



# IES Training Wrap-Up



## AG01 - Clerical Learning Objectives:

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

- Navigate pages within IES and confidently use the Left Navigation
- Use IES Inquiry pages to find information
- View and add documents to the electronic case record
- View case and eligibility information on existing cases
- Transfer cases between offices



## AG02 – Caseworker Learning Objectives:

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

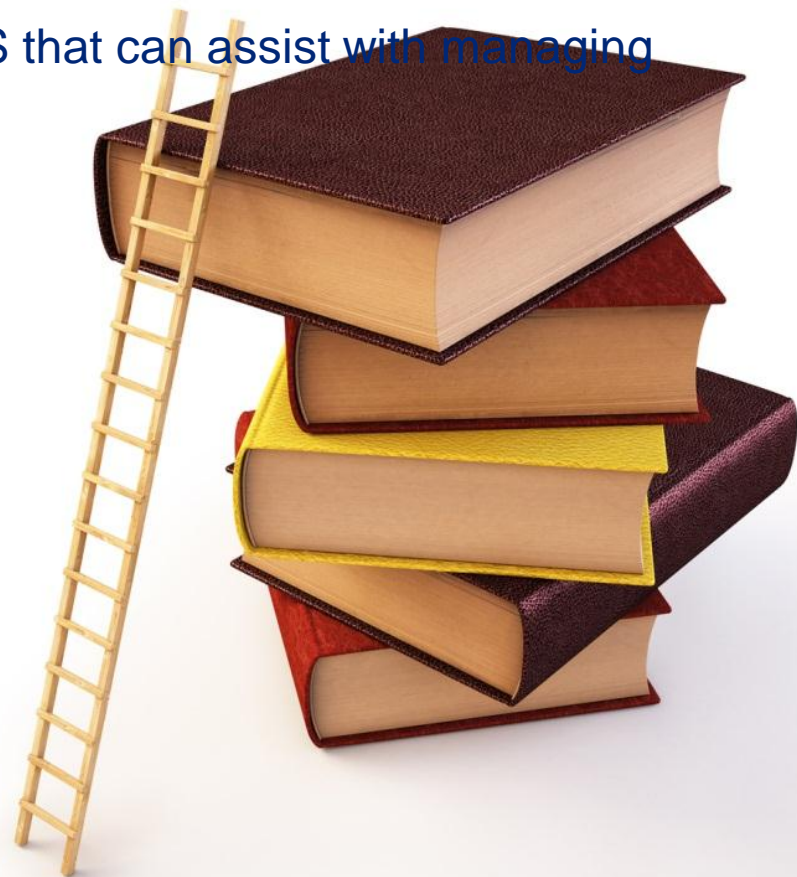
- Navigate pages within IES and use Left Navigation
- Register and withdraw applications
- Use IES Inquiry options to find information
- Perform File Clearance using the Master Client Index
- Add and view documents to the electronic case record
- View case and eligibility information in IES using Inquiry functions
- Schedule appointments during Application Registration
- Know the different tasks and reminders in IES and how to complete them
- Determine eligibility and understand benefit issuance on cases
- Record comments on cases in IES
- Make case changes within IES during intake
- Open cases and explain key points of the case
- Add and remove members from cases that have not been approved and certified



## AG03 – Manager Learning Objectives:

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

- Use IES Inquiry options to answer customer and staff questions
- Troubleshoot common problems and assist caseworkers with common issues
- Setup and update the Default Office Schedule and monitor appointments throughout the day
- Override eligibility results and certification dates
- Setup employee profiles to allow for effective routing of cases
- Utilize reporting and monitoring capabilities within IES that can assist with managing the office
- Request reports in IES



## AG05 – PAEA Learning Objectives:

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

- Navigate pages within IES and use Left Navigation
- Register and withdraw applications
- Use IES Inquiry options to find information
- Perform File Clearance using the Master Client Index
- View and add documents to the electronic case record
- View case and eligibility information in IES using Inquiry functions
- Schedule appointments during application registration
- Know the different tasks and reminders in IES and how to complete them
- Make case changes within IES during intake
- Open cases and explain key points of the case

