



CBMS Enhancements April 2020



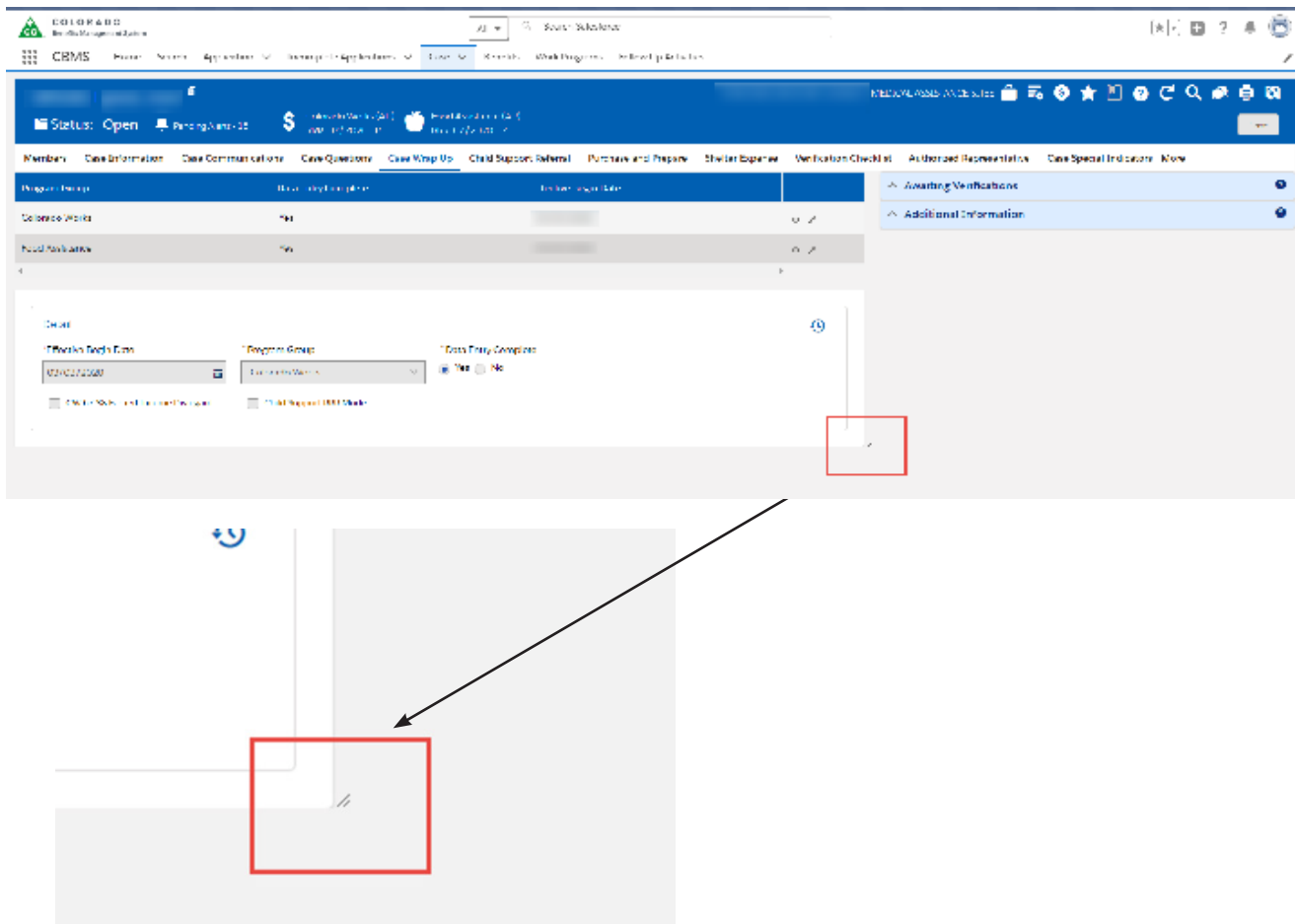
COLORADO
Health Care & Economic Security
Staff Development Center

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Release Date: April 2020



13754 Change Ratio of Main Screen to Related List

- All screens with a related list will now have the option to be resized by the user. When the user resizes the primary screen, the related lists will also be resized.
- If the main screen is made narrower, the related lists will automatically become wider to fill the page.
- When user navigates away from a screen they have resized, and returns to that screen, the default ratio will be displayed.



