N-FOCUS Major Release
Economic Assistance
Assigned Workers
November 14, 2010

How will the Universal Caseload changes in N-FOCUS affect me? I still have an Assigned Caseload.

A Major Release of the N-FOCUS system is being implemented on November 14, 2010. This document provides information explaining new functionality, enhancements and problem resolutions made effective with this release. This document is divided into four main sections:

General Interest and Mainframe Topics: All N-FOCUS users should read this section.

Electronic Application: N-FOCUS users responsible for case activity received through the Web based Electronic Application should read this section.

Developmental Disabilities Programs: N-FOCUS users who work directly with DD programs and those who work with the related Medicaid cases should read this section. Note: This section will only appear when there are tips, enhancements or fixes specific to Development Disabilities Programs.

Expert System: All N-FOCUS users with responsibility for case entry for AABD/MED, ADC/MED, FSP, CC, FW, IL, MED, and Retro MED should read this section.

Universal Caseload changes addressed in this document will provide information pertinent to the Assigned Worker. For more detailed information regarding the changes made to N-FOCUS to accommodate the Universal Caseload, refer to the Release Notes for Economic Assistance Universal Caseload Workers.

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General Interest and Mainframe Topics

Many changes have been made to N-FOCUS to accommodate the Customer Service Centers (CSC) and the Universal Caseload (UC) concept that is beginning to take effect in November 2010. These release notes provide an overview of the changes to N-FOCUS in relation to Universal Caseload and how they will affect staff who will continue to maintain an Assigned Caseload. Changes not related to the Universal Caseload are also included.

For more detailed explanation of the Universal Caseload changes, and how they will affect the Universal Caseload Worker, please refer to the Release Notes for Economic Assistance.

Notifying Clients of Universal Caseload (New)

Correspondence will be automatically sent to clients informing them when their case is transferred to the Universal Caseload. It will also inform them that future contact should be made to the ACCESSNebraska toll free telephone number and address provided.

Assignments Transfer Master/Program Case/Office Display (Change)

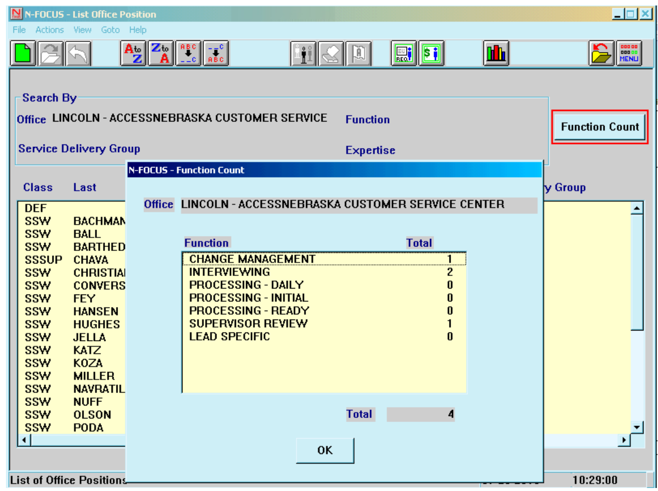
In anticipation of Universal Caseload delivery, the Transfer Master/Program Case Office actions have been removed. The display of a particular Office on the Master Case and most other windows is being removed. If a case moves from one office to another, the assignments can be transferred to the new Office.

List Office Position Window – (Change)

The List Office Position window has been rearranged to display Function, Service Delivery Group and Expertise. The Search criteria used to access this window will display in the Search By section at the top of the window.

The Function Count button will display the number of positions that have been assigned to the various UC Functions within the selected office.

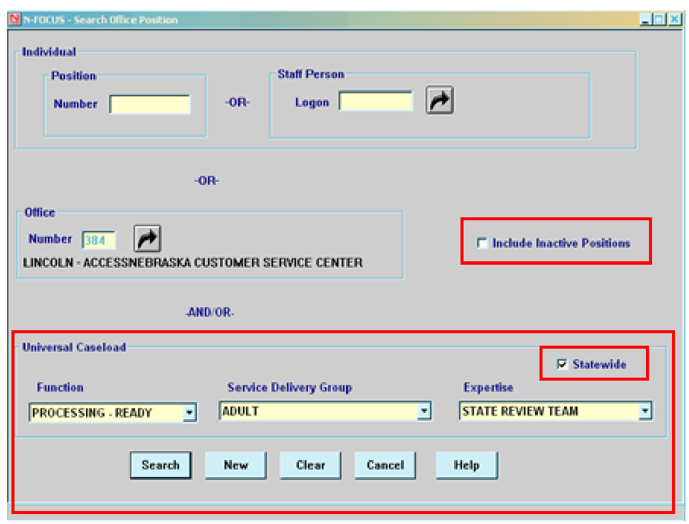
Note: All N-FOCUS staff has the ability to view this information.



