Georgia WIC Specific Train-the-Trainer

Training Summary

Module 01: General System Information

Purpose:

This module contains multiple topics to familiarize you with the Georgia Gateway system. This module introduces the overall course structure and tools you will use. the module also guides you through the overall purpose and layout of this training course.

Objectives:

Upon completion of this module, the learner will demonstrate the ability to execute the following:

- To provide an overview of system benefits
- To understand the purpose of material tools

This course will cover various tools to teach you how to navigate the system, locate your work and complete daily tasks within the Georgia Gateway system. Live guided practice in the system allows you ample time to practice using system functionality based on general examples and detailed case scenarios. Overall, this prepares you to be job ready on day one.

The training environment is designed to help you. It provides practice opportunities in a live environment. In most ways, it is similar to the production environment. However, there are some areas that must be mocked up for training purposes. Your trainer will call these out when appropriate. They will ensure you understand exactly how the system works live.

Key Terms:

Key Terms	Definition
Applicant	An applicant is a Georgian applying for benefits.
Application	An Application is a person's request for assistance that is entered in the Application Registration pages. It is assigned a nine-digit number that begins with a "T".
Case	A Case is the information and documentation related to an eligibility determination that is entered in Data Collection. It is assigned a nine-digit number that begins with a "1".
Client	A Client is a Georgian who receives benefits.
Logical Units of Work	A logical unit of work (LUW) is a series of related data pages in Georgia Gateway. These pages are combined in the **Left Navigation Menu** and follow a driver flow sequence.
Date Header	A set of four date fields at the top of Detail pages used to document the date circumstances for a client are started, changed, reported and verified.
Interface	An interface allows users to access or submit client information to/from trusted sources.
Client ID	Everyone is assigned a unique Client ID when an application is registered.
Applicant Group	An Applicant Group is a term used to describe all the individuals for whom we are gathering information. The applicant group is everyone applying on the application.

Eligibility Determination Group (EDG)	An Eligibility Determination Group (EDG) includes all people and income, who impact eligibility for a participant. An EDG is like our current WIC concept of family size.
Assistance Unit (AU)	An assistance unit consists of the specific individuals who qualify for a particular benefit. An assistance unit may include all members of the applicant group, or may be as small as just one member of the applicant group. An Assistance Unit (AU) consists of approved members of the Applicant Group who receive benefits.
Document Management (DM)	Document Management in Georgia Gateway allows workers to view and upload documents to the Document Imaging System (DIS).
Document Imaging System (DIS)	The Document Imaging System (DIS) is a repository of documents containing client information that is used for eligibility determinations.

Module 02: Inquiry

Purpose:

The purpose of this module is to:

- Provide instruction on searching and finding information in the Georgia Gateway system
- Familiarize learners with the processes of data conversion from legacy systems to Georgia Gateway

Objectives:

Upon completion of this module, the learner will demonstrate the ability to execute the following:

- Locate and interpret case and client information
- Use Georgia Gateway to identify conversion status and recognize the process of interim conversion
- Review case data and eligibility pages in **Read Only** mode
- Review historical case data

Introduction:

Accessing information and locating work areas in the Georgia Gateway system most often starts with the search process. This lesson introduces you to the many ways that you can find information in the system.

Georgia Gateway contains multiple **Search** functions. The most common **Search** functionality and options are accessible from the **Home Page**. Some search functions are very specific and only accessible within their designated modules. Other search tools are accessible from nearly any page in the system.

Search features help you locate individual, application, and case data. Most often searches locate current case or client information. However, you can also find historical data on the cases and search for reports, assigned work, appointments, benefit issuance, correspondence, and much more.

