SEC Common Duties

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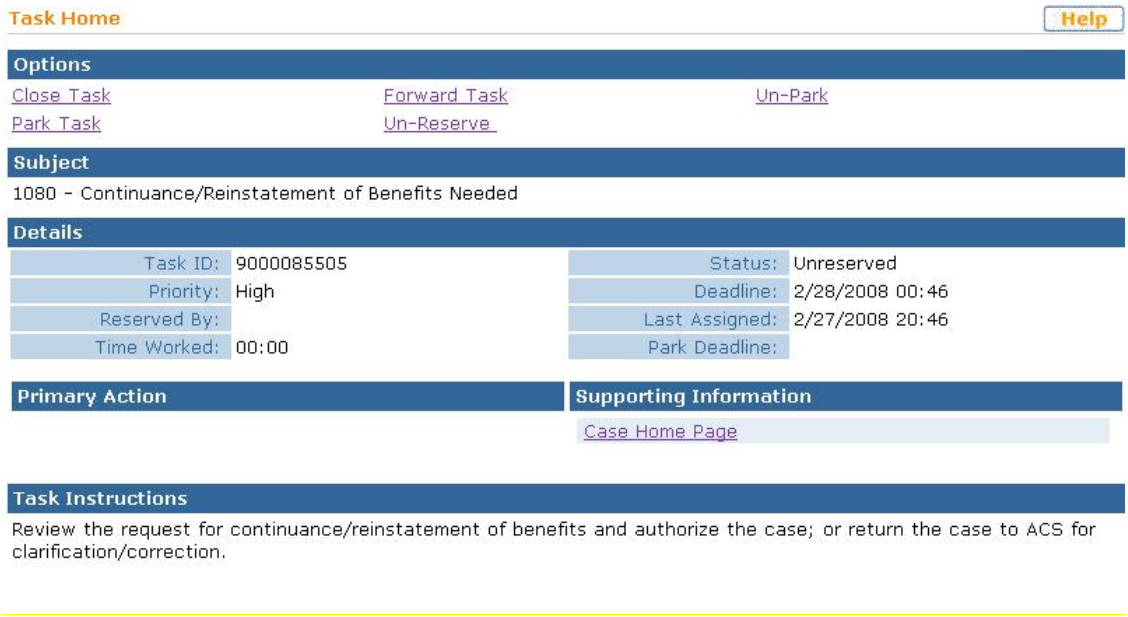
*Staff should review all parked tasks the first thing each morning to ascertain if any may be completed.

1.0 Continuance/Reinstatement of Benefits Needed

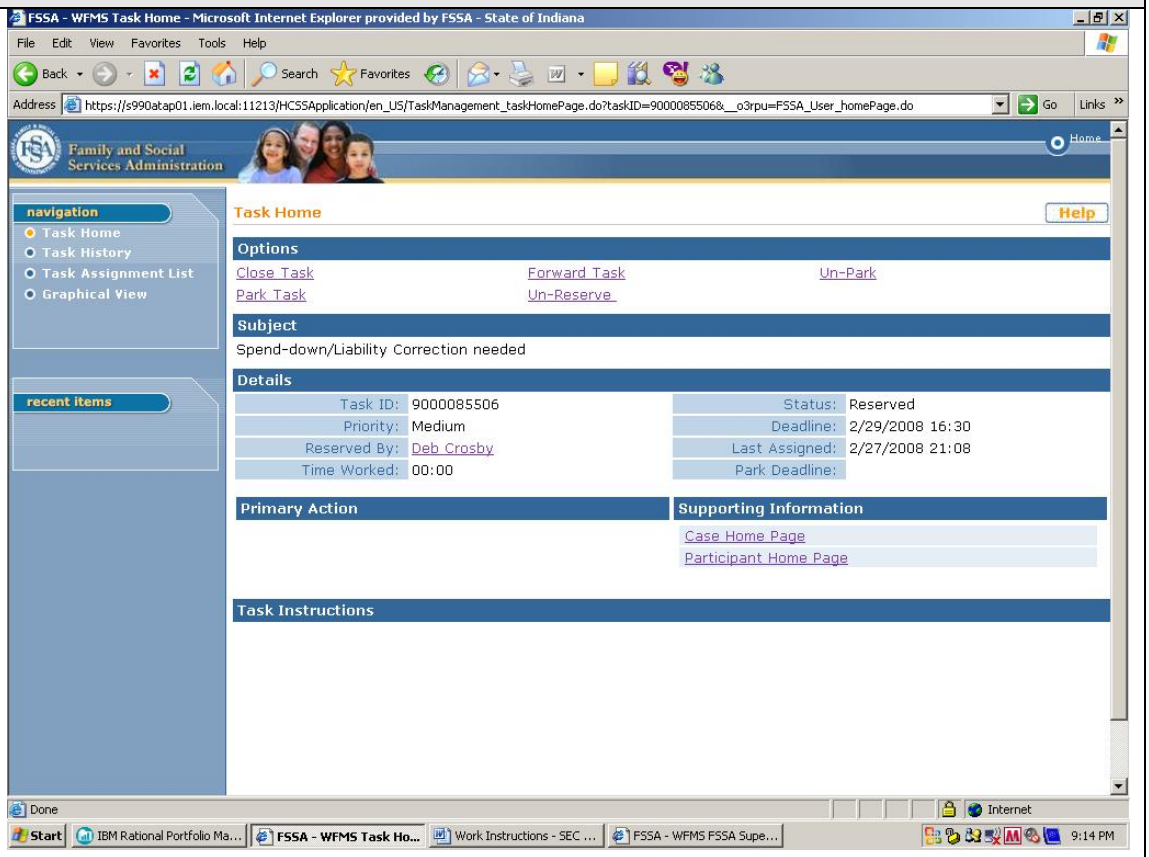
Step	Continuance/Reinstatement of Benefits Needed
1.	From the *User Home Page* in WFMS, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*. Task | Case Primary Client | Task Name | Status | Priority | Due Date 9000085505 | JOHN BLANK | 1080 - Continuance/Reinstatement of Benefits Needed | Reserved | High | 2/28/2008 00:46 The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the request for continuance/reinstatement of benefits and authorize the case; or return the case to ACS for clarification/correction.
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.	Go to ICES and review CLRC and related budgets.

Step	Continuance/Reinstatement of Benefits Needed
5.	Authorize benefits if correct and document in CLRC. If action is incorrect, go to step 6.
6.	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.*
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 **Continuance/Reinstatement of Benefits Needed** task with an Open Status. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page. 

2.0 Spend-Down/Liability Correction Needed (*CUMED*)

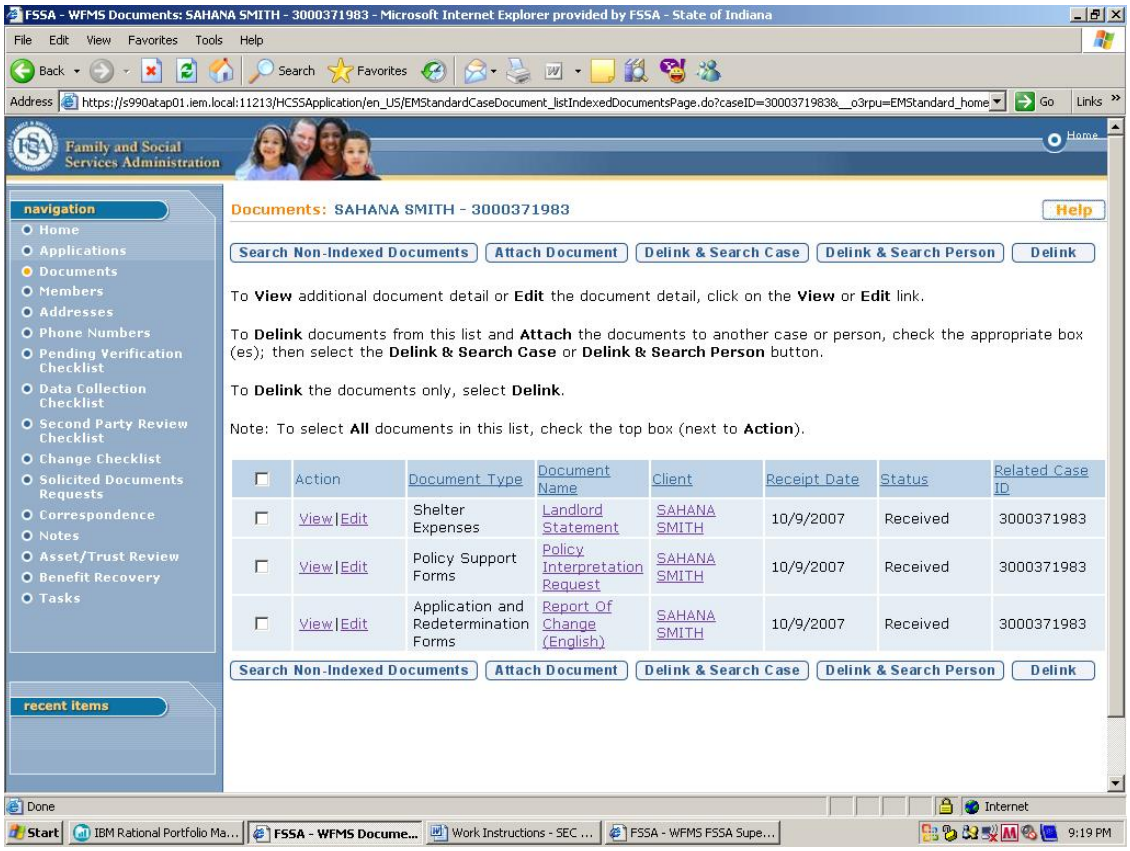
Step	Spend-Down/Liability Correction Needed (*CUMED*)
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*. Task | Case Primary Client | Task Name | Status | Priority | Due Date 9000085506 | JOHN SMITH | Spend-down/Liability Correction needed | Reserved | Medium | 2/29/2008 16:30 The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review case documentation for the requested correction and complete CUMED or return the case to ACS for clarification/correction.
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.	Complete the CUMED screen in ICES with the appropriate information, document action taken in CLRC and create a manual notice to inform the recipient of the action taken or return the case to ACS. Refer to Send Notice Work Instructions (INSERT HYPERLINK) Volume 7 Common Processes, Section 3.11.4 to create a Manual

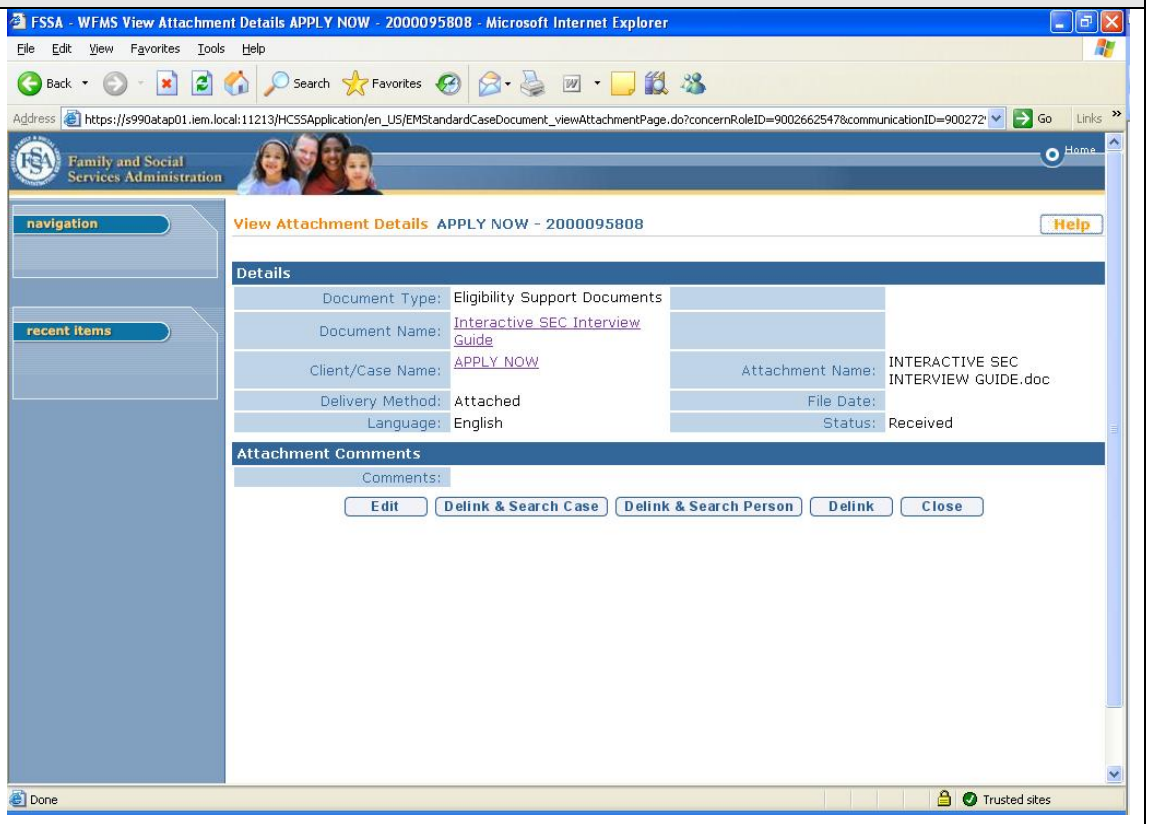
Step	Spend-Down/Liability Correction Needed (*CUMED*)
	Notice.
5.	Returning cases to ACS ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ Click *Create Task*. The WFMS will navigate to the Select Task Type Page. ➢ Using the drop down under the Task Details cluster, select Returned by State as the Task Type. Click Save. The WFMS will create the task and navigate back to the Tasks Page.
6.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
7.	Click on the *Task ID* for the **Spend-Down/Liability Correction Needed** task with an Open Status. The WFMS will navigate to the *Task Home*.
8.	Click on *Close Task* on *Task Home* page.

