



IES AG08- LTC Caseworker Training Wrap-Up



AG08 – LTC Caseworker Learning Objectives:

Congratulations! You have completed this course, and have learned how to

- Navigate pages within IES and use Left Navigation
- Perform File Clearance using the Master Client Index
- Add and View documents to the electronic case record (ECR)
- View existing case and eligibility information in IES using Inquiry functions
- Know the different tasks and reminders in IES and how to complete them
- Record medical expenses to meet spenddown
- Determine and understand eligibility on LTC cases including spenddown
- Record comments on applications and cases in IES
- Understand the connection to the Federally Facilitated Marketplace and Federal data hub
- Understand how to divert income and assets in IES
- Process SLF and LTC cases from application registration to certification





Key Information for Processing LTC Cases

- **Two entries for the Living Arrangements/Domicile- Details page is required if the individual moved into a facility after the first of the month 3 months ago. (default date).**
- **Remember the Driver Flow is determined by the Questions pages.**
- **There are questions that trigger the LTC pages in IES. Review questions pages to ensure accuracy based on the customer's circumstance.**
- **CAU determination changes went into effect October 1 with the ACA Act. Review policy for the latest information regarding CAU determination.**
- **Entering all required asset information accurately is important.**
- **IES requires two entries for diverting resources to a community spouse. Community Spouse Resource Allowance Diversion type is for Assets.**



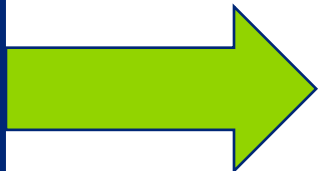
Key Information for Processing LTC Cases

- **IES will auto calculate diversion for a spousal dependent.**
- **To calculate diversion for non-spousal dependents, use the Diversion calculator located on the Diversion Amount- Details page.**

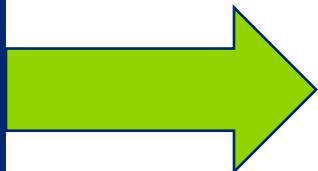
Tips for Successfully Using IES to Manage Your Day



Tips for Managing Your Day in IES



Monitor your work to avoid overdue tasks



Use the tools provided to you – IES Resources Library, Job Aids, Wizards, etc.



Ask for help from your Manager or IES Expert



Embrace the fact that you will gradually gain expertise in IES!



IES Resources



Where Can I Find Resources to Learn More about IES?

- Talk to your IES Expert about new business processes in your office
- There are 4 CBTs you can access in Net Learning to refresh the skills you have learned in classroom training:
 - ✓ IES Case Structure
 - ✓ IES Inquiry
 - ✓ Researching Information in IES
 - ✓ IES Management Functions (Managers Only)
- Don't forget about the **IES Online Help Wizards!** When you begin using IES, these should be the first place you check when you have a question on how to complete a task in IES.
- Check the IES Website often! This website is updated frequently as new IES information becomes available. You can also view the training website to download the latest versions of the IES Job Aids you used in class.
- Utilize your IES Resources Library for helpful information.





IES Top Tools for Continued Success

1. Practice Environment
2. IES Wizards – Page Help – Field Help
3. Online Student guides (On OneNet will be the most up-to-date)
4. Job Aids (On OneNet will be the most up-to-date)
5. IES Resources Library on OneNet
6. Your IES Training Notes from classes and webinars
7. IES Experts
8. Your Managers & Colleagues
9. IES Help Desk
10. DHS/HFS Intranet Site
11. IES Tasks & Reminders/EDM Inbox
12. Business Processes from the Business Process Team
13. Policy Info. from the Policy Team
14. Self-motivation and preservation
15. DEEP BREATHING...STAYING CALM... & GRADUALLY ALLOWING YOURSELF TO LEARN!

IES Practice Offices Available!

Each region has been provided with user IDs to sign into an IES practice office. Work with your LOA or Regional Training Coordinator to be assigned a practice user ID. We hope you ENJOY practicing the skills you learned in this classroom training and continue to learn in IES!



