

CBMS Project 10059: CBMS Activity Mapping and Workflow Updates



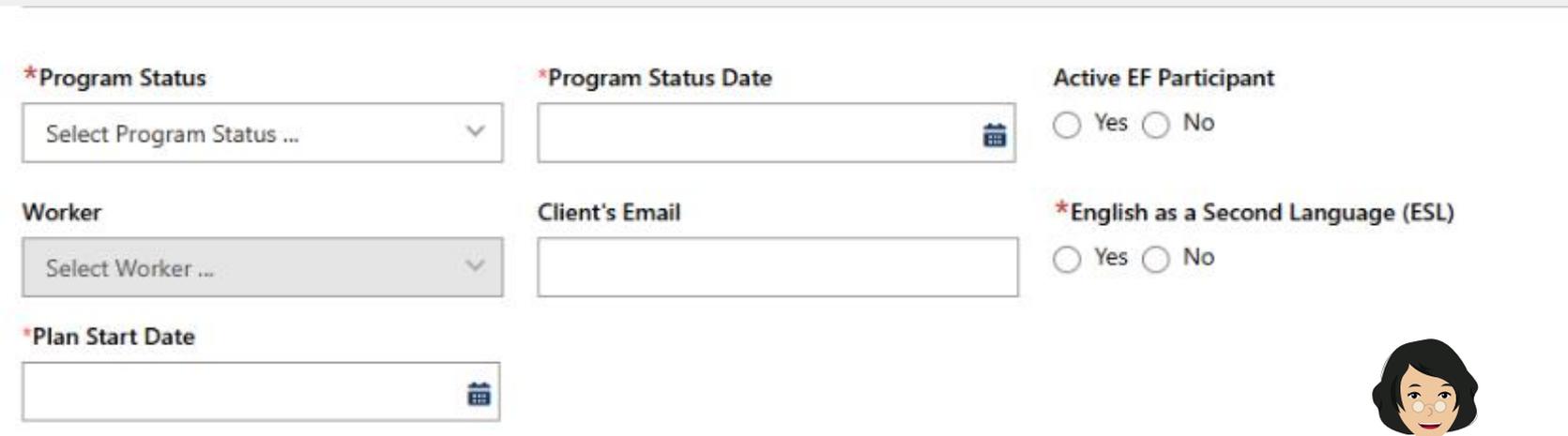


Purpose

This project will simplify the user experience for Plan and Activity workflow for Colorado Works (CW) Workforce Development (WD) and Employment First (EF). Numerous changes to screen design and functionality have been made to increase usability and efficiency. This project is the result of the Activity Mapping workgroup.

Employment First Plan Updates

These fields have also been rearranged to allow for a more intuitive workflow.



The screenshot shows a form with the following fields and controls:

- *Program Status**: A dropdown menu with the text "Select Program Status ...".
- *Program Status Date**: A date input field with a calendar icon.
- Active EF Participant**: Radio buttons for "Yes" and "No".
- Worker**: A dropdown menu with the text "Select Worker ...".
- Client's Email**: A text input field.
- *English as a Second Language (ESL)**: Radio buttons for "Yes" and "No".
- *Plan Start Date**: A date input field with a calendar icon.

1. Plan Status → Program Status

2. Plan Status Date → Program Status Date

3. The Plan Start Date will be cleared when any change is made to the Individualized Service Plan.



Activities in the County House

View Activities Active

Activities

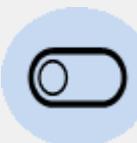
Description	Type	Begin Date	End Date
RE-Re-engagement 7/	Re-engagement	07/01/1997	
WS-Work Study updat	Work Study	07/01/1997	
SS-Serving Sanction 7/	Serving Sanction	07/01/1997	
JT-Job Skills Training 7	Job Skills Training	07/01/1997	
HS-High School Educa	High School Education	07/01/1997	

Previously, counties could add and remove certain activities within the County House. This has led to numerous duplicates as well as unnecessary values that were difficult to remove. *The changes to EF and CW work programs are summarized below:*

View Activities Inactive

Activities

Description	Type	Begin Date	End Date
PS-Post-Secondary Edi	Post-Secondary Educa	07/01/1997	01/31/2007
DI-Statewide Diversion	Statewide Diversion	07/01/1997	03/03/2025
OR-Orientation 7/1/19	Orientation	07/01/1997	03/03/2025
WX-Expanded Commu	Expanded Community	07/01/1997	01/31/2007
PD-Post-Employment I	Post-Employment Dive	07/01/1997	03/03/2025



The Activity Maintenance section within the County House is now a view-only toggle button that allows users to see active and closed activities for their specific county.