13738 CBMS Interface Page Enhancements

This project provides updates to the Interfaces Summary page that will reduce and simplify county users' work effort and improve accuracy.

- The Interfaces Summary page will be modified to allow users to view and take action on one page. This one page will show all household members.
- Users will be able to select one or more individuals and will be able to select one or more services to run for the customer.

The screenshot shows the 'Interfaces Summary' page with a search bar and a table of data. The table has columns for Last Name, First Name, IVES BENDEX, IVES CDLE, IVES SDX, SOLQ SCHIP, DRIS, IVES UBI, PARIS, SVES, and SSA CD. Below the table, a 'Rerun Service Call' button is highlighted with a red box. An arrow points from this button to the 'Rerun Service' dialog box shown in the next image.

The 'Rerun Service' dialog box is shown with two sections: 'Choose Service to Rerun' and 'Choose Individuals'. The 'Choose Service to Rerun' section has a list of services including DMV Identity, SVES, Verify Lawful Presence, SOLQ/SCHIP, and SSA Composite. The 'Choose Individuals' section has a list of individuals. A red box highlights the 'Interface Run' button at the bottom right.

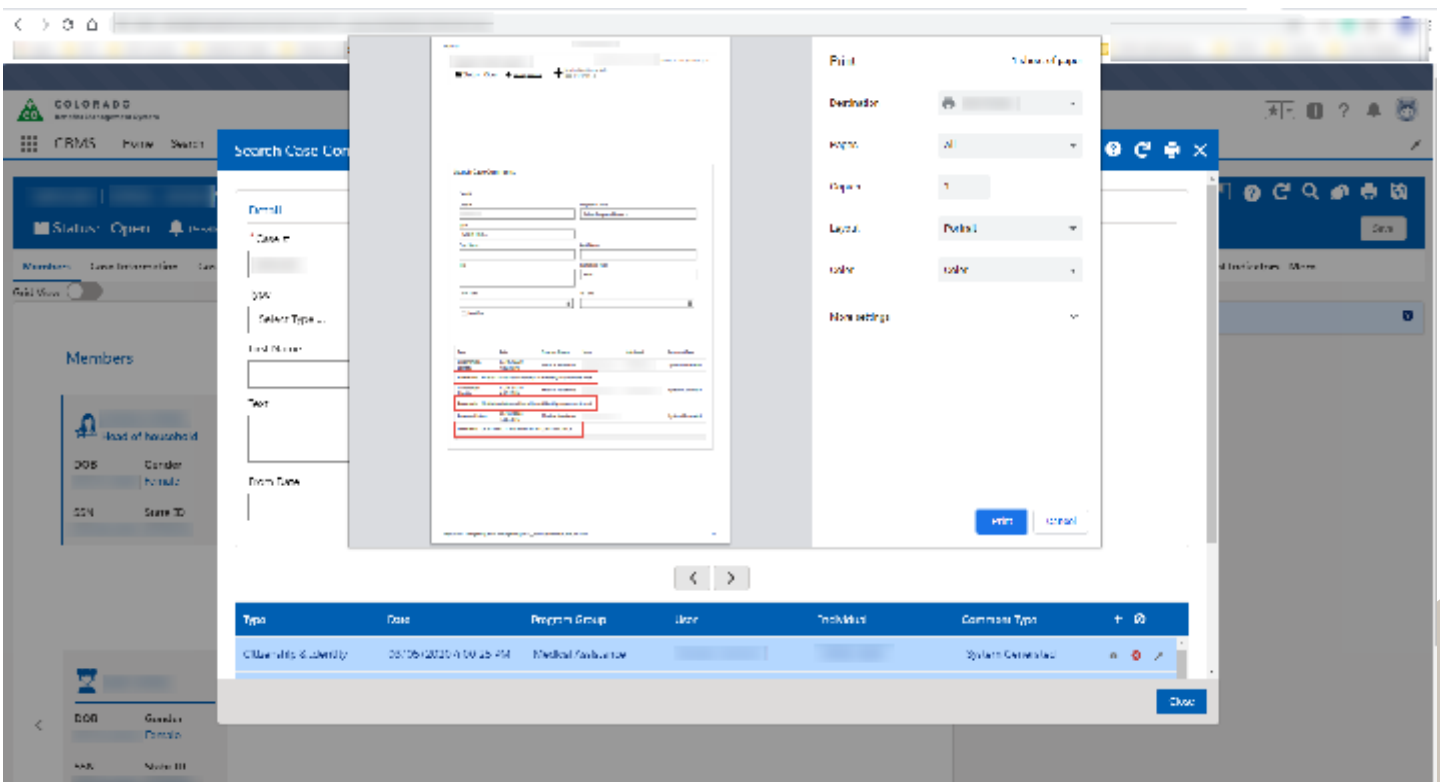


13735 Case Comments Improvements

Case comments are vital tools for maintaining cases and communicating to coworkers in CBMS. With this update, more comments will be viewable at one time in CBMS. This project will simplify county users' work effort, improve accuracy, and reduce the time needed to find case comments.

There are 4 enhancements with this project:

1. On the Search Case Comments screen, the user will be able to perform a search for key words using the Text field, or by selecting the print icon and using Control + F to search Comments screen or by selecting the print icon from the Search Case Comments screen and then using Control F on the print screen.
2. In the new easy to read layout, the "Comments" field will be bold to help distinguish each comment from the next.



13735 Case Comments Improvements

This screenshot shows a detailed view of a case comment within a web application. At the top, there is a table listing comments with columns for user, date, and comment text. Below this is a 'Detail' section with the following fields:

- Case #:** A text input field.
- Type:** A dropdown menu.
- Program Group:** A dropdown menu with the text 'Select Program Group ...'.
- Date:** A date picker set to 'Nov 25, 2019'.
- Time:** A time picker set to '3:33 AM'.
- Individual:** A dropdown menu.
- System Generated Comment:** A large text area containing a system-generated message.
- *Enter Comment:** A text area for user input.

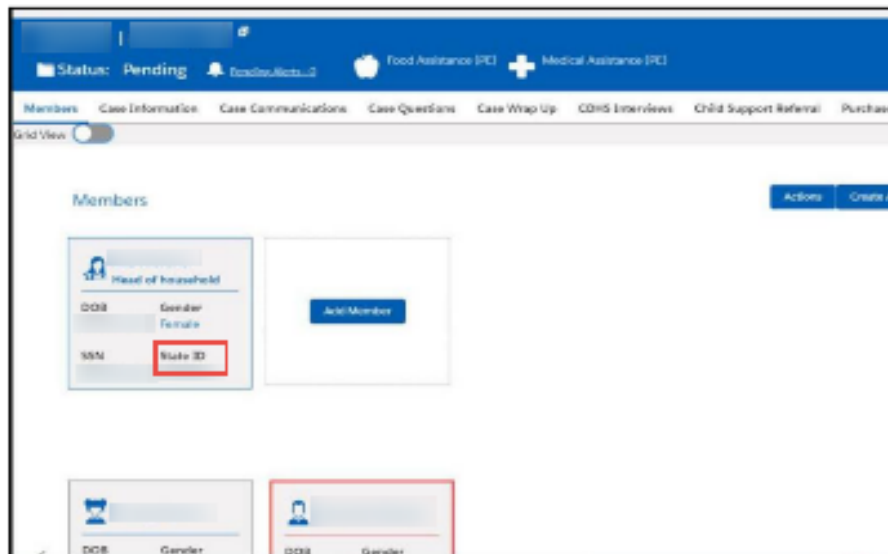
This screenshot shows the same case comment form as above, but it is presented as a modal window titled 'Maintain Case Comments' overlaid on a larger application interface. The background interface includes a search bar, a 'Search Case Comments' button, and a sidebar with navigation options like 'Status: Pending', 'Members', and 'Case Information'. The modal form contains the same fields as the first screenshot, including 'Case #', 'Type', 'Program Group', 'Date', 'Time', 'Individual', 'System Generated Comment', and 'Enter Comment'. At the bottom of the modal, there are buttons for 'Cancel', 'Save & New', and 'Save'.