Search Office Position (Change)

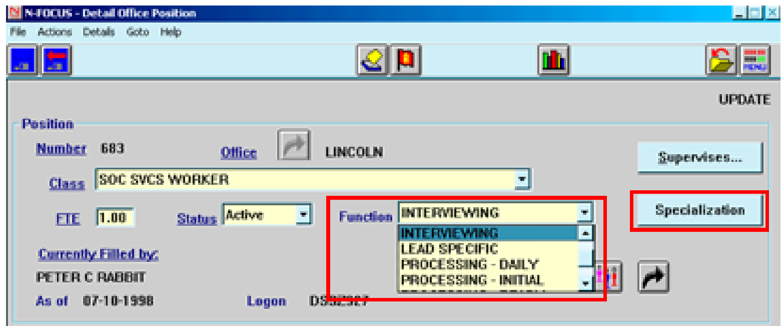
Searches by Position Number, Staff Person and Office remain. Only active positions will be brought forward unless the Inactive Positions check box is selected. New searches available are by Function, Service Delivery Group and/or Expertise.

When a Universal Caseload option is selected, a Statewide search is also available by checking the Statewide check box.



Detail Office Position - Function and Specialization (New)

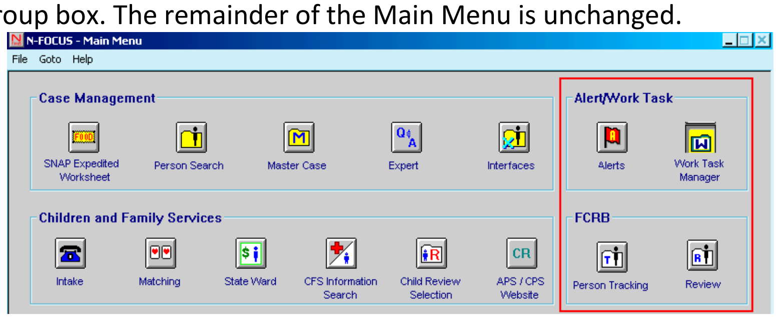
The Detail Office Position window displays a Function field and Specialization button. The Function field and Specialization button are available to accommodate the Customer Service Centers and the Universal Caseload.



Note: If your position is not assigned to a Universal Caseload, the Function field will be blank and the Specialization button will not be enabled.

Main Menu (Change)

A new group box called `Alert/Work Task' is located on the first row of the Main Menu next to the Case Management icons. The FCRB group box has been moved to the second row next to the Children and Family Services group box. The remainder of the Main Menu is unchanged.



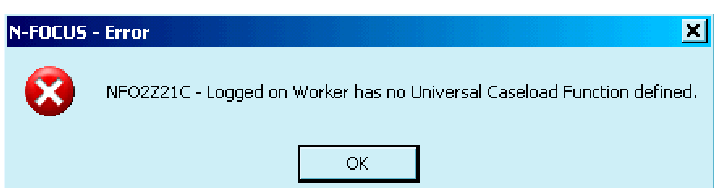
Workers who are part of the Universal Caseload will receive their daily assignments through the Work Task Manager.

UC Terminology Definition:

Work Task – A Work Task identifies a Master Case that needs to have work done on a Universal Caseload. The Work Task is displayed to a worker based on their Function (Interviewing, Processing – Initial, Processing – Daily, Processing – Ready, Change Management), Service Delivery Group (Adult or Family) and Language specialty.

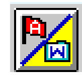
Note: New Work Tasks will only display if the case is in the Universal Caseload.

Workers who are not part of the Universal Caseload will still access their designated Alerts by selecting the Alerts icon. If an Assigned Worker selects the Work Task Manager icon, the following error message will display.