The Maintain Participant Screen will now display the same activities for all EF and CW operators, according to their respective programs.

WD and EF Activities

The CW WD Activity Category for WD will only have one category and now will auto-populate to WD activities.

The EF Activity Category will have two options:



EF Allowable Activities



Activities for Work Requirement

Note: For more information, reference the EF Handbook.

Maintain Participant Activities

Detail

*Activity Category: WD Activities

*Activity: Select Activity ...

Third-Party Partner: Select Third-Party Partner ...

*Date Referred: [Calendar icon]

*Start Date: [Calendar icon]

End Date: [Calendar icon]

Outcome: Select Outcome ...

Closure Reason: Select Closure Reason ...

Other: [Text field]

Required Workfare Hours: [Text field]

Maintain Participant Activities

Detail

*Activity Category

Select Activity Category ...

EF Allowable Activities

Activities for Work Requirement

Maintain Participant Activities Screen Redesign

Maintain Participant Activities

Detail

*Activity Category: WD Activities

*Activity: Select Activity ...

Third-Party Partner: Select Third-Party Partner ...

*Date Referred: [empty]

*Start Date: [empty]

End Date: [empty]

Maintain Participant Activities

Detail

*Activity Category: WD-Job & Work Experience Activities

*Activity: JS-Job Search

Third-Party Partner: Select Third-Party Partner ...

*Date Referred: 05/01/2024

Actual End Date: [empty]

Actual Start Date: 05/01/2024

Closure Reason: Select Closure Reason ...

Outcome: Select Outcome ...

Other: [empty]

Required Workfare Hours: 0

Employment Detail

Job Code: Select Job Code ...

Job Title: Select Job Title ...

Hourly Wage: \$0.00

Employer Name: [empty]

Credential Details



The Actual Start Date has been moved and relabeled to Start Date. This is now a mandatory field when an activity is opened.



Actual End date have been relabeled to End Date.



The values within the Closure Reason and Outcome fields have been updated.



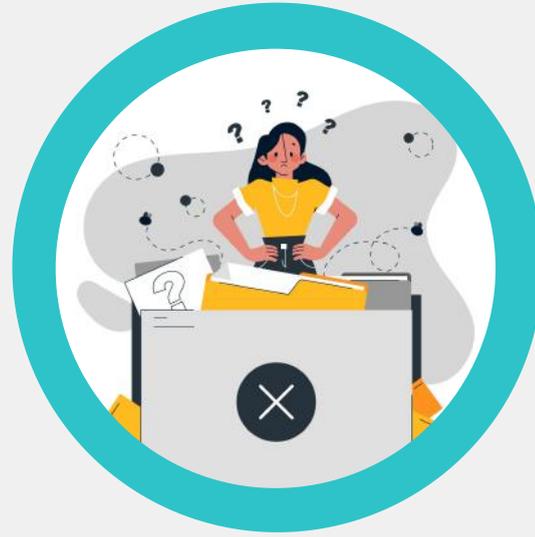
This screen layout has been updated to reflect workflow.

Activity Outcome Updates

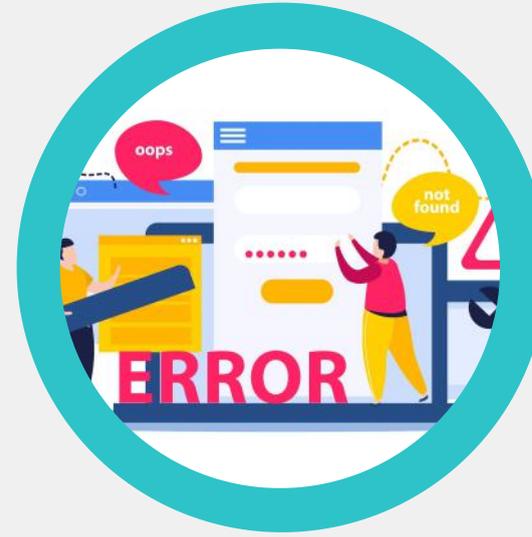
The **Outcome Field** will display the following four values:



Completed- Client has completed the Activity successfully (positive outcome, something was gained by the client)



Not Completed- Client did not complete the Activity (client action resulting in unpreferable outcomes)



Unable to Complete- Client has a life circumstance that prevented them from completing the Activity (unforeseen circumstance)



Non-Compliance (WD)- No change to the definition. Non-compliance will only be available for WD.