Key Terms:

Key Term	Definition
Historical Data	Historical Data is the data that applies to the case/program for current and past months. This is case or client information that has ended and is different from the current record. Information entered into Georgia Gateway remains accessible for review.
Page History	Page History is the historical data that is pertinent to a particular page in a case. Access it using the arrows at the bottom of the page.
Inquiry	Inquiry is the process of searching for and finding specific information regarding an application, case, or individual within Georgia Gateway.
Quick Search	A search field and functional area located in the Context Bar. It displays on most pages within the system and allows you to quickly search for case and person records from within system pages. It takes you out of the module you are in and brings you directly into the Search module.
Conversion	The process of moving case and client information from a legacy system to the Georgia Gateway system.
Wave	The process of moving all data and all new work to the Georgia Gateway system for a particular set of counties. Only those cases associated with the designated counties convert at the start of each Wave.
Pilot	The name of the first conversion. Only a small number of counties are converted during the pilot.
Interim Conversion	The process of requesting that a case be converted from a legacy system to the Georgia Gateway system before its scheduled wave conversion.
Read Only mode	This mode allows access to view information, but not add, delete, or edit functionality.
Case Action	The action initiated on an application or case. Case actions include: Intake, Case Change, Add Person, Add Program, Renewal, Continue Previously Selected Action, Revert to Open, View Data Collection Page (Read Only), and Case Read. Identifies the type of work you do in the case.

Module 03: Application Registration

Introduction:

In this lesson, you learn the five-stage process of Application Registration. You also can view, in a live demonstration, the full application registration process in Georgia Gateway.

Purpose:

The purpose of this Module is to:

- Provide instruction on how to register in person or online applications
- Offer guidelines on how to use the Georgia Gateway system to evaluate matches for existing clients or to create new clients

Objectives:

Given a sample scenario, the learner will be able to successfully execute the following:

- Access applications
- Register paper applications
- File clear all applicants
- Register a Customer Portal application
- Withdraw an application
- Perform Troubleshooting processes

Application Registration is a function in Georgia Gateway and a process that is performed prior to data collection. The five steps of registering an application are:

1. Locating Work
2. Screening
3. Application Registration (pre-File Clearance)
4. File Clearance
5. Application Registration (post-File Clearance)

There are two general ways to receive applications. One is direct. These applications may come by participants applying in person. The second is from online sources where customers have applied through the Customer Portal.

Walk-in/ in person applications are registered directly in the Georgia Gateway Worker Portal when they are received, and then scanned into the Document Imaging System (DIS) following registration. It is very important to identify your office procedure for how in person applications are assigned and routed.

Some online applications for new clients are automatically registered and go directly to the clearinghouse worker. Applications received from online sources for existing clients are retrieved from the Georgia Gateway Inbox so that they can be matched to their existing records and associated to existing cases if appropriate. The Inbox provides the ability to search for applications. The clearinghouse will then have the ability to select an application, perform data collection, run EDBC, and send to VMARS for notification to the respective clinic. We will review the step-by-step instructions for this process later in the course.

Key Terms:

Key Term	Definition
File Clearance	File Clearance is the process of searching the Enterprise Master Person Index (EMPI) for persons already existing in the Enterprise Master Person Index (EMPI).
Application Inbox	Area of Georgia Gateway that provides access to new applications, changes, and renewals submitted online.
Dispose as Duplicate	The process of deleting an application that has been entered with the same application data and is requesting the same assistance.
Self-Service icon	Clicking this icon displays the information collected in Customer Portal.

Module 04: Intake

Purpose:

The purpose of this module is to:

- Demonstrate case processing
- Accurately complete the intake process and maintenance using samples case scenarios of varying complexity

Objectives:

After completing this lesson, you should be able to:

- Identify the three stages of the Georgia Gateway Intake Process
- Identify the functions and pages of Data Collection
- Identify the functions of Eligibility Determination
- Identify the functions of Authorizing Benefits

Data collection is the most lengthy and complex stage of intake. The required information, which must be collected to determine eligibility, can come from:

- Clients applying and providing verifications in person
- Clients applying and providing verifications via the Customer Portal

When the client applies through the Customer Portal, their application will be registered by the Office of Family Independence (OFI) and the Intake process (Data Collection, Eligibility Determination, and Authorization) will be completed by the WIC Clearinghouse. When clients arrive in the clinic for Certification or Recertification appointments, it is important to screen them in Georgia Gateway to determine whether the client requires application registration, data collection, and/or only a nutrition assessment.