List Master Case Alerts/Work Tasks Window (New)

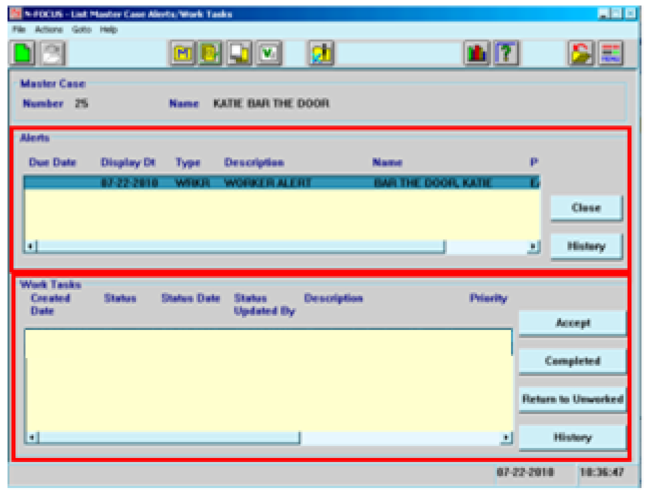
The List Master Case Alerts/Work Tasks window can be opened by selecting the Alerts/Work Task Toolbar icon from the following locations:



- Detail Master Case
- Detail Work Task
- List Eligibility Summary
- List Standard Narrative
- Detail Standard Narrative
- Consolidated Standard Narrative
- Detail Verification Request Tracking
- List Change Report
- Case Status List
- Expert System

The Alerts icon from the Detail Master Case window has been changed to a combined window displaying both the Work Tasks and Alerts.

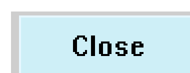
This window will display the Open Alerts for the Master Case. The Alerts displayed are all of the Alerts associated to all of the Program Cases within the indicated Master Case.

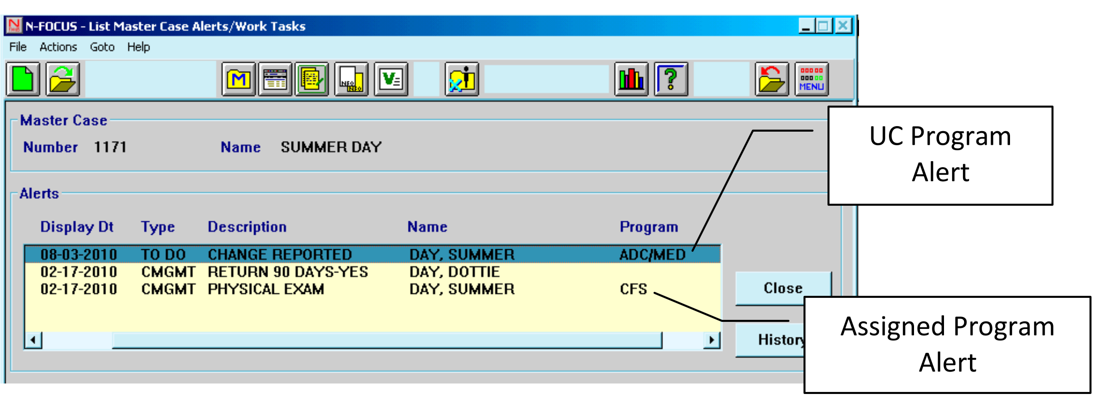


Alerts (Change)

Working with Alerts (Change)

Clearing Alerts from your Position List has not changed. In addition, you can also now work an Alert from the List Master Case Alerts/Work Task window. Doing so will remove the Alert from your Position List.





To close an Alert, follow these steps:

1. From the List Master Case Alerts/Work Task window, select the Alert(s).

Alerts can be multi-selected by clicking each row.

2. Click the Close button.
   A confirmation window will display.
3. Click Yes.
   The Alert is removed from the list.

Note: Alerts Closed in this manner will be removed from your List Position Alert window.

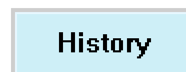
It is possible that an Alert for an Assigned Program could be inadvertently closed by a Worker before the Assigned Worker had an opportunity to work with the Alert. In that instance, the Alert would remain on your List Position Alert window until you Clear the Alert.