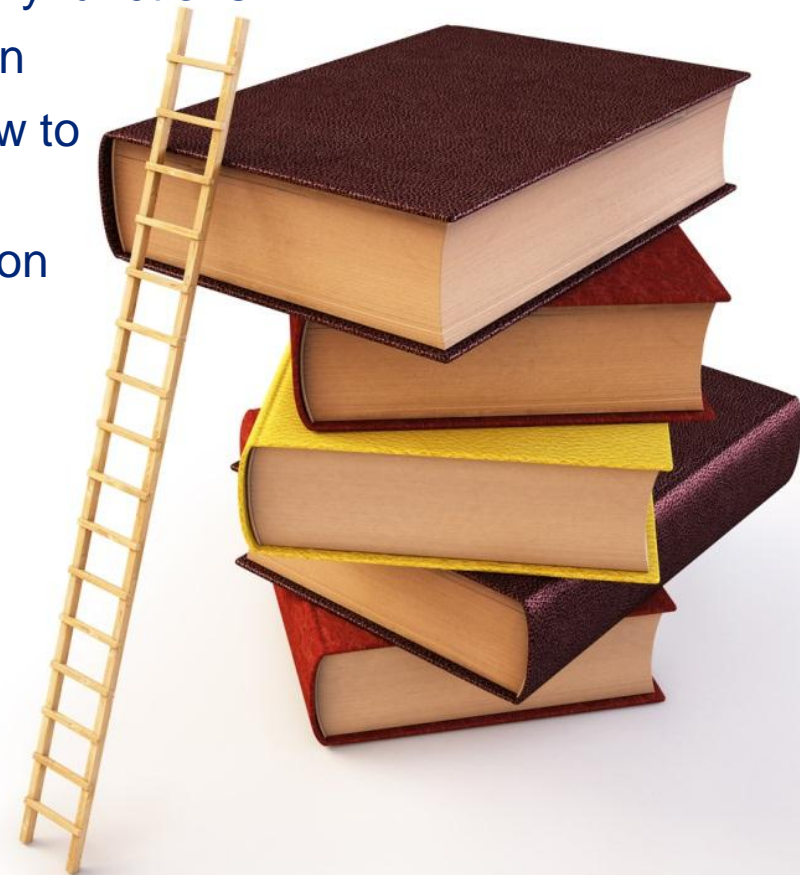




## AG08 – LTC Caseworker Learning Objectives:

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

- Navigate pages within IES and use Left Navigation
- Register and withdraw applications
- Use IES Inquiry options to find information
- Perform File Clearance using the Master Client Index
- View and add documents to the electronic case record
- View case and eligibility information in IES using Inquiry functions
- Schedule appointments during Application Registration
- Know the different tasks and reminders in IES and how to complete them
- Determine eligibility and understand benefit issuance on cases
- Record comments on cases in IES
- Make case changes within IES during intake
- Open cases and explain key points of the case
- Add and remove members from cases that have not been approved and certified



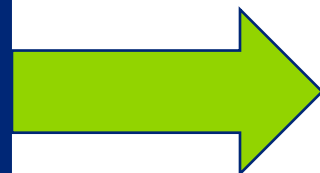
# Tips for a Successful IES Implementation



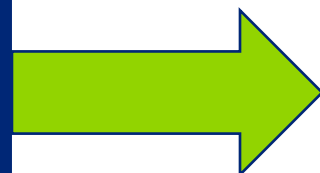
## Tips for a Successful IES Implementation



Monitor your work to avoid overdue tasks



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



Ask for help from your Manager or IES Expert



Be ready to learn and gradually gain expertise!



# Reminder – IES Phased Functionality





# IES Functionality By Phase

## Phase 1A-Intake (Oct 2013-Present)

- The Customer Self-Service Portal (ABE) and the Community Partner Module
- Intake Functions of the IES Worker Portal
  - Application Registration
  - CPE and MPE functionality
  - Data Collection
  - Master Client Index
  - Case Changes during Intake
  - Verification Checklist
  - Eligibility
  - Electronic Case Record
  - Tasks and Reminders
  - Reports
  - Case Transfer
  - Online Interfaces/  
Clearances
    - Security
- IES Integration with Federally Facilitated Marketplace
- Scheduling Functionality
- IES Customer Call Center & User Support Center

## Phase 2-Service Coordination (Sept 2015)

- Service Coordination Functions of the IES Worker Portal
- Case Changes during Service Coordination
  - Overpayment Calculation
  - Calendaring and Scheduling
  - Redeterminations
  - Hospital PE functionality
  - PSI Interface
  - Additional Tasks and Reports
- Conversion of AIS/ACM
- Additional ABE customer functionality:
  - Check My Benefits
  - Renew My Benefits
  - Report My Changes
- Additional IES Worker Portal Functionality:
  - Correspondence
  - Hearings/Appeals
  - Full Electronic Document Management
  - Benefit Issuance
- Retirement of Legacy Systems