13733 Improve Member's Page, Member Card, PEAK Inbox & Member Search

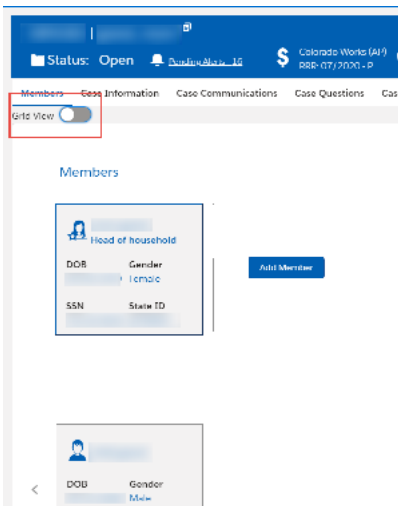
This project provides numerous enhancements to the Member's Page

1. The Member Card will now include the customer's State ID
2. New Related Lists will be available on the Member's Page
 - a. Program, including Expedited Food Assistance Indicator
 - b. Application List
 - c. Case Payee
 - d. Member Dates
 - e. Case Members
 - f. Med Spans
3. The Program Related List from Search on Case Information will replace the existing Program Related List on the Member's Page

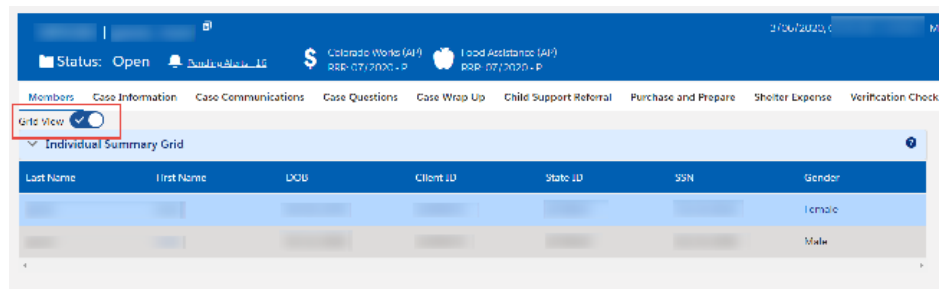


13733 Improve Member's Page, Member Card, PEAK Inbox & Member Search

4. A summary data grid has been added to the Member's Page with the following columns
- Last Name
 - First Name
 - DOB
 - Client ID
 - State ID
 - SSN
 - Gender



Users can toggle between the Member Card View and the Grid View



13733 Improve Member's Page, Member Card, PEAK Inbox & Member Search

5. A new "Companion Cases & Status" Related List has been added and will display when an individual is selected in the grid view. The Related List will have the following columns for each companion case:
 - a. Individual Name
 - b. Case #
 - c. Case Name
 - d. Status
 - e. Status Date
 - f. Applied for SSI (Y/N)
 - g. Medicare Buy In (Y/N)
 - h. In Nursing Facility (Y/N)

The screenshot displays a web application interface. At the top, there is a navigation bar with a status indicator 'Status: Open', a notification bell, and two account balances: 'Colorado Works (AP) 1886.07/2020' and 'Front Assistance (AP) 1886.07/2020'. The main navigation menu includes: Members, Case Information, Case Communications, Case Questions, Case Wrap Up, Child Support Referral, Purchase and Prepare, Shelter Expense, Verification Checklist, Authorized Representation, and Case Special Tr. Below the navigation, there is a 'Grid View' toggle and a section titled 'Individual Summary Grid'. This section contains a table with columns: Last Name, First Name, DOB, Client ID, State ID, SSN, and Gender. Two rows are visible, one for a female and one for a male. To the right of the grid is a sidebar with expandable sections: Programs, Application List, Case Payee, Member Dates, Case Members, Medical Assistance Eligibility Spans, Companion Cases and Status (highlighted with a red box), and Inquire on Closure Reasons.



13733 Improve Member's Page, Member Card, PEAK Inbox & Member Search

- The details section of the PEAK Inbox has been removed. If the user clicks the pencil icon to edit the record the details section will be displayed.

The screenshot shows the 'PEAK Inbox Search' interface. At the top, there is a search bar and navigation tabs including 'Application', 'Incomplete Applications', 'Case', 'Benefits', 'Work Programs', and 'Follow Up Activities'. Below the navigation, there are search filters for 'Program Type', 'First Name', 'Last Name', 'SSN', 'Case #', 'RTE Status', 'Application Status', 'Application Type', 'MA Type', 'App Submit From Date', and 'App Submit To Date'. A 'Search' button is located to the right of these filters. Below the filters, a table displays search results. The table has columns for 'App Type', 'Tracking #', 'Program(s) R...', 'Program(s) A...', 'RRR Program...', 'MA Case #', 'Non MA Case...', 'RMC Case #', 'Expire(d) RA...', and 'ACP'. The first row is highlighted in blue, and a red box highlights the pencil icon in the 'ACP' column of this row. Below the table, there are buttons for 'Update', 'Invalidate', 'View PDF', 'Manual Process', and 'Process Application'.