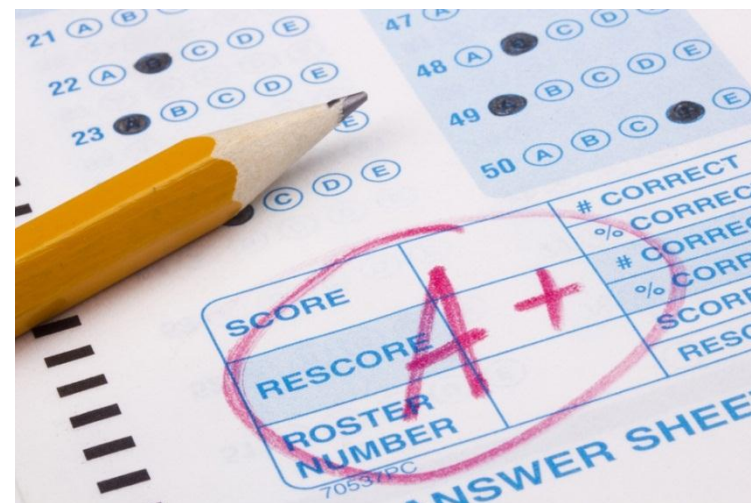
- This is a practice environment so you cannot break anything
- Do not use real numbers or customer information in the system
- Only use cases you created in the practice environment
- The environment will refresh once a week. This means all data you created will be removed



