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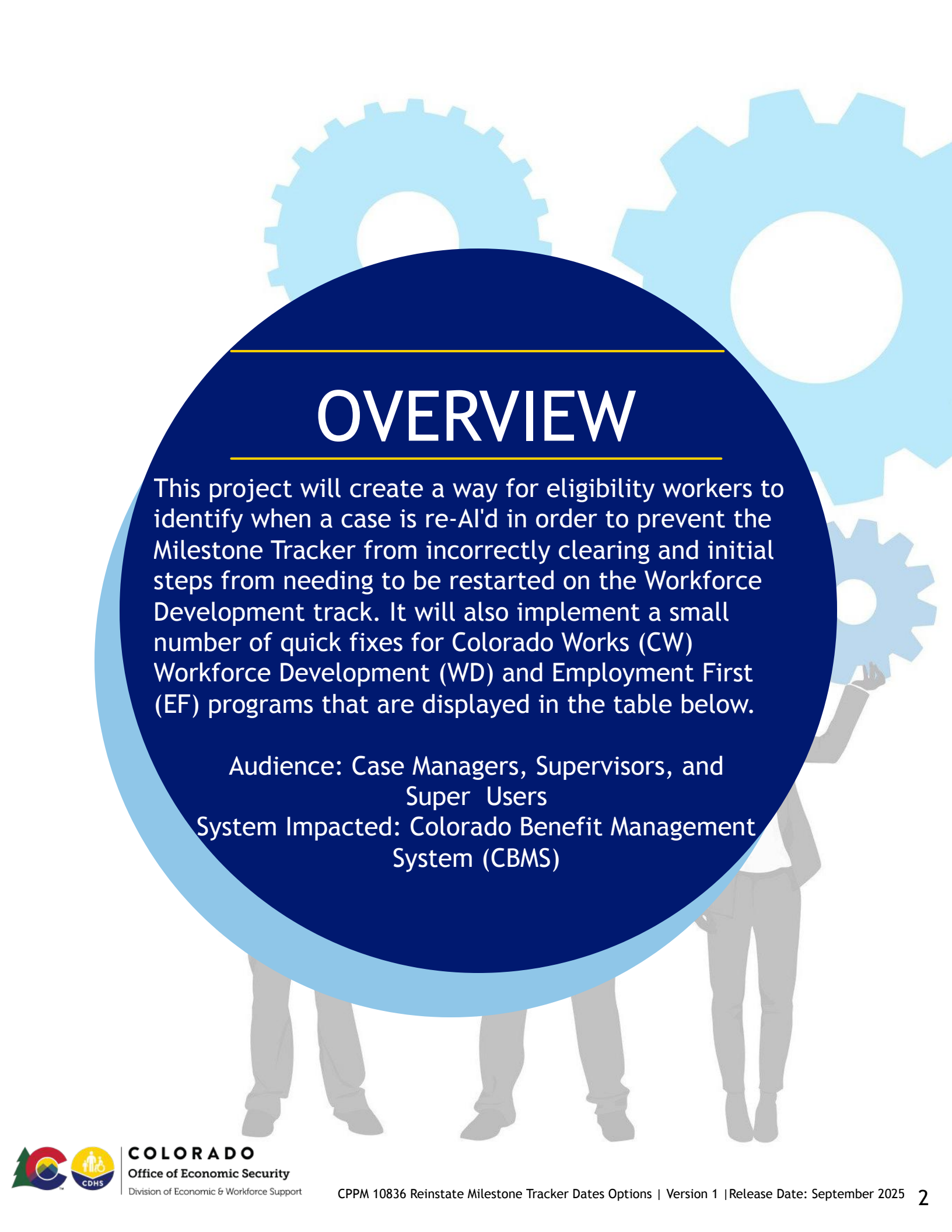
STEP
03

STEP
04

STEP
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Case Management Updates (CBMS 10836)





OVERVIEW

This project will create a way for eligibility workers to identify when a case is re-Al'd in order to prevent the Milestone Tracker from incorrectly clearing and initial steps from needing to be restarted on the Workforce Development track. It will also implement a small number of quick fixes for Colorado Works (CW) Workforce Development (WD) and Employment First (EF) programs that are displayed in the table below.

Audience: Case Managers, Supervisors, and
Super Users

System Impacted: Colorado Benefit Management
System (CBMS)

Table of Contents

CBMS Screen or Location	Overview of Changes
 Map Icon	Adding new shortcuts for Supportive Payments
 Informational Banner	The plan page will now show a banner for dual-enrolled EF and WD clients
 County House	Counties will now only see their own information
 Workforce Screening	History will now display regardless of the status of the Colorado Works case
 WD/EF Home/ Dashboard	All types of users for EF and WD will be able to toggle between Resolved and Unresolved
 Plan Page	• Extension Plans will be more easily distinguished on the Plan page for WD • The Plan Status filed will no longer be able to be updated by case managers for EF
 Activity Related List	Case managers can now initiate Re-engagement through the County Transfer (TC) work activity
 Milestone Tracker	Eligibility actions will no longer affect the Milestone Tracker, except in the case of a new application
 Re-engagement	New pop-up questions related to Exceptional Disengagement

What's New in CBMS

1. Map Icon Updates

The Map Icon in CBMS will now display links to the following supportive payment screens. Case managers will be able to filter in the Map Icon for “payments.” Once the worker clicks on the specific Supportive Payments tab, they will be taken to the corresponding tabs in the Interactive Interview (II) screens.

