HIP WORK INSTRUCTIONS

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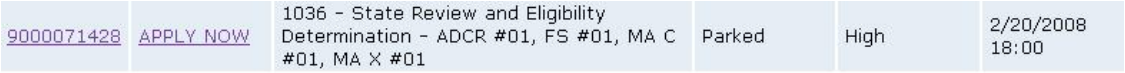
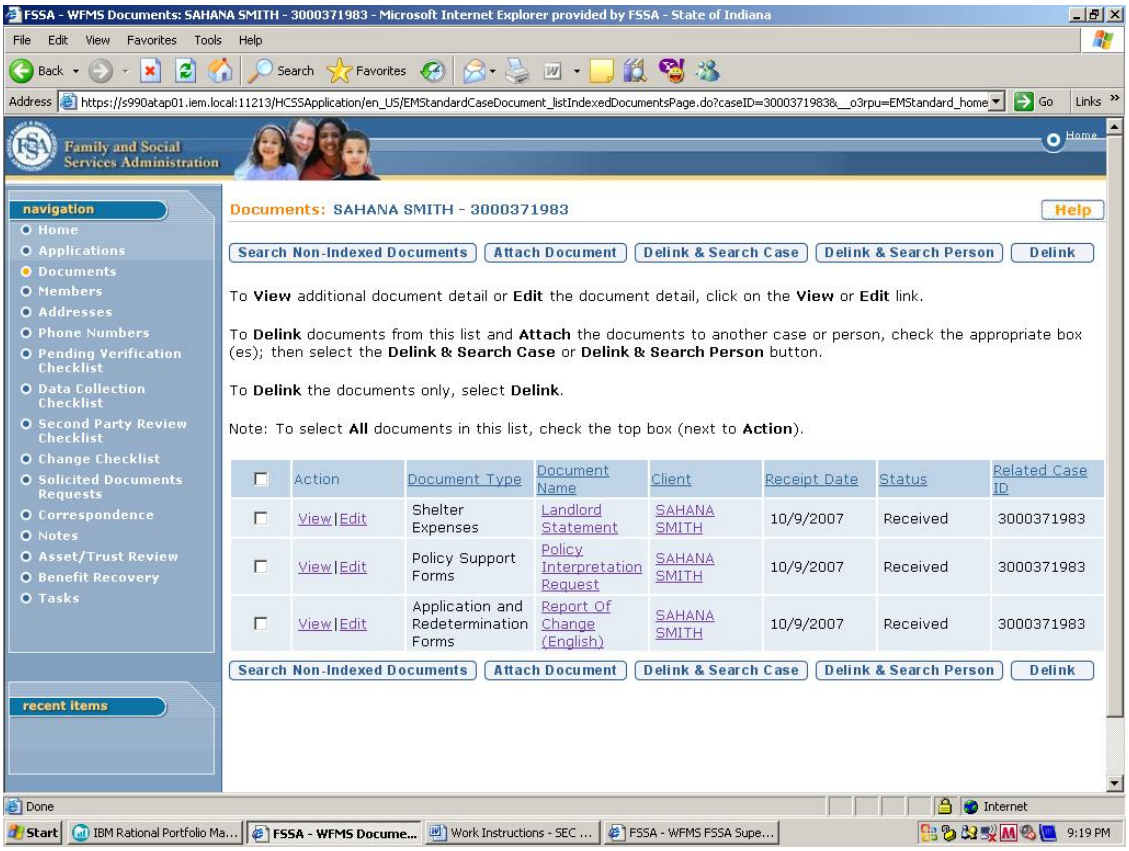
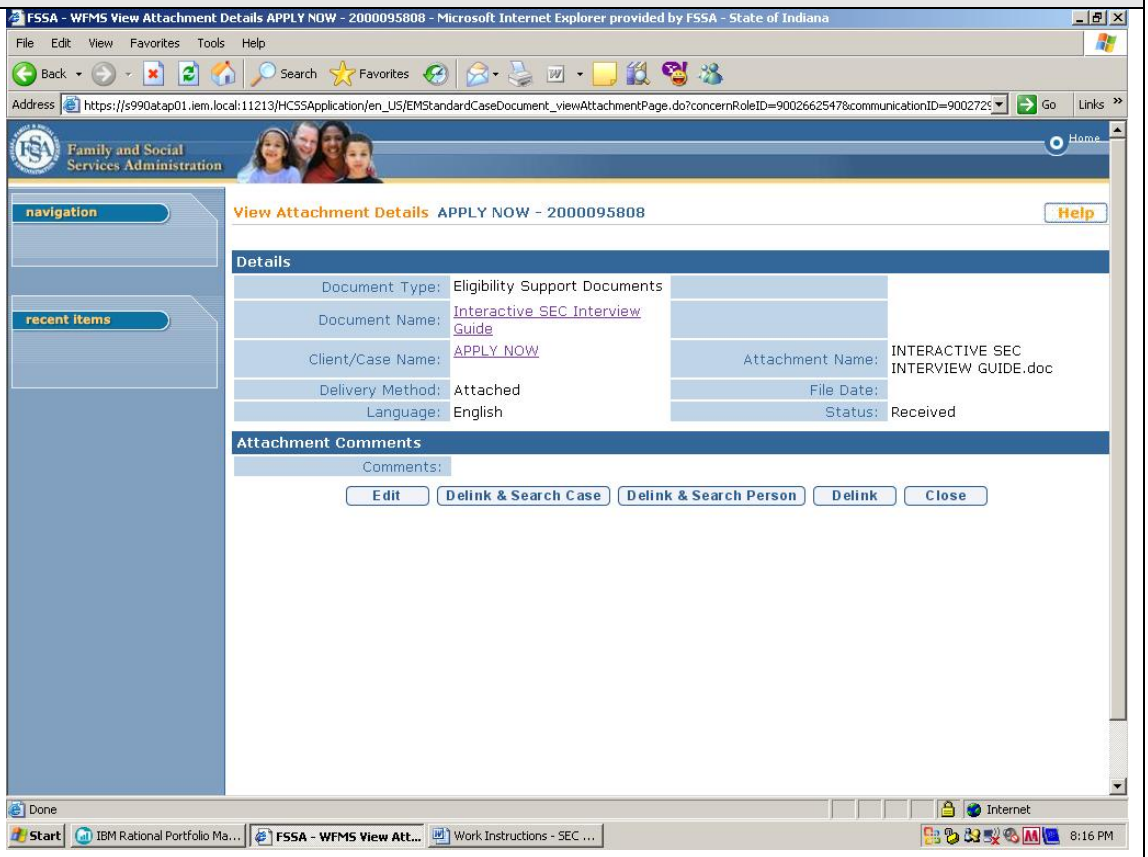
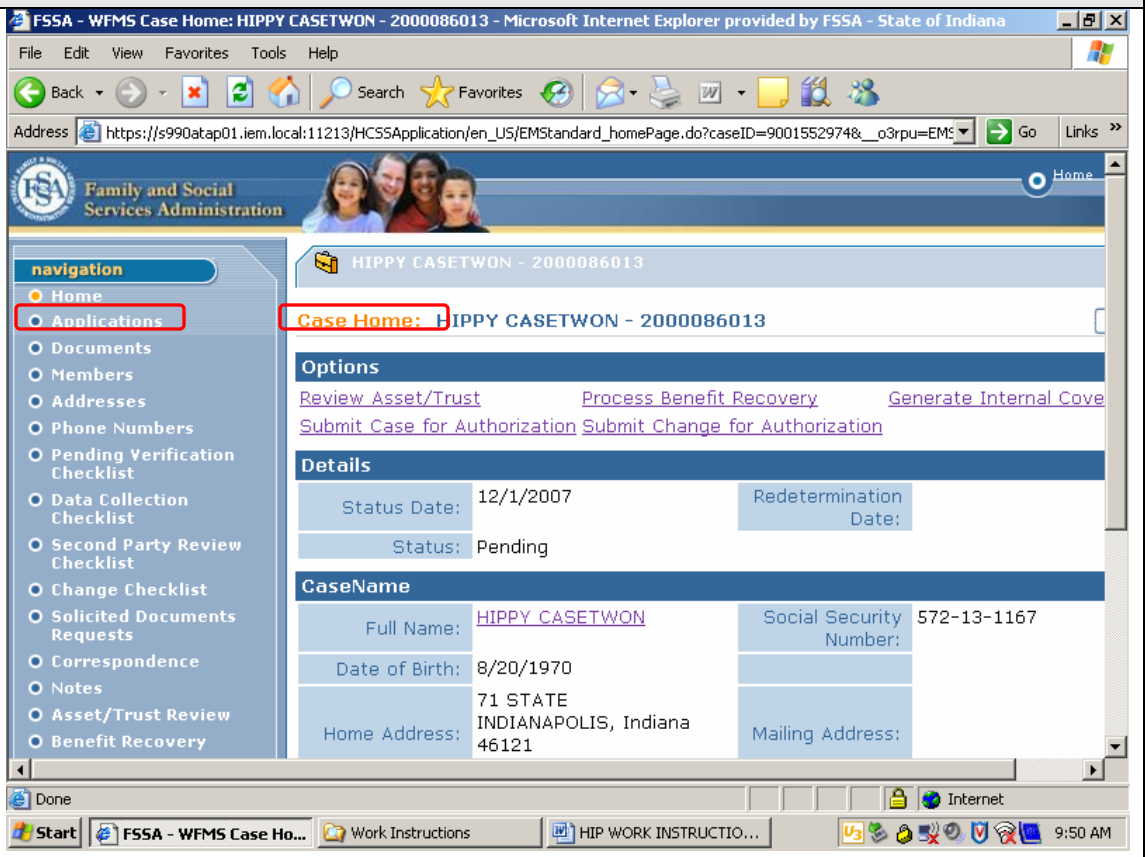
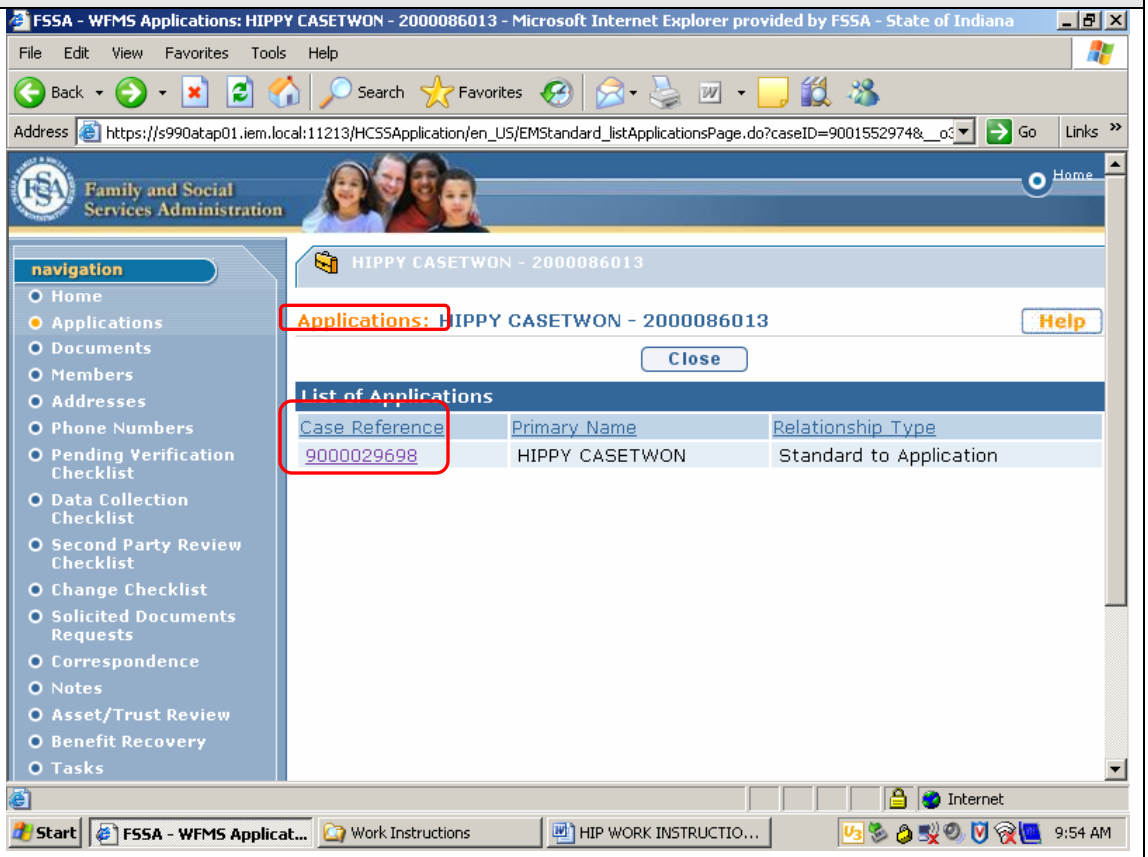
1.0 State Review and Eligibility Determination (User Generated)
When an action for review and eligibility determination is determined as necessary by a non-state coalition individual (ACS) the SEC will receive a user generated "**State Review and Eligibility Determination"** task.

