format 'MM/YYYY'.
- CW Use Month**: Text input field with format 'MM/YYYY'.
- *Date Reported**: Text input field with a calendar icon.
- Date Verified**: Text input field with a calendar icon.
- Good Cause Reason**: Dropdown menu labeled 'Select Good Cause Reason ...'.
- Unavailable**: Radio buttons for 'Yes' and 'No'.

Buttons at the bottom of the window include 'Cancel', 'Save & New', and 'Save'. The background shows the 'Senior Citizen Volunteer Prog Over 60' record for 'Monthly' on '02/10/2019'.

Notes:

What Did You Learn?

- Unearned Income - The instructor will show you how to add an **Unearned Income** record (screenshot below).

Type	Frequency	Effective Begin Date	Effective End Date	
Social Security Disability	Monthly	01/01/2018		
SSI	Monthly	02/13/2007	08/31/2007	
SSI	Monthly	09/01/2007	08/31/2007	
SSI	Monthly	09/01/2007	08/31/2007	
Social Security Disability	Monthly	08/01/2007	12/31/2007	

The instructor will also review the **In-Kind Income**, **Student Detail**, and **Child-Spousal Income** screens (screenshots below).

- In-Kind Income

Type	Frequency	Effective Begin Date	Effective End Date	
Rent	Monthly	09/01/2007	09/30/2007	

- Student Detail

School Name	Type	Expected Graduation Date	Effective Begin Date	Effective End Date	Highest Grade Completed	
			11/29/2018			
			11/30/2018			

Notes:

■ Child Spousal Income

Type	Frequency	Effective Begin Date	Effective End Date
Alimony Direct	One Time Only	01/30/2019	

Logout

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

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

What Did We Learn?



Knowledge Check 1

Q1. Write steps to navigate to the Income pages?

Ans:



Knowledge Check 2

Q2. Write steps to add a new Check Stubs.

Ans:



Knowledge Check 3

Q3. Where can you locate Income Summary tab?

Ans:

Additional Support

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

This FAQ document is 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 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 to Income pages in CBMS.
- Review all the tabs under Income pages.