

Tribal·D™

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PAPERLESS CASE MANAGER 101 TRAINING

AGENDA

Time	Activity
8:30–9:00 am	1 Overview of TribeVue System Architecture and Capabilities
9:00–10:00 am	2 Applicant, Application, Eligibility, Case flow 2.1 Documents / Files Collection
10:00 – 10:30 am	Hands-on Session / Break
10:30 – 11:00 am	3 Eligibility Processing <ul style="list-style-type: none"> • Eligibility Period Benefit Calcs
11:00 – 11:30 am	Hands-on Session / Break
11:30 – 12:00 pm	4 Initial Case Creation <ul style="list-style-type: none"> • Status, Start Dates • Assessments • Letters
12:00 – 1:00 pm	Lunch

Afternoon

1:00 – 1:30 pm	5 Case Plans, Notes <ul style="list-style-type: none"> • Client Activities, Goals • Case Notes • Exports
1:30 – 2:00 pm	6 Case Services, Check Requests <ul style="list-style-type: none"> • Activity Types • Program Objectives: 477 Stats • Check Requests
2:00 – 2:30 pm	7 Recoupments, Sanctions, Adverse Actions <ul style="list-style-type: none"> • Over payments • Sanctions
2:30 – 3:00 pm	Hands-on Session / Break
3:00 – 4:00 pm	8 Case Recertifications <ul style="list-style-type: none"> • Checklists • Next Recert Date • Benefit Records • Mass Eligibility Review Letters
4:00 – 4:30 pm	Hands On Session / Break / Adjourn

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MAR. 2020 – AGENDA
DAY 2

Time	Activity
8:30–9:00 am	1 Message Center and Alerts
9:00–10:00 pm	2 Federal Reports Review <ul style="list-style-type: none">• TANF• 477• Child Support• Other
10.00 – 10.15 am	3 Break
10.15 – 12:00 pm	4 Electronic Document Management <ul style="list-style-type: none">• Scans• Meta data• File names• Expirations• Notifications• Searches