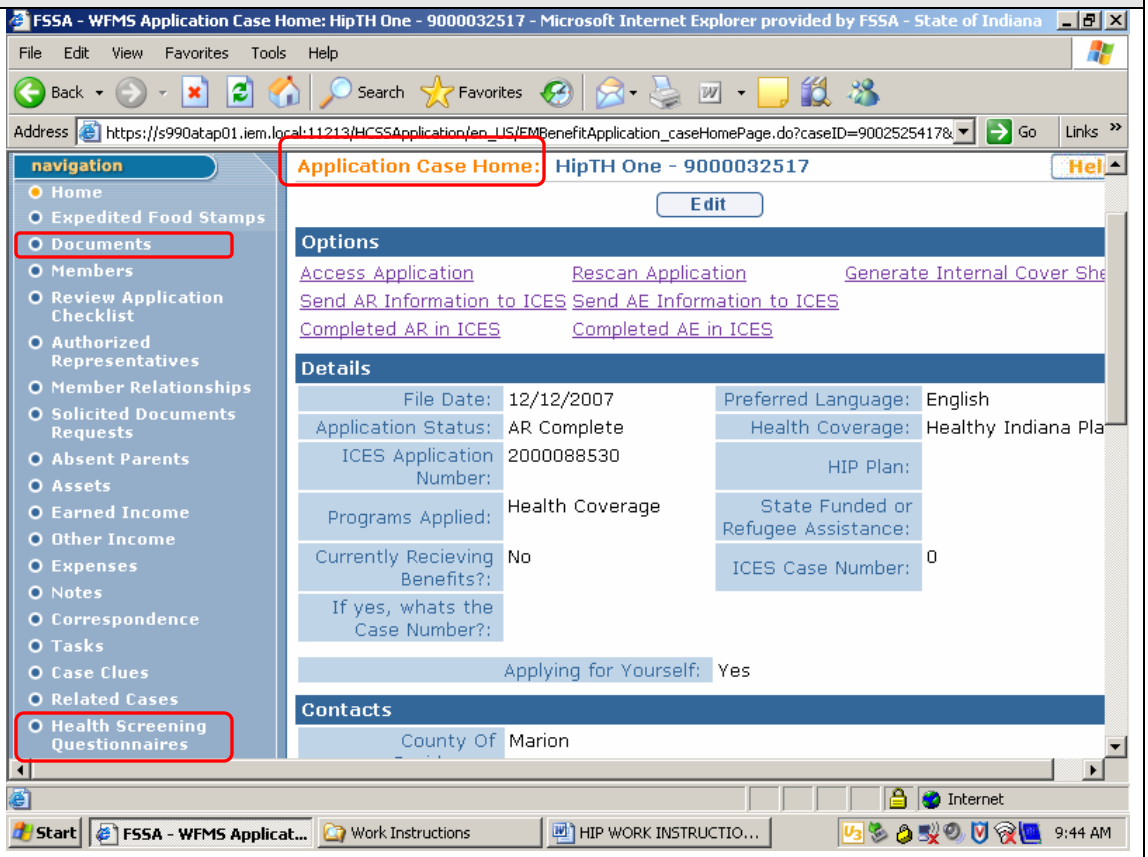
Step	State Review and Eligibility Determination
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.  9000071428 APPLY NOW 1036 - State Review and Eligibility Determination - ADCR #01, FS #01, MA C #01, MA X #01 Parked High 2/20/2008 18:00 The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the action, and authorize the case or return the case to ACS for clarification/correction.
3.	Click on *Application* or *Case Home Page* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Application* or *Case Home Page* to display the ICES case number.

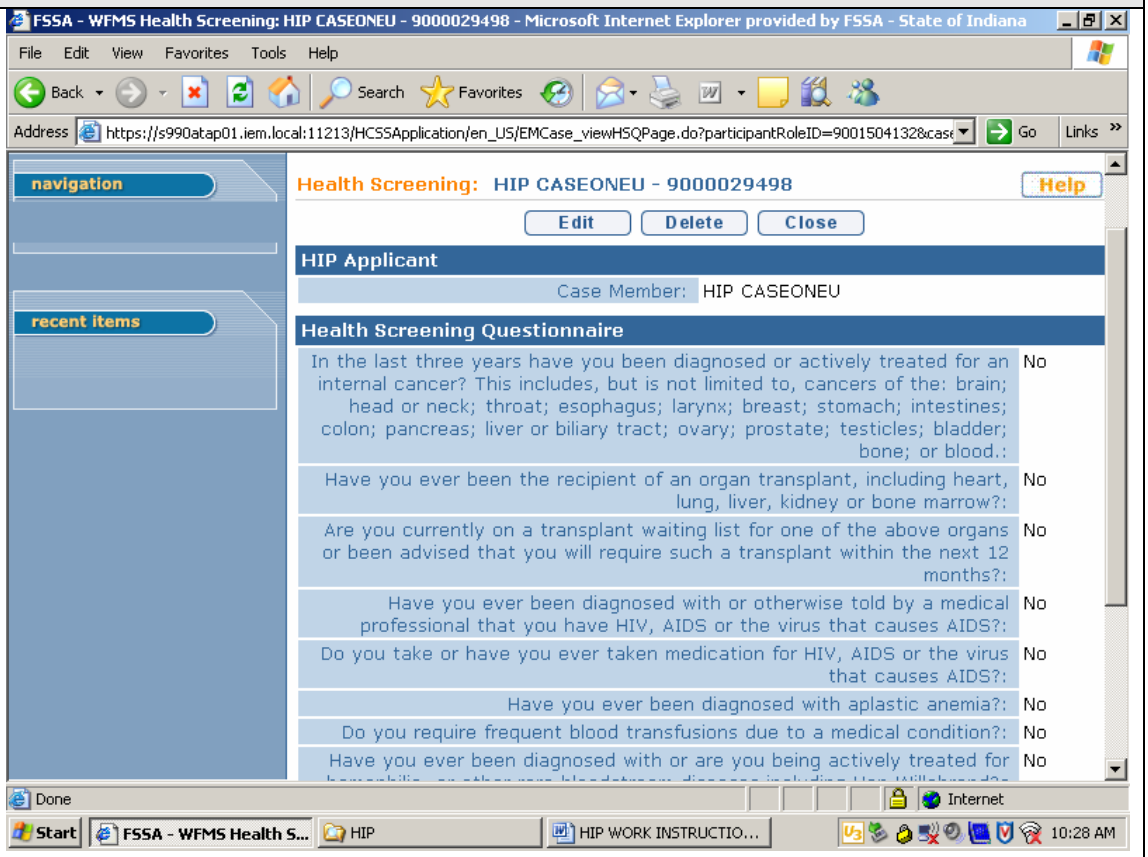
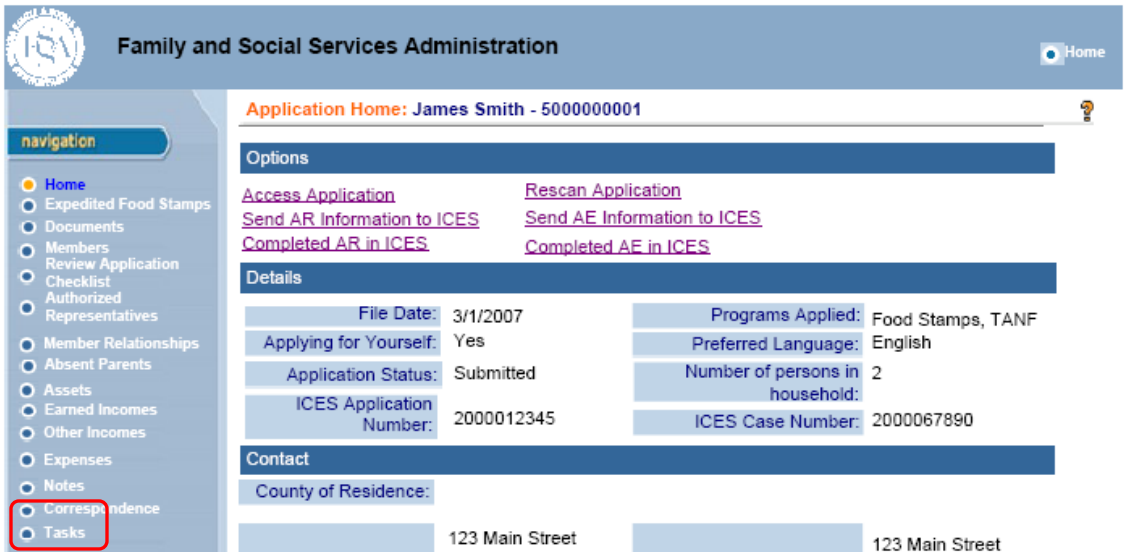
Step	State Review and Eligibility Determination
4.	From the *Application* or *Case Home Page*, click *Documents* from the Left Navigation. The WFMS will navigate to the *Documents Page*.
5.	From the *Documents* page click view to see the document's details related to the task. 
6.	Within the *View Document Details* screen click the document name hyperlink to view all supporting documentation

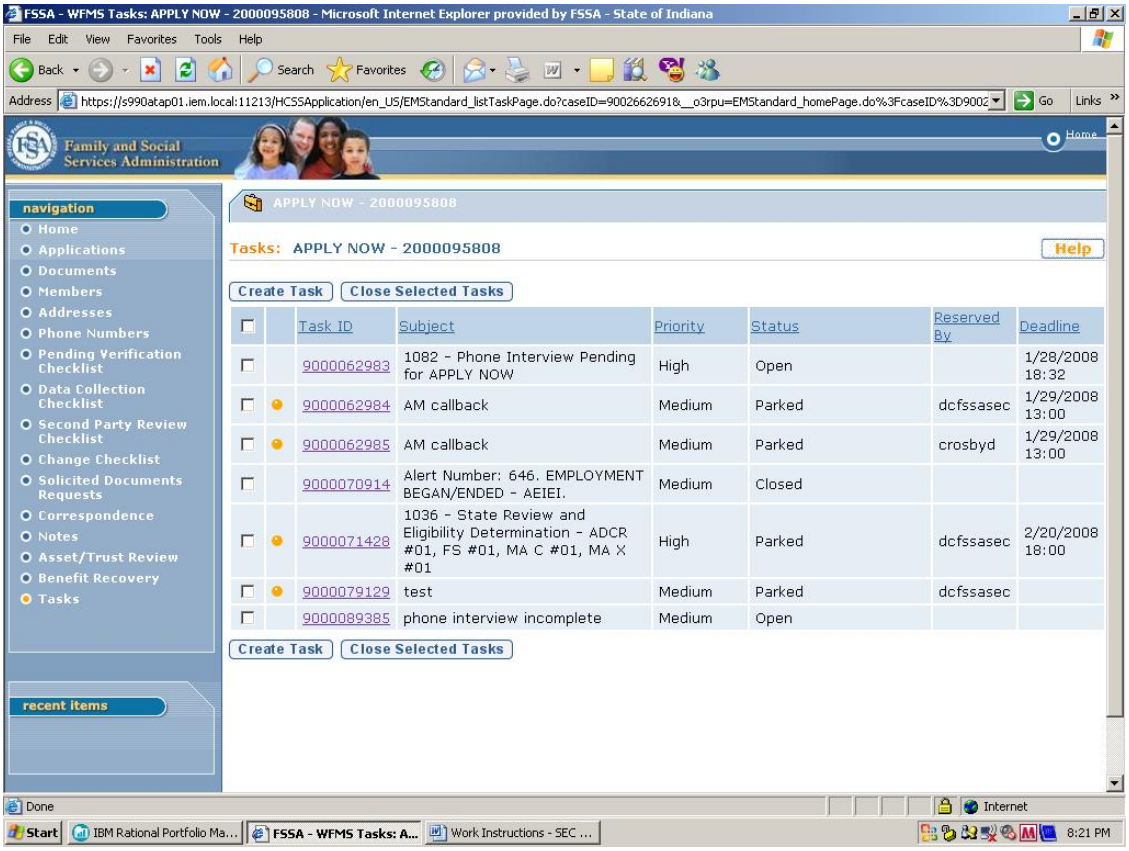
Step	State Review and Eligibility Determination
	 Clicking on *Close* will take the user back to the *Documents* page.
7.	From the *Application Home Page*, click *Health Screening Questionnaire* from the Left Navigation. Note: from the Case Home page click on *Applications* from the left navigation to access the application's case reference link. Click on the case reference link to access the Application Case Home. Click on *Documents* link in the left navigation to view the application form. Click on *Health Screening Questionnaire* in the left navigation to view the screening questionnaire.