Viewing Alert History (Change)

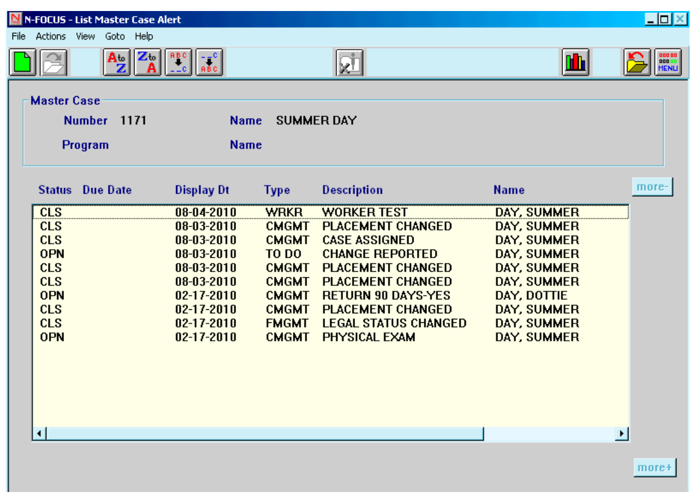
It is very important for assigned workers to close Alerts when they have completed the required action associated to the Alert. Doing so will help to prepare the case to be moved to the Universal Caseload in addition to making it easier to keep track of work that has and has not been completed on the case.

Closed Alerts will display on the Alert History window.

The List Master Case Alert window displays both the Open and Closed Alerts for the associated Master Case. Viewing this information may be beneficial in helping the worker become familiar with the case and recent actions which have taken place.



To view Alert History, follow these steps:



1. From the List Master Case Alerts/Work Task window, click the History button.
   Note: An Alert does not need to be selected to view Alert History.

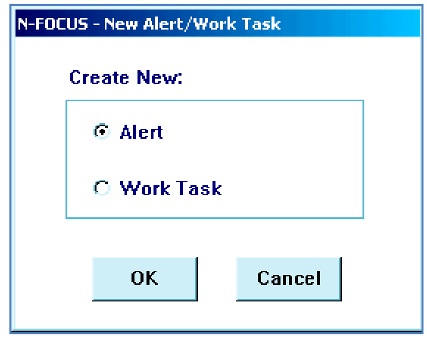
   The List Master Case Alert Window will display.

Note: If a UC Worker Closed an Assigned Worker's Alert from the List Master Case Alerts/Work Tasks window, the Alert will display on this window in Closed Status. This will occur even if the Assigned worker has not Cleared the Alert from the List Position Alert window.

Creating a New Alert (Change)

Alerts can be created from the List Master Case Alerts/Work Task window and the Detail Program Case window. Alerts created from the Detail Program Case window will be directed to the worker Assigned to that specific Program Case or to UC.

If an Alert is created from the List Master Case Alerts/Work Task window, a program will need to be selected. Only one program can be selected in this process. If multiple workers need to be notified, separate Alerts (one for each program) will need to be created.

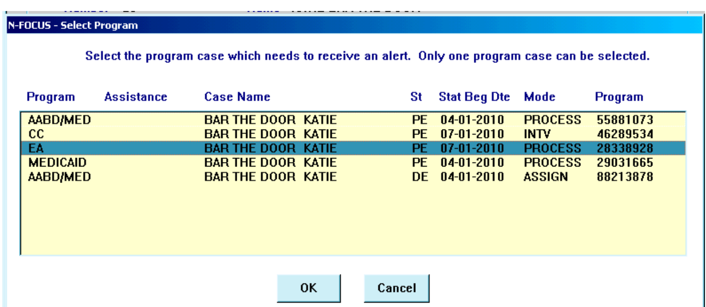


Example

- If you are creating an Alert when there is an ADC and SNAP case in UC, only one Alert needs to be created. Be sure to note in the description all the programs involved.
- If there is a Service Coordinator on the AD Waiver case and the MED case is assigned to an SSW, and both workers need to be notified, two alerts need to be created so it will display for both workers.

To create a new Alert from the List Master Case Alerts/Work Task window, follow these steps:

1. Click the New icon.
   The New Alert/Work Task window will display.
2. Select the Alert radio button.
3. Click OK.
4. Select the program case which needs to receive an Alert.
   Note: Only one program case can be selected.



5. Click OK.
   The Detail Master Case Alert window will display.
6. Enter the Alert Description.
7. Click Save or Save and Close.

Waiver Staff Communication Alerts (No Change)

Waiver staff will continue to use Alerts to communicate on cases that are both Assigned and in the Universal Caseload.