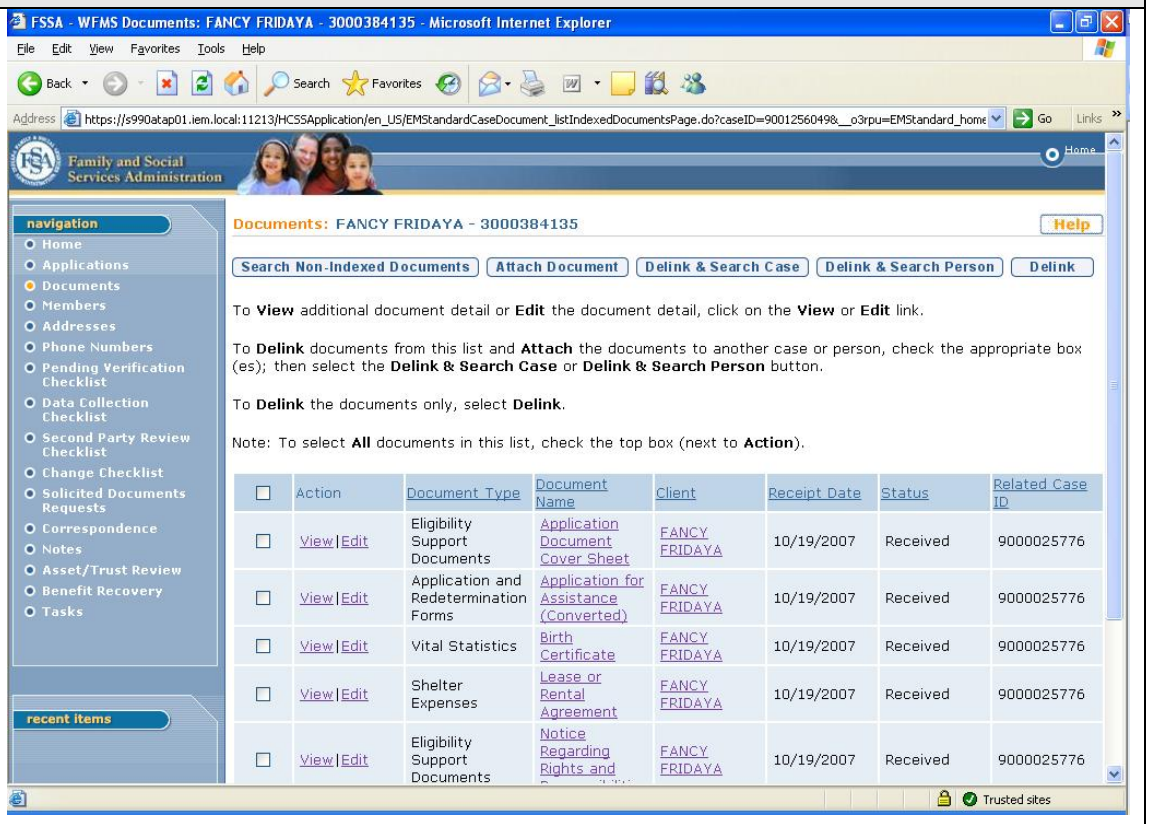
Step	Spend-Down/Liability Correction Needed (*CUMED*)
	

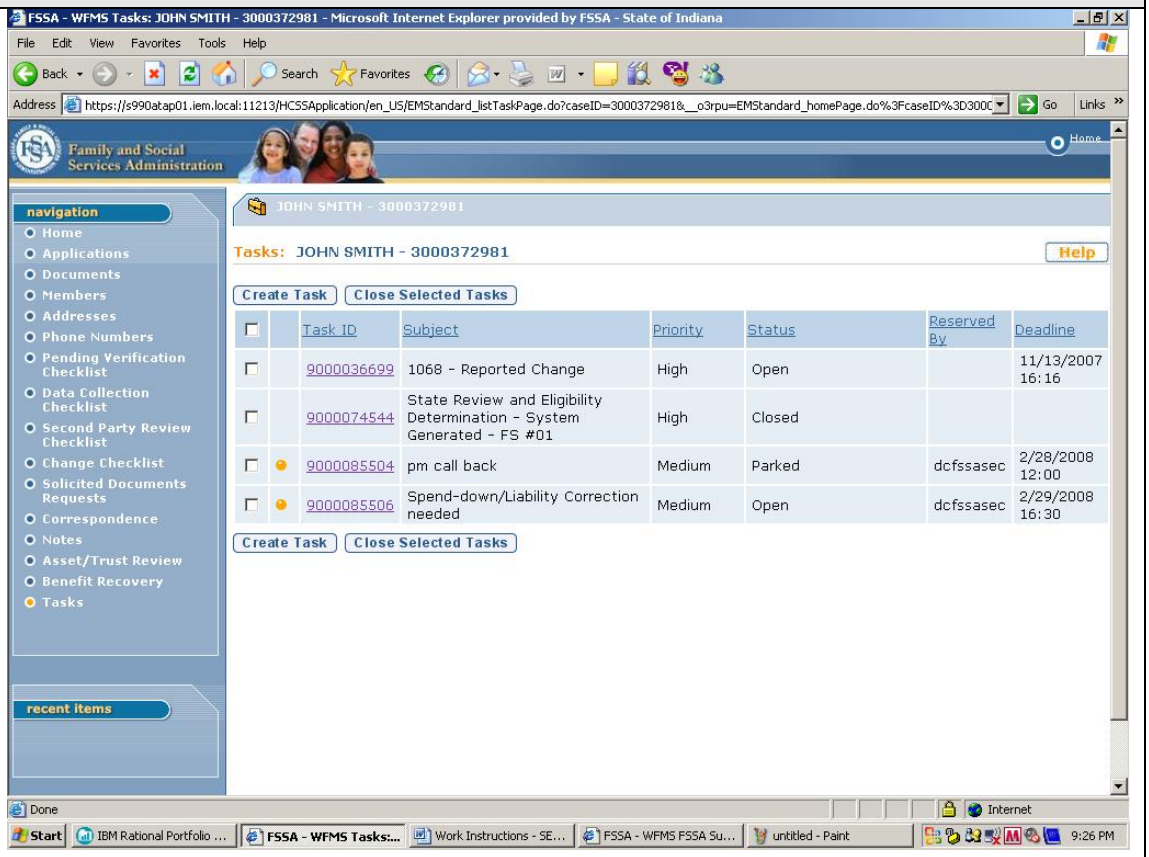
3.0 State Review and Eligibility Determination (Generated from Checklist or User)
When an action for review and eligibility determination is determined as necessary by a non-state coalition individual (ACS/Arbor) the SEC will receive a user generated "**State Review and Eligibility Determination"** task.

Step	State Review and Eligibility Determination
1.	From the *User Home Page* in WFMS, 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 *Primary Action* 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.	Search for any additional tasks related to the application or case that may be outstanding. From the *Documents Page* click on *Tasks* from the Left Navigation.

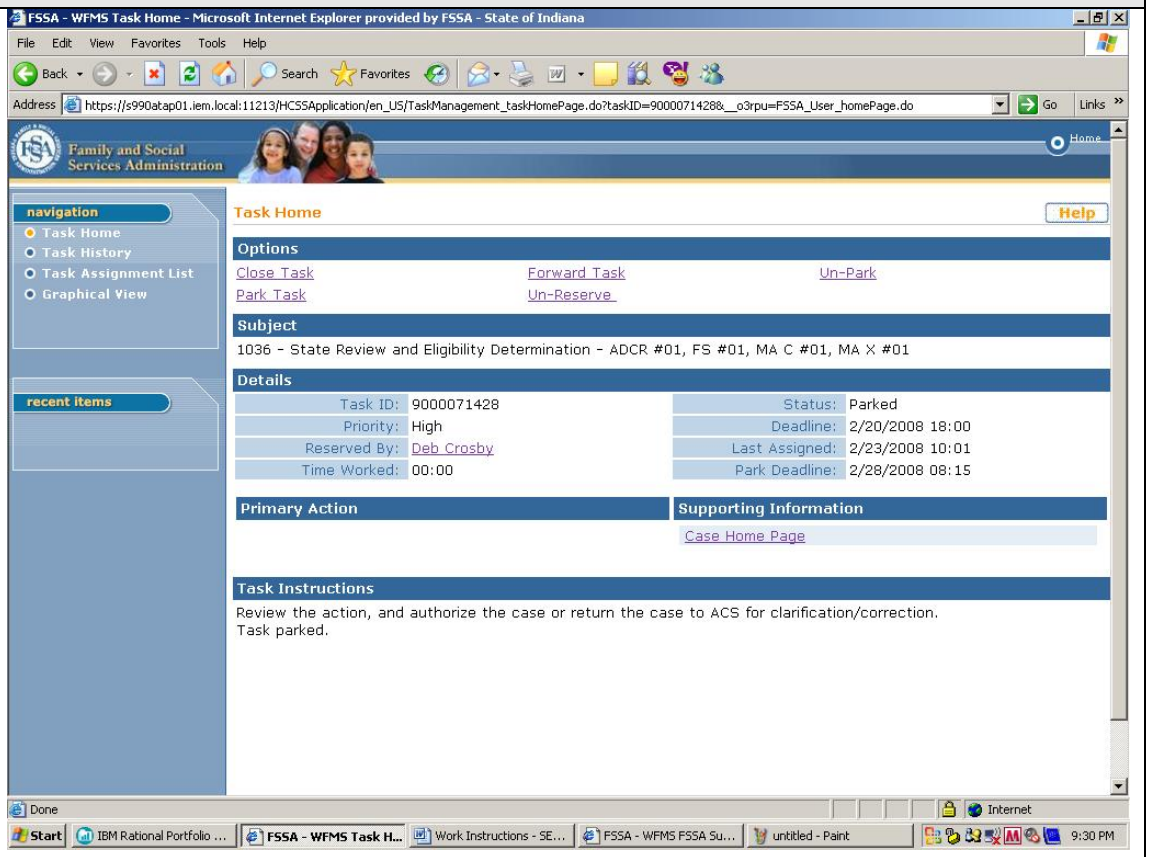
Step	State Review and Eligibility Determination
	
8.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding tasks that may need to be addressed. Selecting a task listed to a queue in which you are assigned will assign the task to you to be worked, closed or parked. Navigate back to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

Step	State Review and Eligibility Determination
	
9.	Authorize the application/case if correct and document in CLRC. If action is incorrect, go to **Step 10** for returning cases to ACS. A. **For Denials/Discontinuances** ✓ **For AE denials/discontinuances** ▪ View CLRC, and CLSC if applicable. ▪ For MA D applications - Review AEMDT, and make corrections, if appropriate. ▪ Review the "*Data Collection Checklist*", "*Change Checklist*" and "*Solicited Documents Requests*", located in the Left Navigation of the *Case Home* page to assist in determining the reason(s) for the denial/discontinuance. ✓ **For 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. ▪ For denials for failing to complete a scheduled interview, o The denial can not occur prior to the 31st day from the application date. o ICES screen CSAH must be checked to determine if a scheduled appointment is still pending prior to any denial. o If an appointment is pending, park the task with the due date being the

Step	State Review and Eligibility Determination
	business day following the scheduled appointment date. . REFER TO (INSERT HYPERLINK) PARK A TASK WORK INTRUCTIONS in Volume 7 Common Processes, Section 3.11.1.5. o If the scheduled appointment is beyond the task deadline, create a U*ser Defined* task to yourself with the due date being the business day following the scheduled appointment date. . REFER TO (INSERT HYPERLINK) CREATE USER DEFINED TASKS WORK INTRUCTIONS in Volume 7 Common Processes, Section 3.11.1.3 ⌗ If the applicant keeps the scheduled appointment close this task without taking any further action on the application. ⌗ If the applicant fails to keep the scheduled appointment deny the application. ✓ **Denials/discontinuances for failing to provide information/verification**, ▪ Search for non-indexed documents via the *User Home* page to attempt to find any documents associated with the application/case. REFER TO (INSERT HYPERLINK) SEARCHING FOR A NON-INDEXED DOCUMENT WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3.7 to find and link a non-indexed document to a case in WFMS. ▪ 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. ✓ **Medicaid Discontinuances for Children Under Age Three** (Regardless of Category) ▪ Review CLRC to determine the Continuous Eligibility Period prior to closing Medicaid for any child under the age of three. If, valid closure reasons apply (death, written voluntary withdrawal or moved out of state) Medicaid coverage may be discontinued. Otherwise, Medicaid coverage <u>must</u> be fiated by ACS. ✓ **HHW Applications/Redeterminations received from an Enrollment Center** ▪ A copy of the disposition must be mailed to the Enrolment Center via the "*Enrollment Center Application Routing Form for HHW*". REFER TO (INSERT HYPERLINK) SENDING NOTICES and CREATING CORRESPONDENCE FROM THE FILE SERVER Volume 7 Common Processes – Section 3.11.4
10.	B. **For Approvals** ✓ For all actions, review budgets and supporting documentation. ✓ **Medicaid property transfer penalties** – send penalty information to state policy queue to inform policy of a transfer of property penalty. REFER TO (INSERT HYPERLINK) CREATE A TASK WORK INSTRUCTIONS (Volume 7 Common Processes – Section 3.11.1.2)

