Data Entry for EF Third-Party Partners

Overview

The Agriculture Act of 2018, or as it is commonly referred to as the "Farm Bill", requires SNAP Employment and Training (SNAP E&T) providers to comply with several new requirements. One of those is case management services and those that receive them.

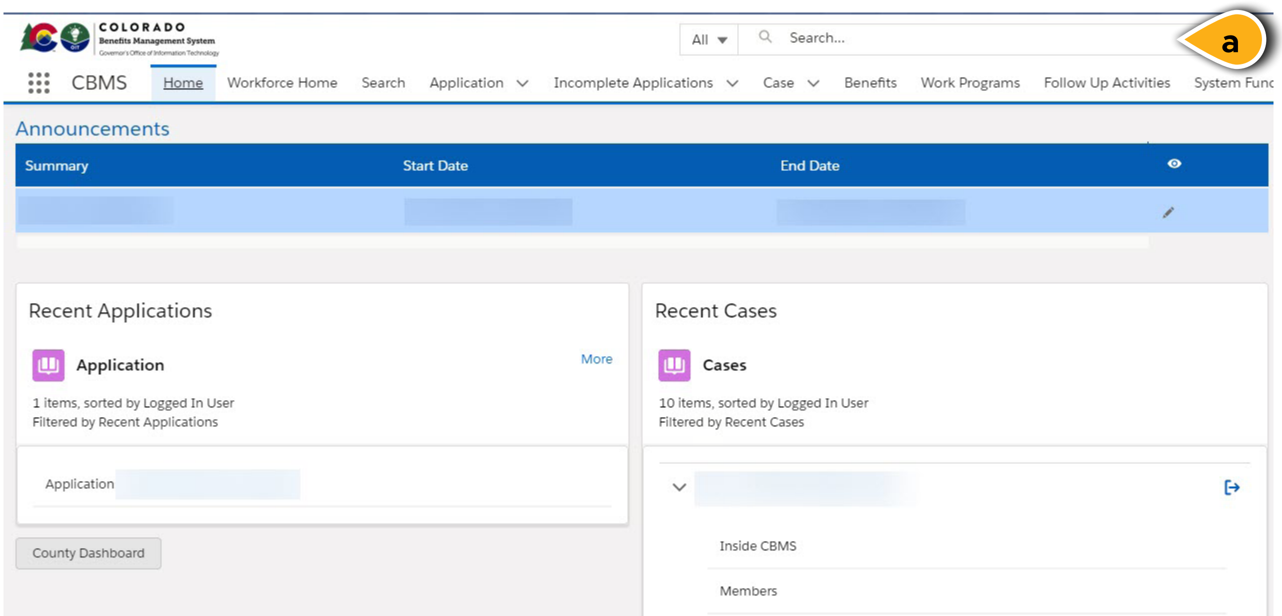
The SNAP E&T program must provide case management services to all clients who have enrolled in allowable components. The State of Colorado collects this data and reports it to our federal partners quarterly. The modality that the State has chosen to use to gather this information is the Colorado Benefits Management System (CBMS). CBMS is Colorado's statewide database system through which eligibility is determined for medical, food, cash, and other assistance programs.

This process manual will cover the data entry steps required by SNAP Employment First (EF) Third-Party Partners (TPP) for us to accurately report our program's outcomes, demographics, and services to satisfy our federal requirements.

Step 1: Verifying Benefits

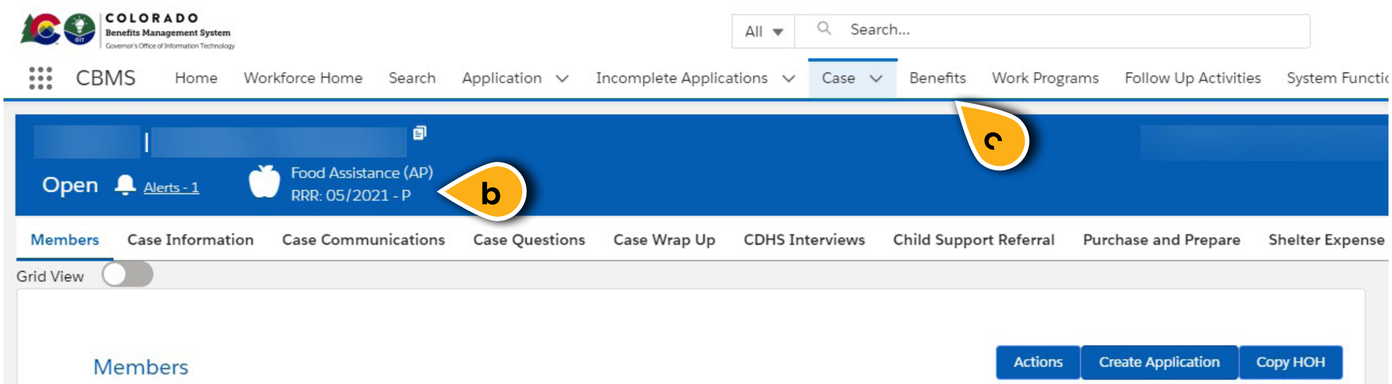
CBMS does an efficient job accurately displaying the client's benefits and what programs they are currently enrolled in. In order for a client to be claimed for reimbursement, they first must be receiving SNAP benefits for the month in which the reimbursement of services is being claimed.