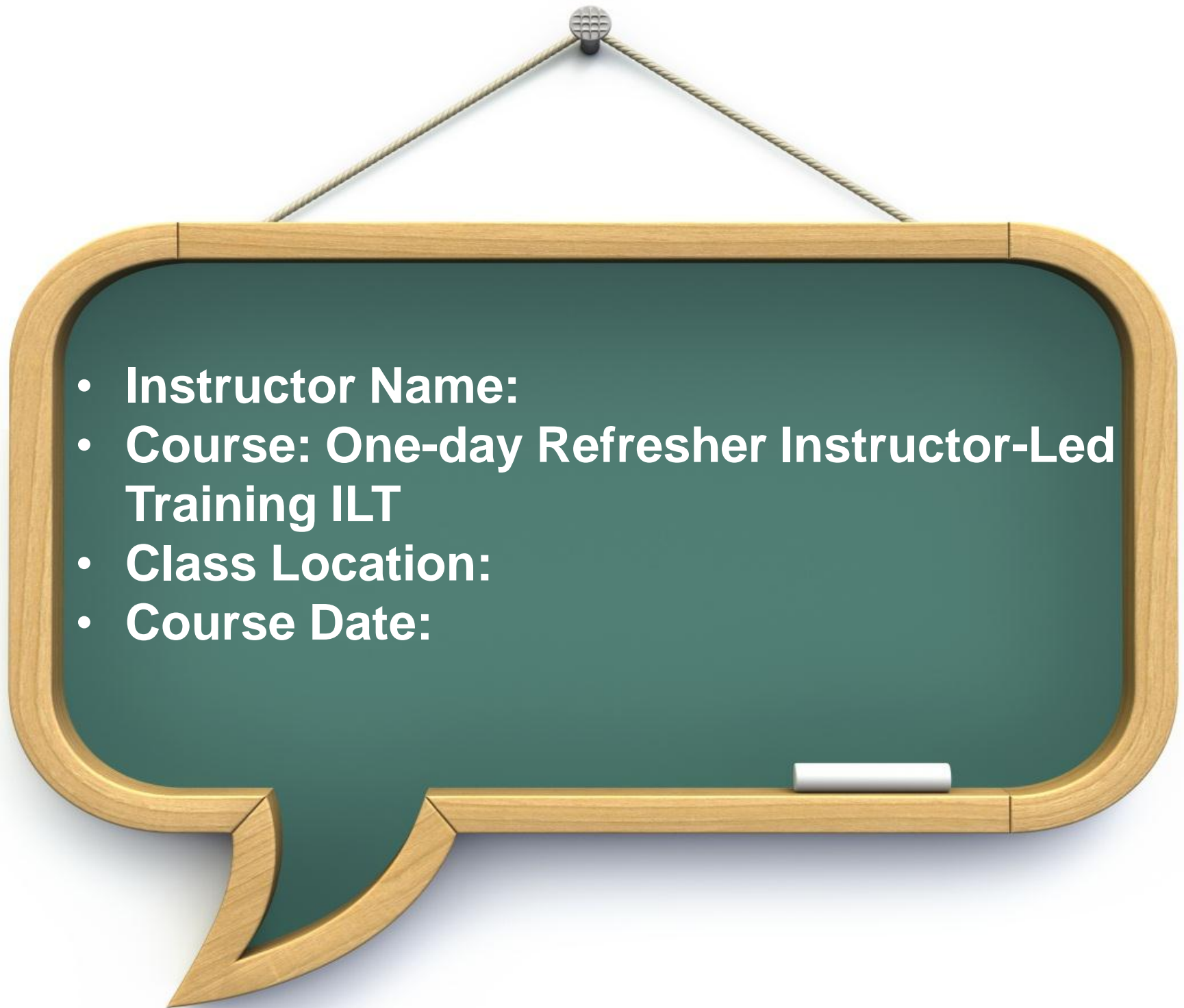
Assessment

Next Stop: The Classroom Training Assessment!

- The assessment is 20-25 questions to help reinforce what you learned this week. It is designed to assess your IES knowledge and help us identify concepts that should be reinforced with supplemental training.
- While completing this assessment, you may use the IES Training Environment, Online Help Wizards, and any classroom training materials. The only resource you cannot use is your classmates.
- You have received a hard copy for your reference, but will submit your answers using Net Learning. Your score will display. A minimum score of 70% is required for successful completion.
- Assessment may be attempted a second time immediately or within 3 business days back at your office.
- Give the paper copy of the Assessment to your instructor before leaving.



Course Evaluation



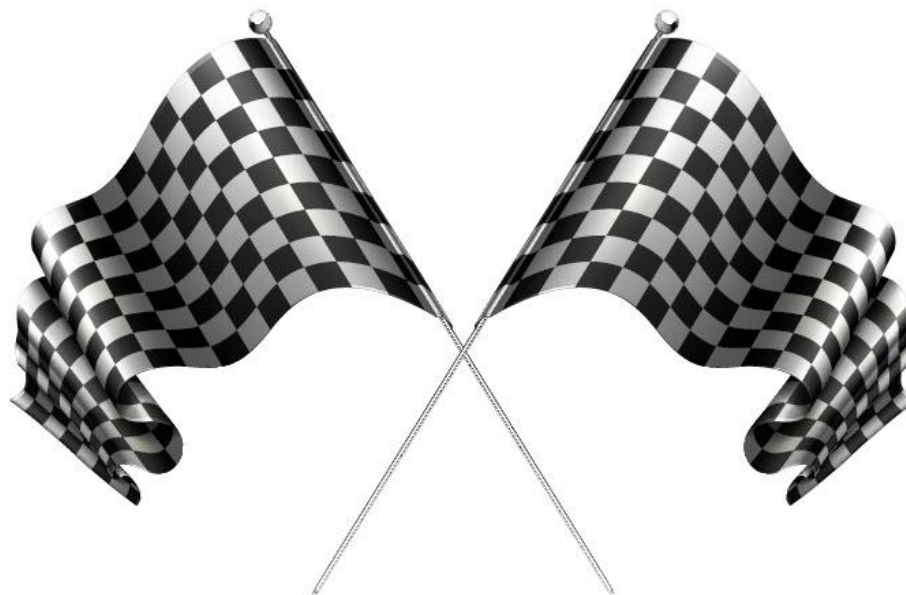
- **Instructor Name:**
- **Course: One-day Refresher Instructor-Led Training ILT**
- **Class Location:**
- **Course Date:**

IES Training Evaluation

Ready, Set, Go!

You're Ready to Start the Course Assessment!

- You have until 4:30PM to answer the questions.
- Assessment may be attempted again within 3 business days at your office.
- Contact an instructor if there are problems with your case or if you cannot logon to Net Learning or the IES Training Website



You Are Now Ready to Continue Your Success with IES!

- Thanks for participating in this class!
- You may leave training as soon as you are finished.