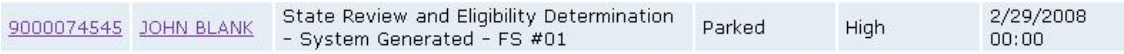
Step	State Review and Eligibility Determination
	▪ Click on the user selected task, "*Impose Medicaid Transfer Penalty*". ▪ Document in CLRC that a transfer has occurred and include the Recipients name, RID, Case number, Begin date of penalty period and End date of penalty. ✓ TANF – send FI-2032 and PRA to recipient REFER TO (INSERT HYPERLINK) SENDING NOTICES and CREATING CORRESPONDENCE FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.11. ✓ **MA D applications** – Review AEMDT and make corrections, if appropriate. ✓ **Independent resource assessment** ▪ Review the FI-2061 ▪ Enter the spousal share on ARRA ▪ Send the FI-2061 to the applicant/spouse/AR if applicable with a copy of the verifications supplied REFER TO (INSERT HYPERLINK) SENDING NOTICES WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4 ✓ **Medicaid Approvals for Children Under Age Three** (Regardless of Category) ▪ SEC must enter begin/end dates for the Continuous Eligibility Period in CLRC. Including the Name and Birth Date of the applicable child(ren). ✓ **HHW Applications/Redeterminations received from an Enrollment Center** ▪ A copy of the disposition must be mailed to the Enrolment Center via the "*Enrollment Center Application Routing Form for HHW*". REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4 ✓ **MA R Authorizations**: SEC will verify that there is an **FSSA approved** BAIS 0005B in the documents section of the RBA Application in WFMS prior to authorizing MA R. Note: A *Standard Case* is not created for RBA applications. Only an *Application Case* is created in WFMS for an RBA, REFER TO (INSERT HYPERLINK) SEARCH WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3 ✓ **If an individual is approved for Medicaid who meets lien referral criteria and has real property:** REFER TO (INSERT HYPERLINK) CREATE A TASK WORK INSTRUCTIONS

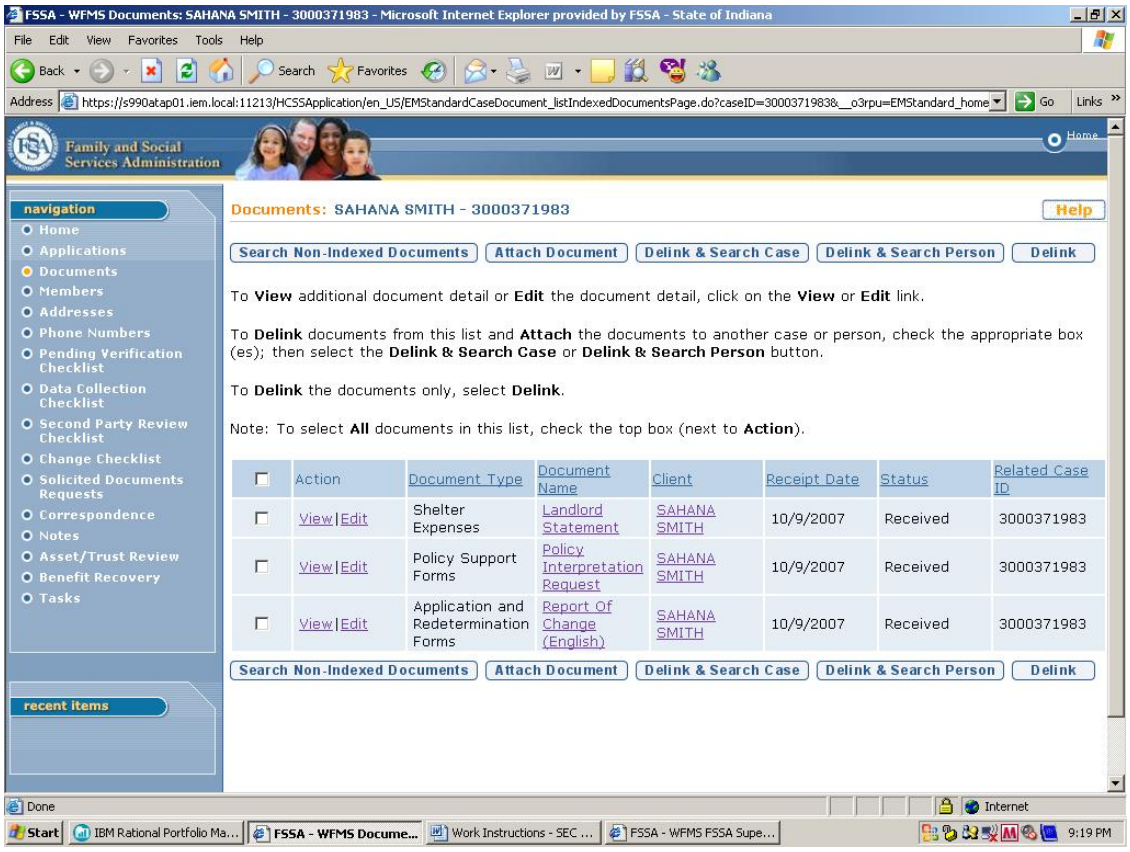
Step	State Review and Eligibility Determination
	Volume 7 Common Processes – Section 3.11.1.2 ▪ Send a User Defined task to the Benefit Recovery queue with the task subject **"Lien Referral"**. ▪ In the Comments section of the task notate the individual's name and their ICES case number. C. **Manual notices should be sent when required.** INVOKE SENDING NOTICES WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4
11.	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.*
12.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
13.	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*.
14.	Click on *Close Task* on *Task Home* page.

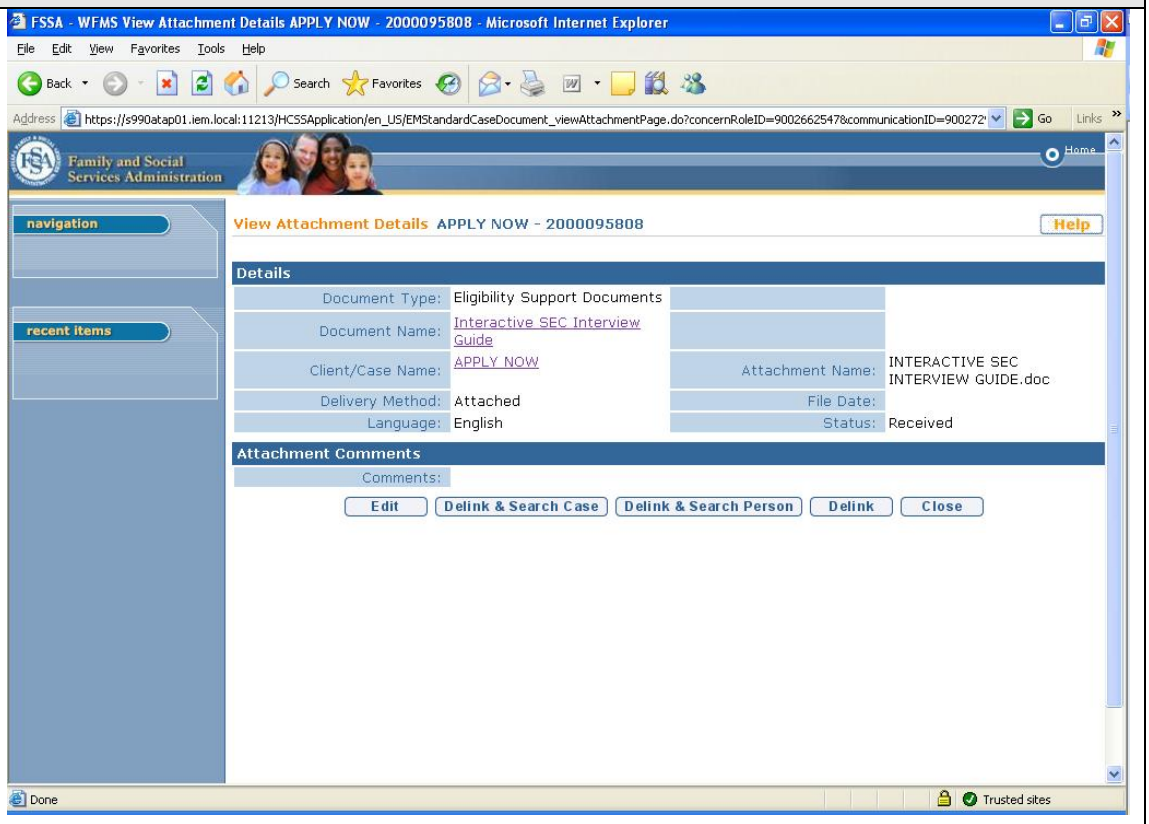
Step	State Review and Eligibility Determination
	

4.0 State Review and Eligibility Determination - System Generated

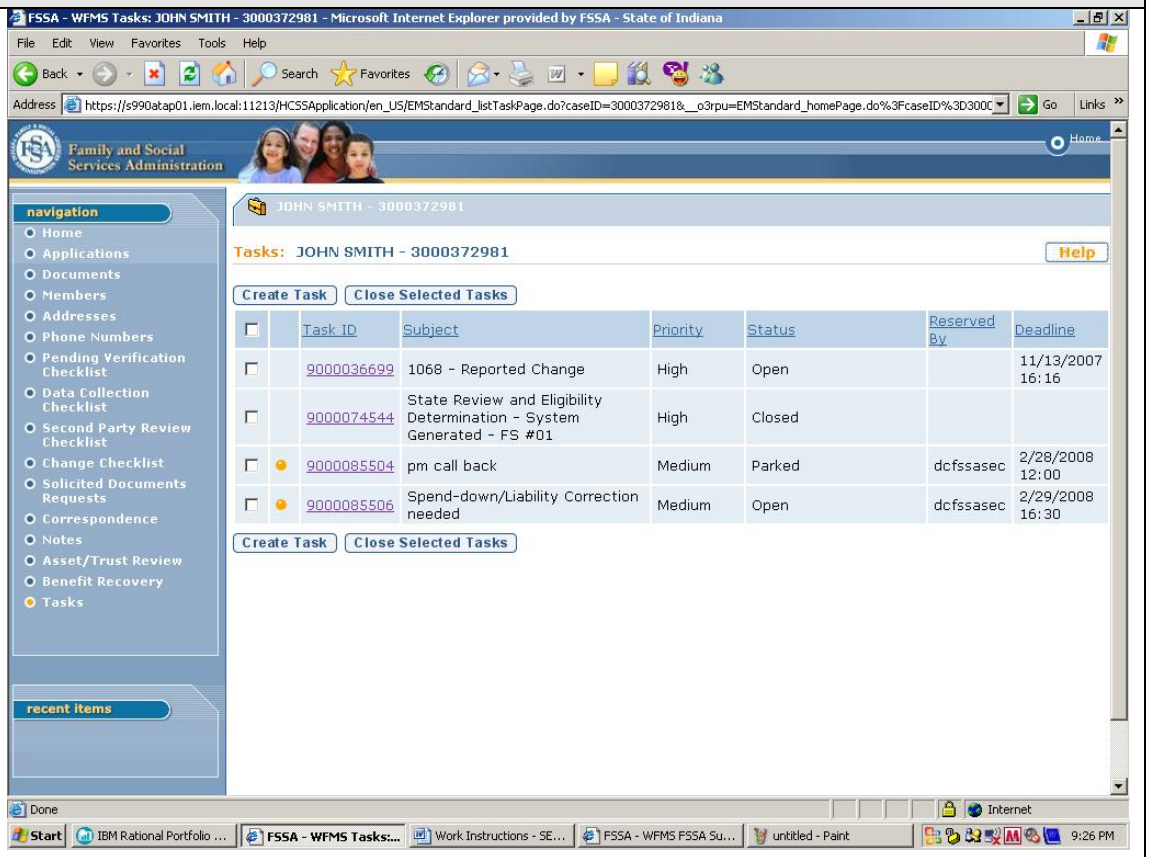
WFMS has been designed to automatically generate a "**State Review and Eligibility Determination – System Generated"** task three business days prior to the threshold date for new applications without disability Medicaid and for redeterminations with food stamps.

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*.  The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. 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.* 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.	Search for any additional tasks related to the application or case that may be outstanding. From the *Documents Page* click on *Tasks* from the Left Navigation.

Step	State Review and Eligibility Determination – System Generated
8.	The WFMS will navigate to the *Tasks* page. Take note of 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.