Step	State Review and Eligibility Determination
	

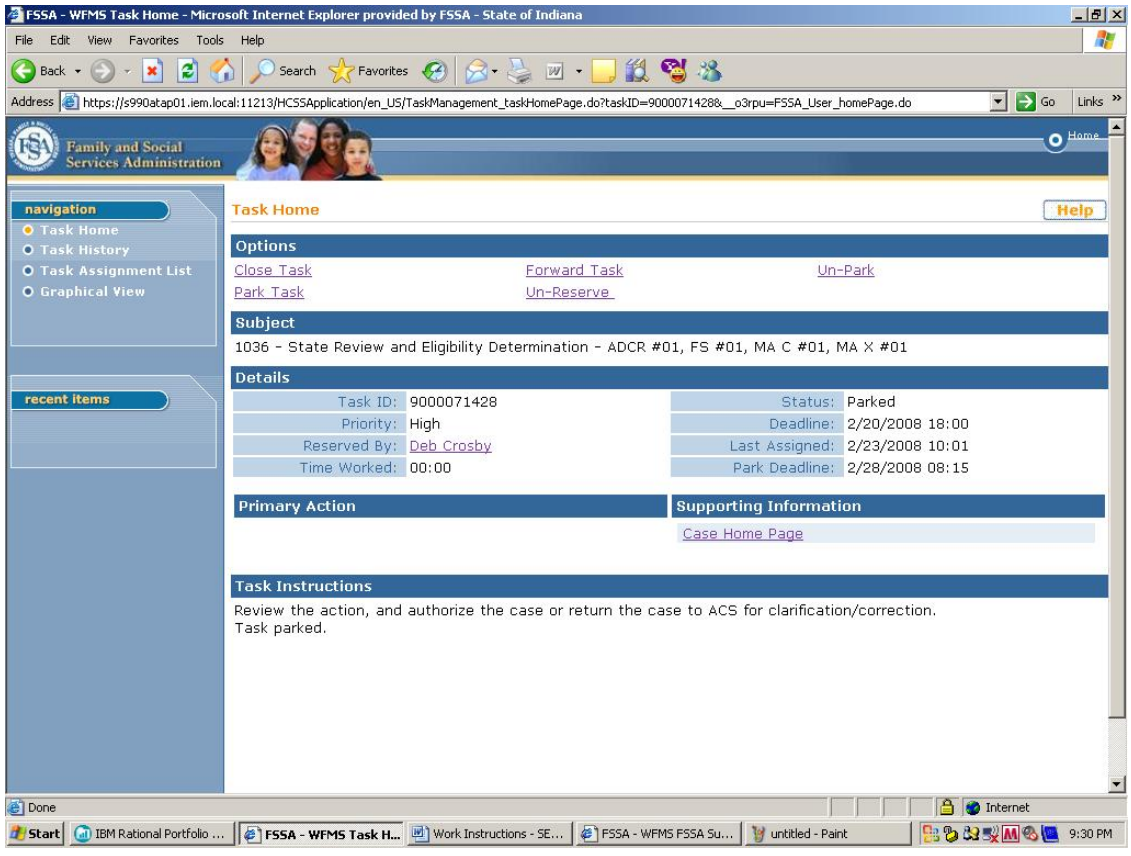
Step	State Review and Eligibility Determination
	

Step	State Review and Eligibility Determination
	
8.	Review the *Health Screening Questionnaire* for each applicant. If the applicant responded 'yes' to any question they are potentially high risk and a referral to Milliman must be completed upon authorization of a Conditional Approval. Instructions are provided in Step **11B**. Click on *Close* at the bottom of the *Health Screening Questionnaire* page.

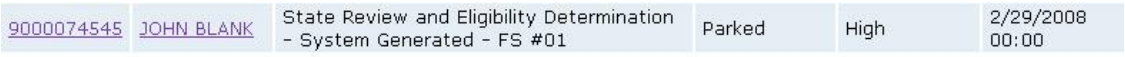
Step	State Review and Eligibility Determination
	
9.	Search for any additional tasks related to the application or case that may be outstanding. From the *Application or Case Home Page* click on *Tasks* from the Left Navigation. . To return to the Case Home page, click on *Related Cases* at the bottom of the left navigation. Click on the number under *Case Reference*. 

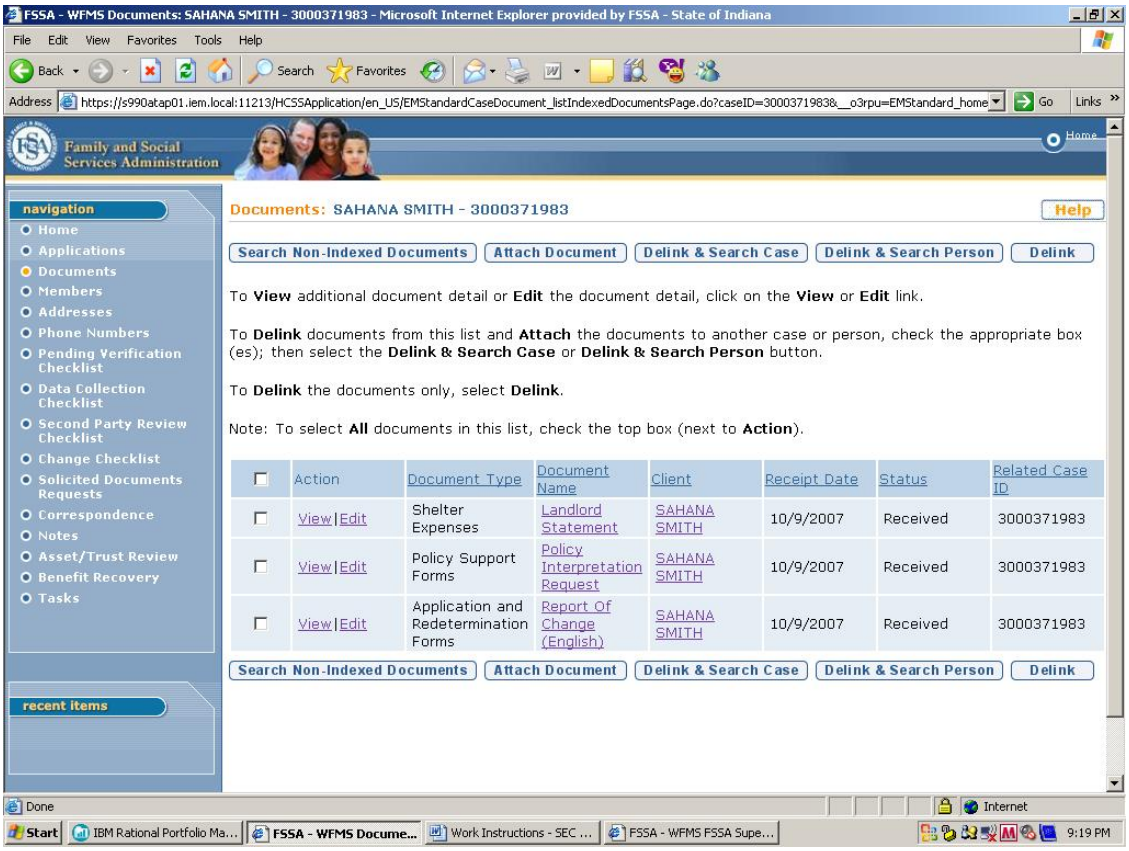
Step	State Review and Eligibility Determination
10.	The WFMS will navigate to the *Tasks* page. Review any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will assign the task to you to be worked, closed or parked. Navigate back to the *Application or Case Home* page by clicking on *Home* in the Left Navigation. 
11.	Authorize the application/case if correct and document in CLRC. If action is incorrect, go to **Step 12** for returning cases to ACS. A. Denials/Discontinuances ✓ AR denials ▪ Review the "*Review Application Checklist*" in WFMS. The *Review Application Checklist is* accessed from the Left Navigation of the *Application Home page*. The checklist will provide the reason(s) for the denial. ✓ AE denials/discontinuances ▪ Review CLRC. ▪ Review budgets and supporting documentation ▪ Review the "*Data Collection Checklist*" or "*Change Checklist*" in WFMS. The *Data Collection Checklist/Change Checklist is* accessed from the Left Navigation of the *Case Home* page. The checklist should also provide the reason(s) for the denial/discontinuance.