Outcome and Closure Reason Updates

The Closure Reason field now houses values related to the Outcome that was selected.

For example: If the Outcome selected is Completed, the Closure Reasons available will only be those that match the value completed.

Example One



Example Two



Example Three



Activity Employment Details



When a Gained Employment Closure Reason is selected, the Employment Details section will become mandatory.

This section will now have a field to capture benefits as well as the type of employment the client has gained.

Maintain Participant Activities

Detail

*Activity Category: WD-Job & Work Experience Activities

*Activity: JS-Job Search

Third-Party Partner: Select Third-Party Partner ...

*Date Referred: 07/09/2024

Start Date: 06/01/2024

End Date: 03/03/2025

*Outcome: Completed

*Closure Reason: Gained Employment

Other: [Empty]

Required Workfare Hours: 0

Employment Detail

*Employer Name: [Empty]

Hourly Wage: \$0.00

*Job Code: Select Job Code ...

*Job Title: Select Job Title ...

*Benefits: Select Benefits ...

*Type of Employment: Full Time Part Time

*Benefits: Select Benefits ...

*Type of Employment: Full Time Part Time

Benefits Unknown

With Benefits

Without Benefits

Credential Description

Employment Automation Details

Job Search End Date



Outcome = Completed



Closure Reason = Gained Employment

Message

Do you want to open this Full-Time activity?

Yes No

When an activity is end-dated with the Closure Reason of Gained Employment and saved, a dynamic message will be displayed, prompting the creation of the corresponding employment activity. This will be based on selecting the Full-Time or Part-Time radio button.

This message will be displayed when Full-Time or Part-Time is selected.

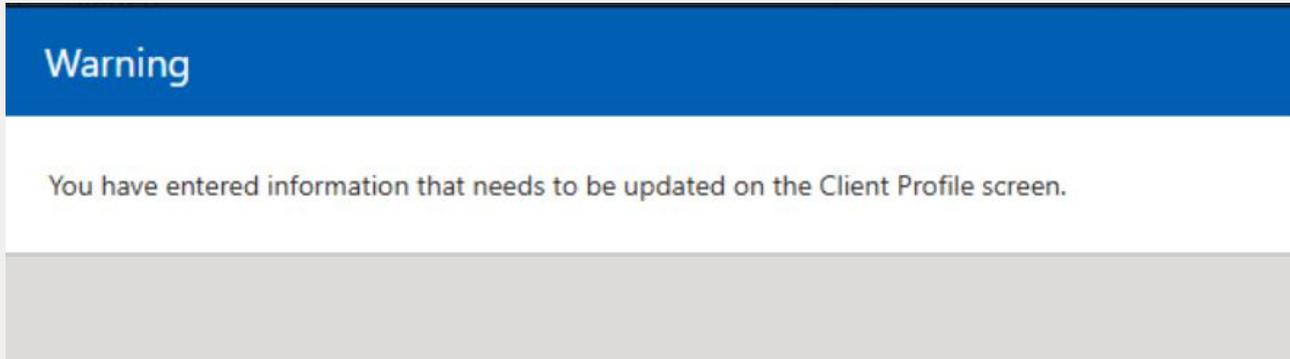


- If **NO** is selected, the message will close out, nothing further will happen, and the screen will save and close.
- If **YES** is selected, CBMS will open the Full-Time or Part-Time activity and auto-populate the Employment Details Section with the data from the previously closed activity. The Start Date will need to be added and saved.

Update Client Profile Screen Reminder



When a case manager enters a Closure Reason of New Barrier, Earned Certification, or Licensure, upon save, a pop-up message will display.



The case manager will be expected to make any updates to the Client Profile screen.