Step	State Review and Eligibility Determination – System Generated
	

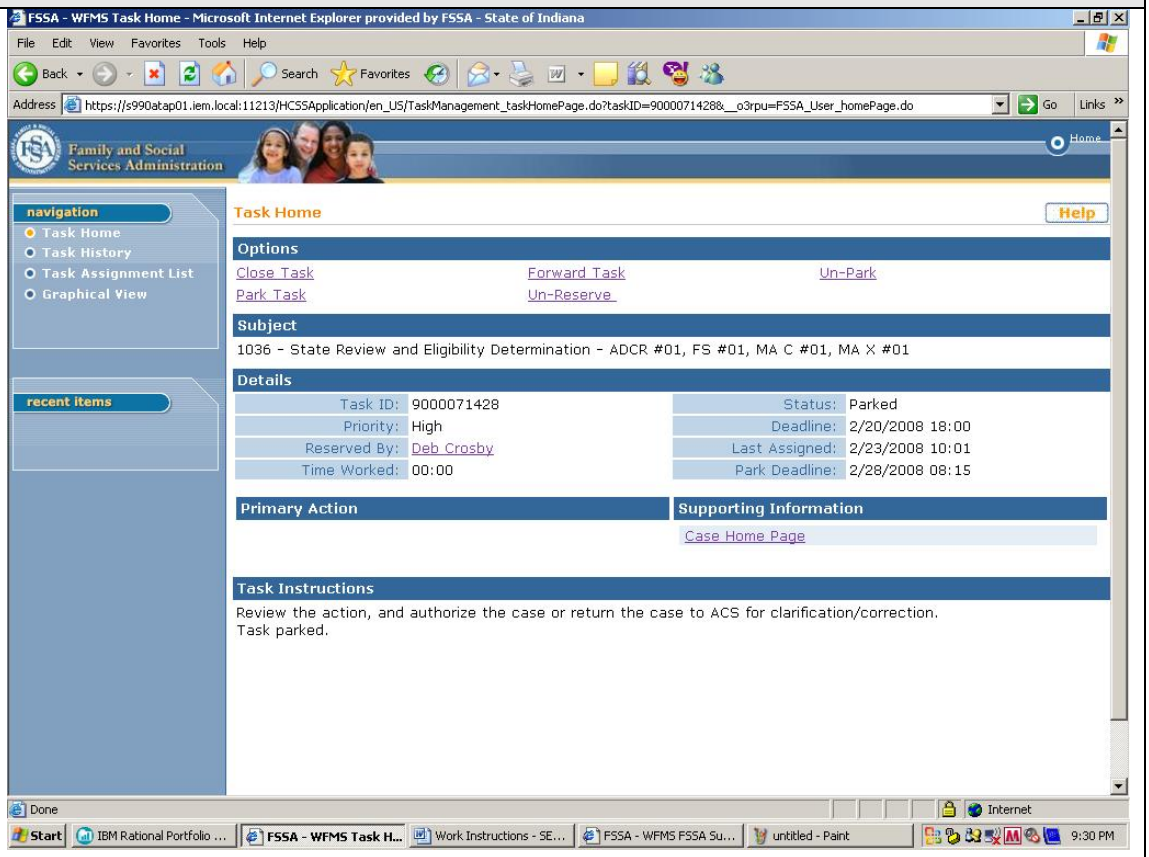
9.	To determine the next step in processing a State Review and Eligibility Determination-System Generated task follow the guidelines below for each specific situation:
	
	Scheduled interview not complete:
	
	• ICES screen CSAH must be checked to determine if a scheduled appointment has been made prior to any denial.
	• If a future appointment has been scheduled, park the task with the due date being the business day following the rescheduled appointment date. REFER TO (INSERT HYPERLINK) PARK A TASK WORK INSTRUCTIONS in Volume 7 Common Processes, Section 3.11.1.5
	  o If the applicant **keeps** the scheduled appointment close this task.
	  o If the applicant **fails to keep** the scheduled appointment deny the application.
	• If the scheduled appointment is beyond the task deadline, create a U*ser Defined* task to yourself with the due date being the business day following the scheduled appointment date. REFER TO (INSERT HYPERLINK) CREATE USER DEFINED TASKS WORK INTRUCTIONS in Volume 7 Common Processes, Section 3.11.1.3. Close this task.
	
	  o If the applicant **keeps** the scheduled appointment close this task.

Step	State Review and Eligibility Determination – System Generated
	o If the applicant **fails to keep** the scheduled appointment deny the application. **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 11. • 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 10 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 15. • If all solicited documents were received, continue to step 10. 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 11).
10.	Authorize the application/case if correct and document in CLRC. If action is incorrect, go to Step 11 for returning cases to ACS.

Step	State Review and Eligibility Determination – System Generated
	A. **For Denials/Discontinuances** ✓ For AE denials/discontinuances ▪ View CLRC, and CLSC if applicable. ▪ Review the "*Data Collection Checklist"* and *Solicited Documents Requests* in WFMS. Both pages are accessed from the Left Navigation of the *Case Home* page and may provide the reason(s) for the discontinuance. ✓ **For 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 denial. ▪ For denials for failing to complete a scheduled interview, o The denial can not occur prior to the 31st day from the application date. o ICES screen CSAH must be checked to determine if a scheduled appointment is still pending prior to any denial. ▪ If an appointment is pending, park the task with the due date being the business day following the scheduled appointment date. If the scheduled appointment is beyond the task deadline, create a U*ser Defined* task to yourself with the due date being the business day following the scheduled appointment date. o ⌗ If the applicant keeps the scheduled appointment close this task without taking any further action on the application. ⌗ If the applicant fails to keep the scheduled appointment deny the application. . ✓ **Denials/discontinuances for failing to provide information/verification**, ▪ Search for non-indexed documents via the *User Home* page to attempt to find any documents associated with the application/case. REFER TO (INSERT HYPERLINK) SEARCH WORK INSTRUCTIONS (Volume 7 Common Processes – Section 3.11.3.7) to find and link a non-indexed document to a case in WFMS. ▪ 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. (See step 11) ✓ **Medicaid Discontinuances for Children Under Age Three** (Regardless of Category) ▪ Review CLRC to determine the Continuous Eligibility Period prior to closing Medicaid for a child under the age of three. If, valid closure reasons apply (death, written voluntary withdrawal or moved out of state) Medicaid coverage may be discontinued. Otherwise, Medicaid coverage <u>must</u> be fiated by ACS. ✓ **HHW Applications/Redeterminations received from an Enrollment Center** ▪ A copy of the disposition must be mailed to the Enrollment Center via the

Step	State Review and Eligibility Determination – System Generated
	"Enrollment Center Application Routing Form for HHW". REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4 and Create Correspondence from the File Server Volume 7 Common Processes, Section 3.11.4.11.
11.	B. **For Approvals** ✓ **For all actions, review budgets and supporting documentation**. ✓ **Medicaid property transfer penalties** – send penalty information to state policy queue REFER TO (INSERT HYPERLINK) CREATE A TASK WORK INSTRUCTIONS (Volume 7 Common Processes – Section 3.11.1.2) to inform policy of a transfer of property penalty. ▪ The subject line of the task must be, "**REPORT OF TRANSFER PENALTY**". ▪ The task instructions must include the Recipients name, RID, Case number, Begin date of penalty period and End date of penalty. ✓ **TANF** – send FI-2032 and PRA to recipient REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.3 ✓ **Independent resource assessment** ▪ Review the FI-2061 ▪ Enter the spousal share on ARRA ▪ Send the FI-2061 to the applicant/spouse/AR if applicable with a copy of the verifications supplied REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.3 ✓ **Medicaid Approvals for Children Under Age Three** (Regardless of Category) ▪ SEC must enter begin/end dates for the Continuous Eligibility Period in CLRC. Including the Name and Birth Date of the applicable child(ren). ✓ **HHW Applications/Redeterminations received from an Enrollment Center** ▪ A copy of the disposition must be mailed to the Enrolment Center via the "Enrollment Center Application Routing Form for HHW". REFER TO (INSERT HYPERLINK) CREATE CORRESPONDENCE WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.3 ✓ **MA R Authorizations**: SEC will verify that there is an **FSSA approved** BAIS 0005B in the documents section of the RBA Application in WFMS prior to authorizing MA R. REFER TO (INSERT HYPERLINK) SEARCH WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.3

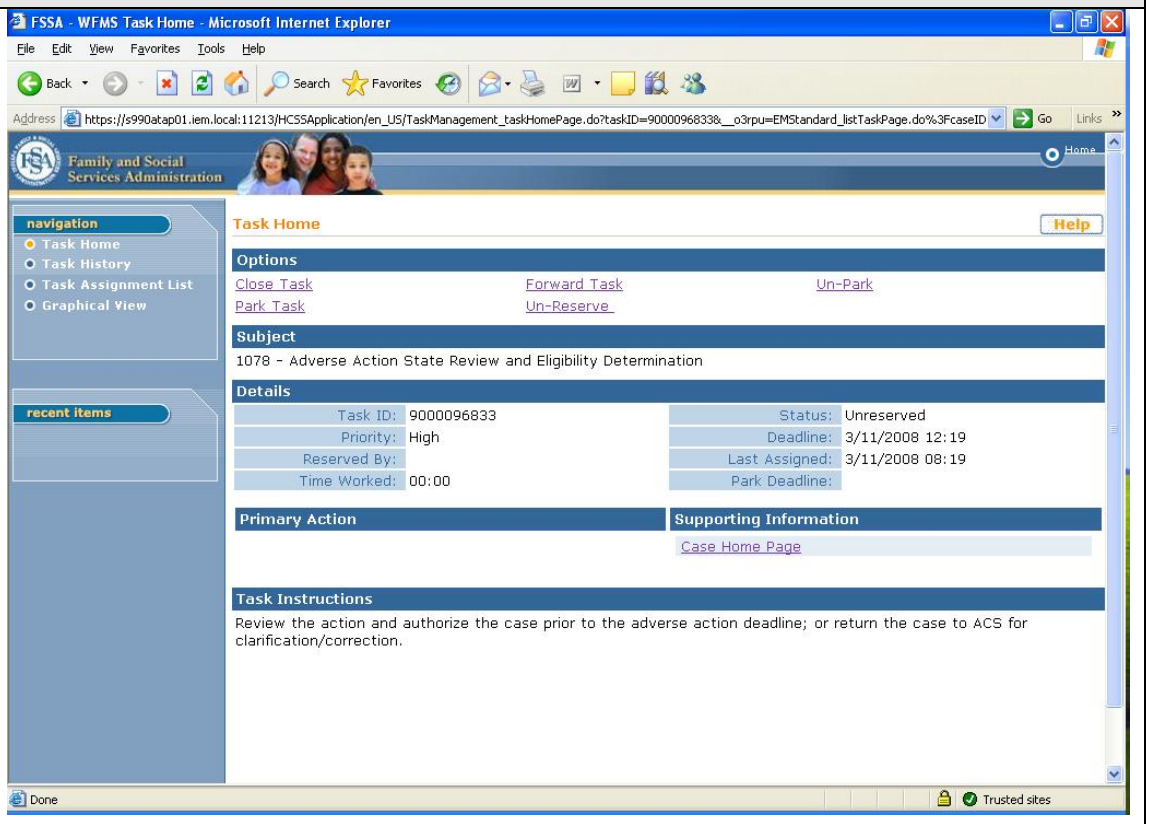
Step	State Review and Eligibility Determination – System Generated
	Note: A *Standard Case* is not created for RBA applications. Only an *Application Case* is created in WFMS for an RBA, ✓ **If an individual is approved for Medicaid who meets lien referral criteria and has real property:** ▪ REFER TO (INSERT HYPERLINK) CREATE A TASK WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.1.2 ▪ Send a task to the Benefit Recovery queue. ▪ The subject line of the task must be, "**Real Property Lien Referral**". ▪ In the Comments section of the task notate the individual's name and their ICES case number. C**. Manual notices should be sent when required**. Refer to (INSERT HYPERLINK) Creating Correspondence from the File Server in Common Processes, Section 3.11.4.11.
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.

Step	State Review and Eligibility Determination – System Generated
	

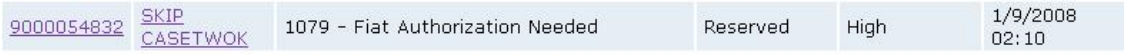
5.0 Adverse Action State Review and Eligibility Determination

Step	Adverse Action 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*. My Tasks Task | Case Primary Client | Task Name | Status | Priority | Due Date 9000096833 | THORNTON LAWSUIT | 1078 - Adverse Action State Review and Eligibility Determination | Reserved | High | 3/11/2008 12:19 The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the action and authorize the case prior to the adverse action deadline; or return the case to ACS for clarification/correction. . .
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.	Go to ICES and review CLRC and related budgets.

