Course Map for

Adult Financial Certificate Plan

* ***Prerequisites***: *MAGI , Non-MAGI & SNAP Certificate Plans*

Program Information
1 WBT

General Eligibility
3 WBTs
1 ILT

Interviews
4 WBTs
1 ILT

Interfaces & Verifications
2 WBTs

Household Comp
2 WBTs
1 ILT

HLPG Specific
1 WBTs
1 ILT

Income
6 WBTs
1 ILT

Resources
2 WBT
1 ILT

Putting It All Together
3 WBTs
1 ILT

Cert Periods/ Changes
2 WBTs

RRR/ Renewal
2 WBTs

Nesting Period
Practice and shadow to become comfortable and confident in the program

Adult Financial Certificate
Participants must successfully pass 2 Assessments to receive the certificate of completion

*Note- Volumes in Grey are required for this Certificate Plan and may have been completed in a previous Certificate Plan

Estimated Total Time to Complete:
~21 hours (WBTs + ILTs)

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Program Information

For Adult Financial Certificate Plan

Overview

This document is the lesson plan for the **Program Information** volume as it relates specifically to CDHS programs. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Program Information and Navigating State Resources for CDHS

- Participants will learn how to find and use the resources they need for CDHS programs.

These WBTs are taken at the participant's own pace - estimated to take about 30 minutes total time to complete. Keep in mind, the total time to complete is all dependent on the learner.

*****Note- This Volume may have already been completed during the SNAP Certificate Plan*****

Resources

There are several websites referenced in this volume, as well as where to find/locate information within Rules and Regulations.

Reminders

Participants who completed this volume with the SNAP Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

General Eligibility

For Adult Financial Certificate Plan

Overview

This document is the lesson plan for the **General Eligibility** volume as it relates specifically to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Participants should have already completed other required WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Adult Financial are:

General Eligibility: Non-Citizens & Sponsors

- Some non-citizens are eligible to receive public assistance benefits. This training will help you understand the rules around this process.

General Eligibility for Adult Financial

- Discover the criteria that make Adult Financial eligibility requirements unique.

These WBTs are taken at the participant's own pace - estimated to take about 20 minutes total time to complete. Keep in mind, the total time to complete is all dependent on the learner.

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***General Eligibility Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Recall eligibility requirements for Adult Financial
2. Apply non-citizenship and sponsor requirements to Adult Financial cases
3. Demonstrate accurate eligibility data entry for General Eligibiity requirements

This ILT component will take approximately 2 hours and is facilitated by an SDD Certified Trainer.

Resources

Important documents referenced in this volume: *(not limited to)*

- Citizen/Non-Citizen Desk Aid
- Non-Citizen Flowchart
- Non-Citizens Acceptable Documents and Class Codes
- Guide to Seleccted U.S. Travel and Identity Documents
- Sponsor Exceptions Desk Aid
- Entering a Non-Citizen PM
- Entering a Sponsor in CBMS PM
- Entering Identification Details PM

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan unless they want to.

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Interviews

For Adult Financial Certificate Plan

Resources

Important documents referenced in this volume: *(not limited to)*

- Interview Program Requirements Desk Aid
- Completing the CDHS Scheduling Interview Page Process Manual (PM)
- Completing the CDHS Interviews Attendance Page PM
- Interview Checklist

Reminders

Participants who completed this volume with the SNAP Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

Overview

This document is the lesson plan for the **Interviews** volume as it relates specifically to CDHS Programs. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Program Requirements for Interviews

- This training covers the interview requirements for eligibility workers. Each High Level Program Group (HLPG) has different interview requirements for eligibility determination.

Scheduling Interviews

- Explore the CDHS Scheduling Interviews page and how it is used to track the date, time, and location of a scheduled interview

Interview Techniques

- This training explores the goals, best practices, and techniques of interviewing.

Interview Attendance

- Explore the CDHS Interviews Attendance page and how it is used to document a client's attendance of a scheduled interview

These WBTs are taken at the participant's own pace - estimated to take about an hour total time to complete. Keep in mind, the total time to complete is all dependent on the learner.

