SEC Service Center

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

1.0 Phone Interview Pending for <Client Name> <RID>

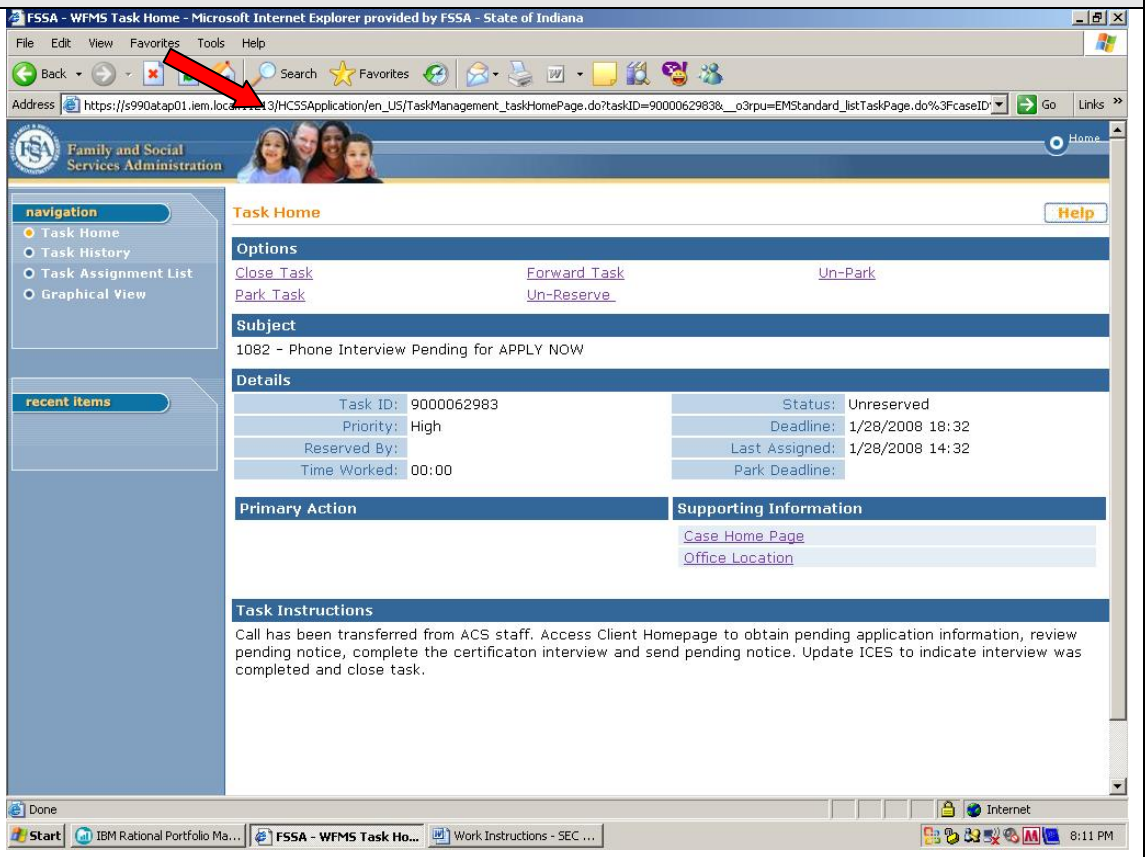
When the application/redetermination involves food stamps, the phone interview will be a joint process. The Eligibility Specialist will initiate the phone call to the client during the designated time block. At the end of the data gathering portion, an attempt will be made to transfer the call to a State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

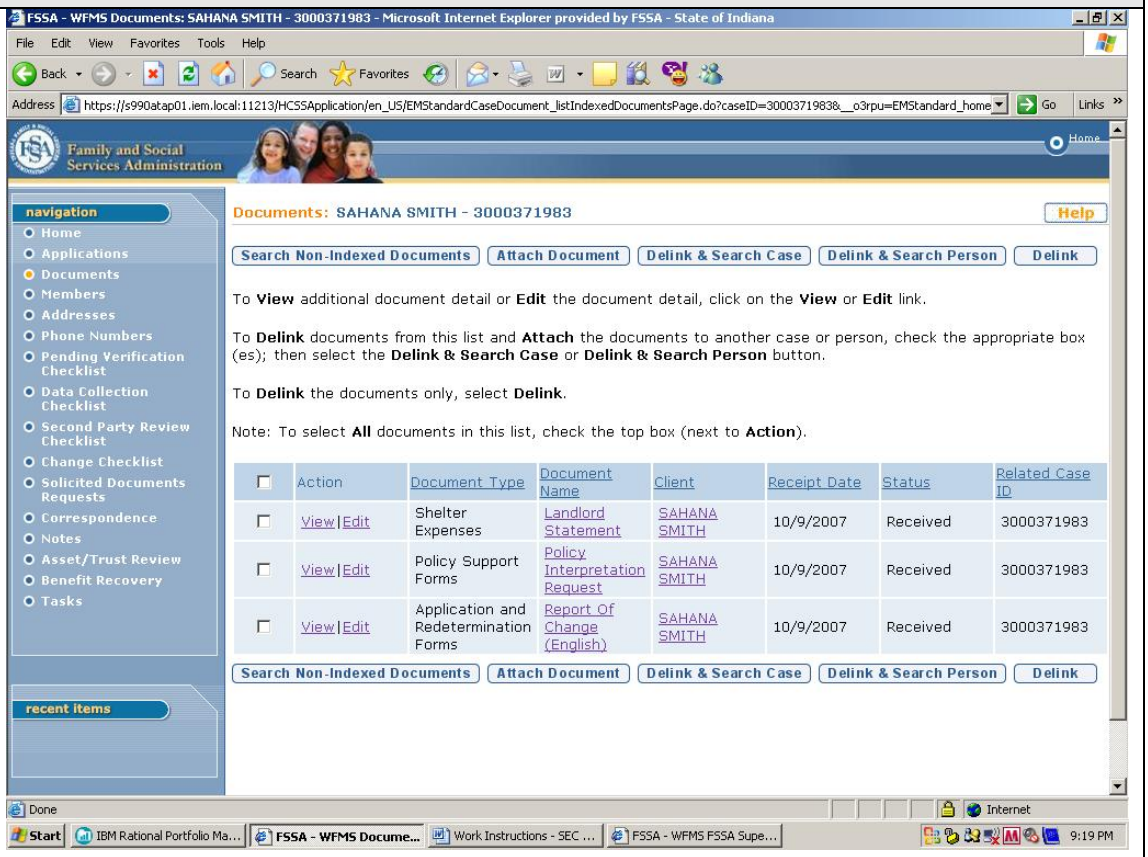
- ✓ Complete a "Warm Transfer" (speak directly with an SEC) and give the applicant's name/ICES case number. The SEC will search the WFMS to find the applicant/recipient's Case Home Page.
- ✓ Complete a "Cold Transfer" (the applicant is placed on hold to await an SEC) which will require the SEC to speak with the applicant/recipient and acquire sufficient information to search the WFMS to find the applicant/recipient's Case Home Page.

