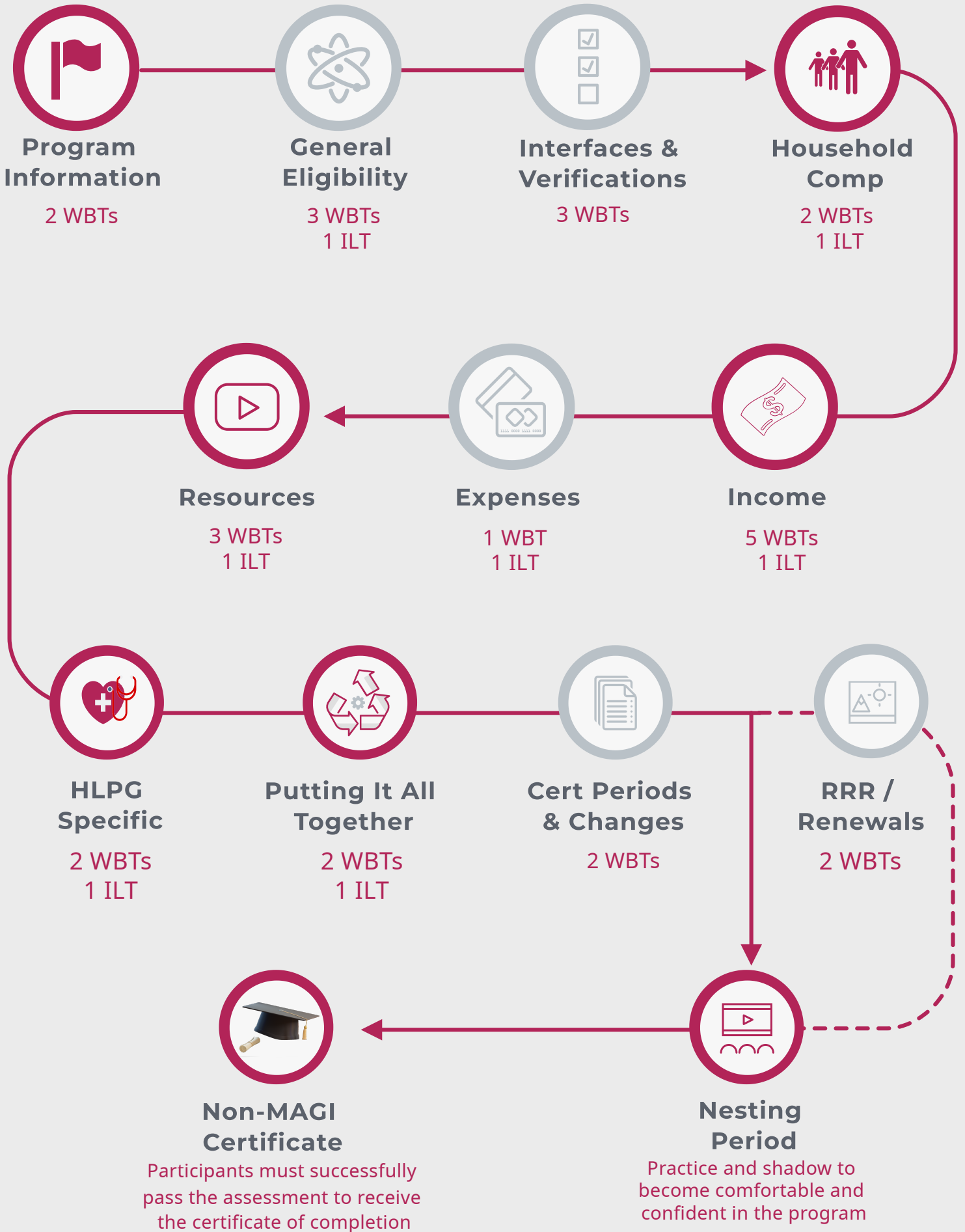




Course Map for Non-MAGI Certificate Plan

Prerequisites: MAGI Certificate Plan



*Note- Volumes in Grey are required for this Certificate Plan and may have been completed in a previous Certificate Plan



Estimated Total Time to Complete:
~13 hours (WBTs + ILTs)



COLORADO
Healthcare & Economic Security
Staff Development Division

Program Information

For Non-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 Non-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!

