Course Map for
MAGI Certificate Plan

Prerequisites: CBMS Access, Building Foundations*

Program Information
2 WBTs

General Eligibility
3 WBTs
1 ILT

Interfaces & Verifications
3 WBTs

Household Comp
3 WBTs
1 ILT

HLPG Specific
3 WBTs
1 ILT

Income
6 WBTs
1 ILT

Expenses
1 WBT
1 ILT

Putting It All Together
2 WBTs
1 ILT

Cert Periods & Changes
2 WBTs

RRR / Renewals
2 WBTs

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

MAGI Certificate
Participants must successfully pass the assessment to receive the certificate of completion

Estimated Total Time to Complete:
~32 hours (WBTs + ILTs)

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Staff Development Division

Program Information

For MAGI Certificate Plan

Resources

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

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 **Program Information** volume as it relates specifically to the MAGI 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)

Program Information and Navigating State Resources for Medical Assistance
 • Participants will learn how to find and use the resources you need for MAGI and Non-MAGI programs. You will know where to find important information when you need it!

MAGI Basics
 • This course will cover some basic information about MAGI, including basic eligibility, covered services, and some data entry.

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.

Instructor-Led Training (ILT)

 • No ILT requirement.

General Eligibility

For MAGI Certificate Plan

Resources

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

- Medicaid Citizenship and Identity Requirements (DRA)
- Citizen/Non-Citizen Desk Aid
- Non-Citizen Flowchart
- Non-Citizens Acceptable Documents and Class Codes
- Guide to Selected U.S. Travel and Identity Documents
- Entering a Non-Citizen Process Manual Process Manual (PM)
- Entering a Sponsor PM
- Entering Residency/Address PM
- Head of Household 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.

Overview

This document is the lesson plan for the **General Eligibility** volume as it relates specifically to Medical Assistance 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)

General Eligibility: The Basics
- Explore how to determine if an applicant is potentially eligible for one of the State's public assistance programs.

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 Medical Assistance
- Correctly assess Citizenship, Identity, and Residency as it relates to the Medical Assistance programs, and acceptable documents to verify them.

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.

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 Medical Assistance*. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Demonstrate the ability to data enter Social Security information in CBMS
2. Recognize who qualifies as a US citizen for public assistance purposes
3. Demonstrate the ability to data enter identification information in CBMS
4. Demonstrate the ability to data enter residency information in CBMS
5. Demonstrate the ability to data enter Non-Citizen information in CBMS

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

Interfaces & Verifications

For MAGI Certificate Plan

Resources

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

- Public Assistance Verification Matrix
- 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 Verification Code Map
- SVES Title II Code Map
- SVES Title XVI Code Map

Reminders

Remember, anything a participant completes will carry over into another certificate plan 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 **Interfaces and Verifications** volume as it relates to all High-Level Programs, including Medical Assistance. 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.

CBMS MA Equifax Data via Federal Hub
- Workers will learn about the Federal Data Services Hub (FDSH) and Equifax interfaces used specifically for Medical Assistance programs.

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

Instructor-Led Training (ILT)

- No ILT requirement.

Household Composition

For MAGI Certificate Plan

Resources

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

- MAGI MBU Flowchart
- HH Comp MAGI Desk Aid
- Entering Demographic Details Process Manual (PM)
- Entering HH Relationship PM
- Completing Individual Tax Information PM
- Entering Attributes PM
- Completing Case Individual 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.

Overview

This document is the lesson plan for the *Household Composition* volume as it relates specifically to the MAGI 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)

Household Composition: The Basics
- Participants will learn about what makes a Household, and how certain screens in CBMS are related to Household Composition for different HLPGs.

Household Composition: MAGI Specific
- Participants will receive an overview of household composition for MAGI Medical Assistance and how to data enter the required information in CBMS.

MA Limited Benefits While Incarcerated
- Participants will be able to define Limited Benefits, determine when an incarcerated individual might be eligible for Limited Benefits, and learn how to correctly complete data entry.

These WBTs are taken at the participant's own pace - estimated to take about an hour 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-MAGI*. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review HH Composition and Relationships
2. Review and practice MAGI Monthly Budget Units (MBU)
3. Demonstrate the ability to data enter required information in relation to Household Composition to determine accurate MBUs

This ILT component will take approximately 3-4 hours and is facilitated by an SDD Certified Trainer.

HLPG Specific

For MAGI Certificate Plan

Resources

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

• Medical Assistance Hierarchy
• Entering Retro Med Process Manual (PM)
• Entering Life or Limb Threatening Emergency for EMAC 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.

Overview

This document is the lesson plan for the High Level Program Specific volume as it relates specifically to the MAGI 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)

MAGI Categories and Special Circumstances
• Identify the different eligibility requirements for MAGI categories and demonstrate the correct data entry needed.

Third Party Liability
• Participants will learn that when a member has health insurance in addition to their medical assistance, this is called Third Party Liability.

Retroactive Medical Assistance
• This training introduces Retroactive Medical Assistance which provides members up to three months of backdated medical coverage.