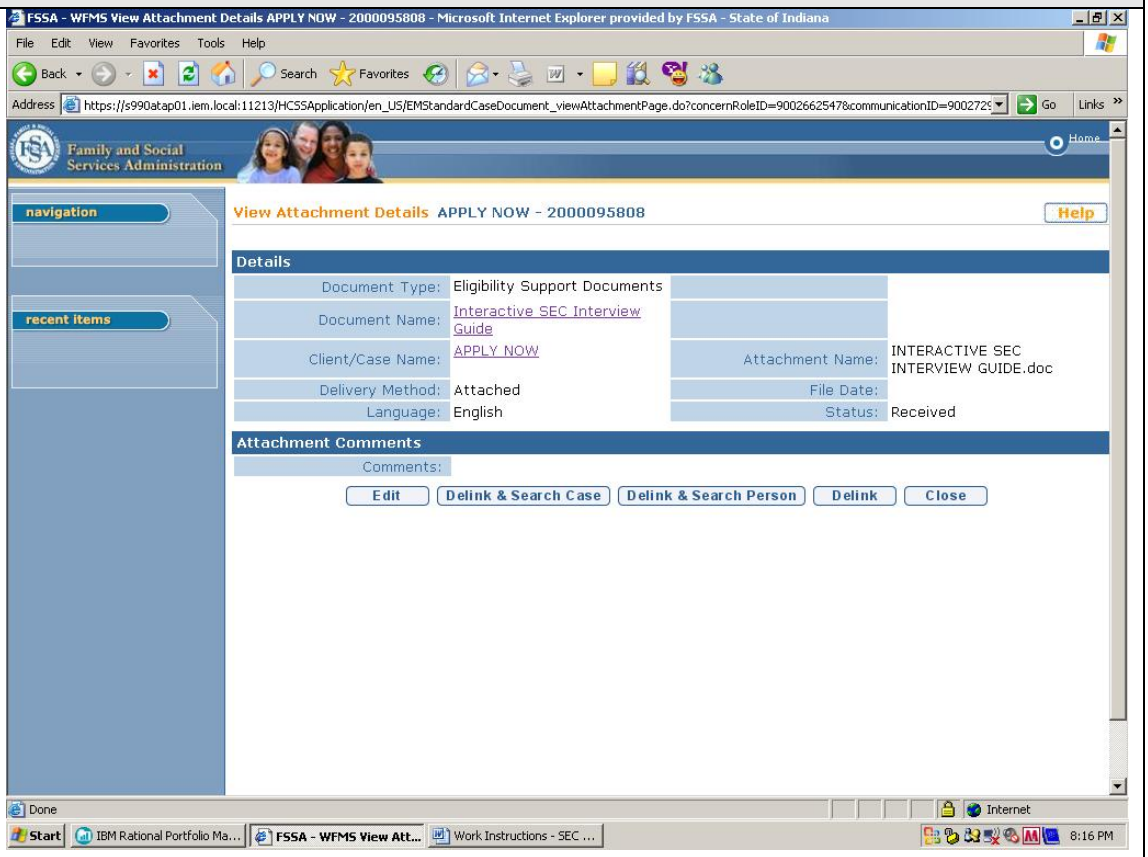
Step	Phone Interview Pending for <Client Name> <RID>
1.	Under *Search For* from the User Home page click on the *Case* link which will display the *Search Case* page.

Step	Phone Interview Pending for <Client Name> <RID>
2.	Enter available identifying information regarding the application or case in the search fields. Click on *Search* button after entering information regarding the case.
3.	A successful *Case Search* will display case information in *Search Results* such as the Case Name, Date of Birth, SSN, Case Type, Case Reference Number(WFMS), ICES Case Number, Date Created (in WFMS) and the status of the case that match the search fields completed. Search Case Help Search Criteria ICES/Curam Case Number: Case Type: SSN: (Don't enter dashes) ICES RID: First: apply Middle/MI: Last: now DOB: (dd/mm/yyyy) Address Line1: Address Line2: County: City: State: Zip Code: Search Reset Cancel Search Results (Number of Items: 5) Case Name / SSN / ICES RID / Date of Birth / Case Type / ICES/Curam Case Number / Date Created / Status APPLY NOW / 314-21-3131 / 200017541099 / 1/1/1970 / Application / 9000036352 / 1/23/2008 / Open apply now / / / 1/1/1970 / Screening / 9000036347 / 1/23/2008 / Open apply now / 314-21-3131 / 200017541099 / 1/1/1970 / Application / 9000040533 / 2/15/2008 / Open

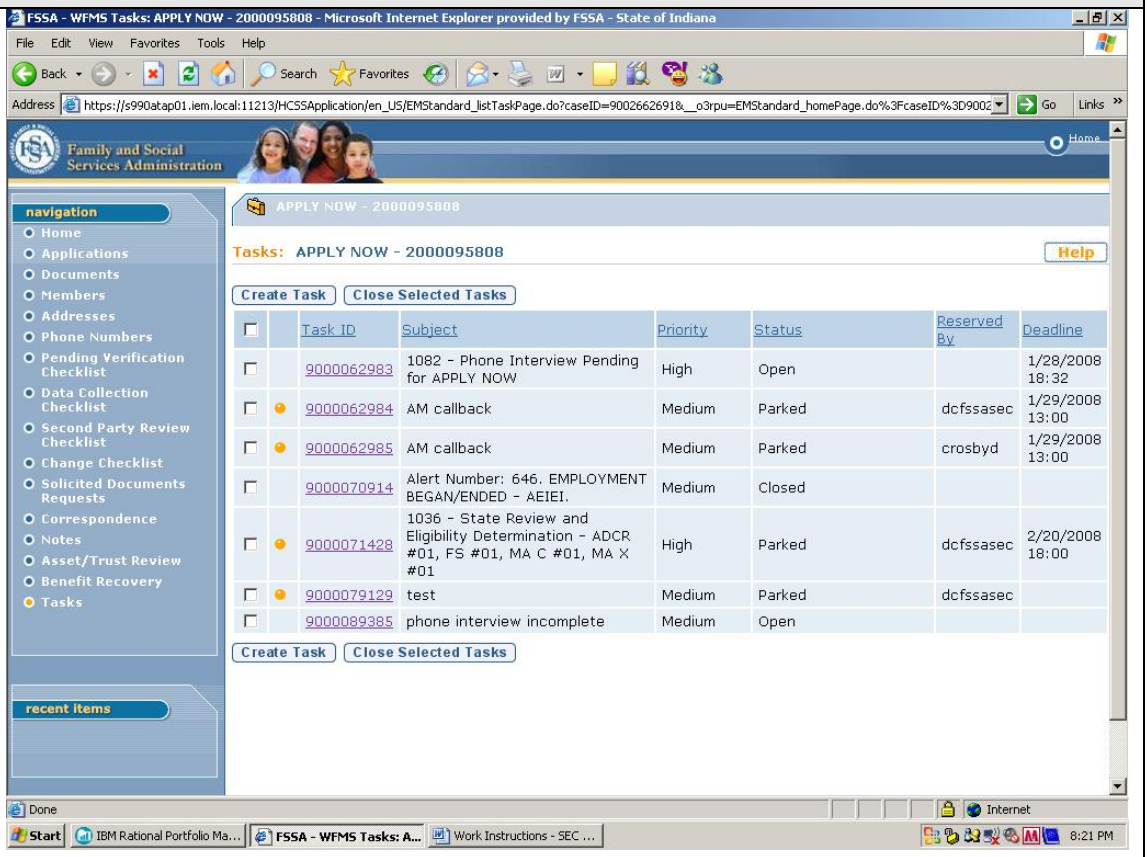
Step	Phone Interview Pending for <Client Name> <RID>
	More than one *Case Type* may display for each case reflecting the stage of processing of the WFMS case. The *Phone Interview Pending* task should be generated from the *Standard Case*. Case actions such as creating correspondence or generating tasks should be done from the *Standard Case* unless the WFMS case will remain an *Application Case*. Search Case Help Search Criteria ICES/Curam Case Number: Case Type: SSN: (Don't enter dashes) ICES RID: First: apply Middle/MI: Last: now DOB: (dd/mm/yyyy) Address Line1: Address Line2: County: City: State: Zip Code: Search Reset Cancel Search Results (Number of Items: 5) Case Name / SSN / ICES RID / Date of Birth / Case Type / ICES/Curam Case Number / Date Created / Status APPLY NOW / 314-21-3131 / 200017541099 / 1/1/1970 / Application / 9000036352 / 1/23/2008 / Open apply now / / / 1/1/1970 / Screening / 9000036347 / 1/23/2008 / Open apply now / 314-21-3131 / 200017541099 / 1/1/1970 / Application / 9000040533 / 2/15/2008 / Open
4.	Click on the *Case Name* link that you want to view. The *Case Home* page displays to access the ICES case number.