What you will see now:

- Child Only/Disaster Payments
- Outside Supportive Payments
- Inside Supportive Payments



What's New in CBMS

2. Informational Banner - Dual WD and EF Enrollment

A new informational, dual-enrollment banner will be created and displayed for case managers on the Plan page when a client is enrolled in both the WD and EF programs. The banner will show that the client has a WD and EF plan.

What you will see now:

The screenshot displays the CBMS interface. At the top, there's a header bar with 'Open', 'Alerts - 10', and three program status boxes: 'Colorado Works (AP)' with cert dates 06/01/2025-11/30/2025 and RRR 11/2025 - P; 'SNAP (AP)' with cert dates 06/01/2025-11/30/2025 and RRR 11/2025 - P; and 'Medical Assistance (AP)' with cert dates 06/01/2025-05/31/2026 and RRR 05/2026 - P. Below this is a navigation bar with tabs: 'Milestone Tracker', 'Workforce Assessment', 'Plan' (highlighted), 'Supportive Payments', 'CCCAP', 'Work Program Summary', 'Work Program Eligibility', 'Re-engagement', and 'Attendance'. Under the 'Plan' tab, there are sub-tabs: 'Workforce Development Plan', 'Employment First Plan', and 'Referrals'. A red-bordered informational banner at the bottom right of the main content area contains an information icon and the text: 'Info client also has a Plan for Employment First.'

3. County House Updates

The County House will only display information for the the county in which the case manager is in. Case managers will no longer be able to see County House information for all 64 counties on the screens listed below and will only see information for their assigned county.

Screens you will now see county-specific information for:

- Maintain Work Programs
- Disaster details-Colorado Works
- Colorado Disaster Limits
- Navigator Counties



What's New in CBMS

4. Workforce Screening Page History

The Workforce Screening Page history will now be viewable, regardless of the Colorado Works case being closed or open.

What you will see now:



The screenshot shows the CBMS interface with the 'Workforce Screening' tab selected. A red arrow points to a new circular history icon in the top right corner of the page. The form contains sections for 'Work Experience' and 'License', each with 'Yes' and 'No' radio button options. The 'Work Experience' section has 'No' selected, and the 'License' section has 'Yes' selected.

5. WD/EF Home/Dashboard Page Task Updates

Case managers, supervisors, and super users on both the WD/EF Home/Dashboard page can toggle between Unresolved and Resolved tasks.

They can also update a task that was previously marked as 'Resolved' to show as 'Unresolved'.



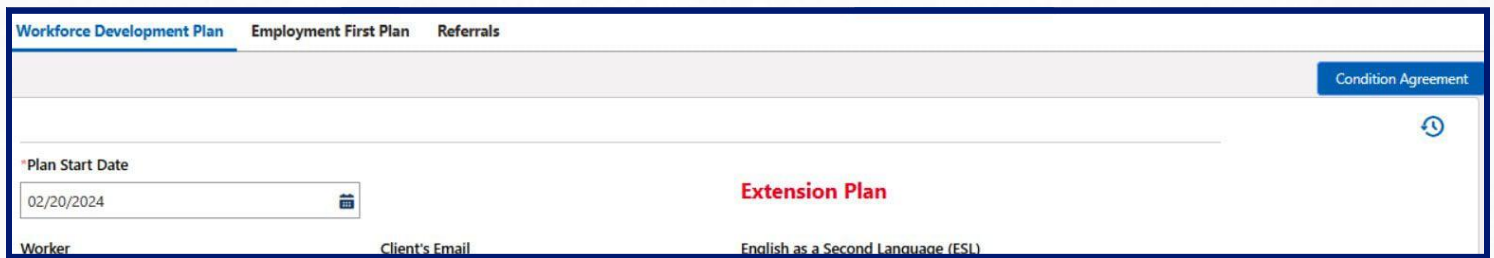
What's New in CBMS

6. Plan Page Updates and Extension Plans

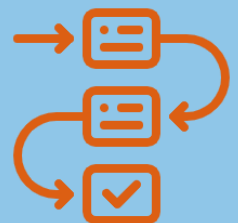
The Plan page will now indicate more obviously when a client has an approved extension and is within the extension time period. This will display on the Plan and show the title, “Extension Plan,” which will display in red text. When an Extension is started and the Extension Plan indicator is present, the Plan Start Date will be blank, and a new task will appear on the WD/EF Home/Dashboard page.