Mode (New)

Each Program Case has a Mode designation. The Mode is determined based on whether the Program Case is in an Assigned Caseload or the Universal Caseload and the lifecycle of the case. Mode designation is an automated process, however, workers have the ability to override the selected Mode or change Mode as necessary.

For cases not in the Universal Caseload, the Mode will be Assigned. The Assigned Mode indicates the case is assigned to either an Office Default position or a specific worker.

UC Program Cases are designated with a Mode of Interviewing, Processing or Change Management.

Note: Only Supervisors and Lead Workers have the ability to change a case from Assigned to Universal Caseload.

Program Cases Being Converted to Universal Caseload (New)

The following list indicates which Program Cases will be converted to the Universal Caseload:

Aid to Dependent Children/Medicaid (ADC/MED)
Assistance to Aged, Blind, Disabled/Medicaid (AABD/MED)
Child Care (CC)
Emergency Assistance (EA)
Supplemental Nutrition Assistance Program (SNAP)
Medical Assistance Only (MED)
Presumptive Eligibility Medicaid (PE)
Personal Assistance Services (PASS)
Retro Medical Assistance Only (RETRO MED)
Social Services Aged/Disabled (SSAD)
Social Services Children and Family (SSCF)
Transitional Medical Assistance – Grant (TMA-G)

Viewing Program Case Mode (New)

Mode designation can be viewed on the following windows:

Detail Master Case
Detail Program Case
Detail Master Case Assignments
Detail Program Case Assignments
Expert System Case Actions Main Window
Expert System Review/Recertification – Current Tab
Expert System Review/Recertification – Recertification Tab
Expert System Review/Recertification – Review Tab

Transferring UC Mode to Assigned Mode – Alert (New)

When a Program Case that was previously in a UC Mode is placed in an Assigned Mode, an alert will be created informing the Assigned Worker of the transfer. The Alert will not be created if the person transferring the case is the same person to whom the case is transferred.

Tracking Functions (New)

Tracking functions within N-FOCUS are important to both the Universal Caseload and the Assigned Caseload and will be available to be used by both.

The Tracking functions of Interview Tracking, Review Tracking, IRF Tracking, Verification Tracking, and QRF Tracking provide a way for N-FOCUS to monitor actions and determine the need for some Alerts for both Assigned and UC cases and Work Tasks for UC cases. Tracking monitors Interview Scheduled and Held Dates, Review Application Due and Received Dates, Quarterly Report Form (QRF) Sent and Received dates, Interim Report Form (IRF) Sent and Received dates and Verification Request Due Dates. Documenting actions in the different Tracking areas will ensure the case will move through the case lifecycle correctly.

Note: It is extremely important to document information accurately in N-FOCUS. This will ensure the case continues on the right track through the lifecycle of the case. If information is not documented accurately, Tracking will not work as designed and could cause case errors.

Interview Tracking (Change)

Interview Tracking has been enhanced to create a row of Interview Tracking when the Interview Appointment letter is created. Additionally, a Notice of Missed Interview (NOMI) will be created when an Interview is not held by the Due Date. Workers will now enter the date that the interview is scheduled to occur (Due Date). Once the Interview takes place the worker will enter the interview Held Date and the Reason and Type like before. Program cases covered in Interview Tracking are AABD, ADC, CC, EA (Emergency Assistance), SNAP, SSAD, SSCF and MED.

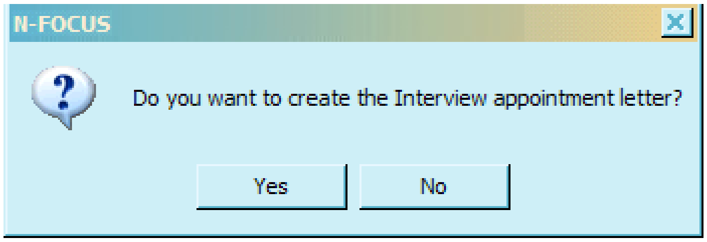
If an Interview Date is not recorded, the following will occur:

1. A Notice of Missed Interview (NOMI) will be created the night of the Interview Due Date and sent the next day.
2. The Interview Type `Not Held' will be posted on the associated Interview row when no Held Date is posted by the 30th day of the Interview Create Date.
3. The Alert `Case Pending 30 Days – review for Denial' will be created when the case(s) is Pending and no Interview Held Date by the 30th day following the Application Received Date.