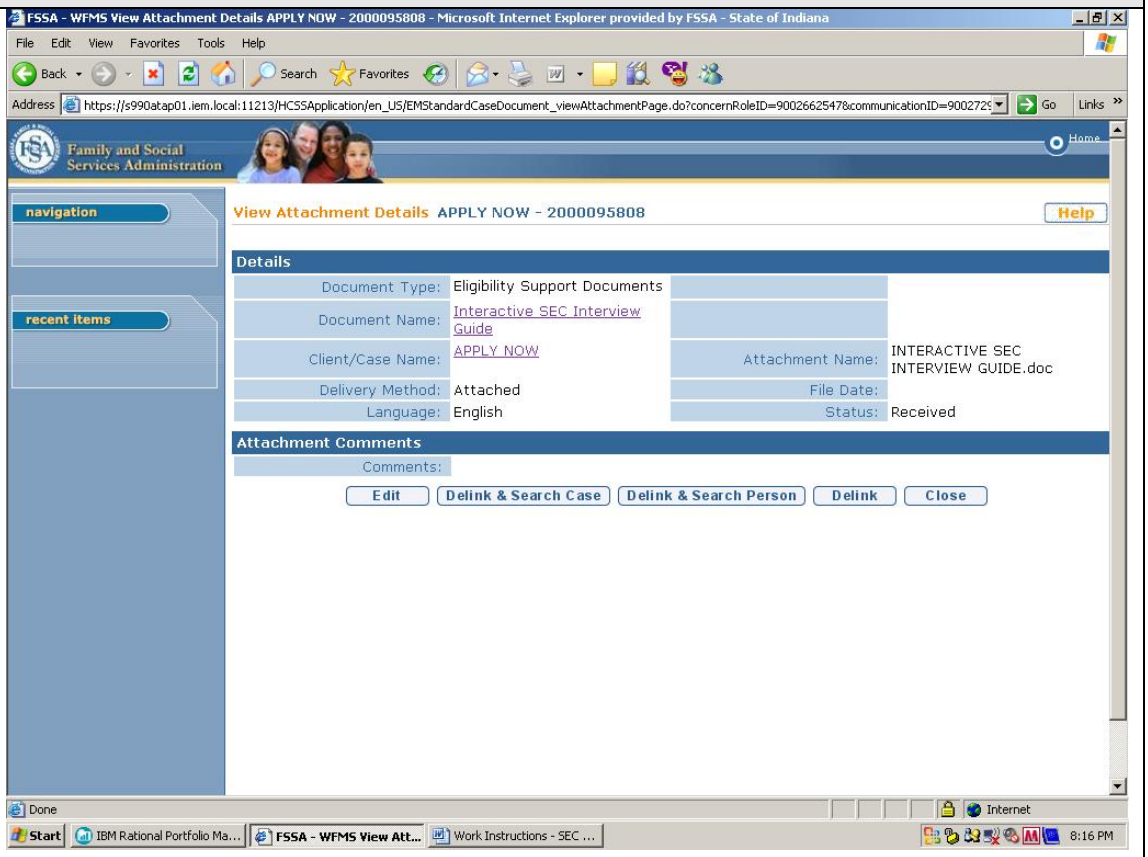
Step	State Review and Eligibility Determination
	✓ Denials/discontinuances for failing to provide information/verification, ▪ Search for non-indexed documents to attempt to find any documents associated with the application/case. If documents found link the non-indexed document to the case in WFMS ▪ REFER TO (INSERT HYPERLINK) SEARCH WORK INSTRUCTIONS (Common Processes – Section 3.11.3.7) to find and link a document. ▪ If any documents that would change the disposition were received prior to the "**State Review and Eligibility Determination"** task being generated and were not enacted upon, the case should be returned to ACS for processing. ✓ HIP Applications received from an Enrollment Center ▪ The disposition must be mailed to the Enrollment Center via the "Enrollment Center Application Routing Form". REFER TO (INSERT HYPERLINK) Sending Notices in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4 B. Conditional Approvals/Approvals ✓ Review CLRC. ✓ Review budgets and supporting documentation ✓ Applicants identified in **Step 8** as potentially high risk must be referred to Milliman upon conditional approval. ▪ Review answer to health screening question on ICES screen AEHIP. ▪ From the WFMS *Case Home* page click *Tasks* from the Left Navigation ▪ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page*. ▪ Using the drop down under the *Task Details* cluster, select *Potentially High-Risk HIP Applicant* as the *Task Type.* ▪ Click *Save*. The WFMS will create the task and navigate back to the *Tasks Page* ✓ HIP Applications received from an Enrollment Center ▪ The disposition must be mailed to the Enrollment Center via the "Enrollment Center Application Routing Form." REFER TO (INSERT HYPERLINK) Sending Notices in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4 C. Changes reported on an open HIP case: ✓ Qualifying event ▪ Review CLRC ▪ Review ICES screen AEHIP to confirm reported change is a qualifying event. D. HIP Manual notice of action should be sent for fiated actions and non-qualifying events. INVOKE Create Correspondence in the WFMS WORK INSTRUCTIONS

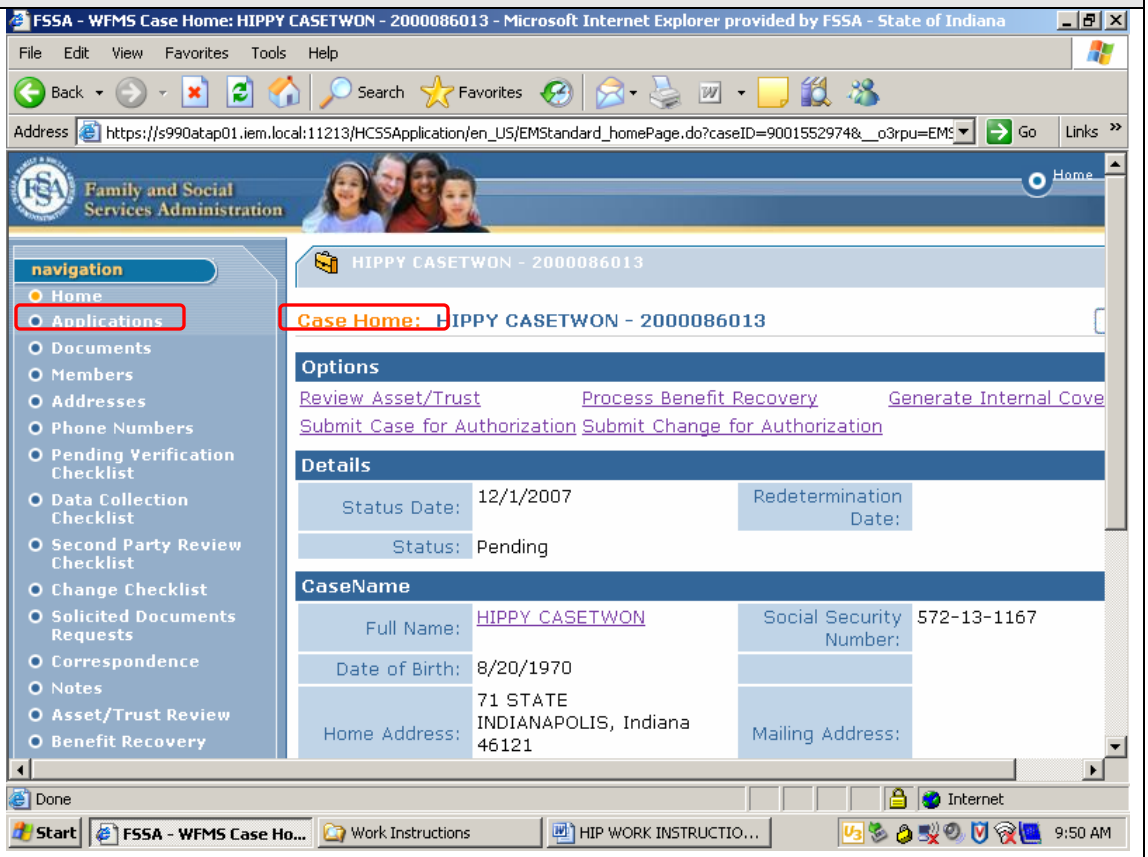
Step	State Review and Eligibility Determination
	Common Processes – Section 3.11
12.	Returning cases to ACS ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page*. ➢ Using the drop down under the *Task Details* cluster, select *Returned by State* as the *Task Type*. Click *Save*. The WFMS will create the task and navigate back to the *Tasks Page.*
13.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
14.	Click on the *Task ID* for the "**State Review and Eligibility Determination"** task with an Open Status. The WFMS will navigate to the *Task Home*.
15.	Click on *Close Task* on *Task Home* page. 

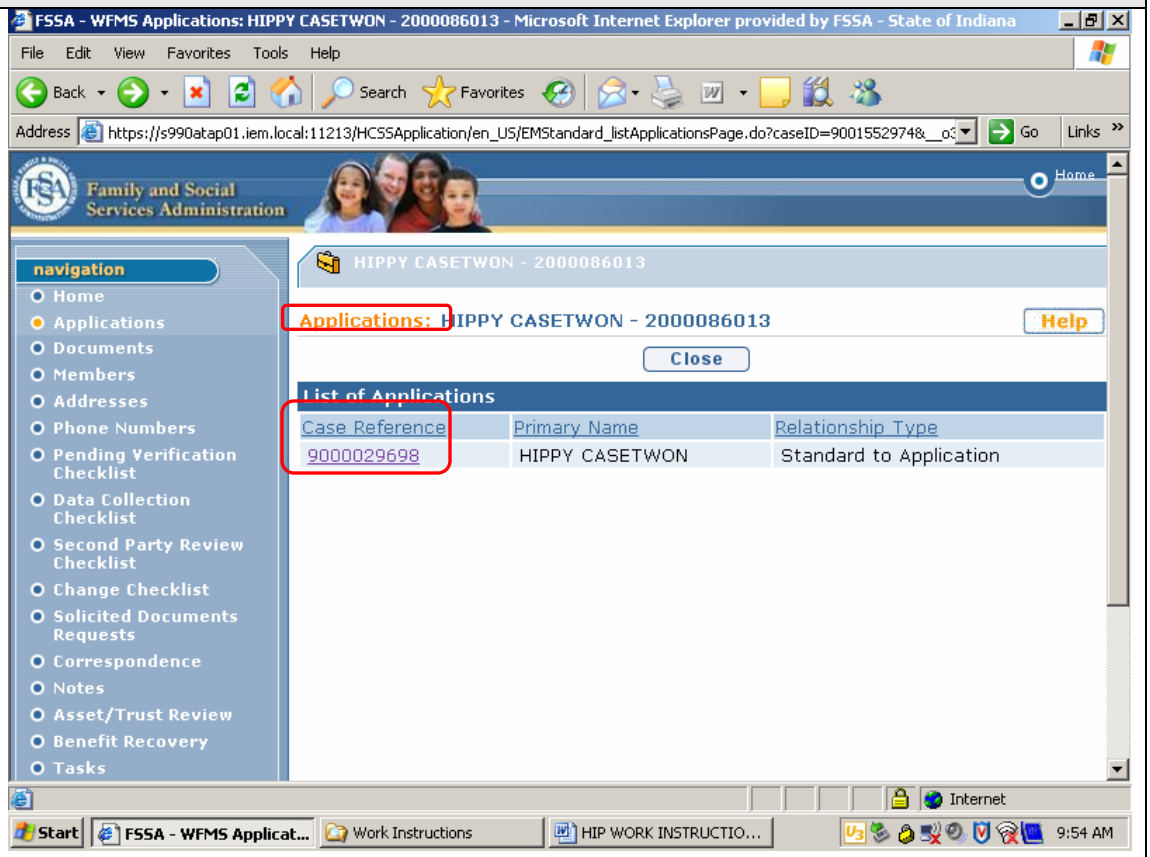
2.0 State Review and Eligibility Determination (System Generated)
WFMS has been designed to automatically system generate a "**State Review and Eligibility Determination"** task three business days prior to the threshold date of specific application actions. ACS has not certified the checklist as complete on these cases and the case processing threshold is approaching.

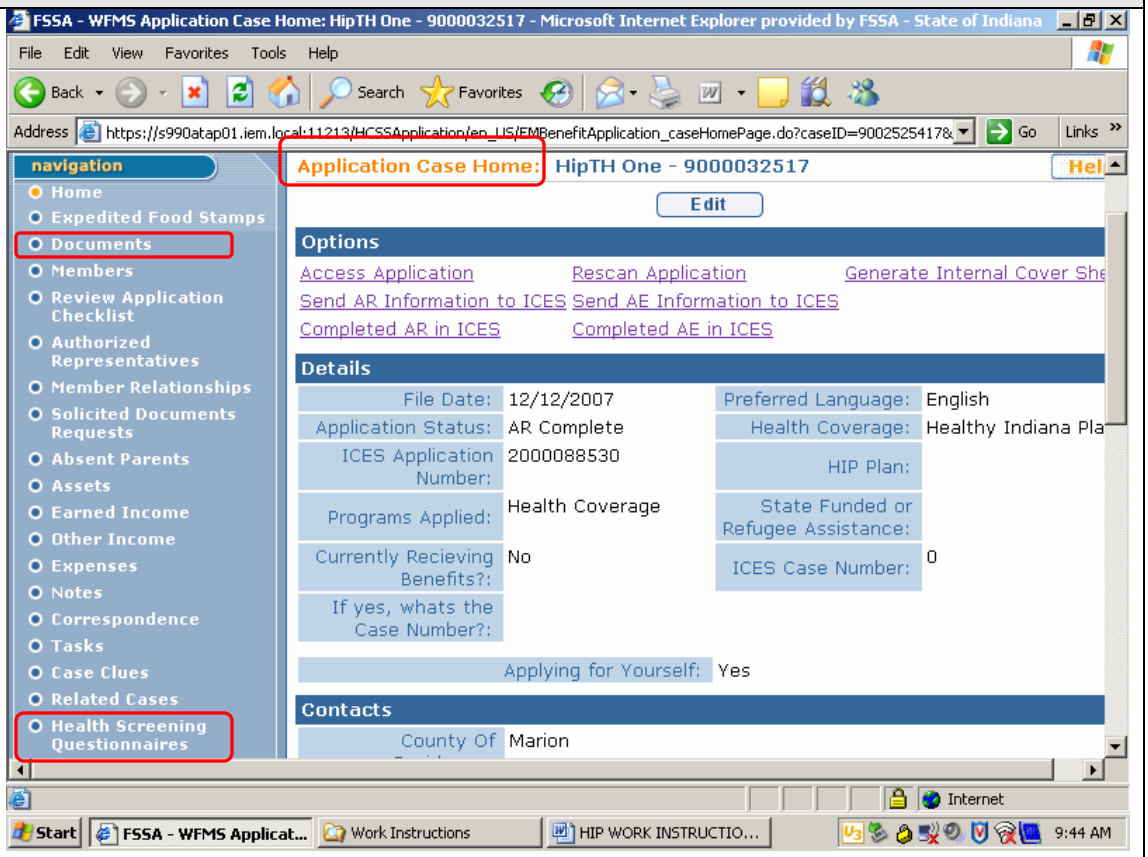
Step	State Review and Eligibility Determination – System Generated
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.  9000074545 JOHN BLANK State Review and Eligibility Determination - System Generated - FS #01 Parked High 2/29/2008 00:00 The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the action, and authorize the case or return the case to ACS for clarification/correction.
3.	Click on *Application* or *Case Home Page* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Application* or *Case Home Page* to display the ICES case number.