Non-MAGI Basics

- This course will cover some basic introductory information about Non-MAGI, including Health First Colorado. Participants will be able to describe how Medicare impacts some Non-MAGI Categories, match Medicare and Medicaid with their SSA counterparts, and identify how Medical Assistance categories are arranged in the hierarchy.

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 Non-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 (PM)
- Entering a Sponsor PM
- Entering Residency/Address PM
- Head of Household PM

Reminders

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

Overview

This document is the lesson plan for the **General Eligibility** volume as it relates specifically to the MAGI, Non-MAGI and Long-Term Care Certificate Plans. 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 requirements as they relate 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.

****Note: This Volume may have already been completed during the MAGI Certificate Plan****

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** and may have been completed during MAGI Certificate Plan. 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 Non-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

Reminders

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

Overview

This document is the lesson plan for the **Interfaces and Verifications** volume as it relates to all HLPG Certificate Plans. 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.

****Note- This Volume may have already been completed during the MAGI Certificate Plan****

Instructor-Led Training (ILT)

- No ILT requirement.

Household Composition

For Non-MAGI Certificate Plan



Resources

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

- HH Comp Non-MAGI Desk Aid
- HH Comp LTC Desk Aid
- 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 Non-MAGI and Long-Term Certificate Plans. 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)

Participants should have already completed other WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Non-MAGI are:

Household Composition: Non-MAGI / Long-Term Care

- Participants will learn how Household Composition is determined for Non-MAGI and LTC programs. Even though Household Composition is not complex for these programs, it is important to know how it applies.

This WBT is taken at the participant's 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 **Household Composition Non-MAGI & LTC**. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Determine Household Composition for Non-MAGI and Long-Term Care
2. Demonstrate accurate Household Composition data entry in CBMS for Non-MAGI

This ILT component will take approximately 1-2 hours and is facilitated by an SDD Certified Trainer.

Income

For Non-MAGI Certificate Plan



Resources

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

- Countable And Exempt Income
- Income Frequency Calculations
- Entering New Earned Income Process Manual (PM)
- Entering Unearned Income PM
- Terminating Earned Income PM
- Entering Self-Employment PM
- Entering Child/Spousal Income 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 **Income** volume as it relates to the Non-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)

Participants should have already completed other required WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. In addition to the WBTs completed in the MAGI Certificate Plan, the following WBTs specifically for Non-MAGI are:

Income Considerations: Non-MAGI

- This training is intended to be an explanation of how CBMS considers income for Non-MAGI categories.

This WBT is taken at the participant's 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 **Income Non-MAGI**. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review and practice income calculations for Non-MAGI categories, including disregards
2. Utilize CBMS to practice data entry of different types of Income

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

Expenses

For Non-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 Medicare Expense PM
- Entering Shelter Expense PM

Reminders

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

Overview

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

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 participant's own pace - estimated to take about 20 minutes total time to complete.

****Note-** This Volume may have already been completed during the MAGI Certificate Plan**

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** and may have been completed during MAGI Certificate Plan. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Review and practice expenses
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.

****Note:** This Volume may have already been completed during the MAGI Certificate Plan**

Resources

For Non-MAGI Certificate Plan



Resources

Important documents to reference in this series include but are not limited to:

- OAP-Medical Assistance Flow Chart
- Countable and Exempt Resources Desk Aid
- Disposing of a Resource Process Manual (PM)
- Entering a Liquid Asset PM
- Entering a Trust Resource PM
- Entering a Life Insurance PM
- Entering a Burial Asset PM

Reminders

For a new worker, this is the first time Resources are being introduced in their training plan. Be sure to take the time they need to really understand this topic.

