



# Manager Roundtable Agenda

## 9:00am – 4:30pm

Version 3.0

Welcome to the Manager Roundtable!		
Time	Module	Lesson
9:00am – 9:30am	Introduction	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Roundtable Agenda</li> <li>▪ Your IES Hot Topic</li> </ul>
9:30am – 10:30am	Manage Your Day	<ul style="list-style-type: none"> <li>▪ IES Resources</li> <li>▪ Starting Your Day in IES</li> </ul>
10:30am – 10:45am	Break	
10:45am – 11:15am	Manage Your Day Continued	<ul style="list-style-type: none"> <li>▪ Searching Applications</li> <li>▪ Adding Comments to an Unregistered ABE Applications and Pending or Completed Applications</li> <li>▪ Tasks/Reminders Overview</li> </ul>
11:15am – 12:00pm	Dates & Income Review	<ul style="list-style-type: none"> <li>▪ Refresher – Dates at Intake</li> <li>▪ Review of earned, self-employment and unearned income pages</li> <li>▪ Dates &amp; Income troubleshooting</li> </ul>
12:00pm – 1:00pm	Lunch	
1:00pm – 2:30pm	IES Tips & Tricks	<ul style="list-style-type: none"> <li>▪ Invoking clearances from pages (Citizenship/Residency &amp; Income Pages)</li> <li>▪ Data Exchange Page</li> <li>▪ Process Applications with No SSNs or Duplicate SSNs</li> <li>▪ Running Eligibility for 10 day verification notice</li> <li>▪ Accessing Case Ownership History &amp; Routing Summary</li> <li>▪ Reviewing denied/disposed applications</li> <li>▪ Reroute a case and reroute a caseload</li> <li>▪ Tips for a SNAP/Medical application when a program is withdrawn</li> <li>▪ Interview date in Application Registration/Data Collection</li> </ul>
2:30pm – 2:45pm	Break	
2:45pm – 3:30pm	Office Setup & USC Troubleshooting	<ul style="list-style-type: none"> <li>• Address common office setup/USC issues and resolutions</li> </ul>
3:30pm – 4:15pm	IES Best Practices	<ul style="list-style-type: none"> <li>▪ <b>Roundtable Discussion</b> – Class discussion on tips &amp; tricks since Go-Live</li> </ul>
4:15pm – 4:30pm	Wrap-up and Evaluation	<ul style="list-style-type: none"> <li>▪ Review key take-aways</li> <li>▪ Manager Roundtable Evaluation</li> </ul>
<b>End of Manager Roundtable</b>		



James Employment – Employer Page		James Employment – Pay Details Page	
Circumstance Start Change Date		1 <sup>st</sup> Pay Verification Received	
Pay Verification Start Date		1 <sup>st</sup> Pay Date Received/ Expected	
		2 <sup>nd</sup> Pay Verification Received	
James Employment – Employee Page		2 <sup>nd</sup> Pay Date Received/ Expected	
Employment Start Date			

Lisa Self-Employment Details Page		Lisa Self-Employment – Pay Details Page	
Circumstance Start Change Date		Date Received/ Expected	
Period Start Month		Pay Frequency	Monthly
Period End Month			
Start Date			

Lisa Self-Employment Expenses Page		Lisa Miscellaneous Expenses Page	
Expense Report Date		Circumstance Start Change Date	
Date Paid		Incurred Date	
Expense Verification Received Date			

Bobby Unearned Income Details Page		Bobby Unearned – Pay Details Page	
Circumstance Start Change Date		1 <sup>st</sup> Pay Date	
Reported On Date		1 <sup>st</sup> Pay Verification Received Date	
Date Client Became Aware		2 <sup>nd</sup> Pay Date	
Pay Verification Start Date		2 <sup>nd</sup> Pay Verification Received Date	