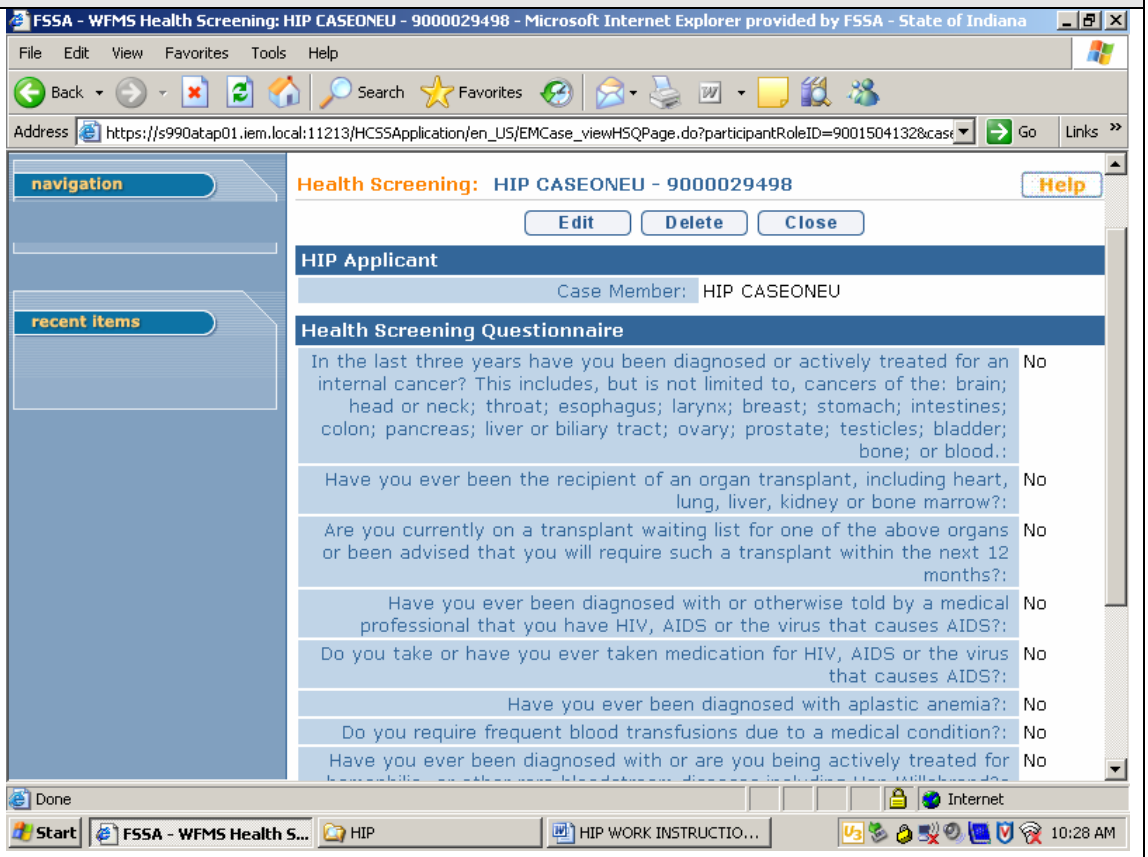
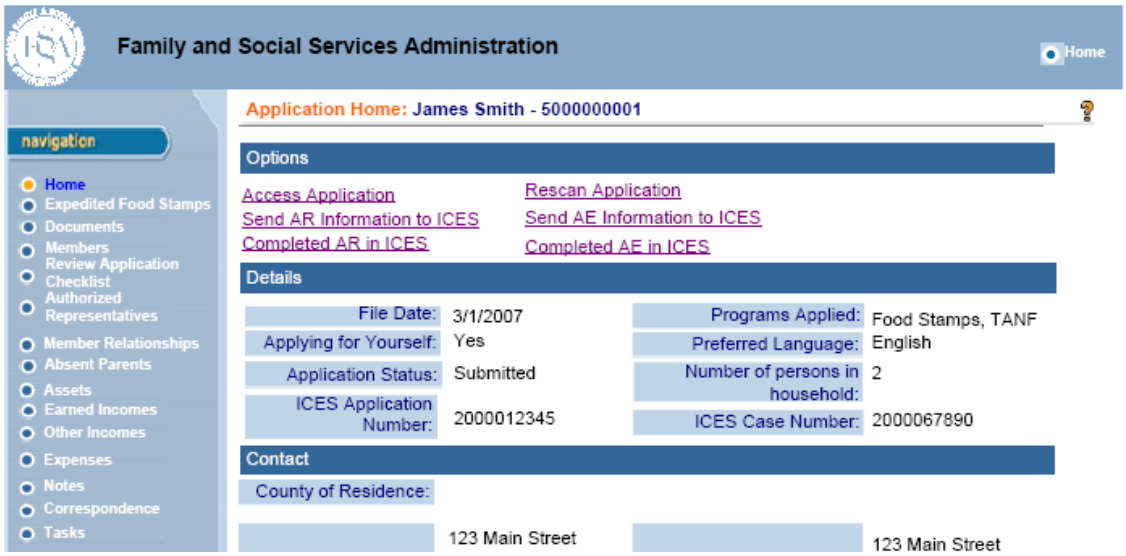
Step	State Review and Eligibility Determination – System Generated
4.	From the *Application* or *Case Home Page*, click *Documents* from the Left Navigation. The WFMS will navigate to the *Documents Page*.
5.	From the *Documents* page click view to see the document's details related to the task. 
6.	Within the *View Document Details* screen click the document name hyperlink to view all supporting documentation

Step	State Review and Eligibility Determination – System Generated
	 Clicking on *Close* will take the user back to the *Documents* page.
7.	From the *Application Home Page*, click *Health Screening Questionnaire* from the Left Navigation. Note: from the Case Home page click on *Applications* from the left navigation to access the application's case reference link. Click on the case reference link to access the Application Case Home. Click on *Documents* link in the left navigation to view the application form. Click on *Health Screening Questionnaire* in the left navigation to view the screening questionnaire.

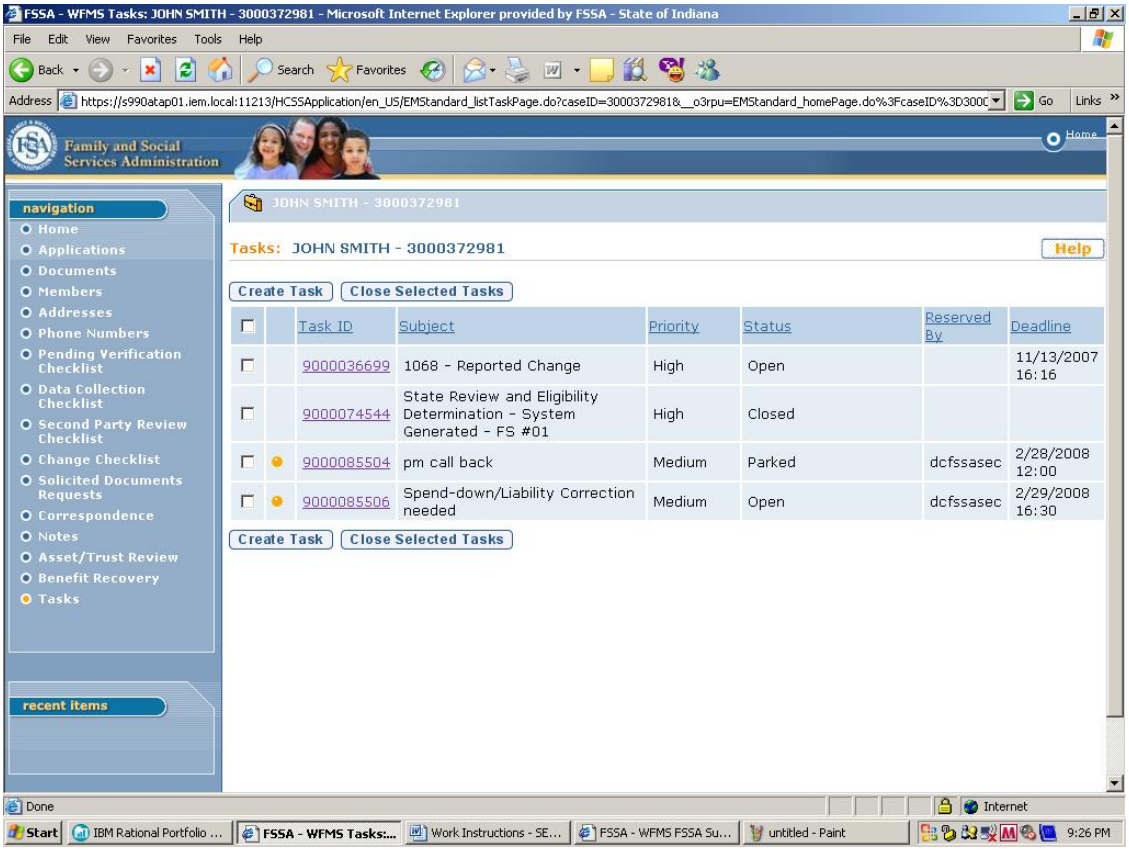
Step	State Review and Eligibility Determination – System Generated
	

Step	State Review and Eligibility Determination – System Generated
	

Step	State Review and Eligibility Determination – System Generated
	
8.	Review the *Health Screening Questionnaire* for each applicant. If the applicant responded 'yes' to any question they are potentially high risk and a referral to Milliman must be completed upon authorization of a Conditional Approval. Instructions are provided in Step **11B**. Click on *Close* at the bottom of the *Health Screening Questionnaire* page.

Step	State Review and Eligibility Determination – System Generated
	
9.	Search for any additional tasks related to the application or case that may be outstanding. From the *Application Home or Case Home Page* click on *Tasks* from the Left Navigation. To return to the Case Home page, click on *Related Cases* at the bottom of the left navigation. Click on the number under *Case Reference.* 

Step	State Review and Eligibility Determination – System Generated
10.	The WFMS will navigate to the *Tasks* page. Review any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will assign the task to you to be worked, closed or parked. Navigate back to the *Application or Case Home* page by clicking on *Home* in the Left Navigation.



11.	