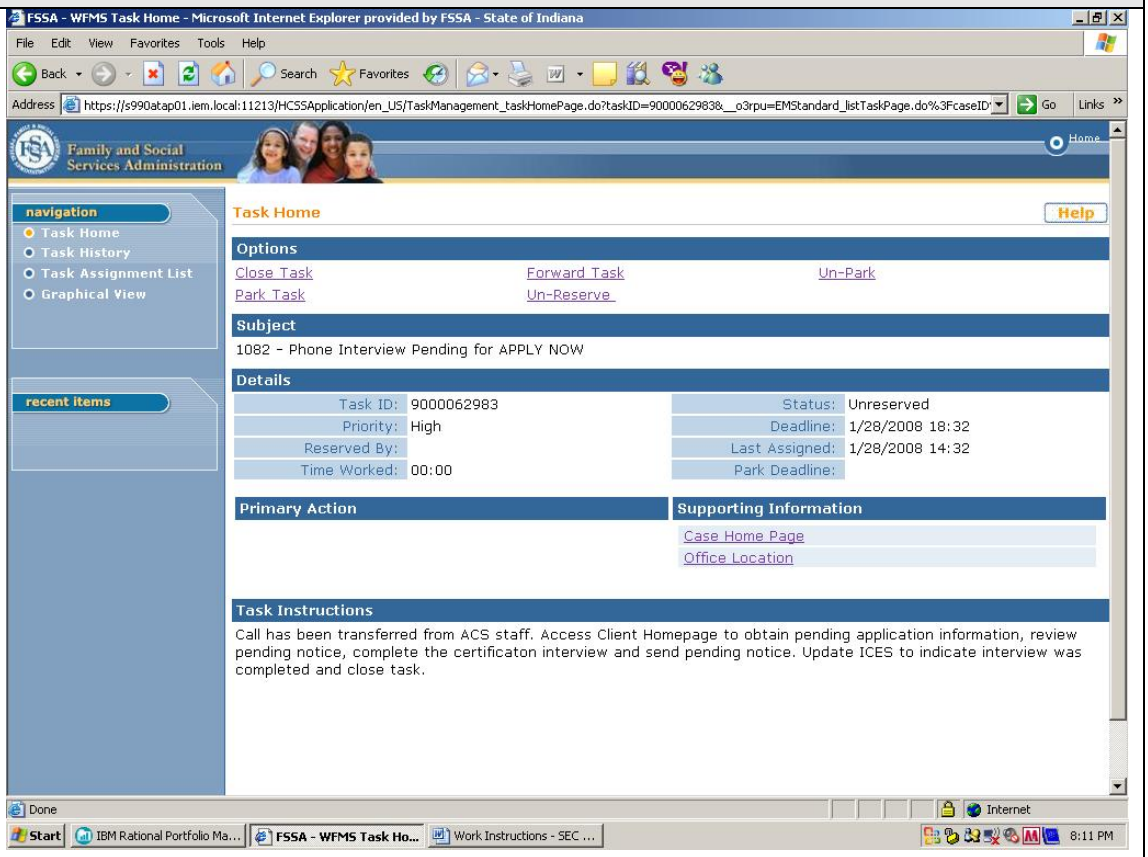
Step	Phone Interview Pending for <Client Name> <RID>
	
6.	After locating the applicant's/recipient's information in WFMS you would review WFMS case information such as Documents, Notes, and Tasks. From the *Case Home Page*, click *Documents* from the Left Navigation. Review all supporting documents, if any, submitted along with the application. The WFMS will navigate to the *Documents Page*.
7.	From the *Documents* page click *view* to see the document's details or click on *Document Name* to view the document.

Step	Phone Interview Pending for <Client Name> <RID>
	
8.	Within the *View Document Details* screen click the document name hyperlink to view the document itself, take appropriate action in ICES.

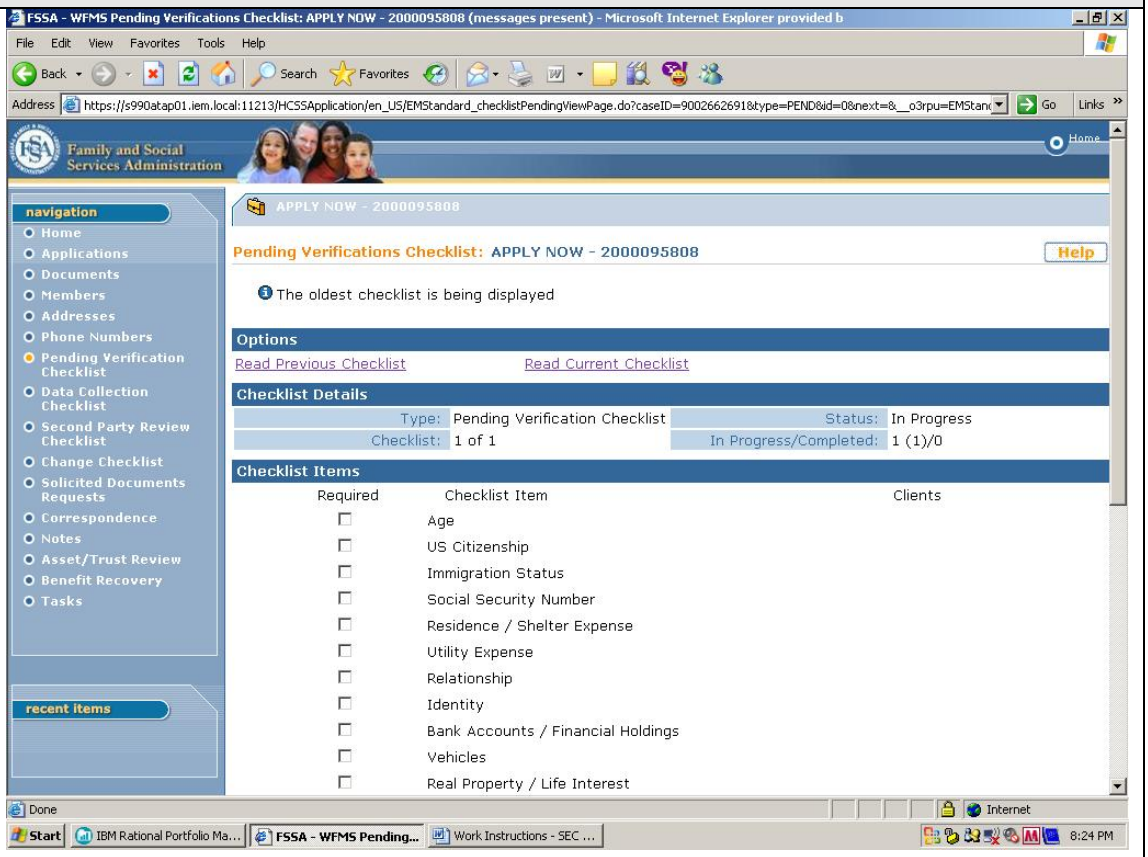
Step	Phone Interview Pending for <Client Name> <RID>
	 Click on close. The WFMS will navigate back to the *Documents Page*.
9.	Search for any tasks related to the application that may be outstanding. From the *Documents Home* page click on Tasks from the Left Navigation.

Step	Phone Interview Pending for <Client Name> <RID>
10.	The WFMS will navigate to the *Tasks* page. Take note of any outstanding tasks that may need to be addressed. Click on the ***Phone Interview Pending for <Client Name> <RID>*** task ID.