The task will display the following information:

- Task Title: Extension Plan
- Task Description: Update Plan Start Date and Individualized Plan for the current extension
- Due Date: The last day of the month of the Extension Begin date



The screenshot shows the 'Workforce Development Plan' tab selected. The 'Plan Start Date' field is set to '02/20/2024'. The 'Extension Plan' title is displayed in red text. The 'Condition Agreement' button is visible in the top right corner. The bottom of the form shows fields for 'Worker', 'Client's Email', and 'English as a Second Language (ESL)'.



What's New in CBMS

6. Plan Page Updates Continued

Employment First Plan Page - Plan Status Updates

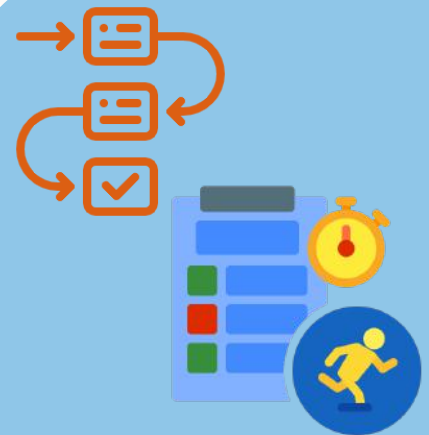
Multiple Plan Status values have been removed from the Employment First Plan Status field. Case managers can now select the following reasons from the drop-down list:

- EF-Outreach
- EF-Enrolled
- Closed
- EF-Declined Program Service
- EF-Provider Determination
- EF-Referred

7. Activity Related List

Work Activity Updates - Inter-County Transfer

The County Transfer (TC) work activity can now be updated by the case manager when the client fails to engage with case management in a new county. When a case is transferred from one county to another, the TC “End Date” field will be modifiable so that case managers may update it to begin the Re-engagement process. This will only be available if the modified date is prior to the CBMS-populated end date. When the end date is modified, the Outcome and Closure Reason fields will open and become required.



What's New in CBMS

7. Activity Related List Continued

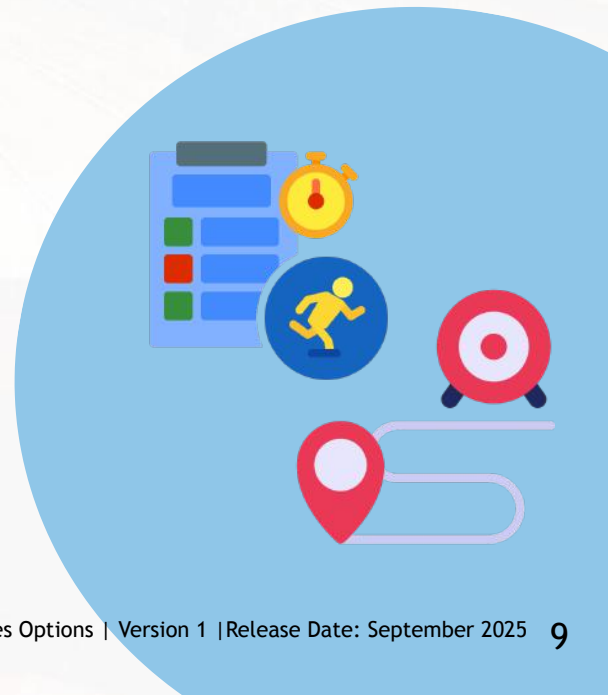
If an End Date is entered after the CBMS-populated end date, the following error message will be displayed: “End date must be less than the system-populated date.” The Outcome field should be entered as Non-compliance to initiate Re-engagement. When this is completed, the Closure Reason will be auto-populated as Re-engagement. This will allow the case manager to initiate Re-engagement from the TC activity.

What you will see now:

- End Date: Can be modified by the case manager
- Outcome Reason: Non-compliance
- Closure Reason: Re-engagement

8. Milestone Tracker Updates

- New Field: The case manager will now see the Go to Case field displayed in the blue ribbon on the Milestone Tracker page.
- Saved Information: Eligibility workers can now indicate if a case is reopened through a Re-AI. When the eligibility worker correctly indicates this, the Milestone Tracker page will no longer clear. Saving case managers the unnecessary workload of repeating initial appointment steps.



What's New in CBMS

9. Re-engagement Page Updates

Exceptional Disengagement Questions

On the Re-engagement page, when the case manager selects “State Review on hold” as yes, the date will auto-populate. The case manager must then:

- Save the Re-engagement screen.
- Once saved, a pop-up will appear with the Exceptional Disengagement questions.
- The case manager must complete the questions to initiate the process.

Once the questions have been answered, CBMS will generate an email to the Division of Economic and Workforce Support (DEWS) Policy inbox. This will replace the Google Form that was previously used. Once the form is submitted, DEWS staff will review the form and respond within two business days. History will be retained for this information and will be case-specific. History will also be retained for prior Exceptional Disengagement submissions.

Developed by the DEWS Innovation and Change Management Training Team.

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