
Virtual Instructor- Led Training (VILT)

Expenses

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

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:

Overview

Objectives:

After this section, you will be able to:

- Use Global Search to find and open case.
- Navigate to Expense screens in CBMS.
- Review and enter data on Expense screens.

What Do We Know?

Goal:

To navigate through Expense screens 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.

Expense Screens

Objectives:

After this section, you will be able to:

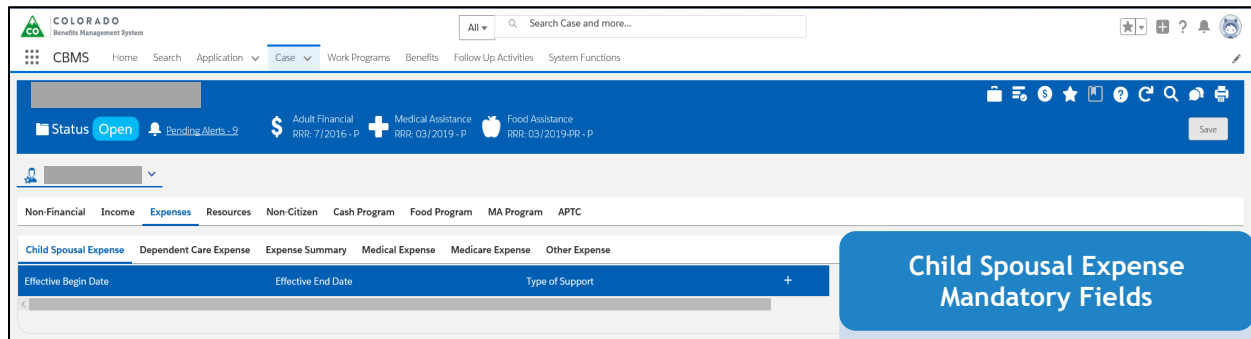
- Navigate to the Expense screens.
- Review all screens in this queue.

Navigation to the Expenses screens: Follow the steps below, to navigate to the Expenses screens:

- From the **Members page**, click a **Household Member Card**.
- Click the **Expenses tab**.

Let us review all the screens under Expenses.

The first screen is the **Child Spousal Expense** screen. Click the + sign to add a record. Practice data entry on this screen.



The screenshot shows the Colorado Benefits Management System (CBMS) interface. The 'Expenses' tab is selected, and the 'Child Spousal Expense' screen is active. The table below shows the mandatory fields for this expense type:

Effective Begin Date	Effective End Date	Type of Support	
			+

Child Spousal Expense Mandatory Fields

- Effective Begin Date
- Type of Support
- Frequency
- Verification
- Date Reported

Notes:

The next screen is the **Dependent Care Expense** screen. Click the + sign to add a record. Practice data entry on this screen.

The screenshot shows the Colorado Benefits Management System (CBMS) interface. At the top, there is a search bar and navigation tabs for 'Case', 'Work Programs', 'Benefits', 'Follow Up Activities', and 'System Functions'. Below this, there are status indicators for 'Adult Financial', 'Medical Assistance', and 'Food Assistance'. The main content area shows a navigation menu with options like 'Non-Financial', 'Income', 'Expenses', 'Resources', 'Non-Citizen', 'Cash Program', 'Food Program', 'MA Program', and 'APTC'. Under the 'Expenses' tab, there are sub-tabs for 'Child Spousal Expense', 'Dependent Care Expense', 'Expense Summary', 'Medical Expense', 'Medicare Expense', and 'Other Expense'. The 'Dependent Care Expense' sub-tab is active, displaying a table with columns: 'Effective Begin Date', 'Effective End Date', 'Dependent Name', and 'Provider Name'. A '+' sign is visible in the top right of the table. A purple callout box on the right side of the screen lists the 'Dependent Care Expense Mandatory Fields': Effective Begin Date, Dependent Name, Care Type, and Date Reported.

- Dependent Care Expense Mandatory Fields**
- Effective Begin Date
 - Dependent Name
 - Care Type
 - Date Reported

Notes:

What Did We Learn?

The next screen is the **Medical Expense** screen. Click the + sign to add a record. Practice data entry on this screen.

Provider Name	Expense Type	Effective Begin Date	Effective End Date	
acct brokers larmier	Medical	03/01/2013	03/31/2013	+ /
poudre valley	Medical	03/01/2013	03/31/2013	+ /
kroger	Prescriptions	04/01/2016	03/31/2018	+ /
	Medical	05/26/2016	03/31/2017	+ /
	Medical	03/01/2017	03/31/2018	+ /

Medical Expense Mandatory Fields

- Effective Begin Date
- Expense Type
- Frequency
- Date of Service
- Expense Ongoing
- Verification
- Date Reported

Notes:

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

- **Medicare Expense.**
- **Other Expense.**
- **Expense Summary** (where you can see all expenses entered for that individual).

The other screen where expenses are entered is Shelter Expense (rent, utilities, etc.).

Below are the steps to navigate to the **Shelter Expense** screen (the instructor will show how to navigate to this screen and will review it with the class).

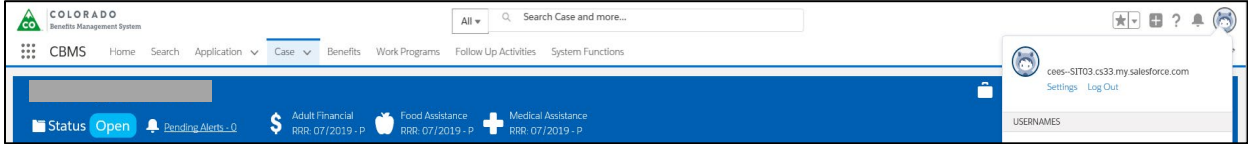
1. Open your assigned case.
2. Click the **Shelter Expense** tab.

Notes:

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?

Lined area for writing notes.



Knowledge Check 1

Q1. What are the mandatory fields on the Medical Expenses screen?

Ans:



Knowledge Check 2

Q2. Write the steps to navigate to the Shelter Expense?

Ans:



Knowledge Check 3

Q3. Name the screen under which you can find Provider's Name.

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 you can take when on your own time that provide more details on 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 to find and open case.
- Navigate to Expense screens in CBMS.
- Review and enter data on Expense screens.