
Virtual Instructor-Led Training (VILT)

Resources

Participant Guide for Transformation Phase II VILT

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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:

Overview

Objectives:

After this section, you will be able to:

- Use Global Search for a case.
- Navigate to Resources screens in CBMS.
- Review and enter data in important Resources screens.

What Do We Know?

Goal:

To navigate through Resources screens in the new CBMS.

Global Search

Objectives:

After this section, you will be able to:

- Use Global Search to find and open 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.

Resources Screens

Objectives:

After this section, you will be able to:

- Navigate to the Resources screens.
- Review all screens in this queue.

Navigation to the Resources screens: Follow the steps below to navigate to Resources screens:

- From the **Members page**, click the **Household Member Card**.
- Click the **Resources tab**.
- Review and explain each of the screens.

Let us review all the screens under Resources.

The first sub-tab is **Resource Summary**, where you can see all resources entered for that individual.

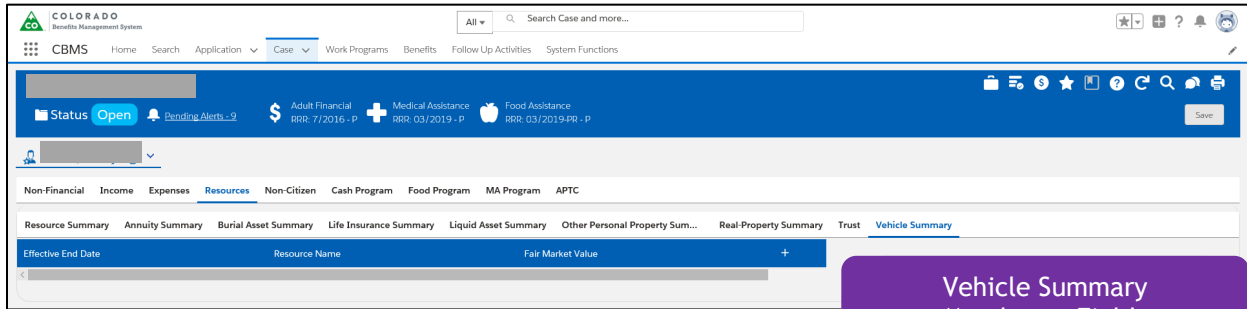
The screenshot displays the Colorado Benefits Management System (CBMS) interface. The top navigation bar includes 'Home', 'Search', 'Application', 'Case', 'Work Programs', 'Benefits', 'Follow Up Activities', and 'System Functions'. The 'Resources' tab is selected in the main navigation. Below the navigation, there are several resource summary cards for different types of resources: Annuity Resource, Burial Asset Resource, Life Insurance Resource, and Liquid Asset Resource. Each card shows a table with columns for Effective End Date, Resource Name, Date Established, Type, Policy #, Account Number, and Fair Market Value. A green callout box on the right side of the screenshot contains the following text:

Resource Summary

- Scroll down and view the details.
- Click each of the different Resource tabs.

The instructor will display and review the Vehicle Summary and Liquid Asset Summary sub-tabs, where you can practice data entry. Screenshots of these screens are shown below.

Click the + sign on the **Vehicle Summary** screen to add a vehicle record.

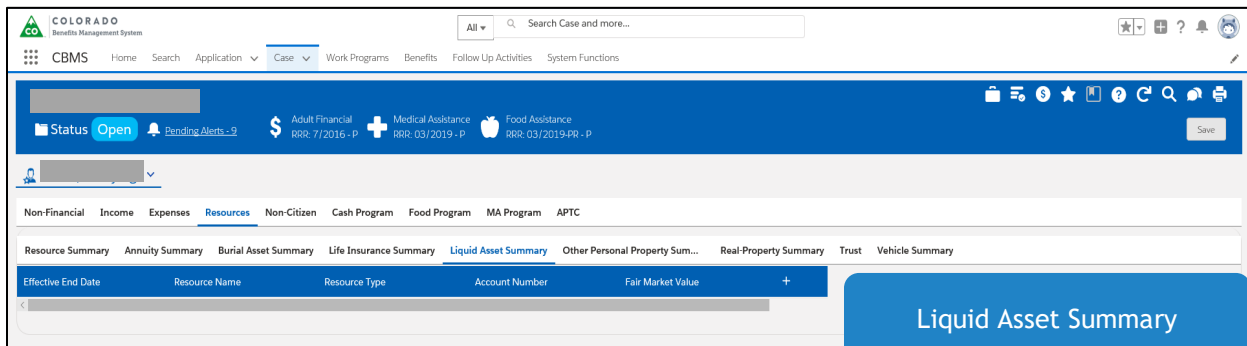


Vehicle Summary Mandatory Fields

- Effective Begin Date
- Resource Name
- Fair Market Value
- Type
- Date Reported

Notes:

Click the + sign on the **Liquid Asset Summary** screen to add a liquid asset record.



Liquid Asset Summary

- Effective End Date
- Resource Name
- Resource Type
- Account Number
- Fair Market Value

Notes:

The instructor will review the other resource sub-tabs (but you won't practice data entry), which are:

- **Annuity Summary.**
- **Burial Asset Summary.**
- **Life Insurance Summary.**
- **Other Personal Property Summary**
- **Real-Property Summary.**
- **Trust.**

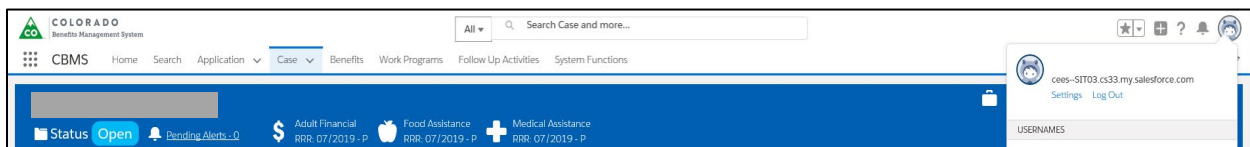
The instructor will show you how to dispose of a resource by adding a record to the Disposition Details Related List with the following steps:

1. Navigate to the Resource screen (in this case Vehicle Summary).
2. Click on the row of the summary table of the vehicle for which you to dispose; the Disposition Details Related List will be displayed on the right.
3. Click the + icon of the Disposition Details Related List to add a record.
4. In the pop-up window, fill out the mandatory fields and click **Save**.

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. Once you've opened a case, how do you navigate to the Resource screens?

Ans:



Knowledge Check 2

Q2. On any of the Resources screens, what do you click to add a record?

Ans:



Knowledge Check 3

Q3. What information must be entered under Vehicle Summary?

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.

Upcoming Sessions

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 Resources screens in CBMS.
- Review and enter data in important Resources screens.