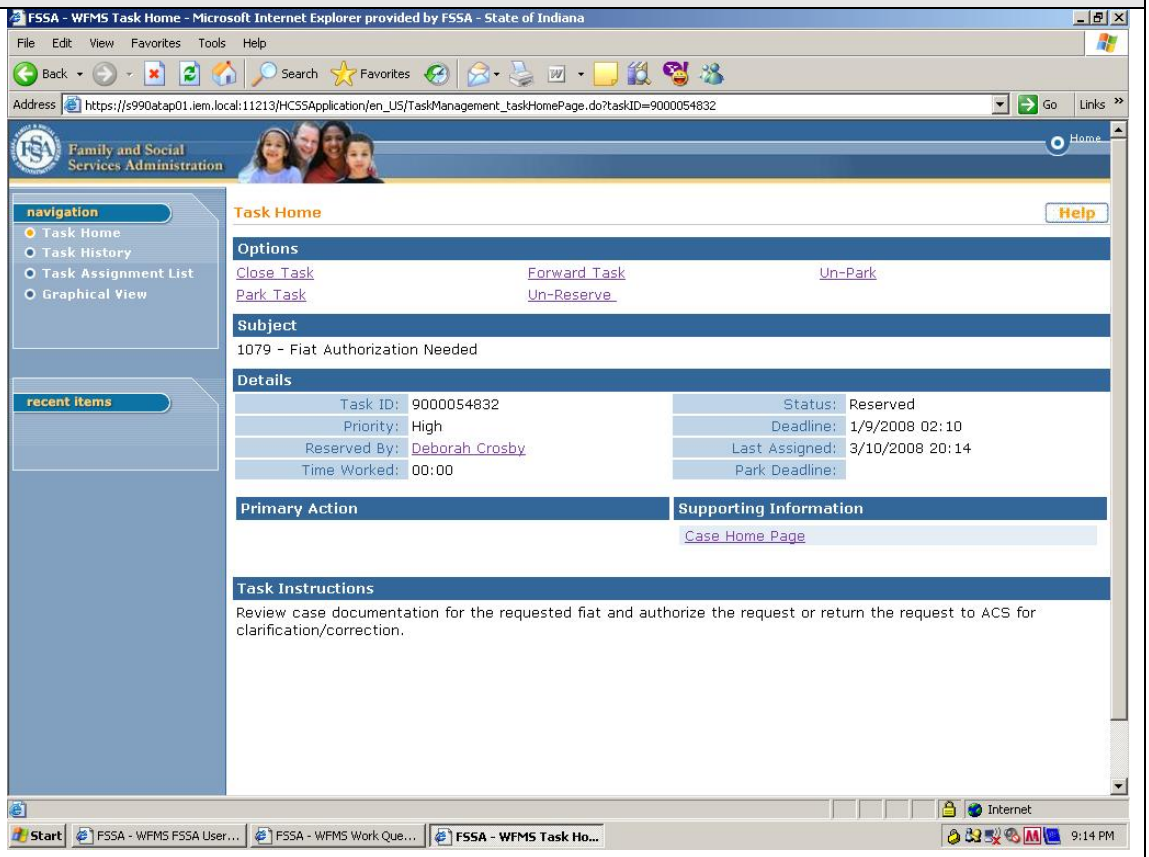
Step	Adverse Action State Review and Eligibility Determination
5.	Authorize benefits prior to adverse action date if correct and document in CLRC. If action is incorrect, go to step 6.
6.	Returning cases to ACS ➢ Document the reason in CLRC ➢ From the *Case Home* page click *Tasks* from the Left Navigation ➢ 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.*
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 **Adverse Action State Review and Eligibility Determination** task. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page.

Step	Adverse Action State Review and Eligibility Determination
	

6.0 Fiat Authorization Needed

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 *Primary Action* 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.	Go to ICES and review CLRC.
5.	Authorize the action the same day as task generated, document action taken in CLRC and create a manual notice to inform the recipient of the action taken or return the case

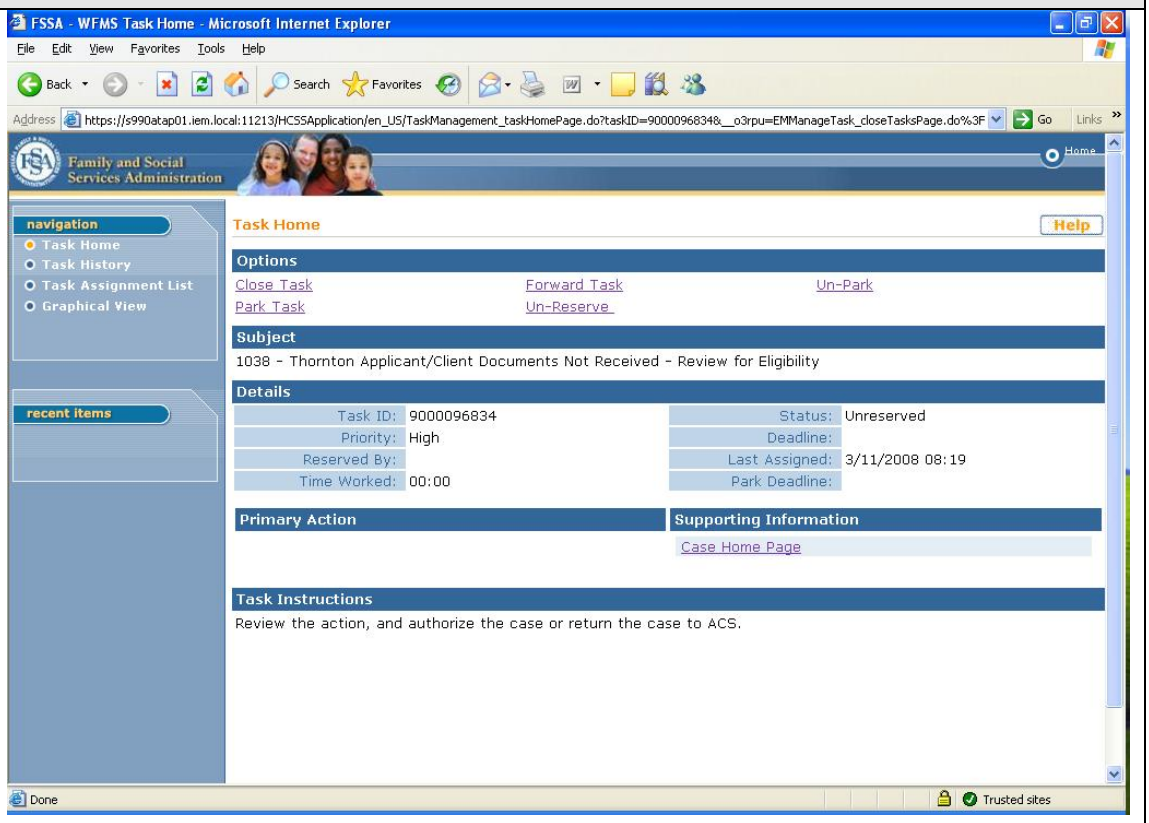
Step	Fiat Authorization Needed
	to ACS. *Reminder, do not run ED/BC on fiated action.* REFER TO (INSERT HYPERLINK) SENDING NOTICES and CREATING CORRESPONDENCE FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4.11.
6.	Returning cases to ACS ➢ Document the reason in CLRC ➢ 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.
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 **Fiat Authorization Needed** task. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page.

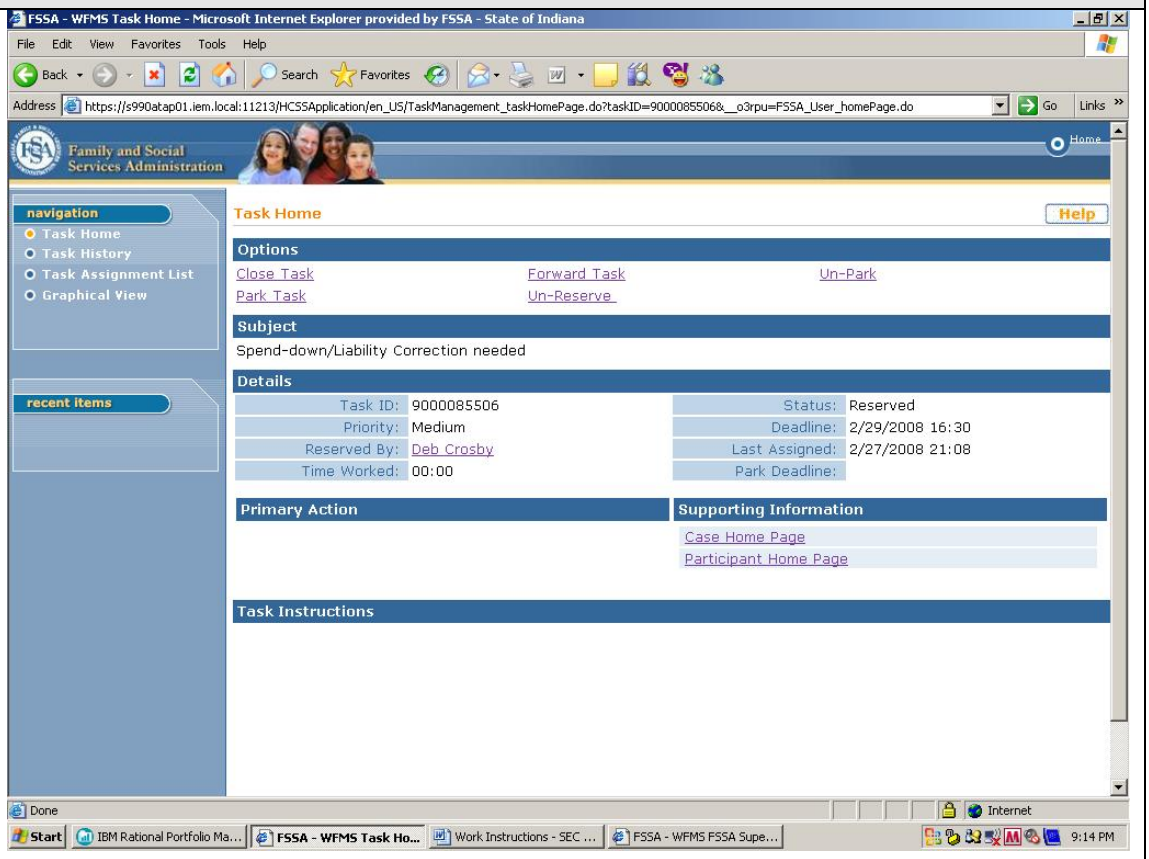
Step	Fiat Authorization Needed
	

7.0 Thornton Applicant/Client Documents Not Received – Review for Eligibility

Step	Thornton Applicant/Client Documents Not Received – Review for Eligibility
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 *Primary Action* and *Task Instructions* on the *Task Home* page. Task Instructions: Review the action, and authorize the case or return the case to ACS.
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.	Go to ICES and review CLRC, AEMDT and CLSC.
5.	➢ Search WFMS for any indexed documents that may have come in after the task was received via the *Case Home* page Click *Documents* from the Left Navigation.

Step	Thornton Applicant/Client Documents Not Received – Review for Eligibility
	 The WFMS will navigate to the *Documents Page*. ➢ Search for non-indexed documents via the *User Home* page to attempt to find any documents associated with the application/case. REFER TO (INSERT HYPERLINK) SEARCHING FOR A NON-INDEXED DOCUMENT WORK INSTRUCTIONS (Volume 7 Common Processes – Section 3.11.3.7) to find and link a non-indexed document to a case in WFMS. ➢ If any documents that would change the disposition were received prior to the Thornton Applicant/Client Documents Not Received – Review for Eligibility task being generated and/or were not enacted upon, the case should be returned to ACS for processing.
6.	Authorize action if correct and document in CLRC. If action is incorrect, go to step 7.
7.	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.*
8.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
9.	Click on the *Task ID* for the **Thornton Applicant/Client Documents Not Received – Review for Eligibility** task. The WFMS will navigate to the *Task Home*.

Step	Thornton Applicant/Client Documents Not Received – Review for Eligibility
	
10.	Click on *Close Task* on *Task Home* page.

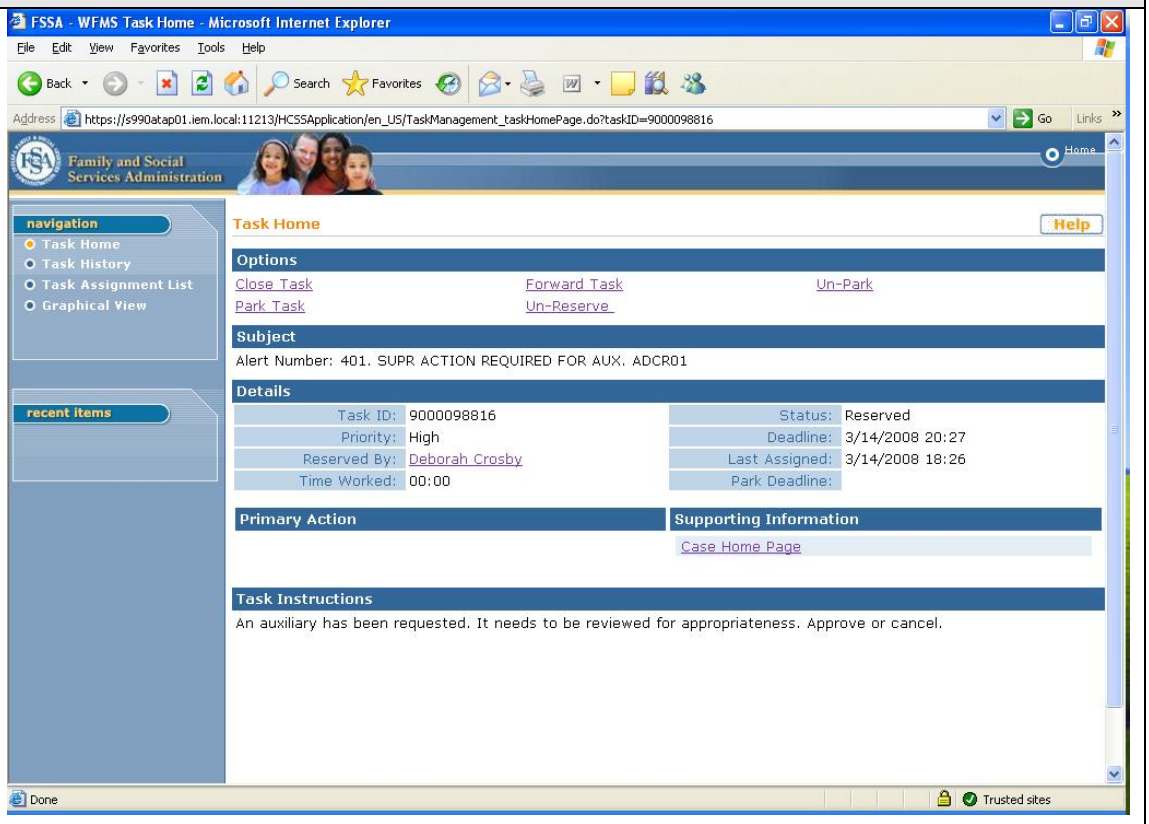
Step	Thornton Applicant/Client Documents Not Received – Review for Eligibility
	

