

# CBMS Project 6369 Colorado Works ReVisioned Phase II Process Manual

## Project Summary

This project will bring useful improvements to the Plan, Milestone Tracker, and Re-engagement pages, as well as useful Colorado Works (CW) functionality additions to PEAK and MyCOBenefits.

The benefit of this project is to provide a more streamlined CW experience for users and clients that is more in line with the CW ReVisioned effort.

## Milestone Tracker Page Updates

- On the Milestone Tracker page, the names of the following fields will be updated:

Current Field Name	New Field Name
Assessment Date	Workforce Screening Date
Assessment Completed	Workforce Screening Completed By

- On the Milestone Tracker Page, there is a new button labeled “Print Latest Signed Condition Agreement”. This button will appear when the latest condition agreement has been signed by the client through PEAK or MyCOBenefits.

The screenshot displays the Milestone Tracker page for a client named 'Female, UAT'. The page includes a navigation bar with options like 'Work Program Summary', 'Work Program Eligibility', 'Plan', 'Client Profile', 'Supportive Payments', 'Workforce Assessment', 'Search Supportive Services', 'Re-engagement', 'Attendance', 'Work Program Appointment', and 'Milestone Tracker'. The main content area shows a 'Program Type' section with 'Workforce Development' selected. Below this, there are several fields for dates and signatures, including 'Workforce Screening Date' (01/12/2023), 'Workforce Screening Completed by', 'Recent Workforce Assessment Date' (01/12/2023), 'Condition Agreement Date' (01/10/2023), 'Individualized Plan Date' (01/10/2023), and 'Last Successful Contact with Client Date'. A 'Signed Condition Agreement' button is visible and highlighted with a red box.

## Workforce Assessment Page Updates

- On the Workforce Assessment Page, CBMS users can print a blank workforce assessment PDF available in both English and Spanish.

## Plan Appointment Detail Related List Updates

- On the Plan Appointment Detail related list, CBMS users will be able to choose whether or not the date entered for appointment detail information will be added to the client’s plan.
  - If the CBMS user selects to include the appointment detail information, that information will be displayed when the plan is printed.
    - If changes are made to the appointment detail information and the CBMS user selects to include the date, the plan signature must be updated.
  - If the CBMS user selects not to include the appointment detail information, the information will not be displayed when the plan is printed.

## Plan Page Updates (This requirement may or may not be included)

- On the Plan page, modify the automatic signature logic created with Project 14998 to allow CBMS user to work on plan changes in a temporary “draft” mode, and once all changes have been finalized the CBMS user has the ability to submit the plan for signature.

## Re-engagement Page Updates

- On the Re-engagement page, the names of the following fields will be updated:

Current Field Name	New Field Name
Appointment Date	Re-engagement Appointment Date
Appointment Time	Re-engagement Appointment Time

- On the Re-engagement page, there are two new fields titled, “Missed Appointment Date” and “Missed Appointment Time”. These fields will be mandatory when the “Re-engagement Reason” value of “Missed Appointment” is selected.

- In the “Re-engagement Reasons” field, CBMS users will be able to select multiple values from the drop-down field. The reasons will be displayed and will print on the client’s notice when selected:

Re-engagement Reason	Re-engagement Reason ENGLISH	Re-engagement Reason SPANISH
Missed appointment	missed your appointment on [missed appointment date] and [Missed Appointment time] with [WD worker based on assignment on the date of the appointment that was missed], who is your Workforce Development worker.	faltó a su cita el día [missed appointment date] a las [Missed Appointment time] con [ WD worker based on assignment on the date of the appointment that was missed], que es su trabajador de Desarrollo Laboral.
Did not participate with IP	did not follow through with your Individualized Plan.	no cumplió con su Plan Individualizado.
Did not provide work activity information	did not provide work activity information for a previous month’s participation.	no proporcionó la información de la actividad laboral de un mes anterior de participación.
Did not provide requested information	did not provide information that was requested by your Workforce Development worker.	no proporcionó la información solicitada por su trabajador de desarrollo del equipo de trabajo.

### Re-engagement Rescheduling Updates

- On the Re-engagement page, CBMS users can reschedule a re-engagement appointment prior to the date and time of the original appointment. The original appointment will remain visible. The two new fields titled “Rescheduled Appointment Date” and “Rescheduled Appointment Time” will only be enabled one time per re-engagement occurrence.
  - Appointment types include in-person, virtual, or phone.