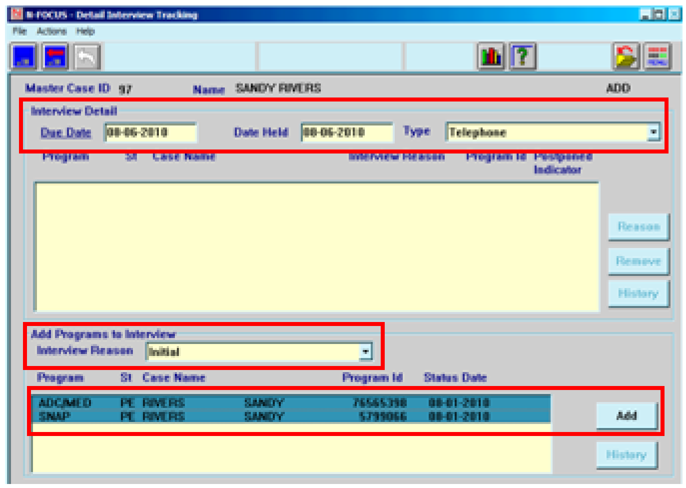
Document Interview Held on Initial Call (New)

If the Interviewer is successful in contacting the client on the first telephone attempt, follow these steps to complete the Interview Tracking.

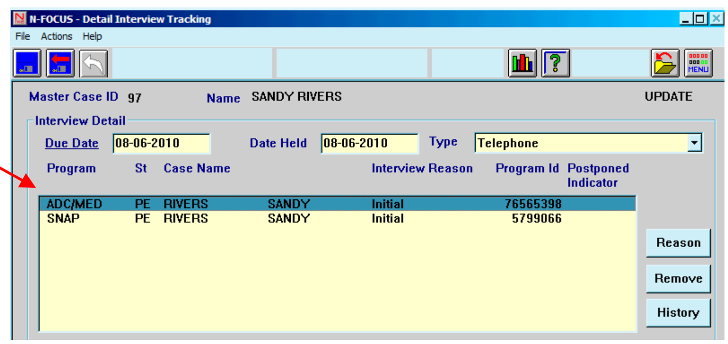
1. From the Detail Master Case window, select Actions>Interview Tracking.
   The List Interview window will display.
2. Select the New icon.
   An Interview Appointment Letter pop up window will display.



3. Select No.
   The Detail Interview Tracking window will display.
4. Enter the Date Held field.
   The Due Date field will default to the same date.
5. Select the interview Type from the drop down field.
6. Select the Interview Reason from the drop down field. (Duplicate, Initial or Review/Recert)
7. Select the Program Case(s) from the Add Programs to Interview section.
   Note: One or multiple Program Cases may be selected.



8. Click the Add pushbutton.
   The selected Program Case(s) will be moved to the Interview Detail section at the top of the window.
   Note: If changes need to be made to any of the data or you wish to view History, select the affected row and the corresponding Reason, Remove or History button.

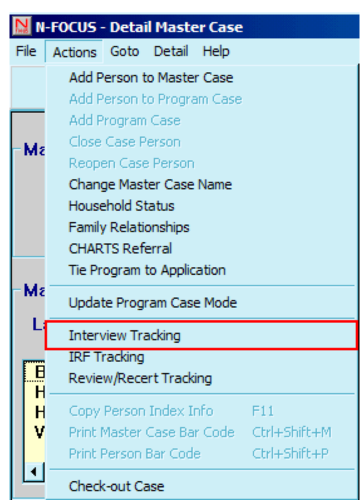


9. Click Save or Save and Close.
10. Narrate as appropriate.

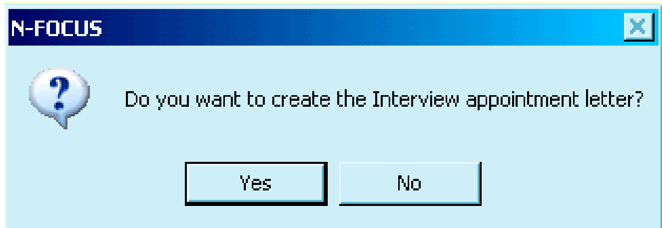
Creating an Interview Appointment Letter (Change)

Creating an Interview Appointment letter will create an instance of Interview tracking. The Interview Appointment letter will no longer be created in Correspondence but will now be created from the Interview Tracking list window.