a) In order to identify whether or not a client is receiving SNAP benefits, you must first enter the client's CBMS Case ID number into the Search bar located at the top of the Home page and click "Enter."



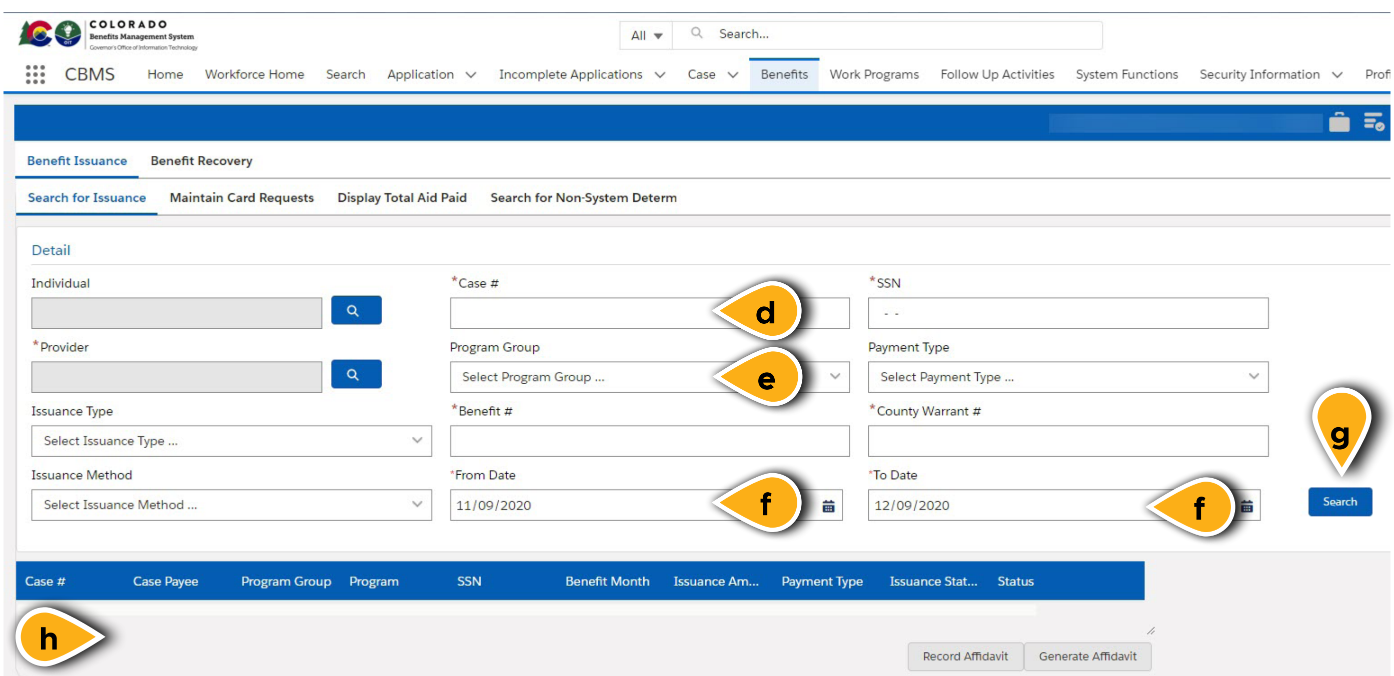
b) Once on the Members page, you will see a client's redetermination date, as well as the program that the client is approved for, which is Food Assistance. The redetermination date informs the worker that the client is approved for benefits until the last day of the month shown.

c) In order to claim reimbursement, a client must receive at least one dollar in Food Assistance benefits for the month in which you wish to claim the reimbursement. This can be verified by using the Benefits tab found on the upper ribbon.