Overview

This document is the lesson plan for the **Resources** volume as it relates to the Non-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)

Resources: Basics

- This course is intended to be an overview of what Resources are and how resources are considered for different HLPGs.

Resources: Data Entry

- Participants will learn how to complete data entry of Resources in CBMS, and review wrap up to ensure data entry is reflected appropriately.

Trusts

- Participants will learn how Trusts affect different programs, identify how income trusts are established and assessed for Long-Term Care, and identify the data entry processes needed.

These WBTs are taken at the participant's own pace - estimated to take about 1 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 **Resources Non-MAGI**. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Identify Resources from example Eligibility cases
2. Utilize CBMS to practice entering data for Resources
3. Review Wrap Up to ensure accurate data entry

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

H LPG Specific

For Non-MAGI Certificate Plan



Resources

Important documents to reference in this series include but are not limited to:

- Entering Pickle_DAC_QDW Process Manual (PM)
- Medicare Savings Program Desk Aid
- Entering Medicare Expense PM
- Entering Life or Limb Threatening Emergency for EMAC PM
- Entering an ARG Disability Determination PM

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any training for each plan, unless they want to.

Overview

This document is the lesson plan for the **High Level Program Group (H LPG) Specific** volume as it relates to the Non-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)

Non-MAGI Categories and Special Circumstances

- This course will cover the different Non-MAGI Categories and review the different eligibility criteria, what each category covers, as well as any data entry that applies specifically to certain programs

Health First Colorado Buy-In

- This training will provide information regarding the Medicaid Buy-In programs for Working Adults with Disabilities (WAWD) and Children with Disabilities (CBwD), which allow access to State Plan Medicaid by paying a premium. The premium is based on their earned and unearned income without considering resources and comes with the choice to opt-out.

These WBTs are taken at the participant's own pace - estimated to take about 40 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 **H LPG Specific Non-MAGI**. During the ILT, participants will have hands-on data entry practice in CBMS through multiple scenarios, and will:

1. Recall key case information that impacts Non-MAGI eligibility
2. Categorize Non-MAGI eligibility based on scenarios
3. Demonstrate accurate data entry for a Disability Determination in CBMS
4. Accurately enter information specific to SSI- and SSA-related programs in CBMS

This ILT component will take approximately 2-3 hours and is facilitated by an SDD Certified Trainer.

Putting It All Together

For Non-MAGI Certificate Plan



Resources

- There are multiple desk aids that can be reference in this volume.
- Refer participants to TrainColorado.com for the most current version.

Reminders

Remember, anything a participant completes carries over into other certificate plans where applicable. They will not have to repeat any 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 Non-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)

Participants should have already completed other WBTs in the MAGI Certificate Plan. Refer to the MAGI Certificate Plan Course Summary for those details. There are no additional WBTs specific to Non-MAGI; users will just need to attend the Instructor-Led session for scenario based, hands-on practice.

Instructor-Led Training (ILT)

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



Resources

There are several desk aids and process manuals associated with this program. Make sure you refer the participants to TrainColorado.com for the most current versions.

Reminders

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

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 45 minutes total time to complete.

****Note: This Volume may have already been completed during the MAGI Certificate Plan****

Instructor-Led Training (ILT)

- No ILT requirement.

RRR / Renewals

For Non-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

Participants who completed this volume with the MAGI Certificate Plan, will not need to complete it again. However, it will be available to them if they need a refresher.

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 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.

Note: This Volume may have already been completed during the MAGI Certificate Plan*

Instructor-Led Training (ILT)

- No ILT requirement.

Nesting Period

For Non-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 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, 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 Curriculum (WBTs and ILTs)
- Shadow Experienced Workers
- 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 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)
- **Non-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 Authorization/Case review as deemed by mentor/lead

Non-MAGI Assessment

For Non-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

Non-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.