These WBTs are taken at the participant's own pace - estimated to take about an hour 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-MAGI*. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review Health First Colorado and MAGI specific information
2. Review and practice MAGI categories
3. Review and practice Retroactive Medical Assistance
4. Utilize CBMS to practice data entry

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

Income

For MAGI Certificate Plan

Resources

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

- Income Frequency Calculations
- Countable And Exempt Income
- MAGI Medicaid Monthly Maximum Income Guidelines
- CHP+ Monthly Maximum Income Guidelines
- MAGI Disregards
- Entering New Earned Income Process Manual PM
- Entering Income Expenses PM
- Entering a Tax Deduction Expense PM
- Entering Child/Spousal Income PM
- Entering Self-Employment PM
- Self-Employment Desk Aid
- Self-Employment Ledger
- Self-Employment Allowable Business Expenses

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 *Income* volume as it relates to the MAGI 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)

What is Income?
- This training provides a basic introduction to Income and Income Types.

Income Frequency
- This training provides an overview of Income Frequencies. CBMS calculates an individual's average monthly income, based on the frequency received, to assess all applications on a level playing field.

Self-employment
- This training is an overview of Self-Employment, related data entry, and how each program looks at this type of income to determine eligibility.

S-Corp/LLC
- This training is an overview of what S-Corp/LLC is, related data entry, and how each program looks at this type of business to determine eligibility.

Income Considerations: MAGI
- This training is intended to be an explanation of how CBMS considers income for MAGI.

Reasonable Compatibility
- This training provides an overview of Reasonable Compatibility and Reasonable Explanations. Verifying member's income using an electronic data source helps verify the income was reported and recorded correctly.

These WBTs are taken at the participant's own pace - estimated to take about 90 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 MAGI*. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review and practice income frequencies and calculations using realistic paycheck examples
2. Utilize CBMS to practice data entry of different types of Income

This ILT component will take approximately 3-4 hours and is facilitated by an SDD Certified Trainer.

Expenses

For MAGI Certificate Plan

Resources

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

- Entering a Medical Expense Process Manual (PM)
- Entering Child/Spousal Expense PM
- Entering Dependent Care Expense PM
- Entering Shelter Expense 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.

Overview

This document is the lesson plan for the *Expenses* volume as it relates to the MAGI 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)

Expenses: The Basics

- This course covers the basic information on what is considered an expense, how that information is entered into CBMS, and how each program considers expenses. Includes data entry on all Expenses including for Retro and Medicare Expense

This WBT is taken at the participants 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 *Expenses Medical Assistance*. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review and practice expense scenarios
2. Utilize CBMS to practice entering data for Expenses

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

Putting It All Together

For MAGI Certificate Plan

Resources

- There are multiple resources that can be referenced throughout this volume.
- Refer participants to TrainColorado.com for the most current versions.

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 *Putting It All Together* volume as it relates to the MAGI 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)

Finalizing Data Entry and Wrap Up Basics
- This training will walk through and explain the final steps in processing a case through the Interactive Interview Queue and the Initiate Wrap Up Queue.

Case Comments
- This training highlights the importance of case comments; ensuring CBMS data entry matches casefile information.

These WBTs are taken at the participant's own pace - estimated to take about 30 minutes total time to complete.

Instructor-Led Training (ILT)

Once all Volumes in the MAGI Certificate Plan are complete, participants will then move to the final instructor-led component. This course is titled *Putting It All Together MAGI*. 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 MAGI Certificate Plan

Resources

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

- Medical Assistance Hierarchy
- CBMS MA Postpartum Coverage
- Public Assistance Verification Matrix
- Terminating Earned Income 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.

Overview

This document is the lesson plan for the *Certification Periods & Changes* volume as it relates to Medical Assistance 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)

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.

Certification Periods and Changes: Medical Assistance (MA)
- This training provides information specific to the reporting of changes for the Medical Assistance program, including the changes that need to be reported by members.

These WBTs are taken at the participant's own pace - estimated to take about 30 minutes total time to complete.

Instructor-Led Training (ILT)

- No ILT requirement.

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Staff Development Division

RRR / Renewals

For MAGI Certificate Plan

Resources

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

- Acceptable Forms for RRR/Renewal Desk Aid
- MA Processing Information 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 **RRR/Renewals** volume as it relates specifically to Medical Assistance 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.

Medical Assistance Renewals
- This training will provide general information specific to the Renewal process for Medical Assistance programs (MAGI, Non-MAGI), including the ex-parte process and actions needed when an MA Renewal packet is required.

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

Instructor-Led Training (ILT)

- No ILT requirement.

Nesting Period

For MAGI Certificate Plan

Resources

- [Printable Nesting Checklist](#)
- SDD Created Practice Scenarios

If your site would like assistance in creating a nesting plan that works for you, please email us at: SOC_StaffDevelopment@state.co.us

We would be happy to work with you and help you create a plan.

Reminders

Participants do not have to complete/pass their Final 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.

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 TRN, 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 Live CBMS PRD environment 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)
- *MAGI Final Assessment*
- 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 MAGI cases
- Remain on 100%, 75%, 50% or 25% Supervisory Auth/Case review as deemed by mentor/lead

MAGI Assessment

For MAGI Certificate Plan

Resources

- TrainColorado.com
- CoLearn
- Rules & Regulations

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

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MAGI Assessment & Certificate

What is an Assessment?
Each of the High Level Program Groups' (HLPGs) Certificate Plans has an accompanying *Assessment*. 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, you will need to apply both your knowledge of policy and your CBMS Data-Entry skills. An Assessment 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, login to your COLearn profile and access the Assessment from your training plan playlist. There you will find directions for uploading your completed case when finished. 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. In the event a participant does not pass the Assessment after two attempts, next steps will be discussed with their leadership.

What are the rules?
The Assessment cases *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.