Once on the Benefits tab:

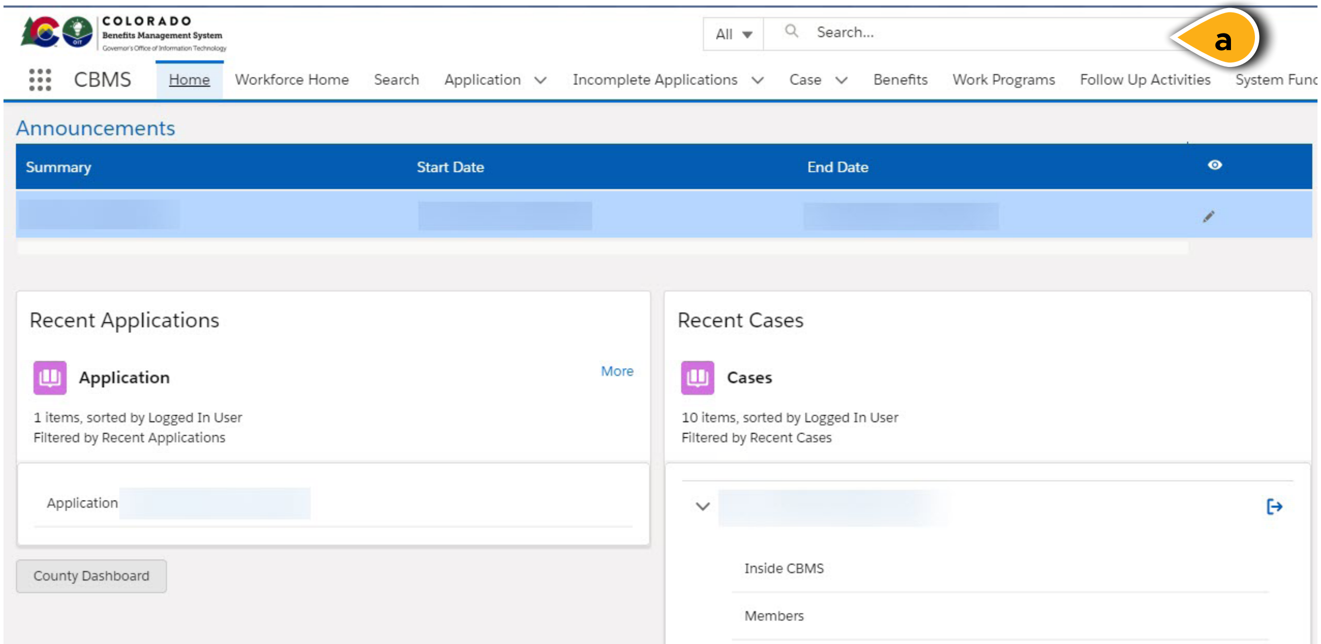
d) Enter the case number.
e) Select "Food Assistance" in Program Group dropdown.
f) Enter both a From Date and To Date to search.
g) Click the Search button.
h) Search results will appear in the Results section.



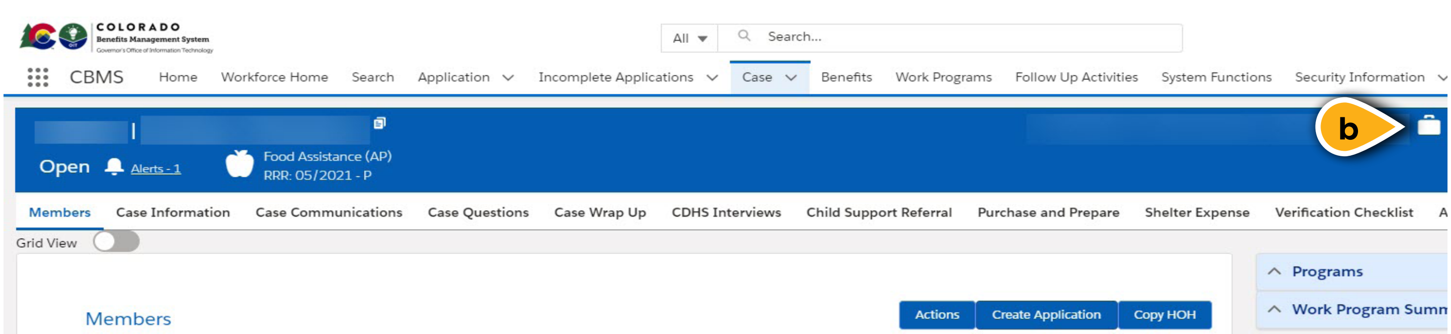
Step 2: Creating a Plan

Each client that is enrolled in an allowable SNAP E&T component must have a plan in CBMS. The plan should include the start date and the start date of the client's status in the program. Whenever the participant's status changes in the program, the client's status date should be updated. A plan only needs to be created for a client once a year. If the client currently has a plan that was opened in the current calendar year, you do not need to create a plan