****Note- This Volume may have already been completed during the SNAP Certificate Plan****

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***Interviews*** and may have been completed during SNAP Certificate Plan**.** During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Recall interview requirements that apply to CDHS programs
2. Practice Interview process and techniques using real-life client scenarios
3. Demonstrate data entry requirements for interview scheduling and attendance in CBMS

Note: This volume may have already been completed during the SNAP Certificate Plan

Interfaces & Verifications

For Adult Financial Certificate Plan

Resources

Important documents referenced in this volume: *(not limited to)*

- NDNH - Action Guide
- DRS IPV - Action Guide
- CLDE MyUI - Action Guide
- SSA Incarceration - Action Guide
- SVES - Action Guide
- Entering and Curing Non-Compliance
- Completing Rescind or Reinstate Function in CBMS
- IEVS research Flow Chart Desk Aid
- SVES SSN Code Map
- SVES Title II Code Map
- SVES Title XVI Code Map

Reminders

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

Overview

This document is the lesson plan for the **Interfaces and Verifications** volume as it relates to all HLPG Certificate Plans. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Verifications

- Identify the types of verifications, how they are used, and how to act on them.

Interfaces

- Identify the functions of both internal and external Interfaces and when to engage with them in CBMS.

These WBTs are taken at the participant's own pace - estimated to take 40 minutes total time to complete.

****Note- This Volume may have already been completed during the MAGI Certificate Plan****

Instructor-Led Training (ILT)

- No ILT requirement.

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Household Composition

For Adult Financial Certificate Plan

Resources

Important documents referenced in this volume: *(not limited to)*

- Household Composition Adult Financial Desk Aid

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Overview

This document is the lesson plan for the ***Household Composition*** volume as it relates specifically to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

"Participants should have already completed other required WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Adult Financial are:

Household Composition: Adult Financial Specific

- This training provides an overview of Adult Financial specific considerations for Household Composition.

These WBTs are taken at the participant's own pace - estimated to take about 20 minutes total time to complete.

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***Household Composition Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Determine Household Composition for Adult Financial Categories
2. Demonstrate the ability to data enter required information in CBMS

This ILT component will take approximately 1-2 hours and is facilitated by an SDD Certified Trainer.

HLPG Specific

For Adult Financial Certificate Plan

Overview

This document is the lesson plan for the ***High Level Program Group (HLPG) Specific*** volume as it relates to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Adult Financial Categories and Special Circumstances

- This training provides an overview of all Adult Financial categories and programs, and the eligibility and data entry requirements necessary for each.

These WBTs are taken at the participant's own pace - estimated to take about 20 minutes total time to complete.

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***HLPG Specific Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Recall key case information that differentiates Adult Financial categories
2. Categorize Adult Financial eligibility based on scenarios
3. Demonstrate accurate data entry for AND-SO and OAP requirements in CBMS

This ILT component will take approximately 2 -3 hours and is facilitated by an SDD Certified Trainer.

Resources

Important documents referenced in this volume: *(not limited to)*

- AF Reference Guide
- Electronic Med-9 Form
- Fillable IM-14 Form
- Interim Assistance Reimbursement IAR Processing Manual
- Medical Conditions Desk Aid
- Financial Programs Processing Guidelines
- AF Burial Processing Desk Aid

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Income

For Adult Financial Certificate Plan

Overview

This document is the lesson plan for the ***Income*** volume as it relates to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Participants should have already completed other required WBTs in previous Certificate Plans. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Adult Financial are:

Income Considerations: Adult Financial

- This training is intended to be an explanation of how CBMS considers income for MAGI and any additional data entry requirements not already trained in Income Basics.

Data Entry for Potential Income Pages

- This training provides information on requesting Potential Income verification without negatively impacting other programs.

These WBTs are taken at the participant's own pace - estimated to take about 40 minutes total time to complete.

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***Income Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Analyze Adult Financial cases for Income Calculation
2. Demonstrate accurate data entry for different scenarios
3. Demonstrate accurate data entry for ISM for OAP/AND-CS cases

This ILT component will take approximately 2-3 hours and is facilitated by an SDD Certified Trainer.