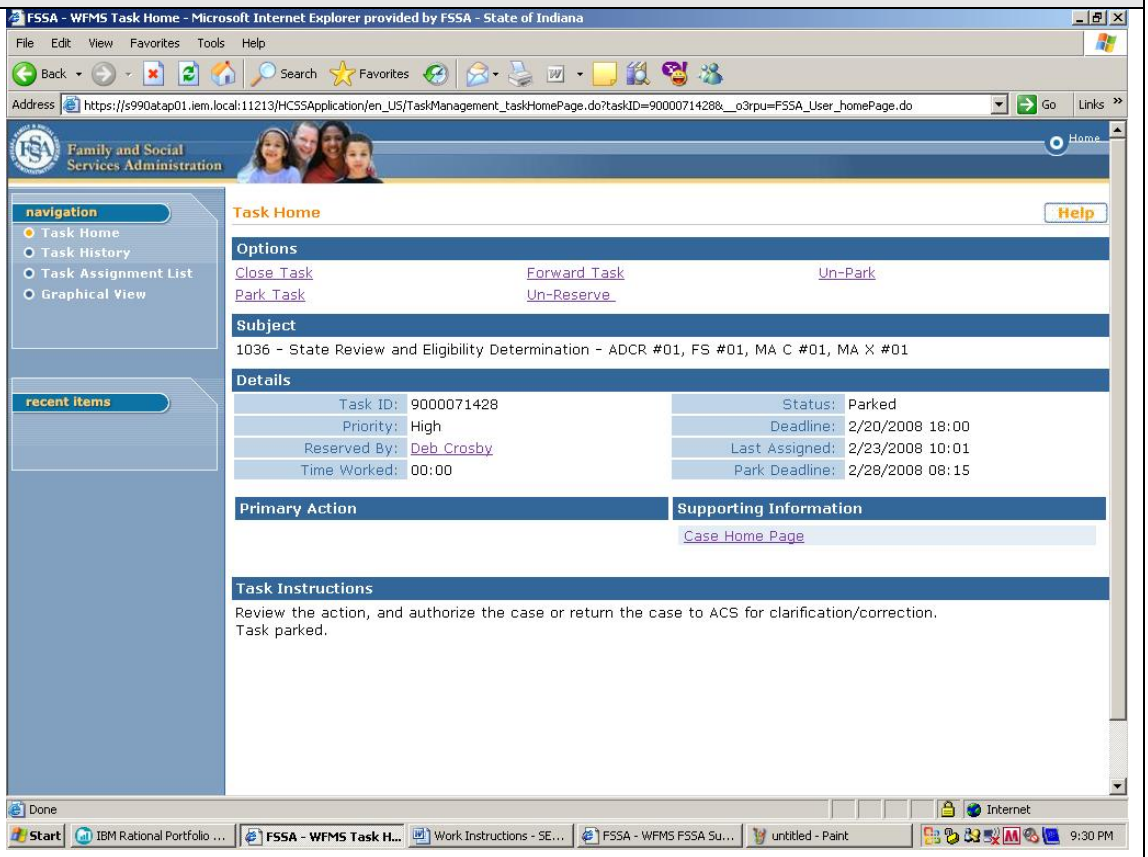
Solicited Documents Requests Help

Action	Solicited By	Correspondence Name	Verification	Client	Mail Date	Due Date	Received Date
View | Edit	April	Pending Verifications for Applicants-Recipients	US Citizenship	MINI ME	2/26/2008	3/10/2008	3/1/2008

Step	State Review and Eligibility Determination – System Generated
	Solicited Documents Requests Due Date is after task deadline date. • From the Left Navigation in the *Application* or *Case Home* page click on *Solicited Documents Requests* and *Correspondence* to view the FI 2032/FI 2032A, Pending Verifications for Applicant/Recipient to determine if all requested documents were received for each Assistance Group. o Evaluate *Solicited Documents Requests* page to determine if each item listed on the FI 2032 has been received. With the exception of the FI 2032A and *Additional Information* (FI 2032), every document requested will have a separate line item. A date in the *Received Date* field will determine if a document has been received for that line item. (Note: If no date is entered for *Received Date* and the *Solicited Document Request* due date is after the *State Review and Eligibility Determination – System Generated*, ACS will receive a task when a solicited document is received or if no document is received.) • If all solicited documents have a received date, but there are additional items listed on the FI 2032A or *Additional Information* (FI 2032) not reflected on the *Solicited Documents Requests* page, that have not been received, then create a *Return by State* task, skip to step 13. • If the *Solicited Documents Requests* page includes items for multiple Assistance Groups determine if processing for any individual Assistance Group can be completed. Continue to step 12 for those Assistance Groups. For the Assistance Groups with missing verifications ascertain from the *Solicited Documents Requests* page that at least one line item appears with no entry for *Received Date*. • If not all documents have been received confirm from the *Solicited Documents Requests* page that at least one line item appears with no entry for *Received Date* for each Assistance Group, skip to step 14. • If all solicited documents were received, continue to step 12. If after review it is discovered that further case work/review must done before an authorization may be completed by the state (example: an AG needs to be fiated), return the application/case to ACS (see **Step 13**).
12.	Authorize the application/case if correct and document in CLRC. If action is incorrect, go to **Step 13** for returning case to ACS. A. Denials/Discontinuances ✓ AR denials ▪ Review the "*Review Application Checklist*" in WFMS. The *Review Application Checklist is* accessed from the Left Navigation of the *Application Home page*. The checklist may provide the reason(s) for the

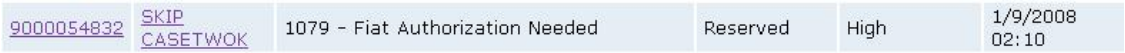
Step	State Review and Eligibility Determination – System Generated
	denial ✓ AE denials/discontinuances ▪ Review CLRC. ▪ Review budgets and supporting documentation. ▪ Review the "*Data Collection Checklist*" in WFMS. The *Data Collection Checklist* is accessed from the Left Navigation of the *Case Home* page. The checklist may provide the reason(s) for the denial/discontinuance. ✓ Denials/discontinuances for failing to provide information/verification, ▪ Search for non-indexed documents to attempt to find any documents associated with the application/case. If documents found link the non-indexed document to the case in WFMS ▪ REFER TO (INSERT HYPERLINK) SEARCH WORK INSTRUCTIONS (Common Processes – Section 3.11.3.7) to find and link a document. ▪ If any documents that would change the disposition were received prior to the "**State Review and Eligibility Determination – System Generated"** task being generated and were not enacted upon, the case should be returned to ACS for processing. (See **Step 13**) ✓ HIP Applications received from an Enrollment Center ▪ The disposition must be mailed to the Enrollment Center via the "Enrollment Center Application Routing Form". REFER TO (INSERT HYPERLINK) Sending Notices in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4 B. Conditional Approvals/Approvals ✓ Review CLRC. ✓ Review budgets and supporting documentation ✓ Applicants identified in **Step 8** as potentially high risk must be referred to Milliman upon conditional approval. ▪ Review answer to the health screening question on ICES screen AEHIP. ▪ From the WFMS *Case Home* page click *Tasks* from the Left Navigation ▪ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page.* ▪ Using the drop down under the *Task Details* cluster, select *Potentially High-Risk HIP Applicant* as the *Task Type.* ▪ Click *Save*. The WFMS will create the task and navigate back to the *Tasks Page* ✓ HIP Applications received from an Enrollment Center ▪ The disposition must be mailed to the Enrolment Center via the "Enrollment Center Application Routing Form". REFER TO (INSERT HYPERLINK) Sending Notices in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4 C. Changes reported on an open HIP case:

Step	State Review and Eligibility Determination – System Generated
	✓ Qualifying event ▪ Review CLRC ▪ Review ICES screen AEHIP to confirm reported change is a qualifying event. D. HIP Manual notice of action should be sent for fiated actions and non-qualifying events. INVOKE Create Correspondence in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11
13.	Returning cases to ACS ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page.* ➢ Using the drop down under the *Task Details* cluster, select *Returned by State* as the *Task Type*. Click *Save*. The WFMS will create the task and navigate back to the *Tasks Page.*
14.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
15.	Click on the *Task ID* for the **State Review and Eligibility Determination – System Generated** task with an Open Status. The WFMS will navigate to the *Task Home*.
16.	Click on *Close Task* on *Task Home* page.

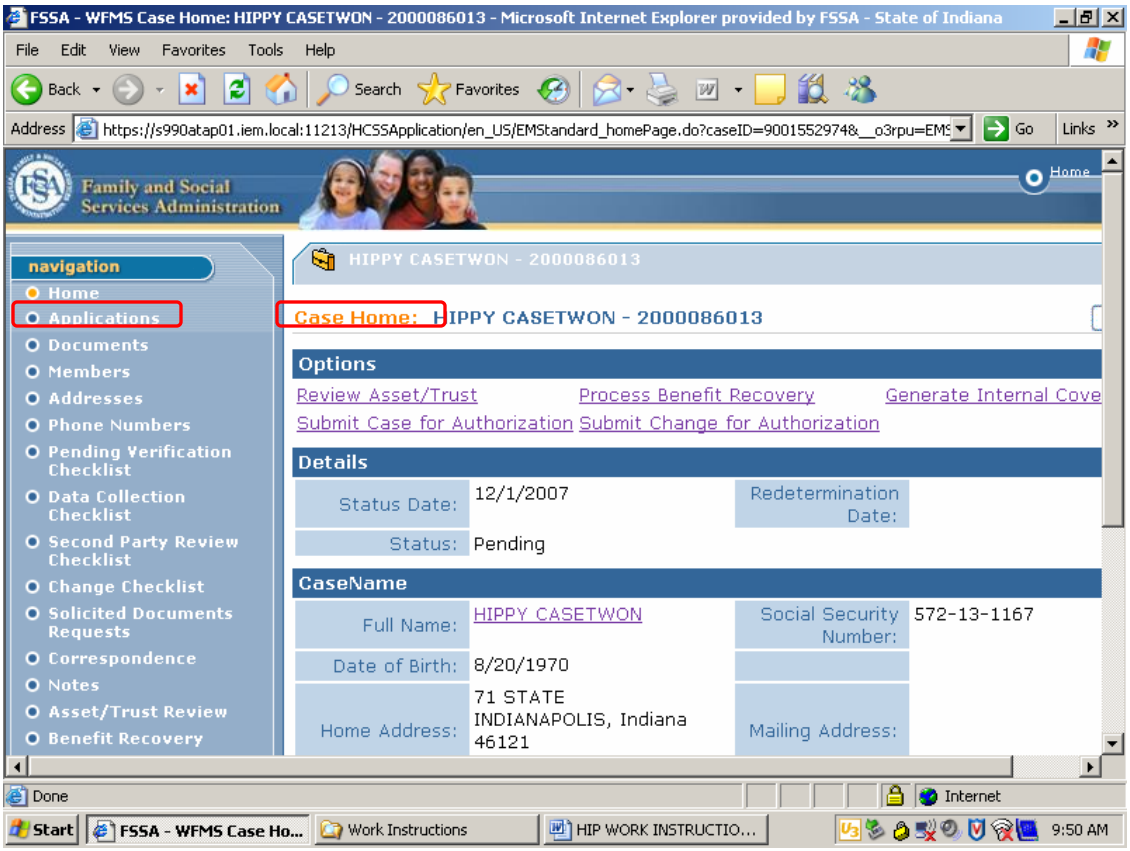
Step	State Review and Eligibility Determination – System Generated
	