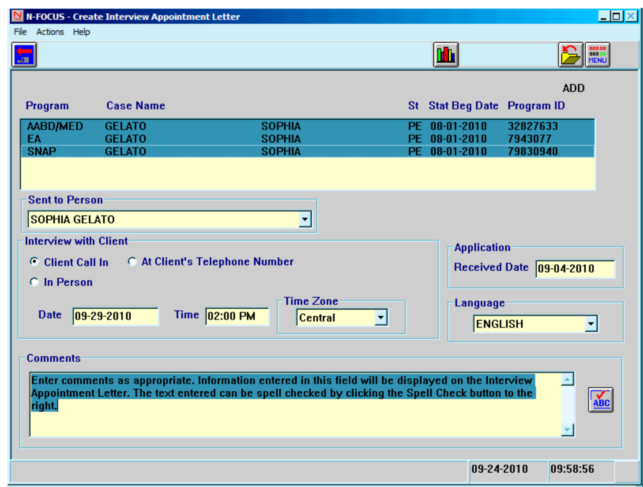
To create an Interview Appointment Letter, follow these steps:



1. From the Detail Master Case window, select Actions>Interview Tracking.
   The List Interview window will display.
2. Select the New icon.
   An Interview Appointment letter pop up window will display.

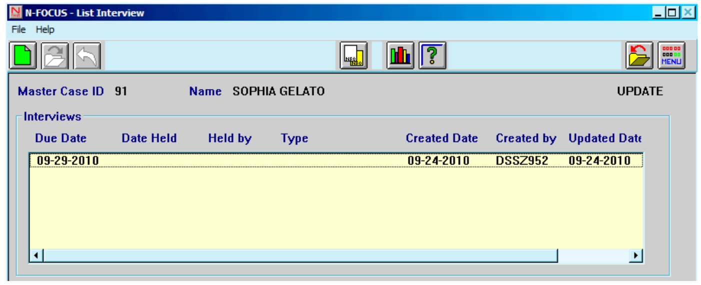


3. Select Yes.
   The Select Worker Name pop up window will display.
4. Select a different name, if appropriate.
5. Click OK.
   The Create Interview Appointment Letter window will display.



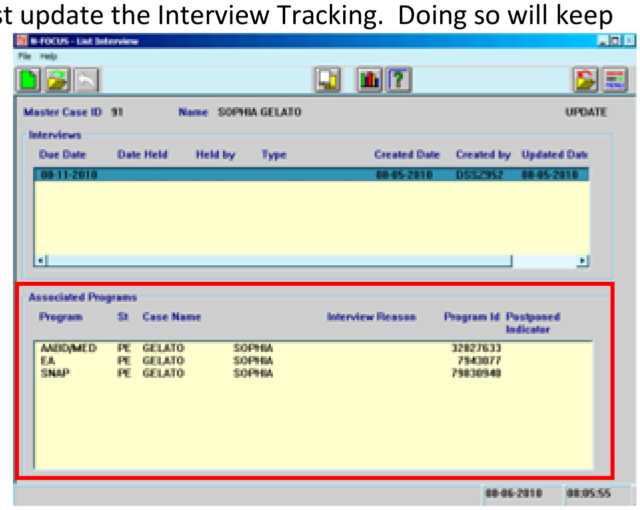
6. Select the Program Case row(s).
   One or multiple rows may be selected.
7. Select the Sent to Person from the drop down menu.
   The options are Program Case Name Persons and Case Representatives with a Notice Indicator of Y.
8. Select the interview location.
   - **Client Call In** – the client will be instructed to call at the designated date and time to complete the interview. (This is the default selection.)
   - **At Client's Telephone Number** – the client's telephone number must be recorded on N-FOCUS in order to select this option. This option indicates an Interviewer will call the client.
   - **In Person** – an Interview Location window will display. You must enter the interview location address on this window. Use the Enter key as a carriage return to format the address as you would on a letter. This information will display in the Interview Appointment letter.
9. Enter the designated Date, Time and Time Zone for the interview.
   Note: Office policy will designate dates and times to schedule interviews.
10. Change the Application Received Date, if appropriate.
    - The most recent Application Received Date will default on most case to the Received Date entered when the application was tied will default on Review applications. This date can be changed.
11. Select the appropriate Language.
    English and Spanish options are available. If the Send To person's written language is indicated as Spanish in their person demographics the language will default to Spanish.