Resources

Important documents referenced in this volume: *(not limited to)*

- Countable and Exempt Income
- AF Non-Recipient Spouse Income Deeming AND-SO Worksheet
- AF Non-Recipient Spouse Income Deeming OAP Worksheet
- AF Sponsor Desk Aid
- AF $20 Disregard Flowchart
- ISM Desk Aid for OAP and AND-CS
- Adding an ISM PM
- Entering S-Corp/LLC Income PM
- Self-Employment Desk Aid
- Self-Employment Allowance Business Expense Desk Aid
- S-Corp/LLC Desk Aid
- Entering Self-Employment Process Manual

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Resources

For Adult Financial Certificate Plan

Overview

This document is the lesson plan for the ***Resources*** volume as it relates to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Participants should have already completed other required WBTs in the Non-MAGI Certificate Plan. Refer to the Non-MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the Non-MAGI Certificate Plan, the following WBTs specifically for Adult Financial are:

Resource Considerations for Adult Financial

- This training provides an overview of how Resources are considered for Adult Financial programs

This WBT is taken at the participant's own pace - estimated to take about 20 minutes total time to complete.

Instructor-Led Training (ILT)

Once the WBTs are complete, the participants will then move to the instructor-led component. This course is titled ***Resources Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Analyze scenarios of Resources considered for Adult Financial
2. Analyze scenarios for TWFC and POI for Adult Financial
3. Demonstrate accurate data entry of Resources for Adult Financial Eligibility in CBMS

This ILT component will take approximately 2-3 hours and is facilitated by an SDD Certified Trainer.

Resources

Important documents referenced in this volume: *(not limited to)*

- Countable and Exempt Resources Desk Aid
- OAP Medical Assistance Flowchart
- Life Insurance and Burial Policies Desk Aid
- AF TWFC Desk Aid
- Entering Vehicle Value for AF Process Manual (PM)
- Entering Liquid Asset Process Manual (PM)

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Putting It All Together

For Adult Financial Certificate Plan

Resources

Multiple desk aids and User Guides will be provided and discussed during this volume.

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

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Overview

This document is the lesson plan for the ***Putting It All Together*** volume as it relates to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Participants should have already completed other required WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Adult Financial are:

Wrap Up: Adult Financial

- This web-based training (WBT) will outline Adult Financial-specific information a worker must review for ensuring accurate eligibility determination and final steps.

These WBTs are taken at the participant's own pace - estimated to take about 20 minutes total time to complete.

Instructor-Led Training (ILT)

Once all Volumes in the Adult Financial Certificate Plan are complete, participants will then move to the final instructor-led component. This course is titled ***Putting It All Together Adult Financial***. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Analyze and data enter multiple realistic scenarios in CBMS _TRN using applications and verifications
2. Practice data entry from start to finish with over the shoulder support, using critical thinking skills to ensure accurate eligibility determination

This ILT component will take approximately 4-6 hours and is facilitated by an SDD Certified Trainer.

Cert Periods / Changes

For Adult Financial Certificate Plan

Resources

Multiple desk aids and User Guides will be provided and discussed during this volume.

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Overview

This document is the lesson plan for the ***Certification Periods & Changes*** volume as it relates to the Adult Financial Certificate Plan. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training, and/or attend the ILT as a way to gain more data entry practice.

Web-Based Trainings (WBT)

Certification Periods and Changes: The Basics

- This training will provide general information about Certification Periods for Public Assistance programs, as well as specific information as it relates to the various program areas and their Certification Periods.

Adult Financial Reporting Requirements & Noticing Information

- This training provides information regarding Adult Financial Change Reporting requirements.

Adult Financial Use Month Logic

- This training provides information regarding Adult Financial Use Months

These WBTs are taken at the participant's own pace - estimated to take about 40 minutes total time to complete.

***Note: Some items in this Volume may have already been completed during the MAGI Certificate Plan.*

Instructor-Led Training (ILT)

- No ILT requirement.

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RRR / Renewals

For Adult Financial Certificate Plan

Resources

Important documents referenced in this volume: *(not limited to)*

- Acceptable Forms for RRR/Renewal Desk Aid
- AF & CW RRR Renewal Checklist Desk Aid
- AF/CW Late RRR/Renewal Verification & Missed Interview Related to Good Cause Desk Aid
- OAP Potential Income Requirements Desk Aid

Resources

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any completed training for each plan, unless they want to.

Overview

This document is the lesson plan for the ***RRR/Renewals*** volume as it relates specifically to Adult Financial programs. Details provided are what the participant is required to complete in order to successfully move on to their next phase in training. Additionally, seasoned workers may take the WBTs as stand-alone refresher training.

Web-Based Trainings (WBT)

RRR/Renewal Basics

- This training will provide general information about RRR/Renewals for all Public Assistance programs.

Adult Financial RRR/Renewal

- This training will provide information specific to the RRR/Renewal process for Adult Financial programs including processing timeliness and actions needed when an Adult Financial RRR/Renewal packet is received.