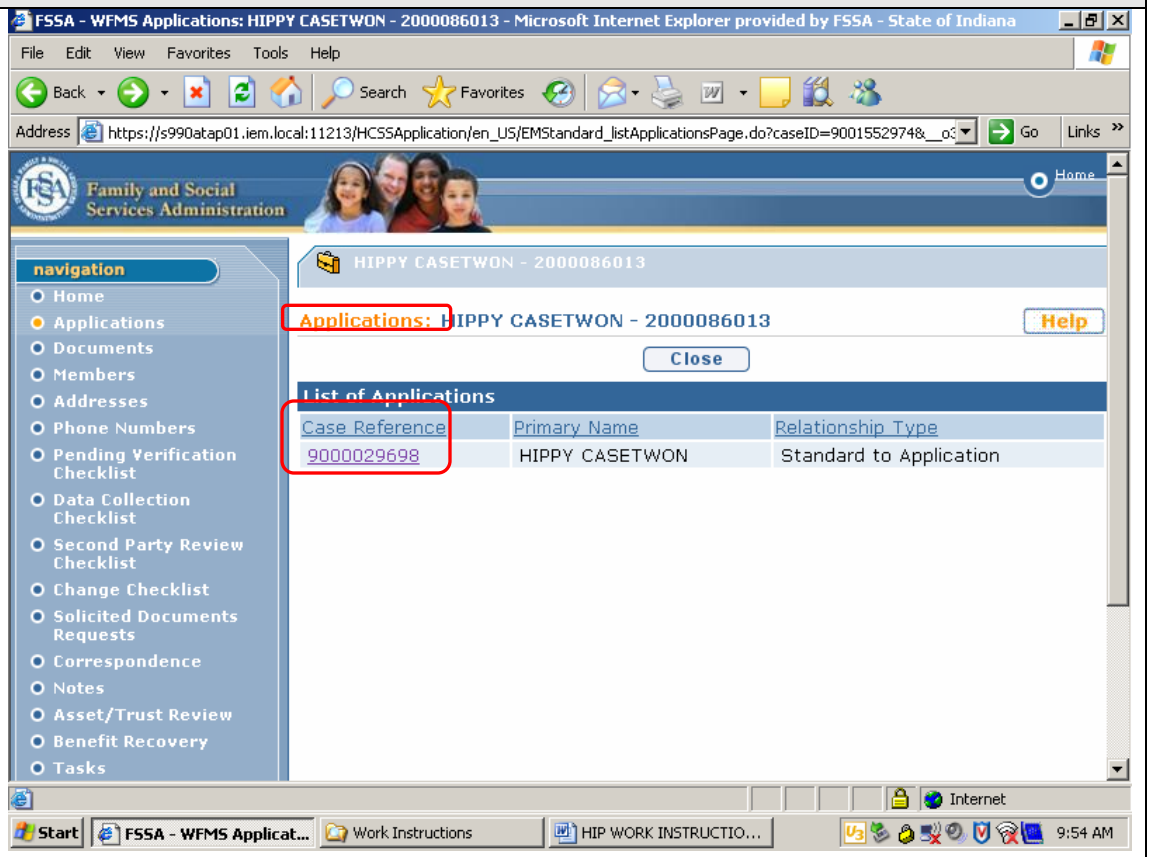
3.0 Fiat Authorization Needed

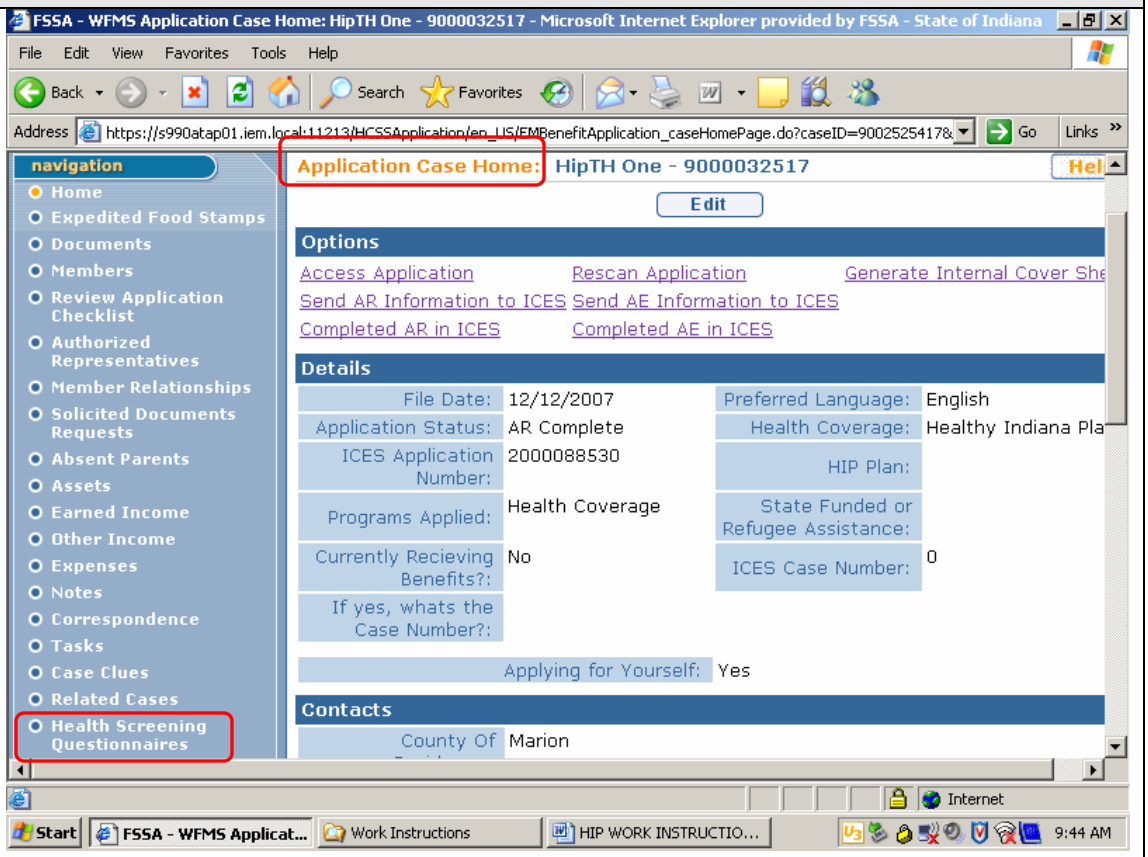
When a fiat is determined as necessary by a non-state coalition individual, they will complete ICES screens AEOAG and/or AEWFT and check 'Fiat Authorization Needed' on the Data Collection or Change checklist. The SEC will receive a "**Fiat Authorization Needed"** task.

Step	Fiat Authorization Needed
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.  The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Task Instructions: Review case documentation for the requested fiat and authorize the request or return the request to ACS for clarification/correction.
3.	Click on *Case Home Page* link under *Supporting Information.* The WFMS will navigate to the *Case Home Page* to display the ICES case number.
4.	From the *Application Home Page*, click *Health Screening Questionnaire* from the Left

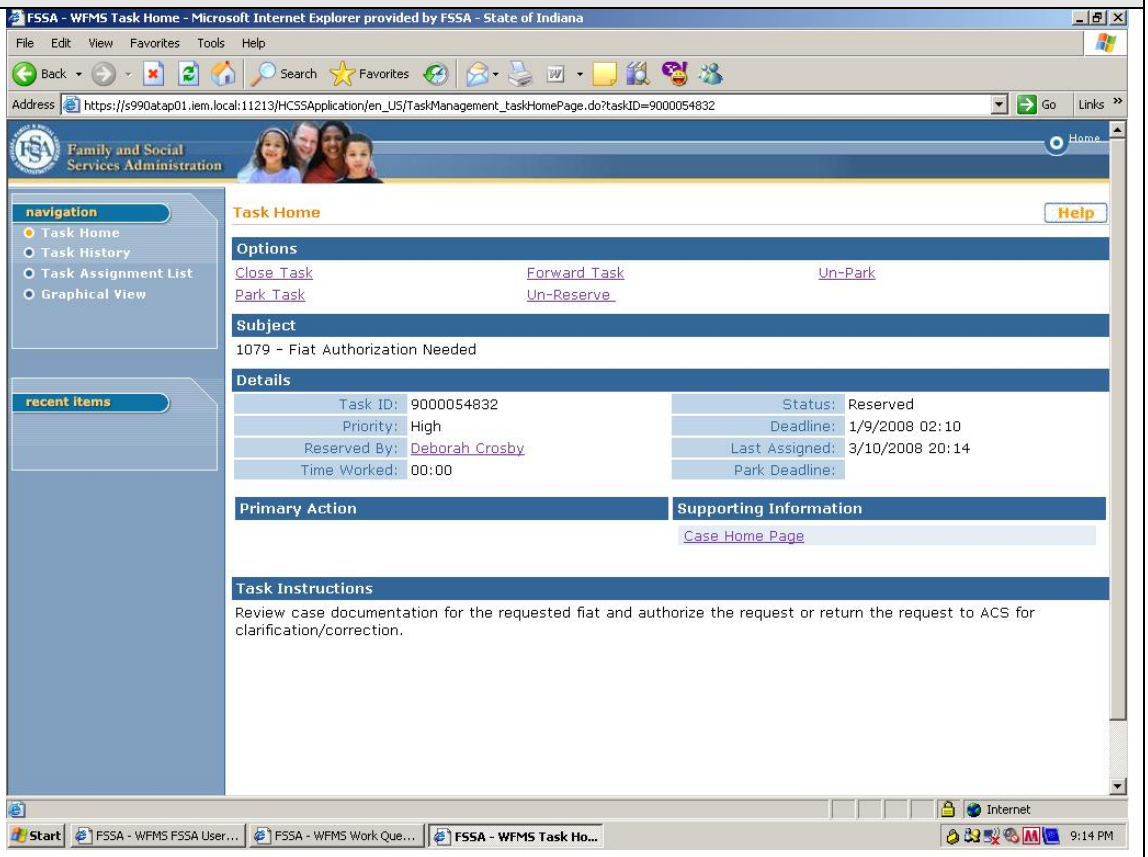
Step	Fiat Authorization Needed
	Navigation. Note: from the Case Home page click on *Applications* from the left navigation to access the application's case reference link. Click on the case reference link to access the Application Case Home. Click on *Documents* link in the left navigation to view the application form. Click on *Health Screening Questionnaire* in the left navigation to view the screening questionnaire.



Step	Fiat Authorization Needed
	

Step	Fiat Authorization Needed
	
5.	Review the *Health Screening Questionnaire* for each applicant. If the applicant responded 'yes' to any question they are potentially high risk and a referral to Milliman must be completed upon authorization. Instructions are provided in **Step 7** **Click on *Close* at the bottom of the *Health Screening Questionnaire* page.**
6.	Review CLRC documentation for the fiated action. Review ICES screens AEOAG and AEWFT.
7.	Authorize the action the same day as task generated if correct. *Reminder, do not run ED/BC on the fiated action.* Go to **Step 8** to return case to ACS. ▪ Document action taken in CLRC ▪ Create a manual HIP notice of action to inform the recipient of the action taken. REFER TO (INSERT HYPERLINK) Create Correspondence in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4 to create the manual notice

Step	Fiat Authorization Needed
	▪ Conditional Approvals ✓ Applicants identified in **Step 5** as potentially high risk must be referred to Milliman upon conditional approval. ✓ Review answer to health screening question on ICES screen AEHIP. ✓ From the WFMS *Case Home* page click *Tasks* from the Left Navigation ✓ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page.* ✓ Using the drop down under the *Task Details* cluster, select *Potentially High-Risk HIP Applicant* as the *Task Type.* ✓ Click *Save*. The WFMS will create the task and navigate back to the *Tasks Page*.
8.	Returning cases to ACS ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ Click *Create* Task. The WFMS will navigate to the Select Task Type Page. ➢ Using the drop down under the Task Details cluster, select Returned by State as the Task Type. Click Save. The WFMS will create the task and navigate back to the Tasks Page.
9.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
10.	Click on the *Task ID* for the **Fiat Authorization Needed** task. The WFMS will navigate to the *Task Home*.
11.	Click on *Close Task* on *Task Home* page.