Step	Phone Interview Pending for <Client Name> <RID>
	
11.	View the *Primary Action* and *Task Instructions*, on the *Task Home* page.

Step	Phone Interview Pending for <Client Name> <RID>
	 Navigate back to the ***Case Home*** page by clicking on ***Case Home Page*** under ***Supporting Information***.
12.	Go to the application/case in ICES to complete the certification interview 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 individual with whom the interview was completed. ✓ complete the Interactive SEC Interview Guide and attach it to documents in the application/case in WFMS. REFER TO CREATING AN ATTACHMENT FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Section 3.11.3.12, Steps 1 - 12
13.	TO MODIFY THE PENDING VERIFICATION CHECKLIST:

Step	Phone Interview Pending for <Client Name> <RID>

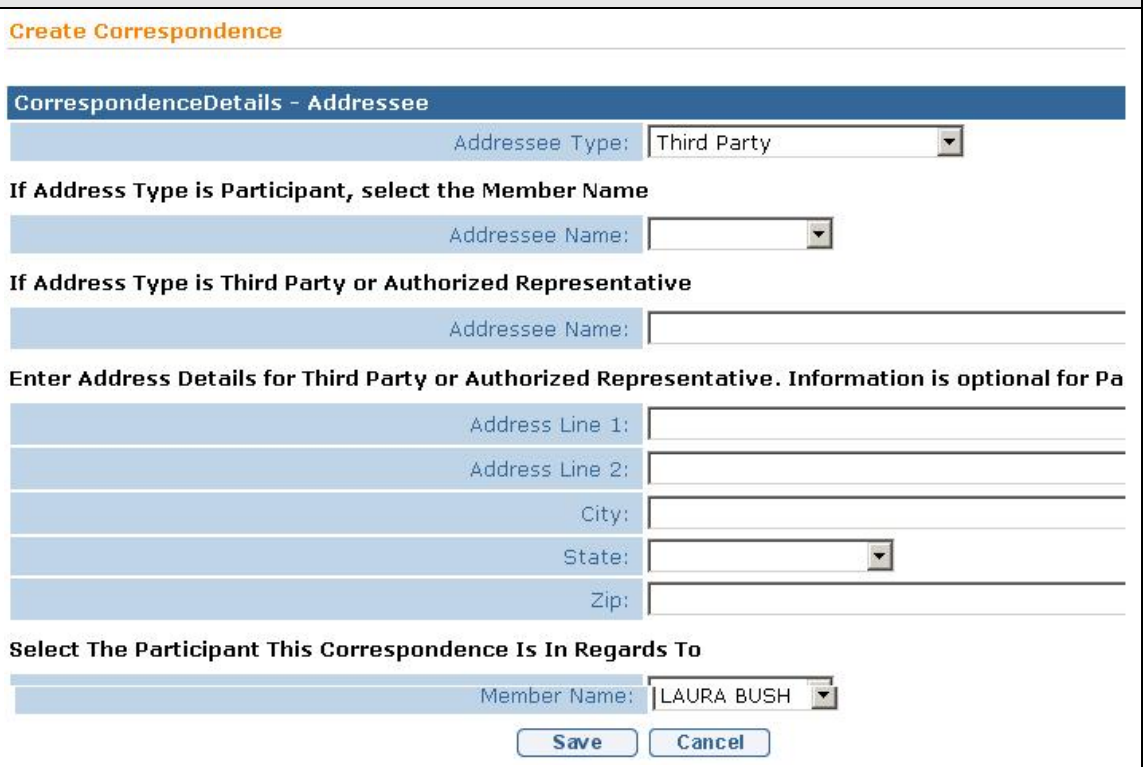


The Pending Verification Checklist is completed during the data gathering interview, if outstanding items are identified. After reviewing the case, if missing or incomplete information is identified on AEPND in ICES, review the Pending Verification Checklist located in the WFMS case and modify, if necessary.

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 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.
- Select the required item(s) and the individual(s) required to provide the information. Note: **Ctrl Click** if the same verification(s) are needed from multiple AG members, hold down the ctrl (Control) button on your keyboard and left click on the name(s) of everyone for whom the verification(s) are required. You may also use the same process (ctrl button/ left click on the name) to de-select an individual whose name has been highlighted in error.

Step	Phone Interview Pending for <Client Name> <RID>
	• Click Save.
14.	Click on Correspondence in Left Navigation to generate the **FI 2032** and any additional forms. The most current Pending Verification checklist will auto populate the FI 2032. **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 Section 3.11.4.7 (INSERT HYPERLINK) to view an FI-2032 created by Non-state Coalition staff. • CREATE CORRESPONDENCE IN WFMS Section 3.11.4.3 (INSERT HYPERLINK) to create the FI-2032, if necessary. • EDIT CORRESPONDENCE IN THE WFMS Section 3.11.4.8 (INSERT HYPERLINK) to edit/modify the deadline date of an FI-2032 created by Non-state Coalition staff, if necessary. • DELETE CORRESPONDENCE IN THE WFMS Section 3.11.4.9 (INSERT HYPERLINK) to delete an FI 2032 created by Non-state Coalition staff, if necessary. 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 ICES for current mailing address.

Step	Phone Interview Pending for <Client Name> <RID>
	
15.	If all verifications are complete authorize the application/redetermination.
16.	Document in CLRC the action taken.
16.	Make sure the applicant has been logged in on screen CSODA by entering an "X" in the "S" (select) field.
17.	Go to CSOUU to enter the worker ID of the interviewer.
18.	The worker will need to note client as being seen by the entry of "Y" on CSOWL. CSOWL CLIENT SCHEDULING 07/23/07 08:38 WORKER WAITING LIST 97JCAR J TEST/CART WORKER ID: 97JCAR NAME: JOAN CON/CARTWRIGHT SN TIME IMO AC IDENTIFIER FIRST NAME LAST NAME y 838 O 01 3000354625 SAMANTHA JENKINS
19.	Remember to close any other tasks enacted upon. REFER TO CLOSING A TASK WORK INSTRUCTIONS Volume 7 Common Processes – Section 3.11.1.13