When clients are scheduled to complete the nutrition assessment, it is important that the clerical staff follow-up on any potential pending verifications. Clearinghouse staff will not have access to Identification (ID) and Residency Verifications that may possibly be available in the Front-End System from a previous clinic visit.

Data Collection is where intake starts. The required information typically depends on the benefit program in which the customer is applying, although some pages are universal to all programs. There are Summary pages which should be reviewed for accuracy. There are also Gatepost Pages which drive to additional questions depending on certain responses (example: Pregnancy Details or Income Details).

There are currently 15 sub-modules that are comprised of Data Collection. Not all sub-modules are required for any single case. A combination of sub-modules appropriate to the case is created as data collection progresses. When all information is collected, and entered, the data collection stage is complete.

Key Term	Definition
+Add	This is an "add" function that is located within certain tables in Georgia Gateway and allows information to be added directly to fields within the table.
Applicant Group	An Applicant Group is a term used to describe all the individuals for whom we are gathering information. The applicant group is everyone applying on the application.
Assistance Unit	An assistance unit consists of the specific individuals who qualify for a particular benefit. An assistance unit may include all members of the applicant group, or may be as small as just one member of the applicant group. An Assistance Unit (AU) consists of approved members of the Applicant Group who receive benefits.
Authorize	The act of finalizing and confirming the approved or denied benefit.
Batch Process	The practice of sending items to a queue to hold until a specific time. When the batch triggers, all items in the queue process at once.
Case Action	The action initiated on an application or case. Case actions include: Intake, Case Change, Add Person, Add Program, Renewal, Continue Previously Selected Action, Revert to Open, View Data Collection Page (Read Only), and Case Read. Identifies the type of work you do in the case.
Conflict Resolution Panel (CRP)	A pop-up window that compares field values on a page and identifies conflicts. It compares data already existing in the Worker Portal to new information coming from the Customer Portal.
Data Collection	A module within Georgia Gateway. Also, the process of collecting information regarding the applicant group and entering it into the system, usually in the Data Collection module.
EDBC	This acronym stands for the Eligibility Determination Benefit Calculator.

Eligibility Determination	A module within Georgia Gateway. Also, the process of the system calculating eligibility based on the data entered.
Error Prone Profile	An investigative lead that is displayed when data has been reported that is identical or similar to information in another unrelated case. For example, the same address has been reported in two or more cases.
Intake	The name of the process that includes data collection, determining eligibility, and authorizing benefits.
Maternal/Paternal Indicator	This is a field on the Relationship Details page which indicates whether an extended family member in the applicant group is a member of the mother's or father's family. (Example: a paternal grandmother.)
Relationship Matrix	A table within the Relationships LUW, which methodically records and displays each member of the applicant group and his/her family, legal, or other relationship with every other member. It also displays other key relationship details as relevant.
Verification Checklist	This is the automatically generated list of missing verifications Created by the system when eligibility is determined.

Summary Conclusion

The Trainers will receive an instructor's guide, a participant's guide, PowerPoint presentation for each module, and the exercise workbook to use during the training session. The instructor's guide will aid the trainers in how the information should be presented when training their district staff. It provides guidance on what job aides to use, talking points, guided practices, and skill check answers in the power points. The participant's guide is the actual guide the trainees will receive during the district training. Receiving the participants guide will help to get them familiar with the differences between the instructor's guide and participants guide. The PowerPoint presentation provides a visual for the learners and screenshots of the information being discussed in each module. The exercise workbook has WIC specific exercises and guided practices the learner will us to practice in the Gateway system.

The trainers will learn to navigate the Gateway system to complete a WIC application from beginning to end. They will also learn the temporary work-arounds until all Change Request (CRs) are completed. The trainers will learn to identify the job aides that are used in each module and submodule.

The first two and a half days will be spent covering modules one through four with considerable emphasis on Data Collection, and the last one and a half days will be spent working on scenarios and exercises to ensure they are comfortable with navigating the system and entering WIC applications.

This train-the trainer training is WIC specific, the trainers' may receive information on how some information is universal to all programs and how some of the information from other programs may affect WIC outcomes and how to resolve those issues. The training will help the trainers present the information to the s in a manner that is conducive to receiving and retaining the material.