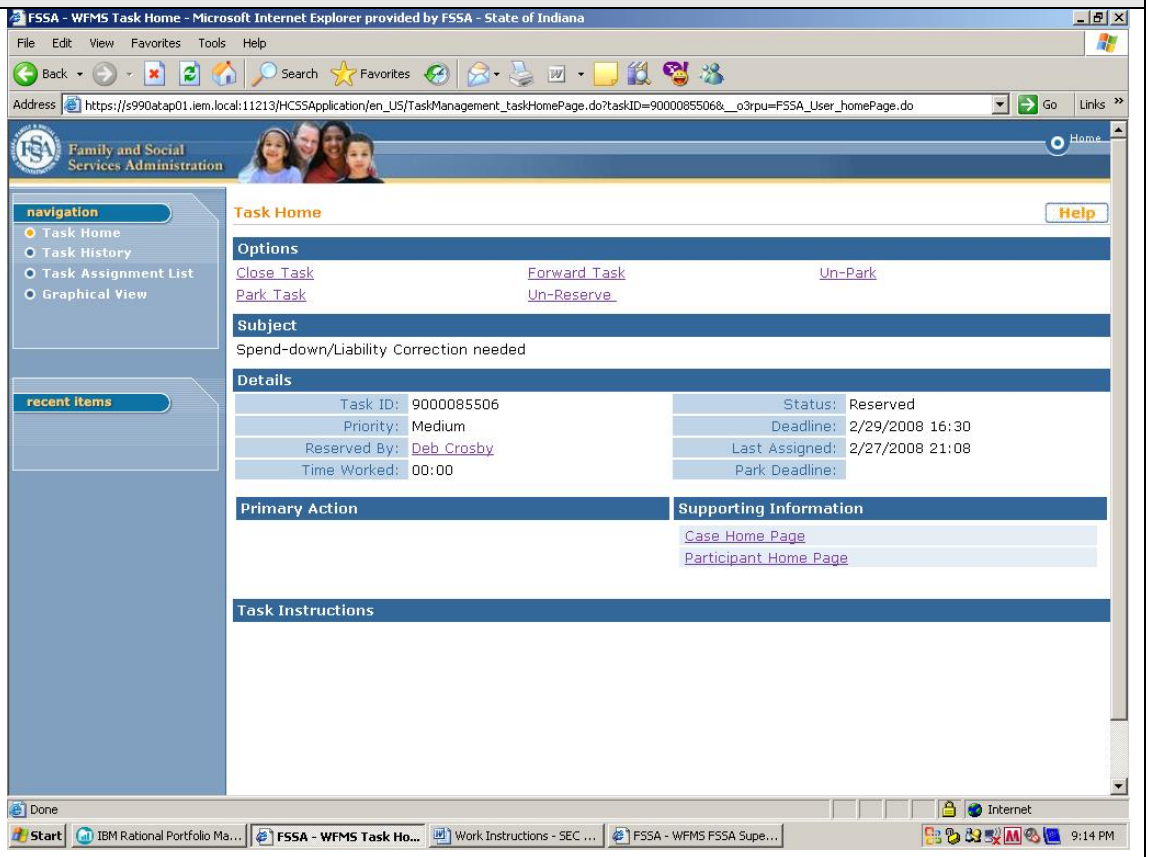
8.0 SUPR ACTION REQUIRED FOR AUX

Although work task is entitled "**SUPR ACTION REQUIRED FOR AUX"** the capability to authorize auxiliaries still remains an SEC function.

Step	(401) SUPR ACTION REQUIRED FOR AUX
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*. My Tasks Task | Case Primary Client | Task Name | Status | Priority | Due Date 9000098816 | APPLY NOW | Alert Number: 401. SUPR ACTION REQUIRED FOR AUX. ADCR01 | Reserved | High | 3/14/2008 20:27 The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: An auxiliary has been requested. It needs to be reviewed for appropriateness. Approve or cancel.
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.	Go to ICES and review CLRC.

Step	(401) SUPR ACTION REQUIRED FOR AUX
5.	Approve the auxiliary on BIOR, document action taken in CLRC and create a manual notice to inform the recipient of the action taken or return the case to ACS. REFER TO (INSERT HYPERLINK) SENDING NOTICES and CREATING CORRESPONDENCE FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.4
6.	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.
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 **SUPR ACTION REQUIRED FOR AUX** task.

Step	(401) SUPR ACTION REQUIRED FOR AUX
	 The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page.

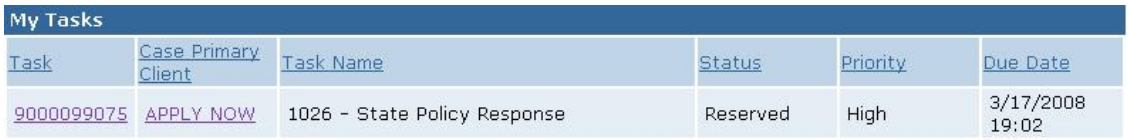
Step	(401) SUPR ACTION REQUIRED FOR AUX
	

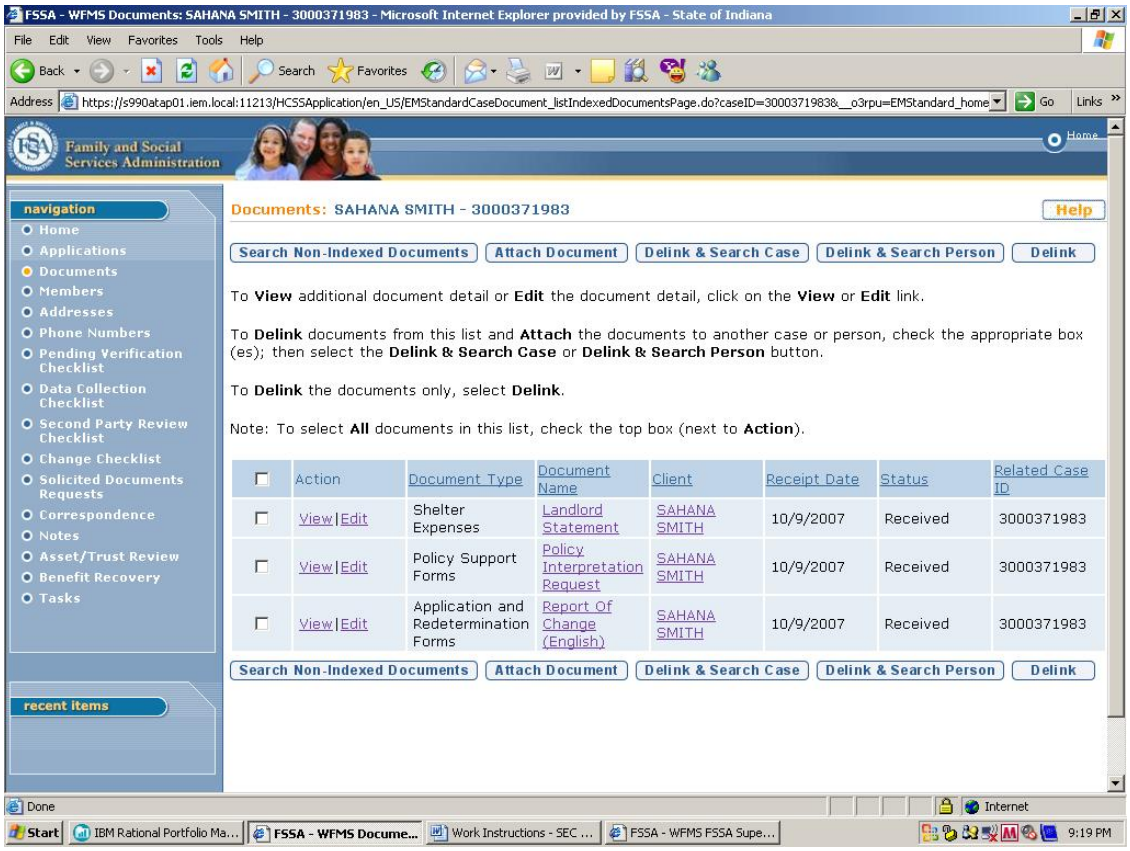
9.0 State Policy Request

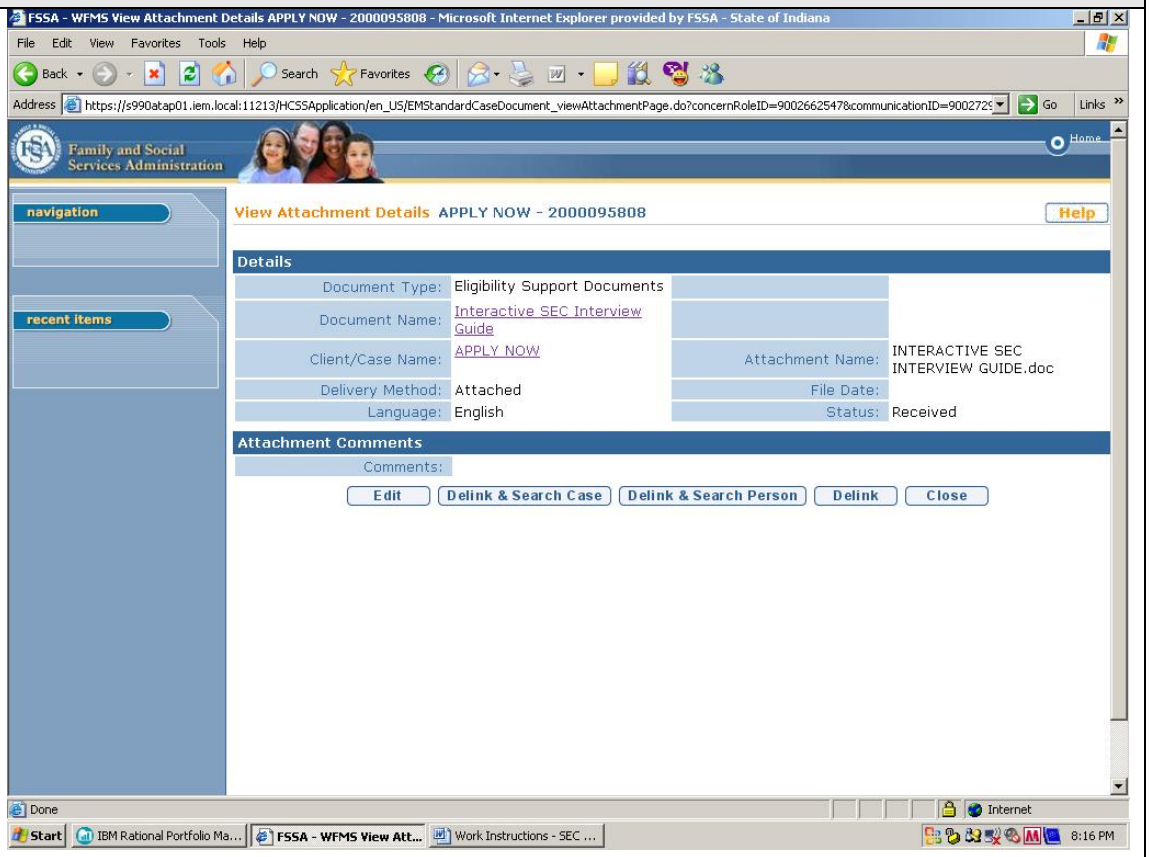
When a policy interpretation is necessary the SEC will communicate the question to their immediate SEM Supervisor, or their designee, and await a response.