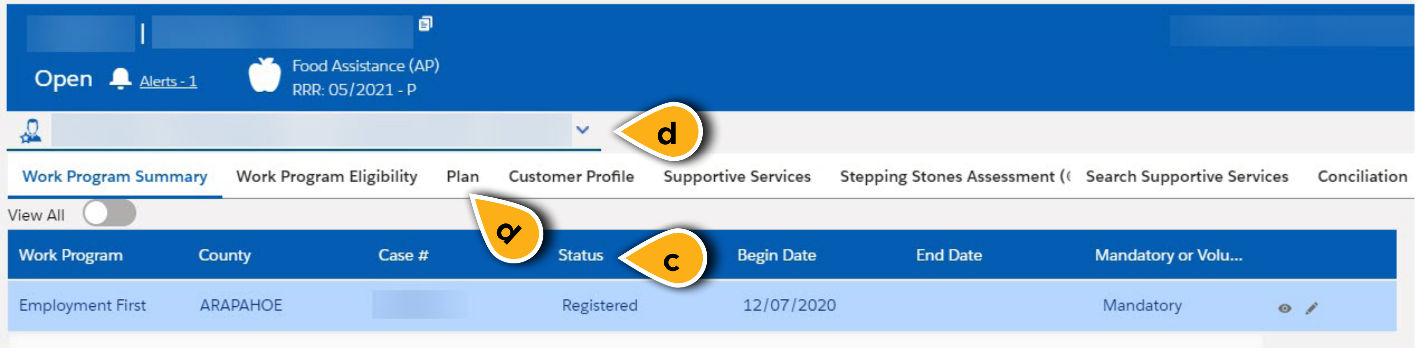
a) Enter the client's case number into the Search bar on the Home page and click "Enter."



b) Once on the Members page, click the Work Program briefcase icon to the right.

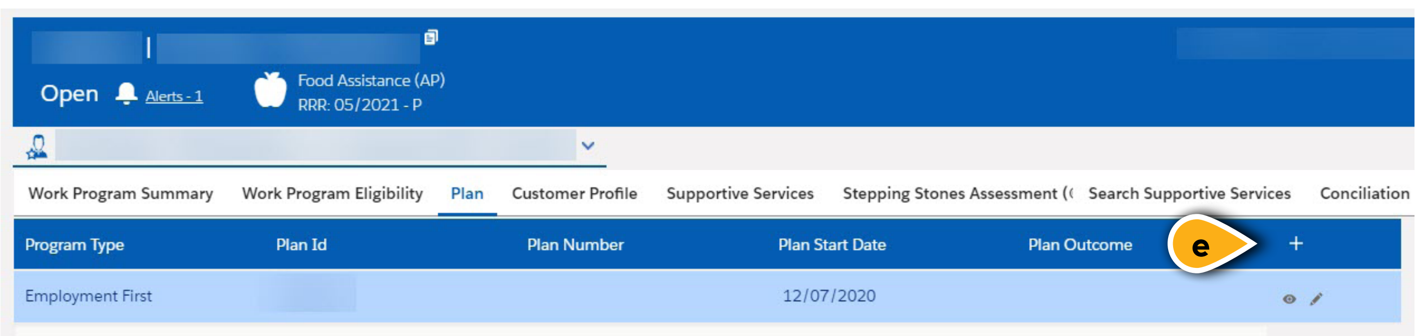


c) On the Work Program Summary page, you will see the client's registration status with the program.
d) Click on the Plan tab. Make sure you have the correct client selected in the dropdown. Some cases have multiple clients. In some cases where you are working with multiple clients in the same household, you will need to complete these data entry steps for all clients enrolled in SNAP E&T components throughout your organization.