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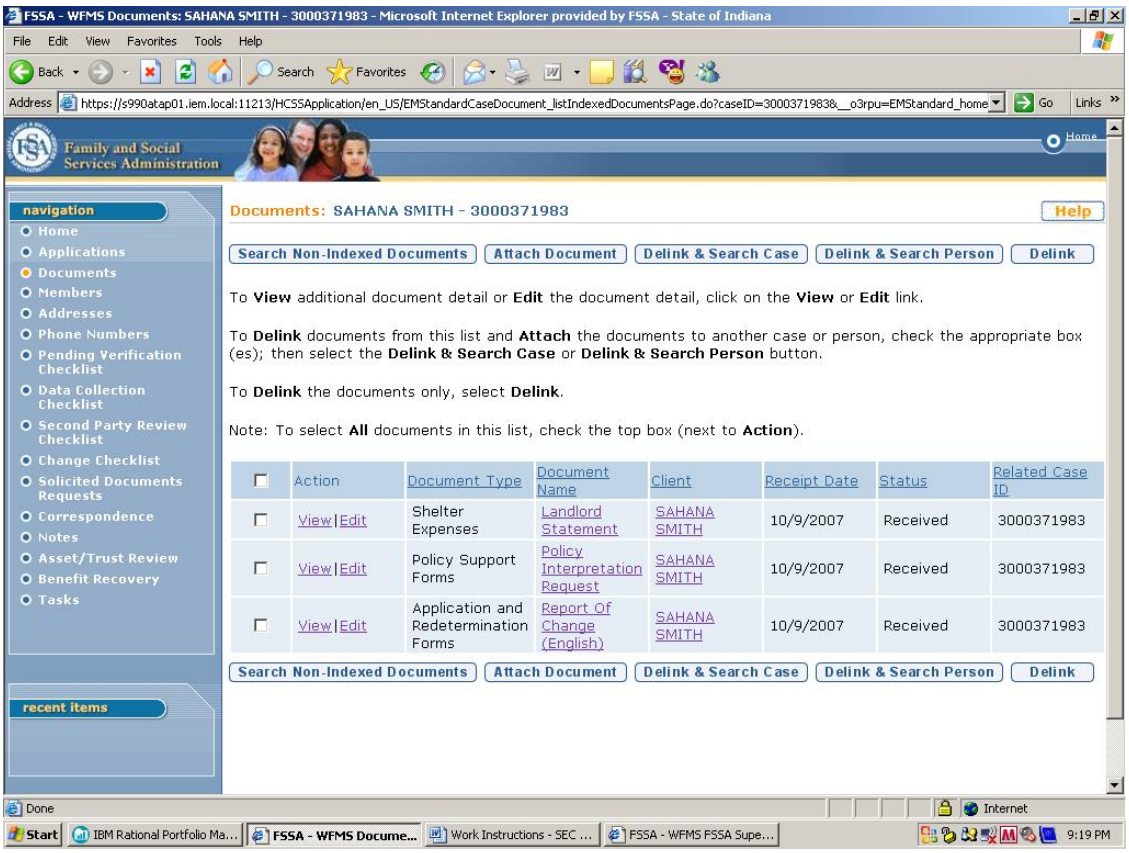
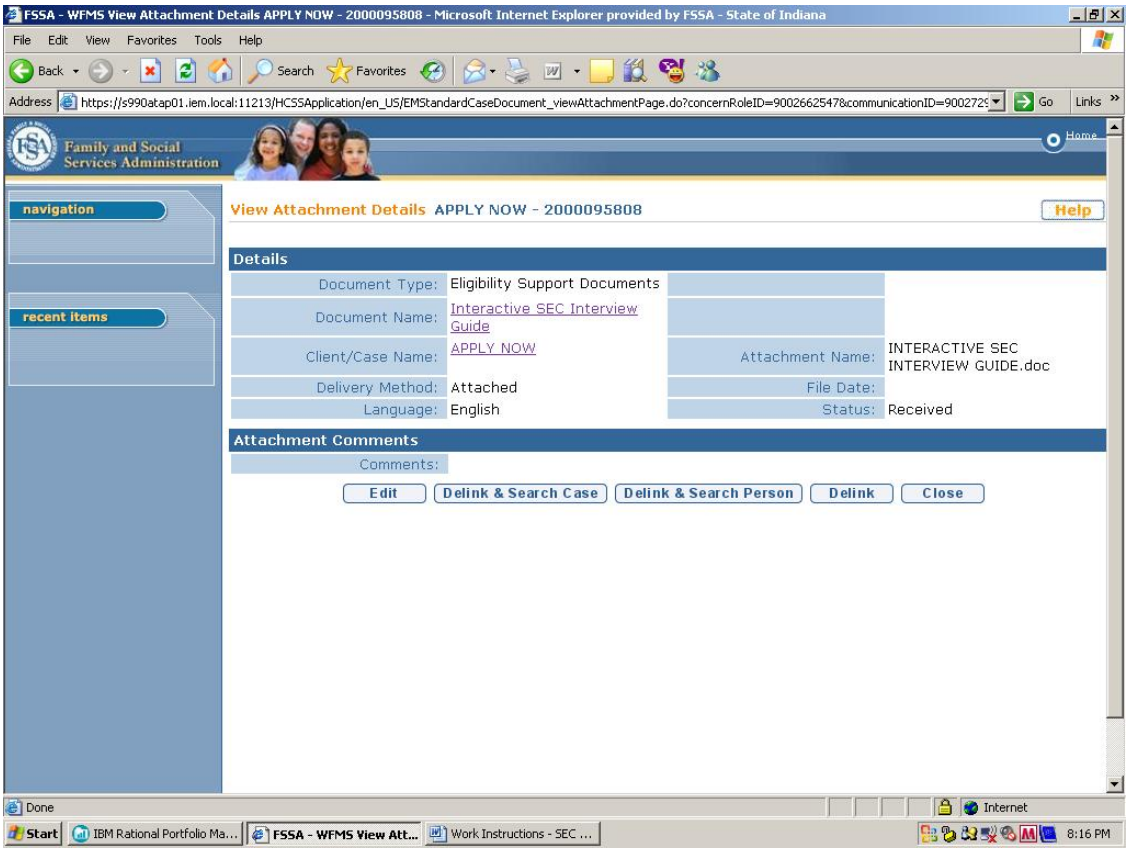
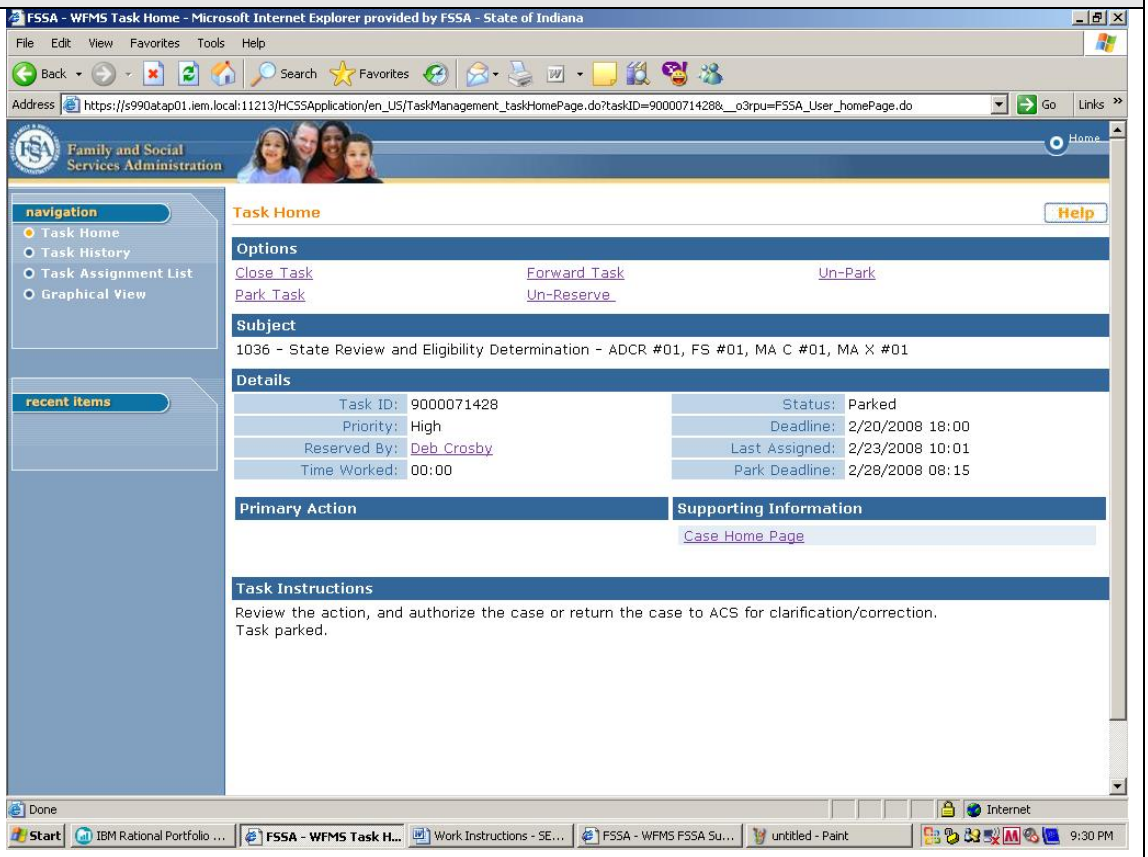
2.0 State Review and Eligibility Determination (Room and Board Assistance)

Step	State Review and Eligibility Determination (Room and Board Assistance)
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 *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* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Application* or *Case Page.*
4.	Review WFMS Case Notes by clicking on *Notes* from the Left Navigation.

Step	State Review and Eligibility Determination (Room and Board Assistance)
	 The WFMS will navigate to the *Notes Page*.
5.	Click on *View* to view the notes.
6.	Click on *Home* on the Left Navigation to return to the *Application* or *Case Home* page.
7.	From the *Application* or *Case Home Page*, click *Documents* from the Left Navigation. The WFMS will navigate to the *Documents Page*.
8.	From the *Documents* page click view to see the document's details. 
9.	Within the *View Document Details* screen click the document name hyperlink to view