Step	State Policy Request
1.	The SEC will complete the "Policy Interpretation Request/Response" form, email the form to the SEM and document in CLRC that a policy question was sent. Refer to Creating an Attachment from the File Server (INSERT HYPERLINK) in Volume 7 Common Processes, Section 3.11.4.12. Steps 1-4.
2.	Remember to complete the Park Deadline Date (allowing two business days) and Comments to remind yourself of applicable eligibility deadlines. REFER TO (INSERT HYPERLINK) PARK A TASK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.1.5

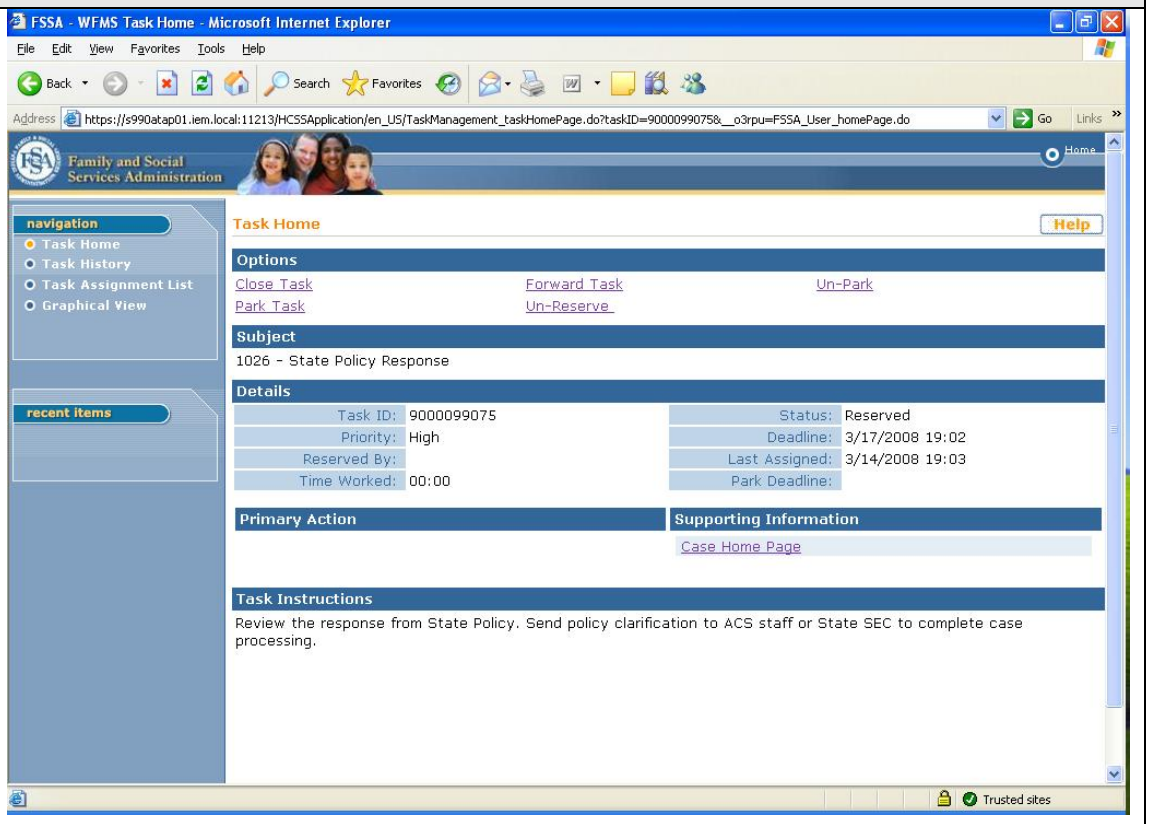
10.0 State Policy Response

Step	State Policy Response
1.	From the *User Home Page*, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.  My Tasks Task | Case Primary Client | Task Name | Status | Priority | Due Date 9000099075 | APPLY NOW | 1026 - State Policy Response | Reserved | High | 3/17/2008 19:02 The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Primary Action Task Instructions Task Instructions: Review the response from State Policy.
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.
4.	From the *Application* or *Case Home Page*, click *Documents* from the Left Navigation.

Step	State Policy Response
	 The WFMS will navigate to the *Documents Page*.
5.	From the *Documents* page click view to see the document's details. 
6.	Within the *View Document Details* screen click the document name hyperlink to view Policy's response in the document itself, take appropriate action in ICES. Click on close.

Step	State Policy Response
	 The WFMS will navigate back to the *Documents Page*.
7.	Click on Tasks in the Left Navigation.

Step	State Policy Response
8.	The WFMS will navigate to the *Tasks* page.

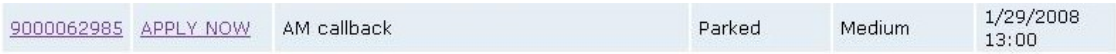
Step	State Policy Response
	 Click on the *Task ID* for the **State Policy Response**. The WFMS will navigate to the *Task Home*.
9.	Click on *Close Task* on *Task Home* page.
10.	Return to the Task Page and repeat the Close Task instructions for the task which initiated the State Policy Request, if applicable. Refer to Closing Multiple Tasks (INSERT HYPERLINK) in Common Processes, Section 3.11.1.14.

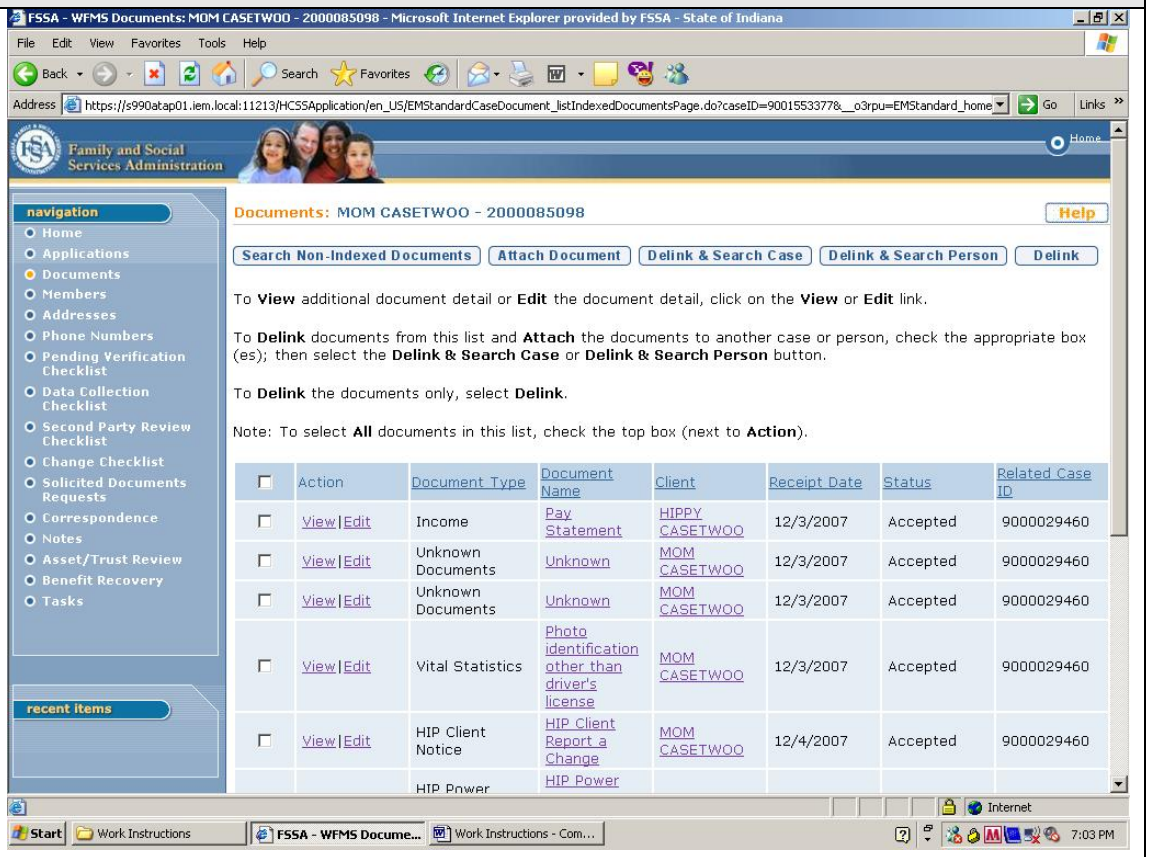
11.0 AM Callback or PM Callback

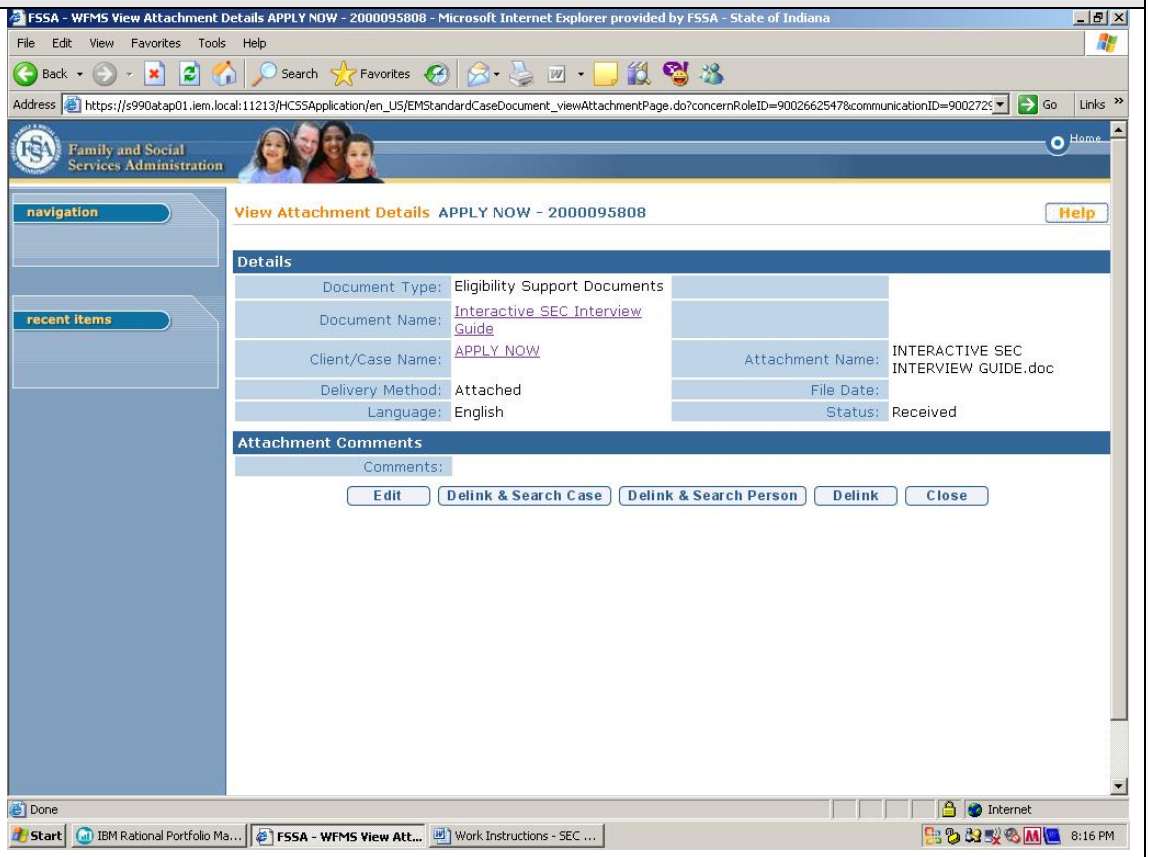
When the application/redetermination involves food stamps the phone interview will be a joint process. The Eligibility Specialist will initiate the phone call to the client during the designated time block. At the end of the data gathering portion, an attempt will be made to transfer the call to a State Eligibility Consultant to complete the certification interview portion. However, if the attempt is unsuccessful ACS will:

- ✓ Inform the applicant/recipient that an SEC will re-contact them, ask if AM or PM would be the most convenient for the re-contact and create the "**AM Callback or PM Callback**" task which will require the SEC to call the applicant/recipient back the same or following business day either in the morning or afternoon, whichever will be displayed in the task name.

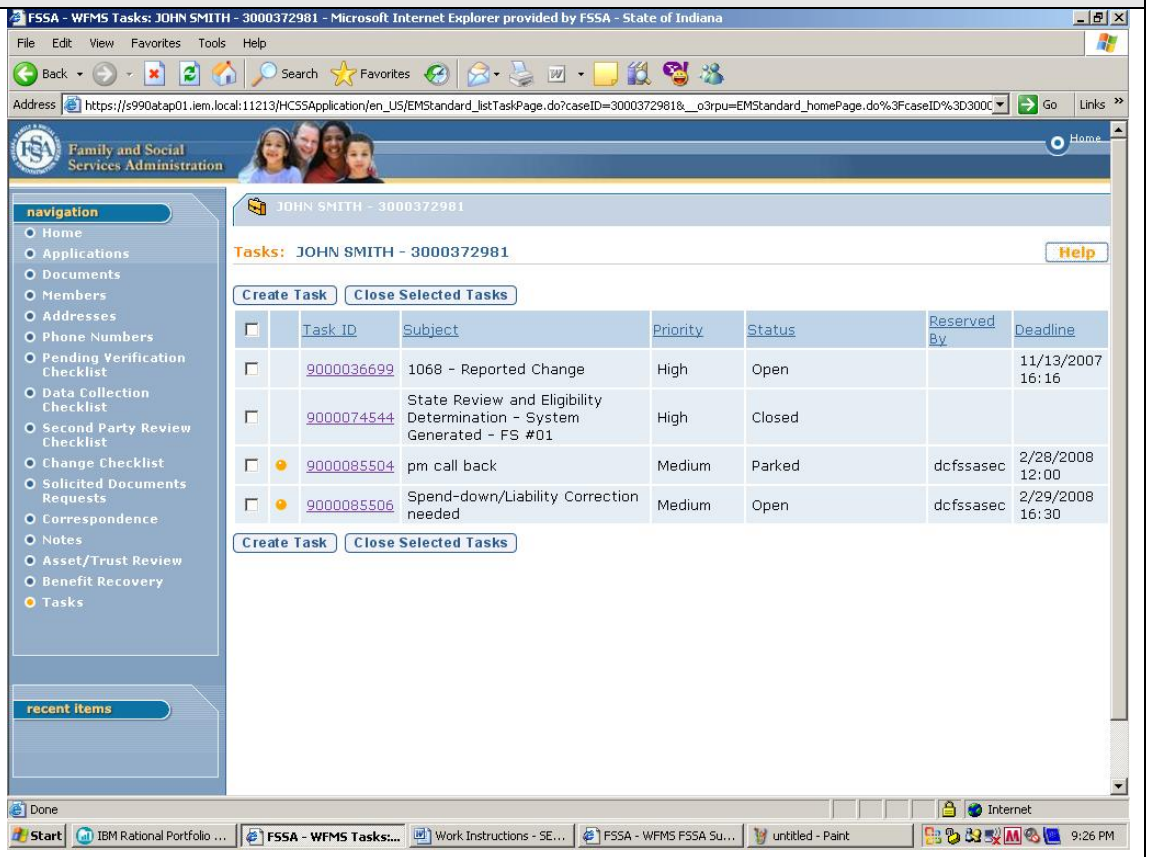
For non-Food Stamp Assistance Groups, in which the SEC Interactive Interview is not required, the data gathering interview was completed, modify the Pending Verification checklist to reflect the items needed for those programs and generate the FI2032. If no additional verifications are needed, take action on the case.