- When a re-engagement appointment is scheduled, an appointment letter will be sent to the client.
- When a rescheduled re-engagement appointment is more than 15 calendar days in the future, the following message will be displayed:

*Warning: The rescheduled re-engagement appointment that you have entered is outside of the 15-day timeframe for rescheduling. Please update the appointment to be within 15 days of the original appointment.*

## Re-engagement Case Comments

On the Re-engagement page, when the “Internal Notes for Re-engagement” is filled out by a CBMS user, a system generated case comment will populate with the following information:

Field	Selection
Type	EF/WD
Program Group	Workforce
Individual	Individual with Re-engagement record

## Automatic Text

Internal Notes for Re-engagement: [Information typed into the field on Re-engagement page for individual]

### Re-engagement Appointment Types

On the Re-engagement page, the following new options will be available under the “Appointment Type” fields:

- County calls client
- Client calls county

### Plan Appointment Detail Page

- On the Plan Appointment Detail page (for Workforce Development and Employment First), the following new options will be available under the “Appointment Type” fields:
  - County calls client
  - Client calls county

### Work Program Appointment Page

- On the Work Program Appointment page (for Workforce Development and Employment First), the following new options will be available under the “Appointment Type” fields:
  - County calls client
  - Client calls county

### Appointment Notifications

- When a Plan Appointment or Work Program Appointment is scheduled by a CBMS user for Workforce Development or Employment First, an email (available in English and Spanish) will be sent to the client when their email address is listed on the Plan page.
- When a Plan Appointment or Work Program Appointment is scheduled by a CBMS user, an appointment notification with reminders will be displayed on the MyCOBenefits home page. These notifications will display until after the date of the appointment.
- When a Plan Appointment or Work Program Appointment is scheduled by a CBMS user, an appointment notification will display on the “To-Do List” appointment cards in PEAK. The “To-Do list” will display until after the appointment date.

# Supportive Payment Updates

The screenshot displays the CWSS interface for a client named 'Female, UAT'. The 'Supportive Payments' tab is active, showing search criteria for 'Supportive Payments'. The search criteria include 'Work Program' (Employment First or Workforce Development), 'Type' (dropdown), 'County' (dropdown), 'From Date' (07/23/2022), and 'To Date' (01/23/2023). A table header is visible at the bottom with columns: Work Program, County, Type, Begin Date, End Date, Amount, Status, Tracking #, and a plus icon.

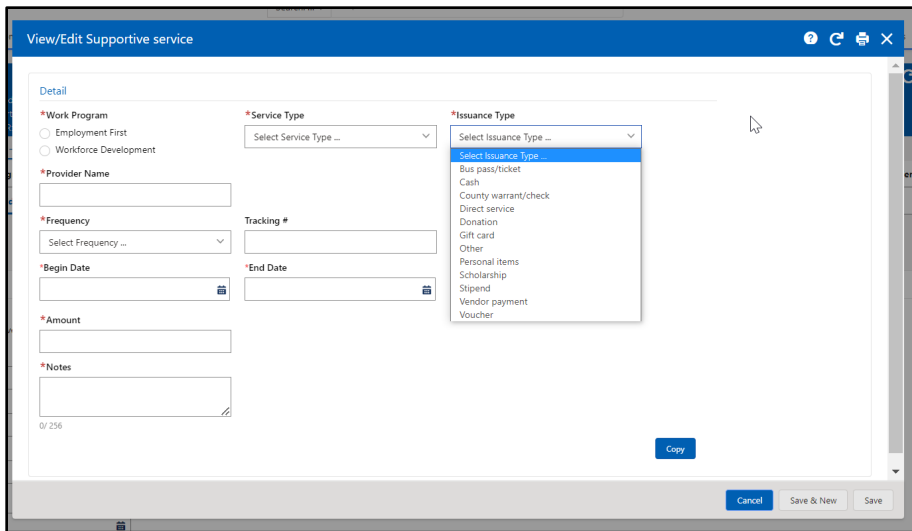
- On the View/Edit Supportive Services pages, including Inside/Outside CBMS Supportive Services tabs, the “Supportive Service Description” field has been removed.
- On the View/Edit Supportive Services pages, including Inside/Outside CBMS Supportive Services tabs, the following issuance types have been removed:
  - Bus Tickets
  - Bus Tokens
  - BusPass
  - CICP Card
  - County Warrant
  - Medical ID Card
  - PE Card