The screenshot shows the 'Detail' view of a record from the PEAK Inbox Search. The 'Detail' tab is selected and highlighted with a red box. The form contains the following fields: 'Non MA Case ID', 'Non MA App Number', 'Tracking #', 'Submit Date' (with a date picker set to 'Mar 4, 2020' and a time picker set to '11:38 AM'), 'FA Hardship Code', 'County' (with a dropdown menu set to 'MEDICAL ASSISTANCE SITES'), 'Application Status' (with a dropdown menu set to 'Submitted'), 'Program(s)' (with a dropdown menu set to 'MA'), 'RTE Status' (with a dropdown menu set to 'Non RTE - Medicare Submitted'), 'Retro MA Months', 'Name', 'DOB', 'SSN', 'Address', 'Phone', 'MA RTE Application #', 'MA Case #', 'RMC case id', 'Other App #', and 'Other Case #'. At the bottom right of the form, there are buttons for 'Close', 'Save & New', and 'Save'.



13739 CBMS EDMS Case ID Pre-Populate & Pre-Load Results

When clicking on the EDMS icon from within a case, the case ID will pre-populate, and will also pre-load the search results, saving two clicks and a paste.

The screenshot displays the CBMS EDMS interface. At the top, there is a navigation menu with options like 'Home', 'Search', 'Applications', 'Case', 'Reports', 'Work Programs', 'Online Up-Load Files', 'System Controls', 'Security Information', 'Casebook Profiles', 'Office', and 'Help'. Below the navigation is a search form with various input fields: 'Search Criteria', 'Institution Name', 'Case ID', 'Document Type', 'Document Sub Type', 'Main Meeting #', 'Application #', 'Security Name', 'Doc Upload Date', and 'Doc Upload To Date'. A 'Search' button is located at the bottom right of the form. Below the search form is a table with the following columns: 'Equipment Category Code', 'Case ID', 'Institution Name', 'Main Meeting #', 'Application #', 'Document Type', 'Document Sub Type', 'Equipment Sub Type', 'Type', and 'Description'. The 'Case ID' column is highlighted with a red box. Below the table is a 'Update Document' section with 'Document Type' and 'Verification' dropdown menus.

Equipment Category Code	Case ID	Institution Name	Main Meeting #	Application #	Document Type	Document Sub Type	Equipment Sub Type	Type	Description
04114 CD08					Verification	Y			Resonance
04114 CD08					Verification	Y			PROTON
04114 CD08					Identification/Classify	Y			Dot
04114 CD08					Verification	Y			PROTON
04114 CD08					Verification	Y			Resonance



13717 Redesign NSDC Page & Add Client Name to BI/BR

Updates have been made to the Claim Summary screen:

1. A new Head of Household column will be added on the Claim Summary screen and will be populated with the Head of Household for the case.
2. A new Case Number column will be added on the Claim Summary screen and will be populated with the case number for the claim.

The screenshot shows the 'Claim Summary' screen. Under 'Search Criteria', there are radio buttons for 'Claim #', 'Case #', and 'Individual'. Below these are input fields for 'Claim #', 'Case #', and 'Individual'. A 'Load' button is to the right. Below the search area is a table with the following columns: Claim #, Case #, Head of Hous..., Judgment, Start Date, End Date, Discovery Date, Program Group, Status, Status Date, and Reason. The 'Case #' and 'Head of Hous...' columns are highlighted with red boxes. Below the table are buttons for 'Claim Status', 'Offset Override', 'Override Claim Error Type', 'Initiate Recoupment', 'Establish Claim', and 'Unestablish Claim'.

Updates have been made to the CDHS Claim Sheet screen:

3. A new Head of Household column will be added on the CDHS Claim Sheet screen.

The screenshot shows the 'CDHS Claim Sheet' screen. Under 'Search Criteria', there is a 'Claim #' input field and a 'Search' button. Below the search area is a table with the following columns: Claim #, Head of Household, Amount of Claim, Amount of EBT Expunged Benefits, if any..., Balance of Claim, if any, and Reason for Overpayment. The 'Head of Household' column is highlighted with a red box. Below the table is a 'CC Request' button.