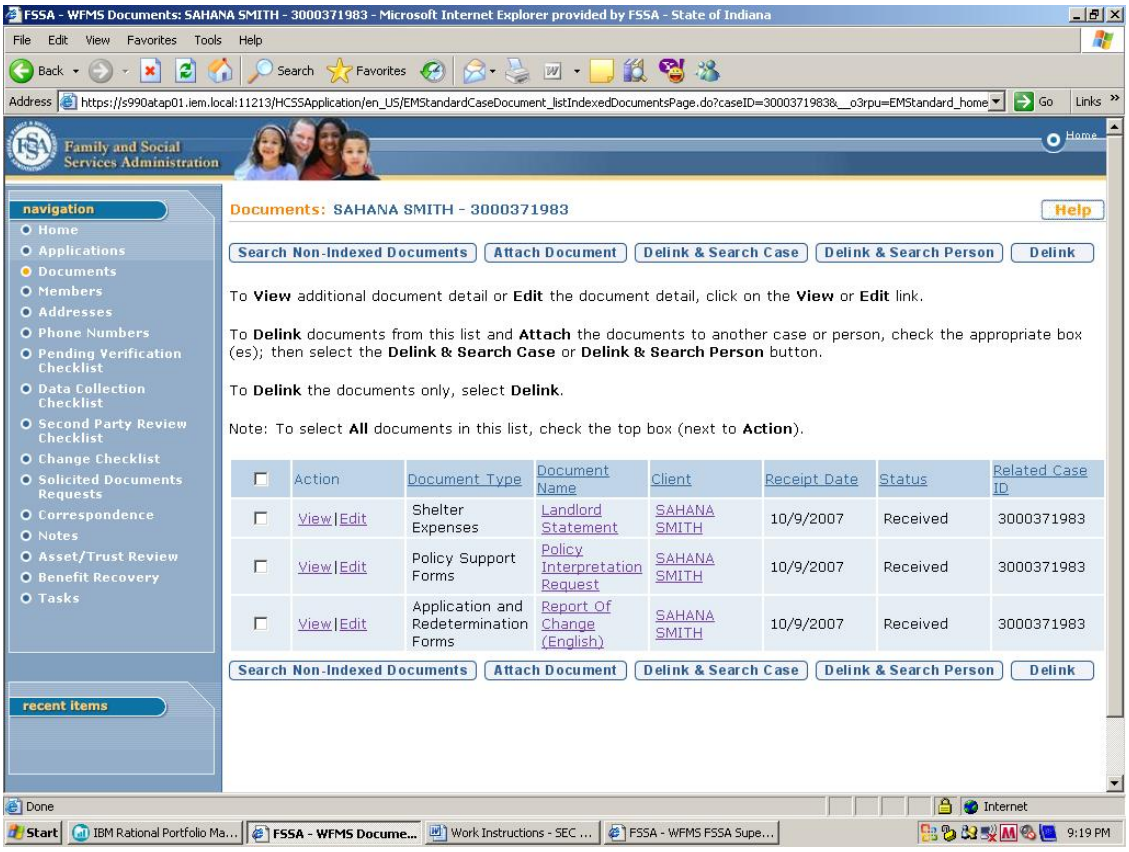
Step	State Review and Eligibility Determination (Room and Board Assistance)
	the application, BAIS 0005B (*Assistance to Residents in County Homes/Room and Board Assistance Budget and Recommendation*) W-9 and all supporting documentation. **For redeterminations view the current* BAIS 0005B *only*..  Clicking on *Close* will take the user back to the *Documents* page.
10.	Review the budget recommendation BAIS 0005B (*Assistance to Residents in County Homes/Room and Board Assistance Budget and Recommendation*) for accuracy. If accurate, Save a copy of the BAIS 0005B to your desktop. The SEC will then modify the saved BAIS 0005B by typing their name in the caseworker signature field followed by their position title of "SEC" and entering the date in the date field to authorize the recommendation if accurate. REFER TO CREATING AN ATTACHMENT FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Section 3.11.3.12, Steps 1 - 12 to reattach the modified BAIS 0005B from their desktop to the Case in WFMS. If the action is incorrect, go to Step 14 to return the case to ACS.
11.	SEC will review for accuracy and save a copy of the following documents, to their desktops; the W-9 and application. **For redeterminations this Step is not applicable.*

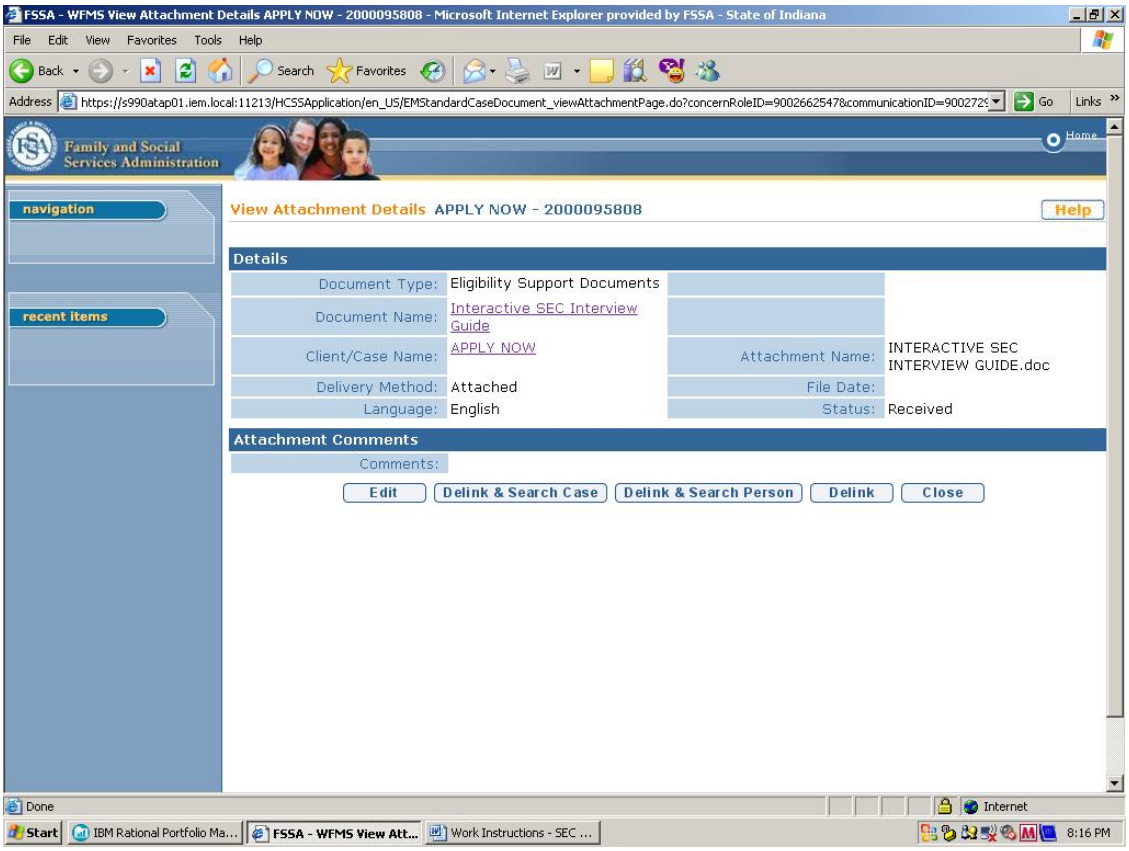
Step	State Review and Eligibility Determination (Room and Board Assistance)
12.	SEC will document action in WFMS Case Notes.
13.	SEC will send the RBA application, BAIS 0005B and W-9 from their desktop via email to FSSA.RCAP@fssa.IN.gov. Subject line of the email should be, "RBA Application Packet." **For redeterminations the SEC will send the BAIS 0005B via email to* FSSA.RCAP@fssa.IN.gov*. Subject line of the email should be "RBA Redetermination".*
14.	Returning cases to ACS ➢ Document the reason in WFMS Case Notes. ➢ 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.*
15.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
16.	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*.
17.	Click on *Close Task* on *Task Home* page.

