



# Course Map for Building Foundations Certificate Plan



## Soft Skills

6 WBTs



## Beginning Data Entry Processes

4 WBTs

1 ILT



Estimated Total Time to Complete:  
~9 hours (WBTs + ILTs)



**COLORADO**  
Healthcare & Economic Security  
Staff Development Division

# Soft Skills

## For Building Foundations Certificate Plan



### 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 **Soft Skills** volume as it relates specifically to the Building Foundations 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.

## Web-Based Trainings (WBT)

### **Understanding Poverty**

- Participants will be introduced to awareness that is required to professionally engage clients experiencing some form of poverty.

### **Diversity Basics: Foundations**

- This course will introduce you to diversity, equity, and inclusion (DEI). By the time you have finished this course, you'll be better equipped to understand the importance of DEI and take action to support diversity initiatives in the workplace.

### **Diversity Basics: Taking Action**

- In this course, you'll learn how the stories we tell ourselves impact our well-being. You'll discover the power of narratives we tell as individuals, within social groups, and through institutions, and you'll explore ways to counter these narratives through specific examples and exercises.

### **Building Effective Relationships**

- Participants will learn strategies and techniques to engage in professional relationships with clients to support positive outcomes!

### **Customer Service Skills**

- In this course, we're going to explore a few essential customer service skills you need for delivering great service along with some tips for developing these skills on your own.

### **Working With Upset Customers**

- In this course, you'll learn why customers get upset and how to defuse those situations with an effective apology and action plan for making things right. Then, you'll learn to spot when customers go too far, so you can protect yourself from abuse.

*These WBTs are taken at the participant's own pace - estimated to take about 3 hours total time to complete. Keep in mind, the total time to complete is all dependent on the learner.*

## Instructor-Led Training (ILT)

- No ILT requirement.

# Beginning Data Entry Processes

## [For Building Foundations Certificate Plan](#)



### Resources

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

- Assigning a Client ID
- Assigning a State ID
- Acting on an Unsigned Application
- Acting on an Application without a Date Stamp
- Existing Case vs. New Case

### 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 **Beginning Data Entry Processes** volume as it relates specifically to the Building Foundations 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)

### ***Inquire on Individual***

- This training provides an overview of searching for a client in CBMS. The Inquire on Individual screen is used to search CBMS for individuals applying for assistance benefits.

### ***Understanding IDs***

- This training provides an overview of the ID Clearance process in CBMS and the importance of accurately entering customer information to avoid errors with Client IDs and State IDs.

### ***Duplicate IDs and Merge Process***

- This web based training demonstrates the process for determining if a new customer already has a Client ID or a State ID in CBMS. Individuals completing this course will be able to define the term “merge.” They will be prepared to search CBMS to determine if a new customer already has a Client ID or a State ID, and be able to choose which ID to use when multiple IDs are found.

### ***Application Initiation***

- This web based training covers the Application Initiation (AI) track for starting the application process.

*These WBTs are taken at the participant's own pace - estimated to take about 2 hours 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 **Beginning Data Entry Processes**. During the ILT, participants will complete hands-on data entry entering multiple Application Initiations (AIs) into the CBMS training environment using scenarios that will be provided to them. Participants will practice searching in CBMS for existing clients using Inquiry. Additionally, users will practice correcting the application date, adding a High Level Program Group (HLPG) to an existing case, and correcting a CBMS Case Number.