# IES Resources

## Where Can I Find Resources to Learn More about IES?

- Talk to your IES Expert about new business process in your office
- There are 6 CBTs you can access in Net Learning to refresh the skills you have learned in classroom training:
  - ✓ Introduction to IES
  - ✓ IES Case Structure
  - ✓ IES Inquiry
  - ✓ IES Navigation
  - ✓ 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.



## Practice Environment

- 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
- URL: <http://167.219.245.50/ies/>
- Log in information

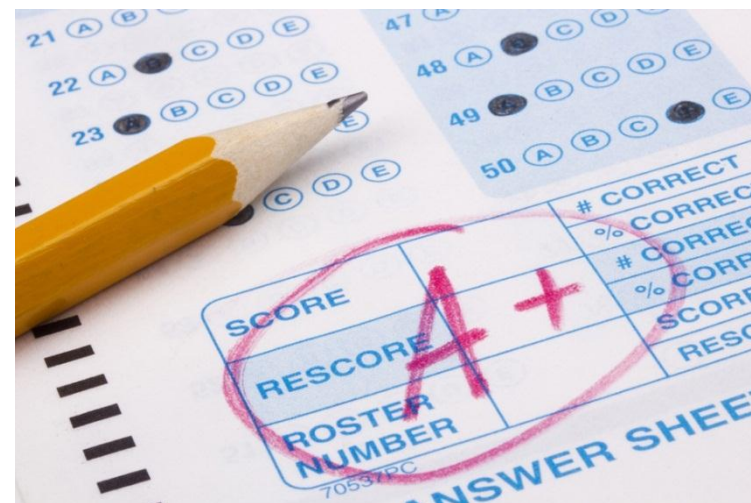


Assessment



## 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



## Online Course Evaluation

Access the IES Training Website to complete the course evaluation:

<http://intranet.dhs.illinois.gov/onenet/page.aspx?item=66266>

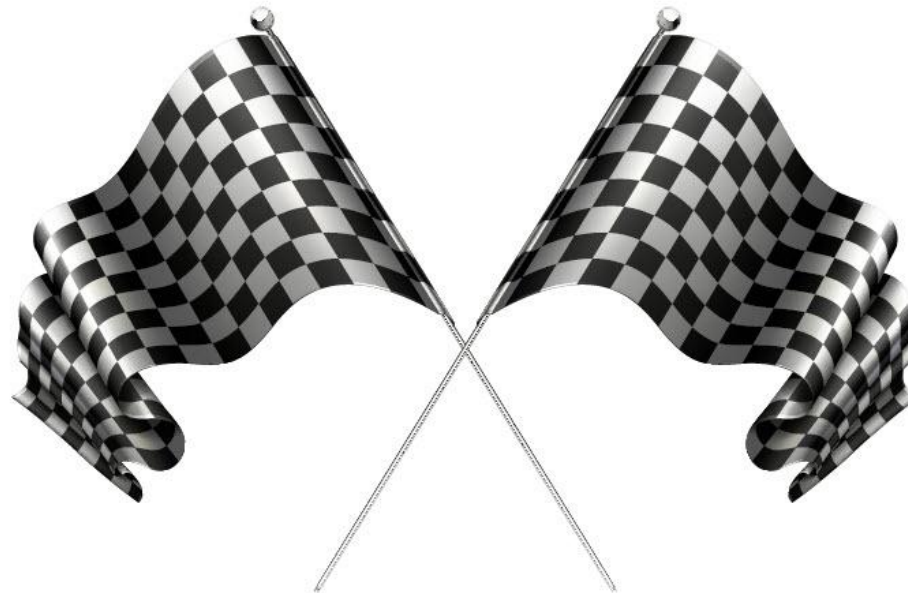
Select the following fields in the Class Identification section to track feedback to this course:

- **Instructor:**
- **Class:**
- **Location:**
- **Today's Date:**

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 Ready to Use IES!

- Thanks for participating in this class!
- Remember to complete the course evaluation and turn in your hard copy of the Assessment before leaving.
- You may leave training as soon as you are finished.