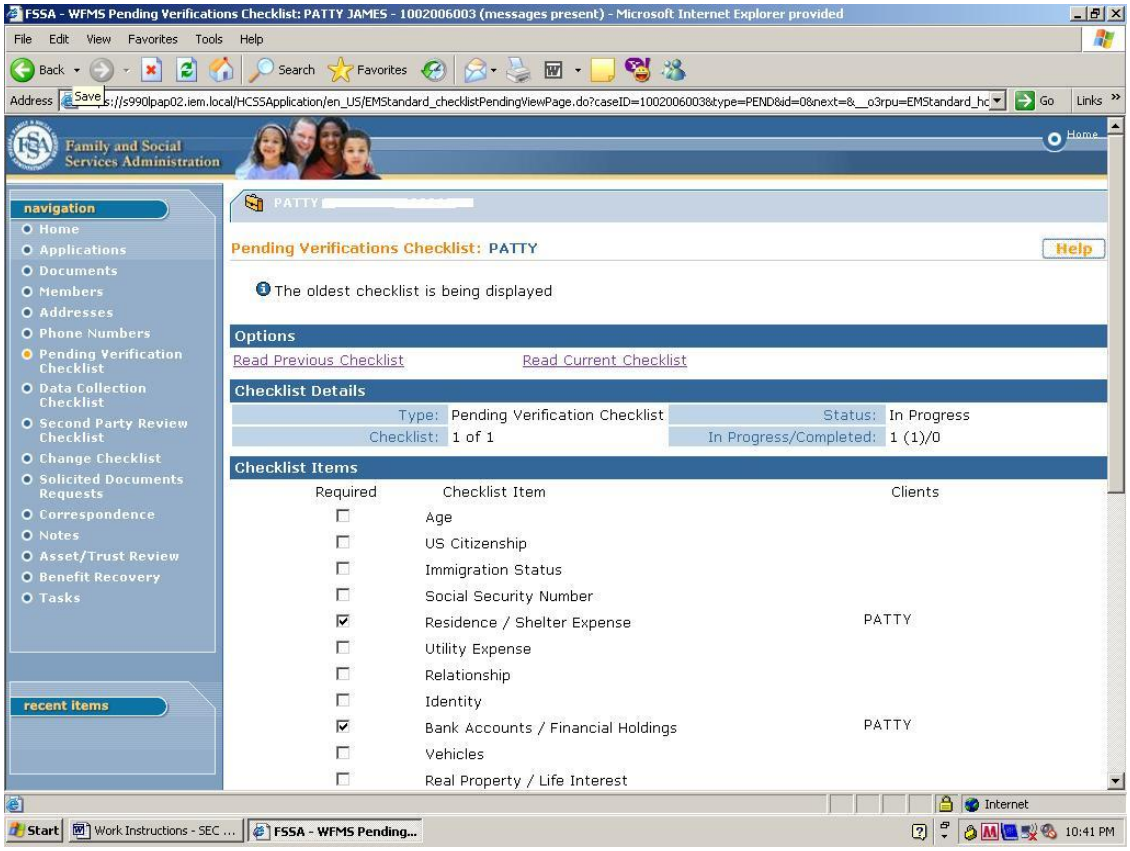
Step	AM Callback or PM Callback
1.	From the *User Home Page* in WFMS, under the *My Tasks* cluster, view the *Task Subject* and click on the *Task ID*.  The WFMS will navigate to the *Task Home*.
2.	View the *Primary Action* and *Task Instructions* on the *Task Home* page. Task Instructions: Contact the applicant at the requested time.
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 *Case Home Page*, click *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. After locating the ICES case number would review WFMS case information such as Documents, Notes, and Tasks. The WFMS will navigate to the *Documents Page*.
5.	From the *Documents* page click view to see the document's details. To view the document from this page click on the Document Name.

Step	AM Callback or PM Callback
	
6.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

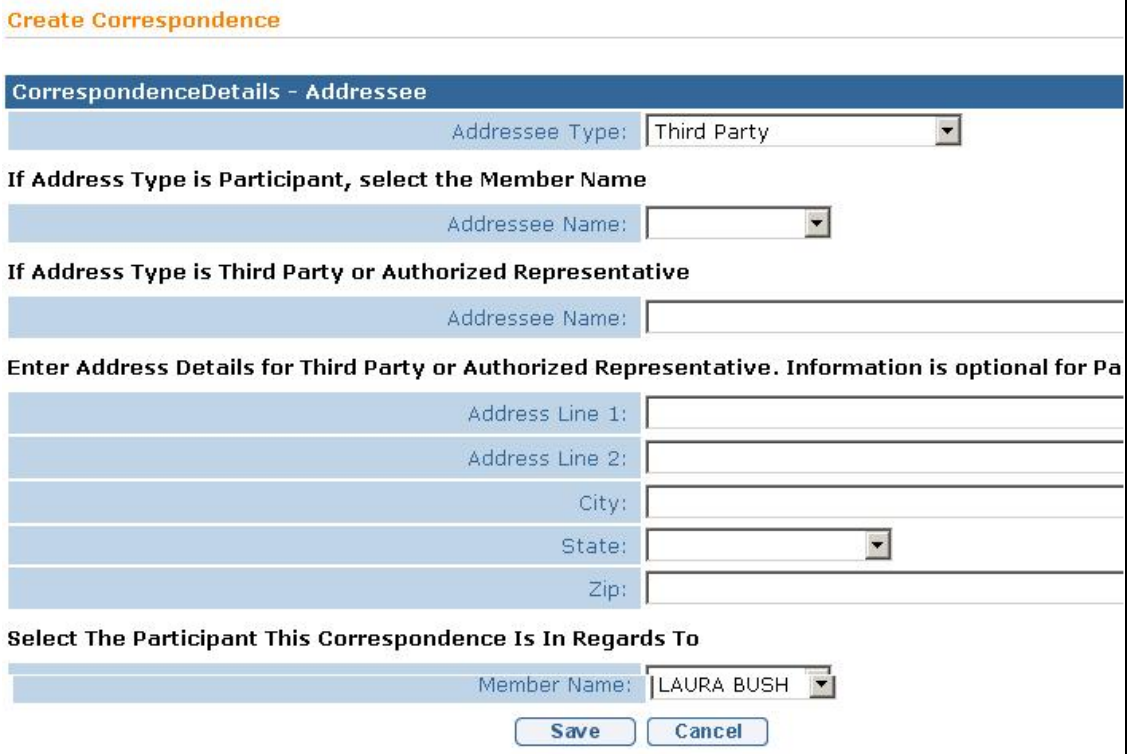
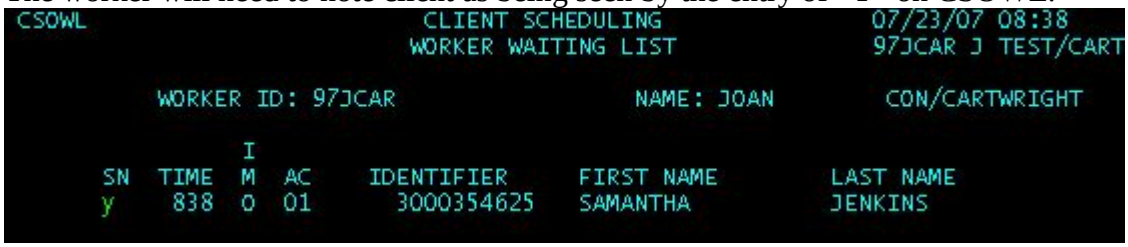
Step	AM Callback or PM Callback
	 Click on close. The WFMS will navigate back to the ***Documents*** *Page*.
7.	Search for any tasks related to the interview yet outstanding. From the *Documents Home* page click on Tasks from the Left Navigation.

Step	AM Callback or PM Callback
8.	The WFMS will navigate to the ***Tasks*** page. Take note of any outstanding tasks that may need to be addressed.

Step	AM Callback or PM Callback
	
9.	Navigate to the application/case in ICES to complete the certification interview with the applicant/recipient. If **contact is made** with the applicant/recipient, the SEC will ✓ review the budget results, ✓ advise the applicant/recipient of their Rights and Responsibilities, and ✓ document in CLRC the date, time, telephone number called and individual with whom the interview was completed. ✓ *Note: should the certification interview occur the following day remember to advise the applicant that they may receive a notice of missed interview and that they should disregard the notice.* ✓ Authorize benefits if no outstanding verifications needed to determine eligibility. ✓ Complete the Interactive SEC Interview Guide and attach it to the application/case in WFMS. REFER TO (INSERT HYPERLINK) CREATING AN ATTACHMENT FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Section 3.11.4.12, Steps 1 – 12. If **contact can not be made** with the applicant/recipient, the SEC will: ✓ park the task between call attempts

Step	AM Callback or PM Callback
	REFER TO (INSERT HYPERLINK) PARK TASK WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.1.5. ✓ make a minimum of two returned call back attempts, no less than 10 minutes apart, ✓ document in CLRC the details of the date, time, and telephone number called for all attempts, and ✓ for recertifications only, AEORE must be completed and the recipient's benefits discontinued for "failing to complete an interview". The recertification must be denied on the last business day of the certification period. ✓ For non-Food Stamp Assistance Groups, in which the SEC Interactive Interview is not required, modify the Pending Verification checklist to reflect the items needed for those programs and generate the FI2032 or authorize benefits on the case, if appropriate. Continue to step 10.
10.	TO MODIFY THE PENDING VERIFICATION CHECKLIST:  The Pending Verification Checklist is completed during the data gathering interview. After reviewing the case, if missing or incomplete information is identified on AEPND in ICES, review the Pending Verification Checklist located in the WFMS case and modify, if necessary. Note: The most current Pending Verification checklist will auto populate the FI 2032. • From the Case Home Page Click on Pending Verification Checklist in Left

Step	AM Callback or PM Callback
	Navigation. • WFMS will navigate to Pending Verification Checklist.. • Click on Edit at the bottom of the Current Checklist. • The Current Checklist will display • Click on any item(s) that are needed to add or remove. • Click on the name of client to whom the item pertains. **CTRL CLICK**: To add more then one member per item or to remove a member, the ctrl button on the keyboard needs to be pressed while clicking on the additional name to be added or name to be removed. • For recertification interviews select *Summary of Eligibility Redetermination Information.*. This form will include client information provided by the client during the data gathering interview. WFMS will create the packet separately from the FI2032 to be mailed the following day. The client is to review, sign, date and return the summary. • ☐ Summary of Eligibility Redetermination Information • Click Save.
11.	Click on Correspondence in Left Navigation to **generate the FI 2032 and any additional forms**. **Take special care to verify that the deadline date is correct on the Create Correspondence Details page.** REFER TO (INSERT HYPERLINK) SEND NOTICE WORK INSTRUCTIONS IN VOLUME 7 COMMON PROCESSES – Section 3.11.4 - TO: • VIEW CORRESPONDENCE HISTORY IN WFMS to view an FI-2032 created by Non-state Coalition staff. • CREATE CORRESPONDENCE IN WFMS to create the FI-2032, if necessary. • EDIT CORRESPONDENCE IN THE WFMS to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary. • DELETE CORRESPONDENCE IN THE WFMS to delete an FI 2032 created by Non-state Coalition staff, if necessary.

Step	AM Callback or PM Callback
	Note: The first screen of Create Correspondence will allow the user to enter an additional address for third party correspondence or an alternative mailing address if the WFMS mailing address is not current. REFER TO (INSERT HYPERLINK) ICES for current mailing address. 
12.	Make sure the applicant has been logged in on screen CSODA by entering an "X" in the "S" (select) field.
13.	Go to CSOUU to enter the worker ID of the interviewer.
14.	The worker will need to note client as being seen by the entry of "Y" on CSOWL. 
15.	Remember to close any other tasks enacted upon. REFER TO (INSERT HYPERLINK) Closing Multiple Tasks in Volume 7 Common Processes – Section 3.11.1.14.

3.0 State Review and Eligibility Determination (Room and Board Assistance)