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

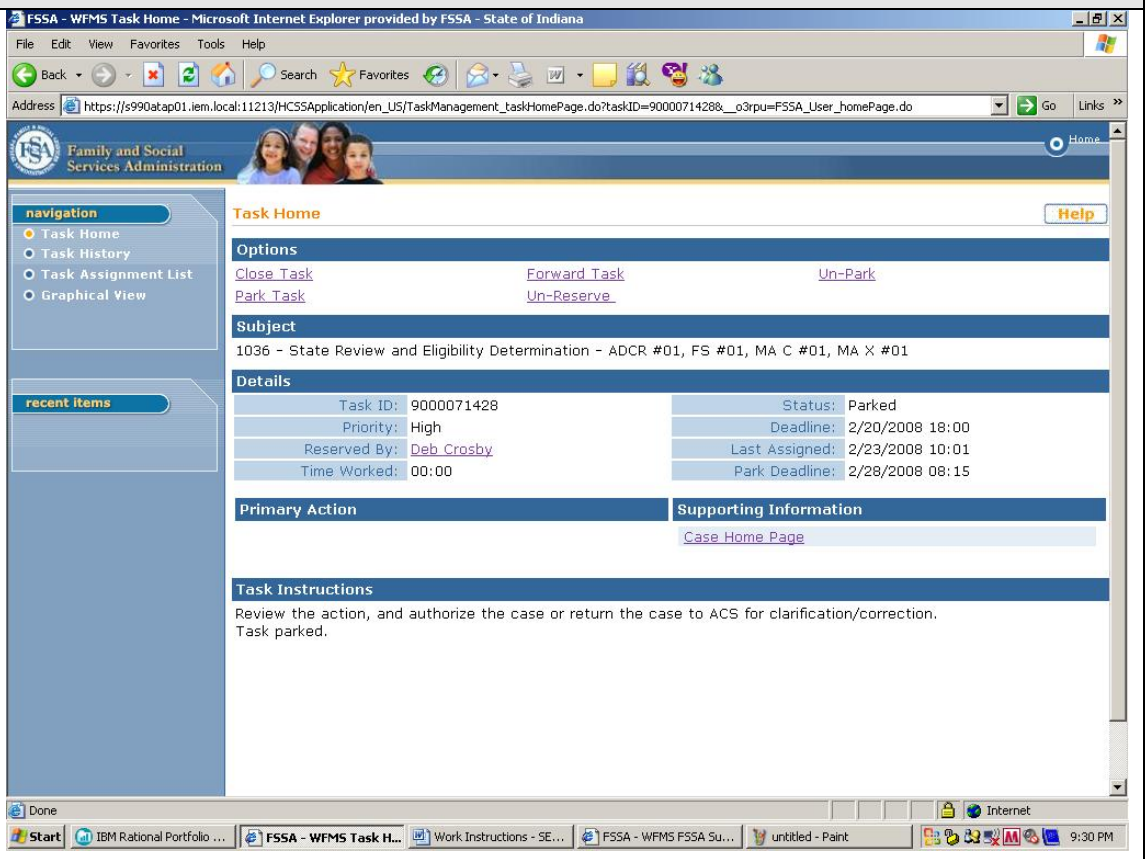
3.0 State Review and Eligibility Determination (Assistance to Residents of County Homes)

Step	State Review and Eligibility Determination (Assistance to Residents of County Homes)
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 *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 Page* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Application Page.*
4.	Review WFMS Case Notes by clicking on *Notes* from the Left Navigation.

Step	State Review and Eligibility Determination (Assistance to Residents of County Homes)
	 The WFMS will navigate to the *Notes Page*.
5.	Click on *View* to view the notes.
6.	Click on *Home* on the Left Navigation to return to the *Application Home* page.
7.	From the *Application Home Page*, click *Documents* from the Left Navigation. The WFMS will navigate to the *Documents Page*.
8.	From the *Documents* page click view to see the document's details. 

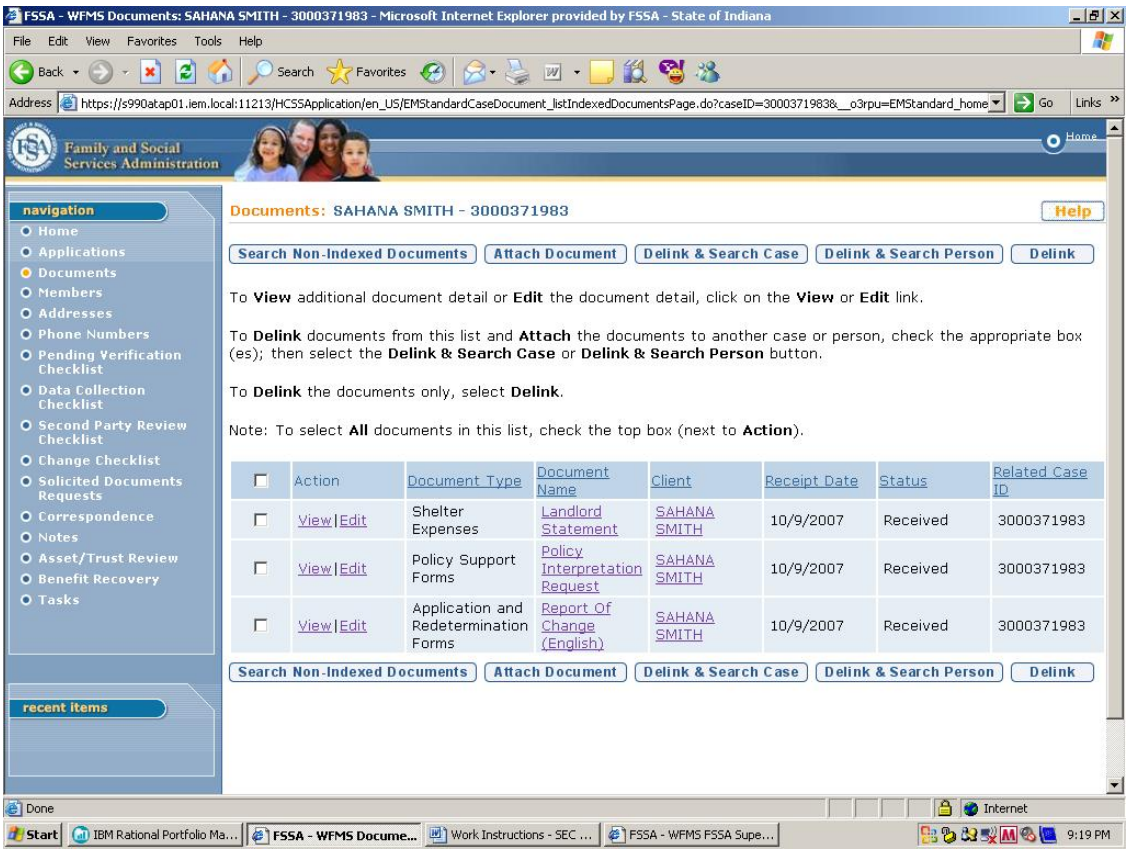
Step	State Review and Eligibility Determination (Assistance to Residents of County Homes)
9.	Within the *View Document Details* screen click the document name hyperlink to view the application, BAIS 0005B (*Assistance to Residents in County Homes/Room and Board Assistance Budget and Recommendation*), W-9 and all supporting documentation.  Clicking on *Close* will take the user back to the *Documents* page.
10.	Review the budget recommendation BAIS 0005B (*Assistance to Residents in County Homes/Room and Board Assistance Budget and Recommendation*) for accuracy. If accurate and applicant is eligible for ARCH the SEC will authorize Medicaid coverage (MA 5, 6 or 7) on AEWAA in the Medicaid enrollment case. SEC will then Save a copy of the BAIS 0005B to your desktop. The SEC will then modify the saved BAIS 0005B by typing their name in the caseworker signature field followed by their position title of "SEC" and entering the date in the date field to authorize the recommendation if accurate. * *For redeterminations in which ARCH eligibility continues, the Medicaid enrollment case does not need to be updated. For redeterminations in which ARCH eligibility fails, the SEC will close the Medicaid on AEWAA in the Medicaid enrollment case.* REFER TO CREATING AN ATTACHMENT FROM THE FILE SERVER WORK INSTRUCTIONS Volume 7 Section 3.11.3.12, Steps 1 - 12 to reattach the modified