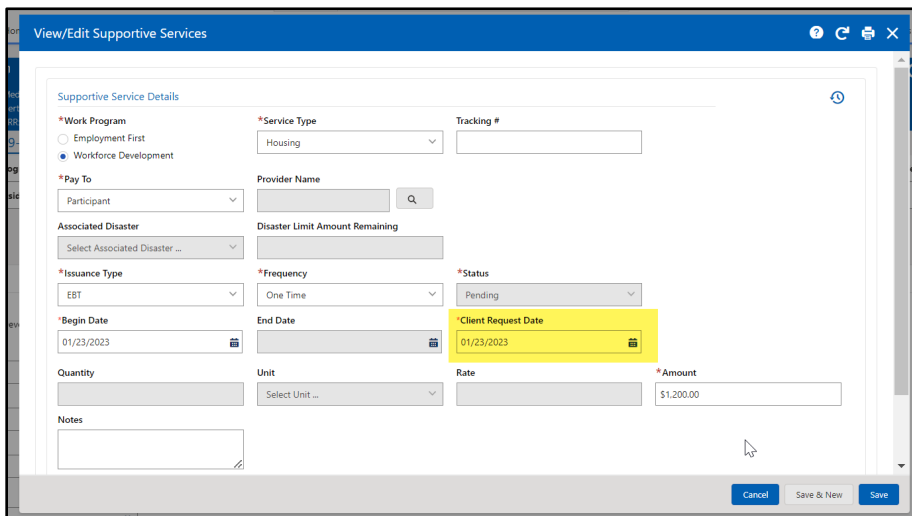
## Supportive Payment Updates, continued

- On the View/Edit Supportive Services pages, including Inside/Outside CBMS Supportive Services tabs, the following fields have been removed:
  - Quantity
  - Unit
  - Rate
- On the View/Edit Supportive Services page in the Outside CBMS Supportive Services tab, there is a new field labeled “Issuance Type” containing the following values:
  - Bus pass/ticket
  - Voucher
  - County warrant/check
  - Gift card
  - Direct service
  - Personal items
  - Vendor payment
  - Scholarship
  - Cash
  - Donation
  - Stipend
  - Other





- On the View/Edit Supportive Services page in the Inside CBMS Supportive Services tab, there is a new field labeled “Client Request Date”.
  - When a supportive payment is requested through MyCOBenefits or PEAK, the date the request was submitted will display in the “Client Request Date” field.



- On the View/Edit Supportive Services page in the Outside CBMS Supportive Services tab, the names of the following fields will be updated:

Current Value Name	New Value Name
IRC Bonus	Participation Bonus

- In PEAK and MyCOBenefits, the names of the following fields will be updated:

Current Value Name	New Value Name
IRC Bonus	Participation Bonus

**\*Add information on page access (pending and discontinued cases for EF and CW based on change request\***

### Re-engagement Appointment Letter Updates

- On the Re-engagement appointment letter, there will be a “Subject” line included:

Subject ENGLISH	Subject SPANISH
SUBJECT: Appointment Notification	ASUNTO: Notificación de la cita

- On the Re-engagement appointment letter, the first paragraph will include the “Re-engagement Reason” that is selected.

<p style="text-align: center;"><b>First Paragraph</b></p> <p style="text-align: center;"><b>ENGLISH</b></p>	<p style="text-align: center;"><b>First Paragraph</b></p> <p style="text-align: center;"><b>SPANISH</b></p>
<p>As your workforce development worker, I am here to assist you in reaching your goals. It's important for you to participate in your Colorado Works Individualized Plan. My records indicate you:</p> <p><b>[plain language reason for re-engagement (List all Reasons selected)]</b></p> <p>I would like to discuss with you any challenges to participation and your re-engagement in the program. We can revisit your goal(s) and change your plan if needed.</p>	<p>Como su trabajador de desarrollo del equipo de trabajo, estoy aquí para ayudarle a alcanzar sus metas. Es importante que usted participe en su Plan Individualizado de Colorado Works. Mis registros indican que usted:</p> <p><b>[plain language reason for re-engagement (List all Reasons selected)]</b></p> <p>Me gustaría hablar con usted sobre cualquier problema de participación y su reincorporación al programa. Podemos volver a revisar su(s) objetivo(s) y cambiar su plan, si es necesario.</p>

On the Re-engagement appointment letter, when the “county will call client” option is selected, the following information will be displayed:

<p style="text-align: center;"><b>Phone appointment - county calls client</b></p> <p style="text-align: center;"><b>ENGLISH</b></p>	<p style="text-align: center;"><b>Phone appointment - county calls client</b></p> <p style="text-align: center;"><b>SPANISH</b></p>
<p>The time I've set for us to meet is: [Appointment date] at [Appointment time].</p> <p>I will call you at this time. If your phone number has changed, please contact me in advance of this meeting.</p>	<p>La hora que tengo para reunirnos es: [Appointment date] a las [Appointment time].</p> <p>Le llamaré en este momento. Si su número de teléfono ha cambiado, póngase en contacto conmigo antes de esta reunión.</p>