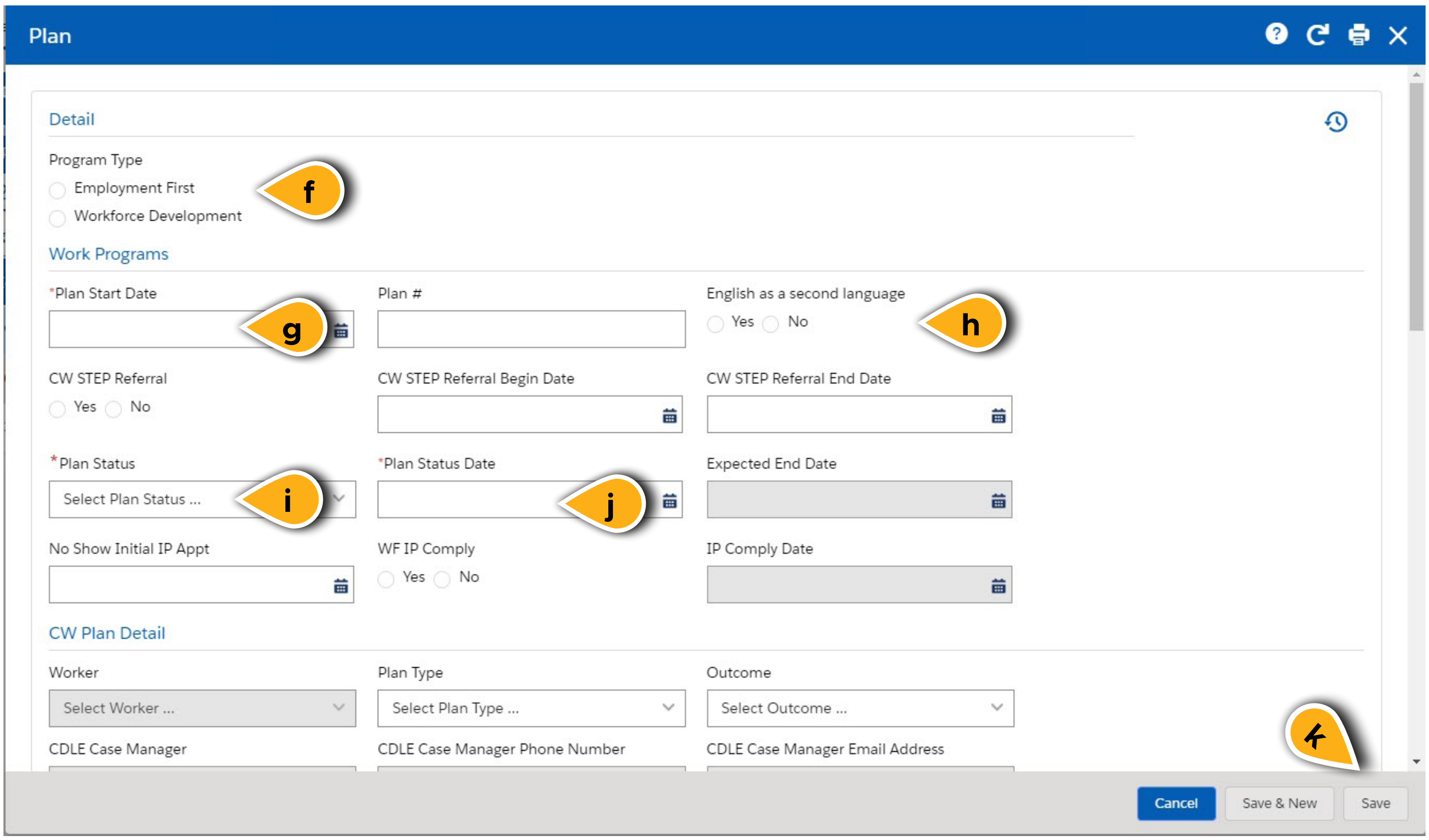
With the Plan sub-tab selected:

e) Click the "+" icon to add a new plan.



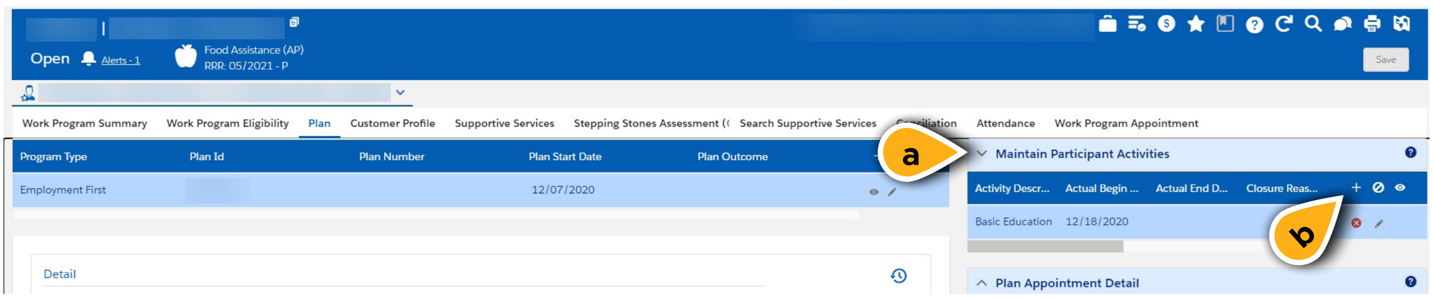
In the Plan page window:

f) Select the "Employment First" radio button as the Program Type.
g) Enter a Plan Start Date.
h) Select either the "Yes" or No" radio button to indicate if the client's second language is English.
i) Select the appropriate Plan Status from the dropdown. The only options that you will need to select for Plan Status are "Referred", "Enrolled", or "Declined Program Services."
j) Enter the Plan Status Date. Please note: Each time you change the Plan Status, you will need to update the Plan Status Date.
k) Click the Save button when completed.