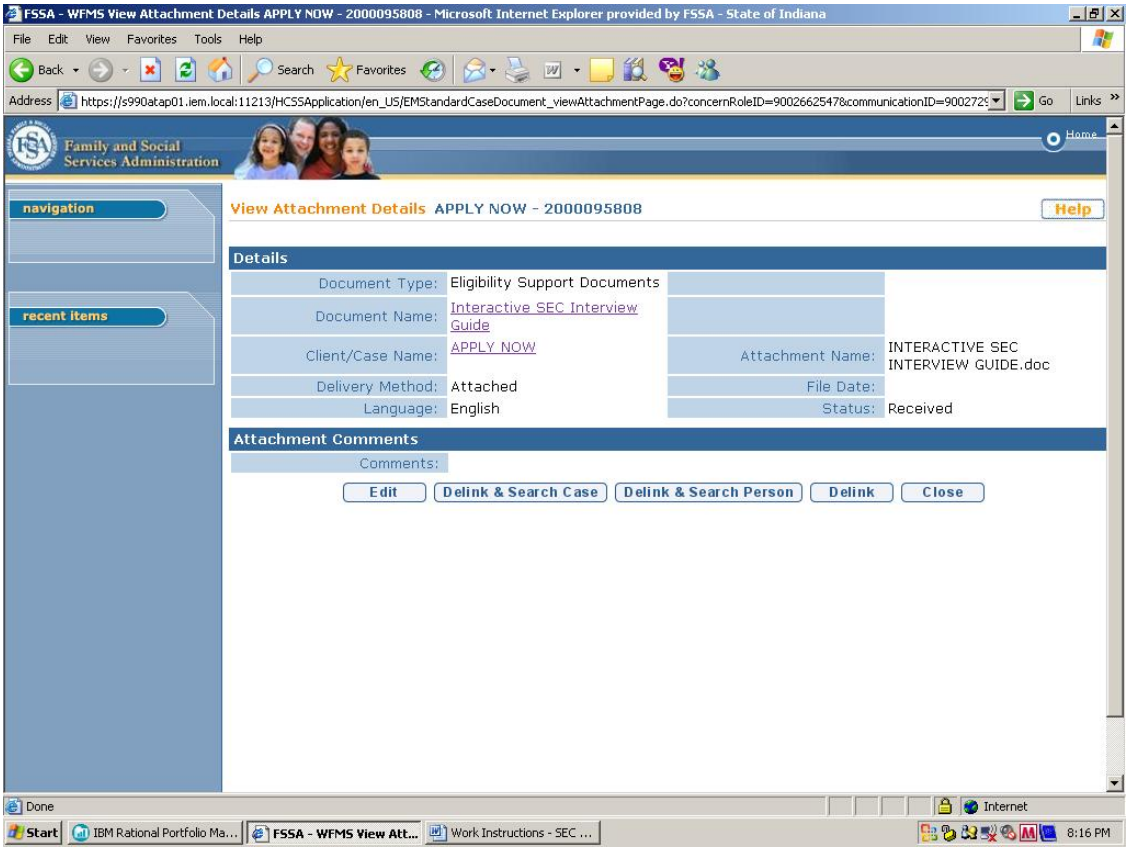
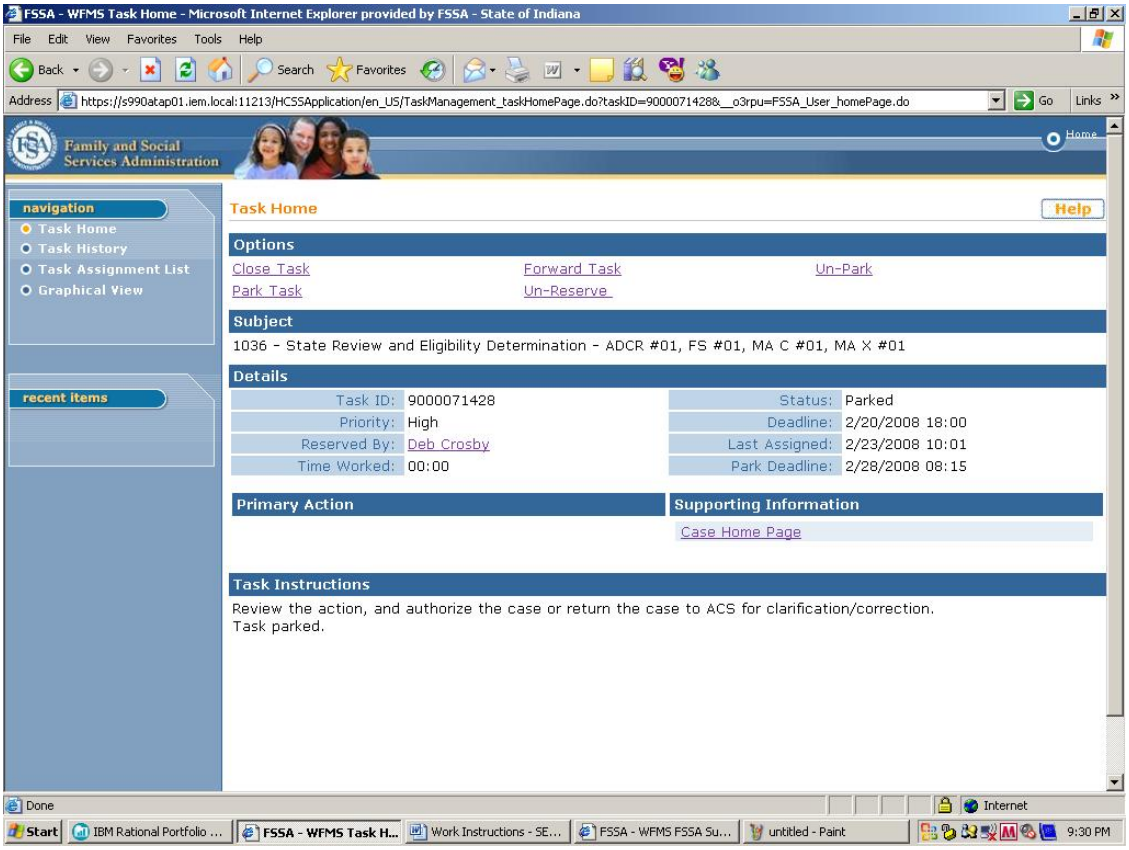
Step	State Review and Eligibility Determination (Assistance to Residents of County Homes)
	BAIS 0005B from their desktop to the Case in WFMS. If the action is incorrect, go to Step 14 to return the case to ACS.
11.	SEC will review for accuracy and save a copy of the following documents, to their desktops; the W-9 and application. **For redeterminations this Step is not applicable.*
12.	SEC will document the action in both ICES and WFMS Case Notes.
13.	SEC will send the ARCH application, BAIS 0005B and W-9 from their desktop via email to FSSA.RCAP@fssa.IN.gov. Subject line of the email should be, "ARCH Application Packet." **For redeterminations the SEC will send the BAIS 0005B via email to* FSSA.RCAP@fssa.IN.gov. *Subject line of the email should be "ARCH Redetermination".*
14.	Returning cases to ACS ➢ Document the reason in WFMS Case Notes. ➢ 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.*
15.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
16.	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*.
17.	Click on *Close Task* on *Task Home* page.

Step	State Review and Eligibility Determination (Assistance to Residents of County Homes)
	

4.0 State Review and Eligibility Determination (Burial)

Step	State Review and Eligibility Determination (Burial)
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 *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 Page* link under *Supporting Information.* Supporting Information Case Home Page The WFMS will navigate to the *Application Page.*
4.	Review WFMS Case Notes by clicking on *Notes* from the Left Navigation. **Additionally, need to review ICES CLRC.*

Step	State Review and Eligibility Determination (Burial)
	 The WFMS will navigate to the *Notes Page*.
5.	Click on *View* to view the notes.
6.	Click on *Home* on the Left Navigation to return to the *Application Home* page.
7.	From the *Application Home Page*, click *Documents* from the Left Navigation. The WFMS will navigate to the *Documents Page*.
8.	From the *Documents* page click view to see the document's details. 
9.	Within the *View Document Details* screen click the document name hyperlink to view

Step	State Review and Eligibility Determination (Burial)
	the "Application and Claim for Funds to Defray Burial Costs for Medicaid Aged, Blind and Disabled Recipients"; and all supporting documentation.  Clicking on *Close* will take the user back to the *Documents* page.
10.	The SEC will obtain from ACS the original claim form.
11.	The SEC will review ICES to determine if payment of the claim is appropriate and authorize the claim or return the case to ACS.
12.	Returning cases to ACS ➢ Document the reason in WFMS Case Notes. ➢ From the *Documents* 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.	If correct, the SEC will modify the original claim form by adding their title, signature and date.
14.	The SEC or SEM will mail the modified original claim form to Financial Management (P.O. Box 28, Indianapolis, Indiana 46206-0028) and fax a copy to the Document

Step	State Review and Eligibility Determination (Burial)
	Center as Image Only.
15.	Click *Home* in the upper right corner. The WFMS will navigate to the *User Home Page*.
16.	Click on the *Task ID* for the **State Review and Eligibility Determination (Burial)** task with an Open Status. The WFMS will navigate to the *Task Home*.
17.	Click on *Close Task* on *Task Home* page.