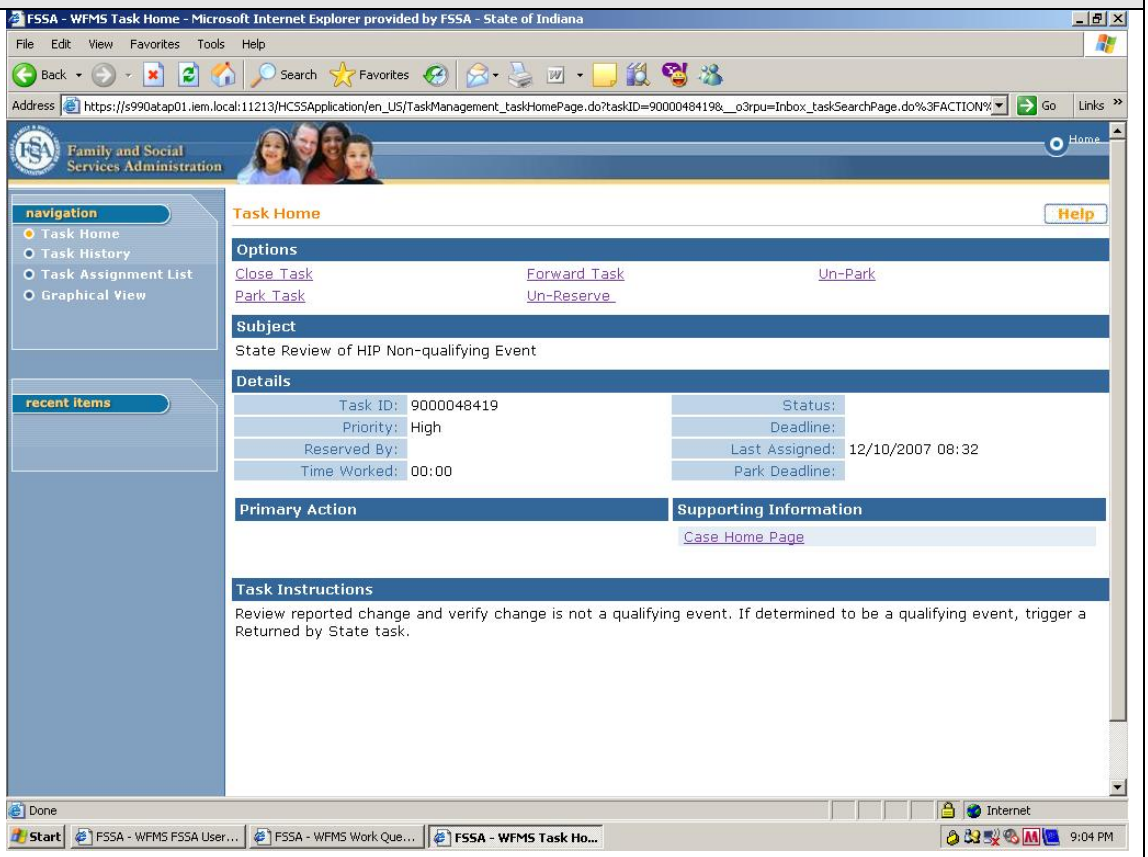
Step	Fiat Authorization Needed
	

4.0 State Review of HIP Non-Qualifying Event

When a reported change is determined to be a non-qualifying event by a non-coalition individual, they complete the 'recalculate HIP' field on ICES screen AEHIP and they check 'recalculation not allowed' on the Change Checklist. The SEC will receive a "**State Review of HIP Non-Qualifying Event"** task.

Step	State Review of HIP Non-Qualifying Event
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*. The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Task Instructions: Review reported change and verify change is not a qualifying event. If determined to be a qualifying event, trigger a **Returned by State** task.
3.	Click on *Case Home Page* link under *Supporting Information.*

Step	State Review of HIP Non-Qualifying Event
	 The WFMS will navigate to the *Case Home Page* to display the ICES case number.
4.	Go to ICES and review screen AEHIP and documentation in CLRC to confirm the reported change is a non-qualifying event. If the change is a non-qualifying event, ED/BC does not form a pending segment to authorize in ICES. A HIP manual notice of action is required.
5.	Create HIP manual Notice of Action if reported change is a non-qualifying event. Enter documentation in CLRC. REFER TO (INSERT HYPERLINK) Create Correspondence in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4
6.	Create '**Returned by State**' task if reported change is a qualifying event or additional clarification is required. ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ Click *Create Task*. The WFMS will navigate to the *Select Task Type Page*. Using the drop down under the *Task Details* cluster, select *Returned by State* as the Task Type. Click Save. The WFMS will create the task and navigate back to the Tasks Page
7.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
8.	Click on the *Task ID* for the *State Review of HIP Non-Qualifying Event* task. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page.

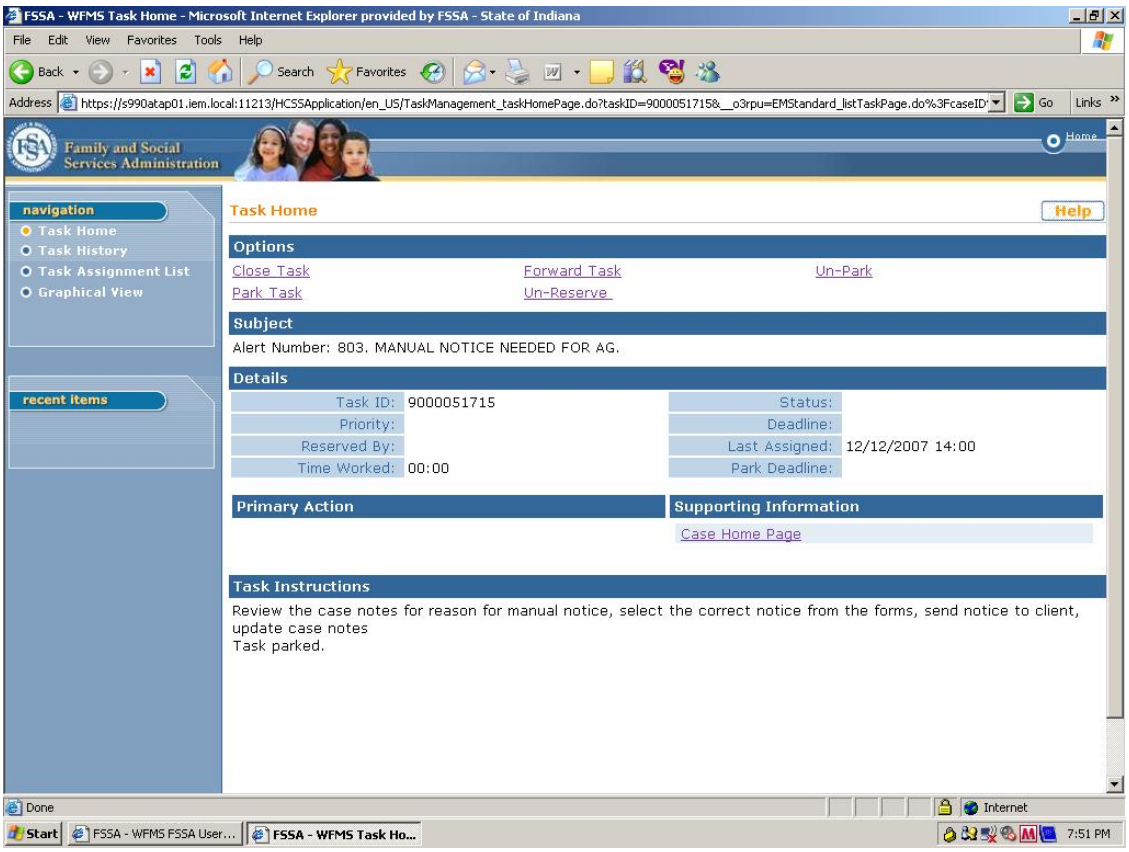
Step	State Review of HIP Non-Qualifying Event
	

5.0 Alert 800-801 or 803 Send AG Manual Client Notice

When a HIP AG has been authorized in ICES and a Notice of Action is not system generated, alert 800-801 or 803 will generate.

Step	Alert 800-801 or 803 Send AG Manual Client Notice
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.

Step	Alert 800-801 or 803 Send AG Manual Client Notice
	9000038449 | TEST PROCESS I | Alert Number: 801. SEND AG MANUAL CLIENT NOTICE. FS 01 | Parked | High | 10/29/2007 22:16 The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the case notes for reason for manual notice, select the correct notice from the forms, send notice to client, and update case notes.
3.	Click on *Case Home Page* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Case Home Page* to display the ICES case number.
4.	Click on *Correspondence* in the left navigation. The WFMS will navigate to the *Mailing Correspondence List.* Review the list to determine if a HIP manual notice of action has been sent. If a HIP notice has been sent, proceed to **Step 7**. If a HIP notice has not been sent, proceed to **Step 5**.
5.	Go to ICES and review documentation in CLRC to confirm the need for the manual notice.

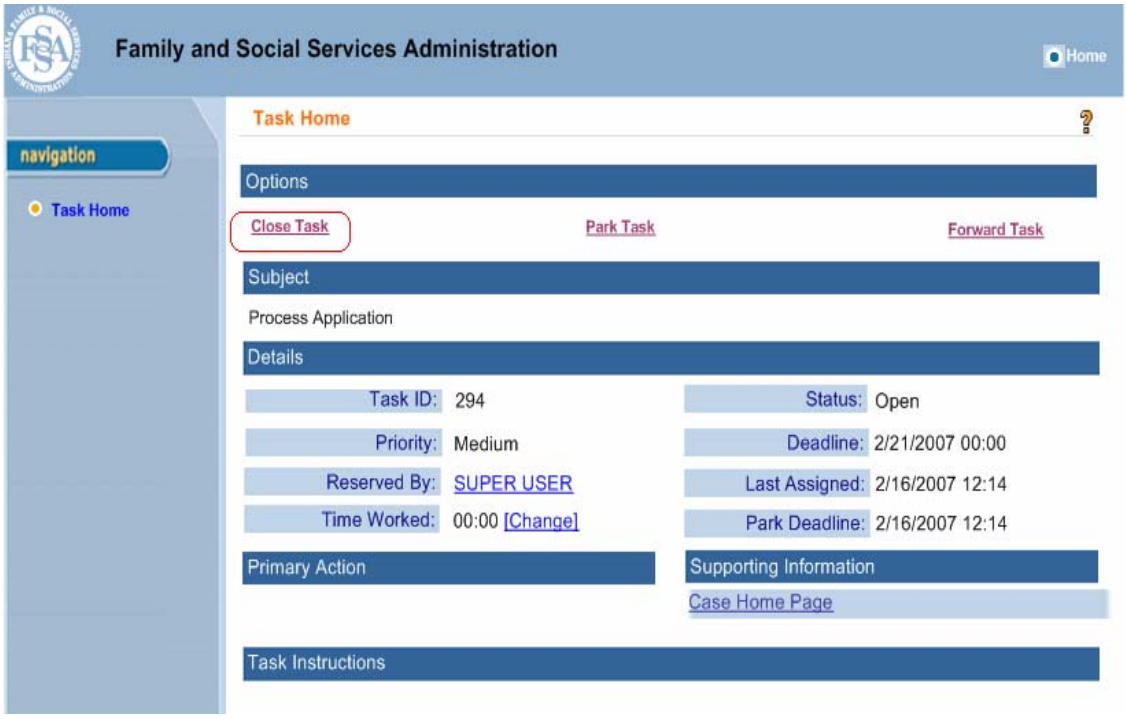
Step	Alert 800-801 or 803 Send AG Manual Client Notice
6.	Create HIP manual Notice of Action and enter documentation in CLRC. REFER TO (INSERT HYPERLINK) Create Correspondence in the WFMS WORK INSTRUCTIONS Common Processes – Section 3.11.4
7.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
8.	Click on the *Task ID* for the *Alert 800-801 or 803 Send AG Manual Client Notice*. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page. 

6.0 Potentially High-risk HIP Applicant

When an applicant is determined to be potentially high-risk by the State Eligibility Consultant at authorization, the Milliman user will receive a "**Potentially High-risk HIP Applicant**" task.

Step	Potentially High-risk HIP Applicant
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*. The WFMS will navigate to the *Task Home*.
2.	View the *Subject* and *Task Instructions* on the *Task Home* page. Task Instructions: Review HIP application and determine if high-risk.

Step	Potentially High-risk HIP Applicant
3.	Click on *Application* or *Case Home Page* link under *Supporting Information.* The WFMS will navigate to the *Application* or *Case Home Page*.
4.	From the *Application Home Page*, click *Applications* and/or *Documents* from the Left Navigation to view the most recent HIP Application. Note: from the *Case Home* page click on *Applications* from the left navigation to access the application's case reference link. Click on the case reference link to access the *Application Case Home*. Click on *Documents* in the left navigation to view the application form.
5.	From the *Application Home Page*, click *Health Screening Questionnaire* from the Left Navigation. . Note: from the *Case Home* page click on *Applications* from the left navigation to access the application's case reference link. Click on the case reference link to access the *Application Case Home*. Click on *Documents* in the left navigation to view the application form.
6.	Review the *Health Screening Questionnaire* for each applicant and proceed with determining eligibility for the Enhanced Services Plan. Click on *Close* at the bottom of the *Health Screening Questionnaire* page.
7.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
8.	Click on the *Task ID* for the **Potentially High-risk HIP Applicant** task with an Open Status. The WFMS will navigate to the *Task Home*.

Step	Potentially High-risk HIP Applicant
9.	Click on *Close Task* on *Task Home* page. 
10.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.