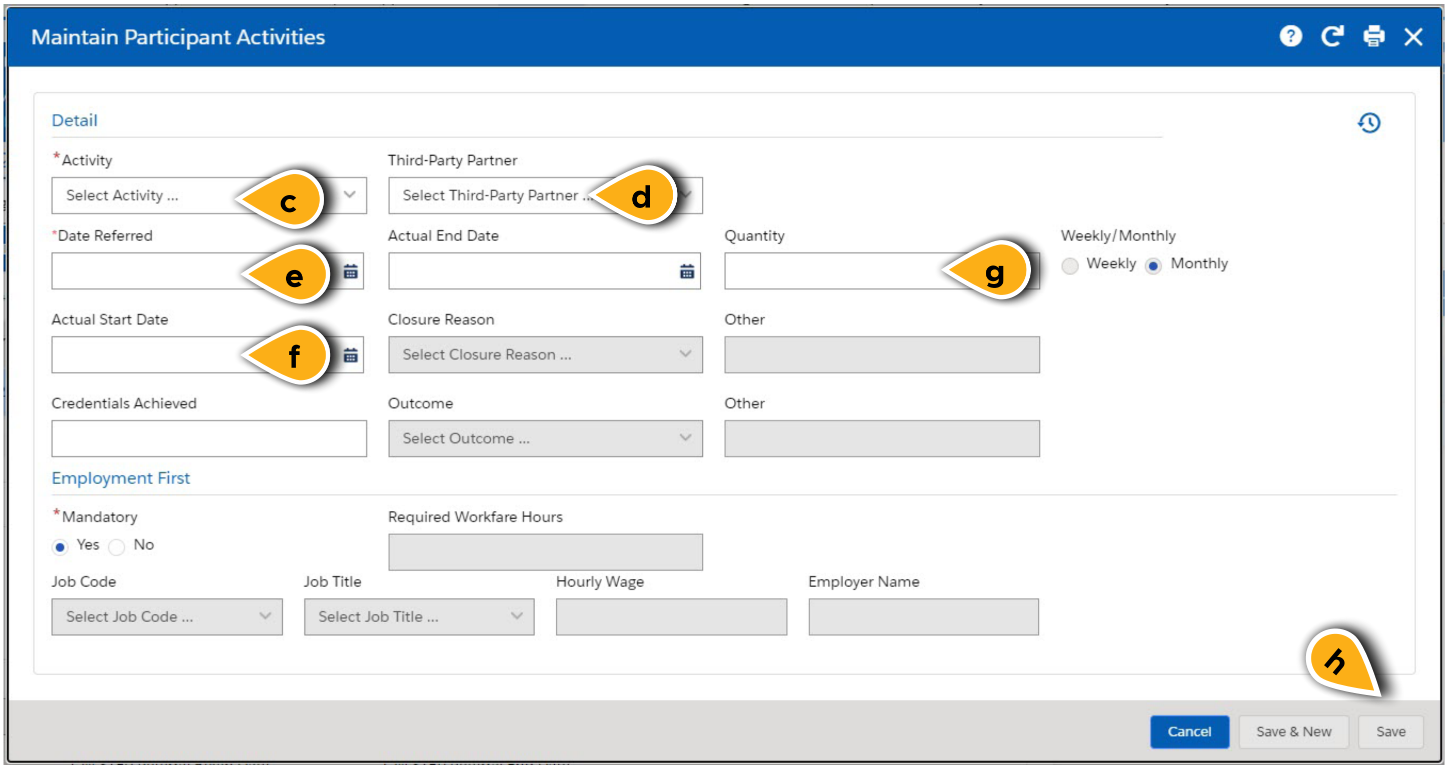
Step 3: Add an Activity

Once a plan has been created and saved, you can now add an activity for your client. The activity that you select for your client should reflect the component that the client is participating in with your organization. Only allowable activities will be options for you to pick.
a) On the "Plan" tab, click on the down arrow on Maintain Participant Activity section on the far right.
b) Click the "+" icon to create a new activity. This will open the Maintain Participant Activities pop-up screen.



Once in the Maintain Participant Activities pop-up screen:

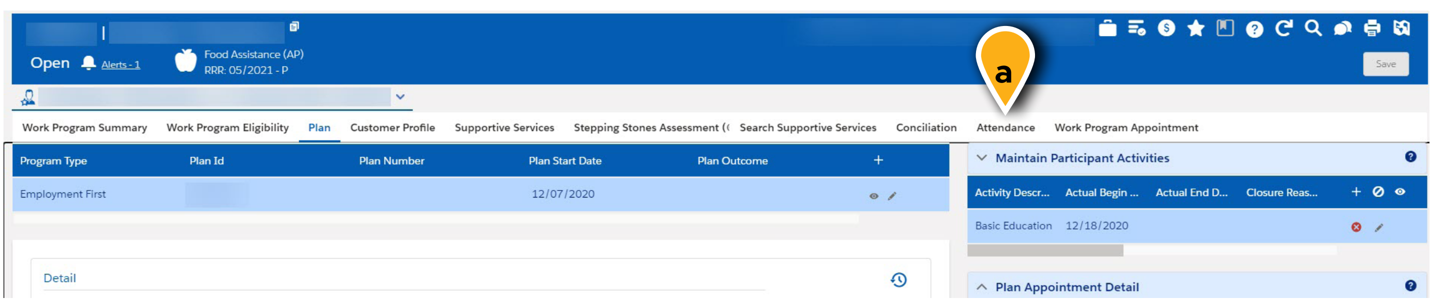
c) Select the appropriate activity from the Activity drop-down list.
d) Select the Third-Party Partner you work for from the drop-down list.
e) Enter the Date Referred.
f) Enter the Actual Start Date. Although these two steps seem redundant, there are times where you will plan for a client to start an activity on a certain date, but they aren't actually able to start due to other reasons. Hours cannot be entered on an activity until the actual start date is entered.
g) The Quantity field will only need to be completed when a client is participating in the Workfare-Permanent Site, Workfare Initial Site, or Work Experience activities. The number in the Quantity field represents how many hours the client is required to complete.
h) Click the Save button.



Step 4: Entering Hours

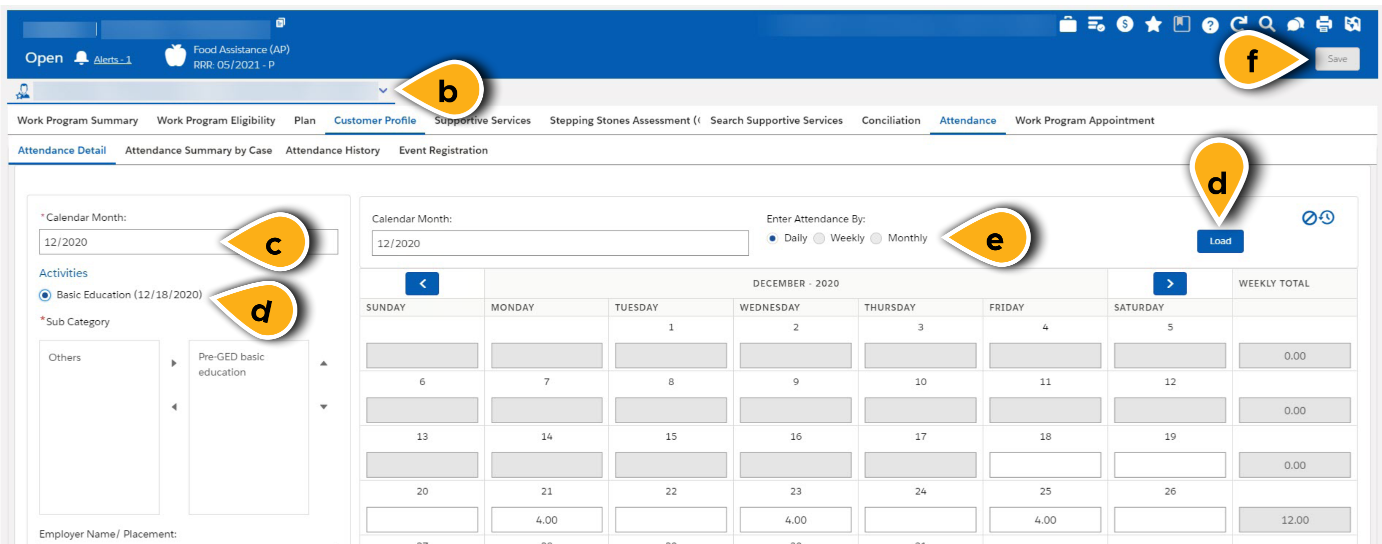
Each client that is participating in an allowable E&T component should have their completed hours entered into CBMS each month. Once you have created the activity on the Maintain Participant Activity screen, you will be allowed to enter hours for that activity.

a) From the Plan page, select the Attendance tab option to the right.



Once on the Attendance Detail window:

b) Ensure that you have the correct client selected.
c) Enter the correct month for which you would like to enter the hours. The month should be entered as a two-digit month and a four-digit year.
d) Select any activity that is open for that month and click “Load”.
e) After the selected activity loads, select the frequency in which you want to enter hours (Daily, Weekly, or Monthly). For all of your activities, monthly will be the easiest way to enter hours and is acceptable for all activities.
f) Click the “Save” button.