13717 Redesign NSDC Page & Add Client Name to BI/BR

Updates have also been made to the Repayment Details screen:

1. A Head of Household column will be added to the Repayment Detail screen and will populate with the Head of Household name.

The screenshot shows the 'Repayment Details' screen. At the top, there are navigation tabs for 'Benefit Issuance' and 'Benefit Recovery'. Below that, there are several tabs: 'Benefit Discrepancy', 'Claim Information', 'Judgment Claims', 'Interim Assistance Reimbursers', 'Non-System Determined Claim', 'Tax Intercept', and 'FS36A'. The 'Repayment Detail' tab is selected. There is a 'Search Criteria' section with a 'Case #' input field and a 'Search' button. Below that is a 'Detail' section with fields for 'Repayment Method', 'Recorded Date', 'Check/MO', 'Received Date', 'Amount', and 'Unallocated Amount'. At the bottom, there is a table with the following columns: 'Claim #', 'Head of Household', 'Program Group', 'Error Type', 'Under Judgment', 'Balance', 'Originating County', 'Allocated Amt.', and 'Fees'. The 'Head of Household' column is highlighted with a red box. There is also a 'Print Receipt Information' link at the bottom.

Additionally, updates have been made to the Search for Issuance screen:

1. Case Payee name will be added as a column on the Search for Issuance screen.

The screenshot shows the 'Search for Issuance' screen. At the top, there are navigation tabs for 'Benefit Issuance' and 'Benefit Recovery'. Below that, there are several tabs: 'Search for Issuance', 'Maintain Card Requests', 'Display Total Aid Paid', and 'Search for Non-System Determ'. The 'Search for Issuance' tab is selected. There is a 'Detail' section with fields for 'Individual', 'Provider', 'Issuance Type', 'Issuance Method', 'Case #', 'Program Group', 'Benefit #', 'From Date', 'SSN', 'Payment Type', 'County Warrant #', and 'To Date'. There is a 'Search' button. At the bottom, there is a table with the following columns: 'Case #', 'Case Payee', 'Program Group', 'Program', 'SSN', 'Benefit Month', 'Issuance Am...', 'Payment Type', 'Issuance Stat...', 'Status', and 'Display Failure Reasons'. The 'Case Payee' column is highlighted with a red box. There are also 'Record Affidavit' and 'Generate Affidavit' buttons at the bottom.



13717 Redesign NSDC Page & Add Client Name to BI/BR

Enhancements have been made to the Non-System Determined Claim Monthly Details related list

1. The Non-System Determined Claim Monthly Details related list will be modified so the Correct Benefit, Offset Amt. and O/P can be updated for all months instead of updating each month separately.
2. User will be able to enter different values for each row and save all for updates.
3. The CDHS Claim Sheet for a Non-system Determined Claim (NSDC) will auto populate the Allotment Amount in Benefit Issued Summary and the Correct Benefit Summary section based on the data entered on the NSDC screen monthly details.
4. The CDHS Claim Sheet for a Non-system Determined Claim (NSDC) will auto populate the Correct Benefit Summary section based on the data entered on the NSDC screen monthly details.

The screenshot displays the 'Non-system Determined Claim Monthly Details' table and the 'Create/Revise Non-system Determined Claim' form.

Start Date	End Date	Error Type	Payment Type	Benefit Issued	Correct Benefit	Offset Amt.	O/P
11/01/2019	11/30/2019	Client Error		300	100		300
12/01/2019	12/31/2019	Client Error		300	100		300
01/01/2020	01/31/2020	Client Error		300	100		300
02/01/2020	02/29/2020	Client Error		300	100		300
03/01/2020	03/31/2020	Client Error		300	100		300

The 'Create/Revise Non-system Determined Claim' form includes the following fields:

- *Cause: 06/01/2020, 06/01/2020, DRIVER
- Change Reported Date: 03/01/2019
- *Program Group: Food Assistance, *Program: Food Stamp, Assistance: No, Segregated Funding: Select Segregated Funding...
- *Error Type: Client Error, *Discovery Date: 03/01/2020, *Discovery Source: Fraud Investigation, *Disciplinary Reason: Violate timely reporting
- *Reason for Manual Claim: Fraudulent Duplicate Issuance, *Originating County/State: CO, Term: CO, County: Select County...