These WBTs are taken at the participant's own pace - estimated to take about 45 minutes total time to complete.

*****Note: Some items in this Volume may have already been completed during the MAGI Certificate Plan.***

Instructor-Led Training (ILT)

- No ILT requirement.

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Nesting Period

For Adult Financial Certificate Plan

Nesting Recommendation

The SDD strongly recommends a nesting period of 1-2 weeks in between each High-Level Program Group Certificate Plan. Nesting allows time for the participant to get comfortable with the information they learned in class, practice in a safe environment, and understand one program at a time to build on their knowledge. Providing support after the training is key to success.

Nesting Checklist

Use this checklist as a guide to help participants be successful in their new role. It is important to provide as much support and guidance as possible.

- Complete the Curriculum (WBTs and ILTs)
- Practice Cases in CBMS TRN environment
  - 1-3 practice cases
  - Practice cases may be done with over-the-shoulder support or independently with walk-through case reviews, guiding the worker to the correct data entry/outcome and providing resources to find answers to questions
- Live Cases in PRD with 100% Supervisory Authorization
  - Worker will work with over-the-shoulder support, utilizing available resources to process cases with the help from a lead/supervisor/trainer to completion
    - Intake (1-3 cases)
    - Ongoing/Changes (1-3 cases)
    - Ongoing/RRR (1-3 cases)
- ***Adult Financial Final Assessments, (2)***
- Live cases independently, 100% Supervisory Authorization
  - Worker will process cases independently, utilizing all available resources to completion with required Supervisory Authorization. Submit case review and Lead/Sup/Trainer will provide feedback
  - Complete minimum of 5 AF cases
- Remain on 100%, 75%, 50%, or 25% Supervisory Authorization/Case review as deemed by mentor/lead

Resources

Reminders

Participants do not have to complete/pass their assessment before moving on to their next Certificate Plan, however it is strongly recommended that they do participate in a nesting period to become comfortable and confident in the information they have learned so far.

Adult Financial Assessment

For Adult Financial Certificate Plan

Adult Financial Assessments & Certificate

What is an Assessment?
Each of the High Level Program Groups' (HLPGs) plans has an accompanying Assessment(s). These Assessments gauge your learning by presenting you with a scenario similar to those you will encounter in live cases. In order to be successful with the Assessment(s), you will need to apply both your knowledge of policy and your CBMS Data-Entry skills. Assessment(s) must be completed in order to complete your training plan and access the accompanying Certificate. You need this certificate in order to gain the proper profile and access in CBMS.

What can a new worker expect during the Assessment process?
In order to access your HLPG's Assessment(s), login to your COLearn profile and access the Assessment(s) from your training plan. There you will find directions for uploading your completed case(s) when finished. Each of the scenarios will be provided on a Single Purpose Application (SPA) and will contain mock verifications. As a participant, you will follow the directions laid out in both COLearn and the first few pages of the Assessment. ***Please read these directions carefully*** as they will contain vital information, including guidance regarding interfaces, verifications, and application dates.

How long does it take to complete?
While the time it takes to complete an Assessment varies from participant to participant, a good general rule is to set aside four hours. This time will include reading through the case directions, familiarizing yourself with the scenario, reviewing wrap-up results and making corrections where necessary, and uploading information regarding your final results to COLearn.

How many attempts does a participant have?
By default, there are two attempts allowed for a participant to complete their Assessment(s). In the event a participant does not pass the Assessment(s) after two attempts, next steps will be discussed with their leadership.

What are the rules?
The Assessments ***must be completed in either the CBMS TRN or UPA*** environments. Exercise extreme caution when starting data-entry to ensure Assessment information is not being entered into Production CBMS as this could have serious real-world consequences. Make sure when reviewing the scenario you take extra time to review the descriptions and verifications that accompany the SPA, as well as thoroughly reviewing the application itself.

Resources

- TrainColorado.com
- COLearn
- Volume materials in COLearn
- You are able to go back and review any WBTs or desk aids that you feel would help you.
- This is "open book" - please use your notes, desk aids, or any other tools you have to complete the assessment.
- Please email the SDD if you have any questions or experience any issues accessing your assessment.

Questions?
SOC_StaffDevelopment@state.co.us

Reminders

The Adult Financial Assessment has 2 components. Both must be completed successfully to receive a Certificate.

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