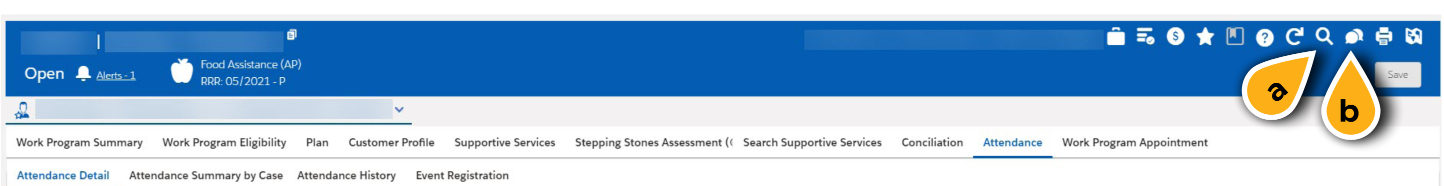


Step 5: Entering Case Comments

Per our State plan, it is a requirement that we track our interactions with clients. To satisfy this requirement, we use a case documenting function in CBMS known as case commenting.

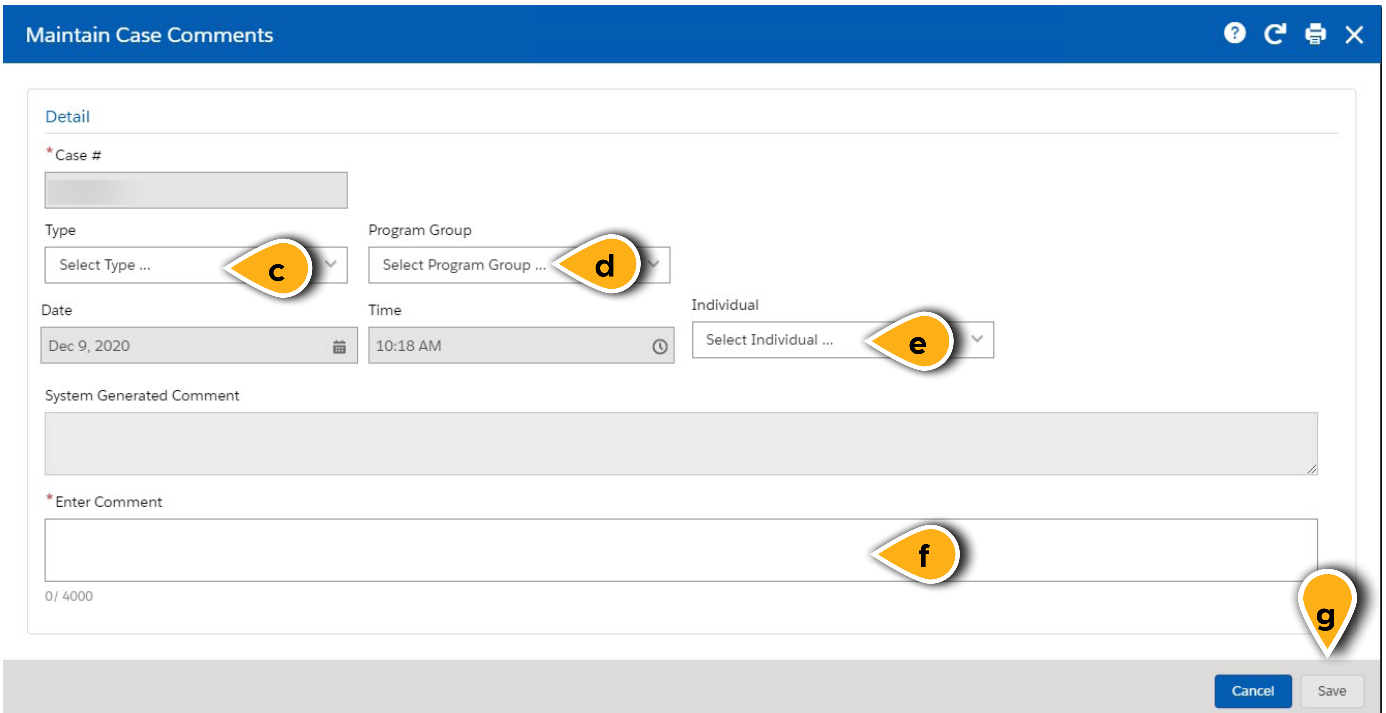
On the top ribbon of every page in CBMS, there are two icons to the right:

a) A magnifying glass icon which is used to search for old case comments.
b) A chat bubbles icon which is used create new case comments.



When the chat bubbles icon is selected, the Maintain Case Comments window will open:

c) Select "EF/WFD" from the Type drop-down.
d) Select "Employment First" from the Program Group dropdown.
e) Select the correct client under the Individual dropdown.
f) Enter the case comment. It should include the details of the appointment and any supports that were provided to the client.
g) Click the Save button.



Step 6: Monthly Follow-Up

Each month, clients who are participating in E&T components will submit hours to you. You should enter these hours in the appropriate activity. After each meeting with a client, you should also enter a case comment detailing what happened at the appointment and any supports that were provided.

If you have any additional questions about data entry as a Third-Party Partner, please reach out to Samantha Martin at sam.martin@state.co.us.