12. Enter Comments as appropriate.
    Information entered in this field will display on the Interview Appointment letter.
13. Select Save and Close.
    Note: The List Interview window will display an Interview Tracking row with the Interview Due Date. If the Interview Held Date is not entered by the designated Due Date, a Notice of Missed Interview (NOMI) will be automatically generated.



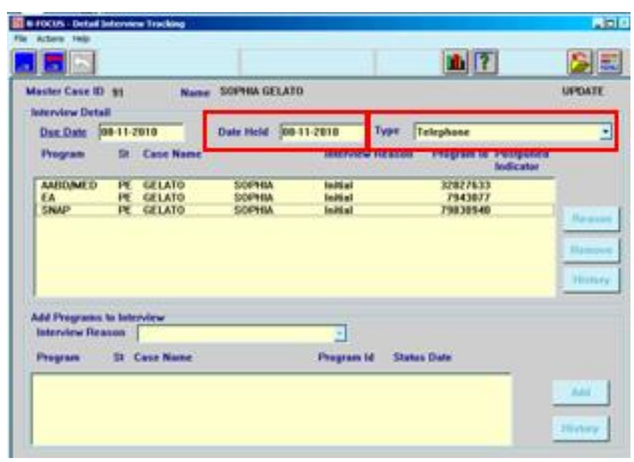
Documenting the Interview Held after the Appointment Letter is Sent (New)

Once the interview is held, the Interviewer must update the Interview Tracking. Doing so will keep the Notice of Missed Interview from being sent.

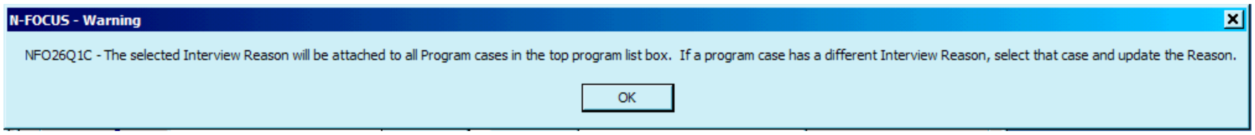


To document an Interview Held, complete the following steps:

1. From the Detail Master Case window, select Actions>Interview Tracking.
   The List Interview window will display.
2. Select the appropriate Interview row.
   The Associated Programs section of the window will display the related Programs, Status and Case Name.
3. Select the Open icon or double click on the row to open.
   The Detail Interview Tracking window will display.



4. Enter the Date Held field.
5. Select the interview Type from the drop down list.
   Note: Options available are Face-to-Face, Not Held or Telephone. The Not Held option cannot be selected by a worker; this is only set by N-FOCUS if the interview has not taken place within 30 days of the Interview Create Date.
   The Update Interview Reason pop up will display.
6. Select the Interview Reason from the drop down field. (Duplicate, Initial or Review/Recert)
7. Click OK.
   The following pop-up message will display. Respond as appropriate.



8. Click Save or Save and Close.
9. Narrate as appropriate.

Automated Notice of Missed Interview-NOMI (New)

A Notice of Missed Interview (NOMI) will be created when no Interview Held Date is entered by the Due Date. The letter will be automatically generated in batch by the system the night of the Due Date and mailed the following work day.

Do not create a NOMI the day the interview was missed because another NOMI will be created in batch that night and will also be mailed the following work day.

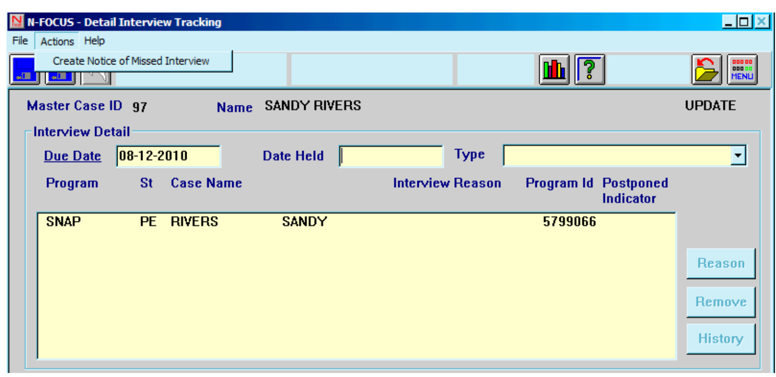
If an Interview Date is not recorded, the following will occur:

1. A Notice of Missed Interview (NOMI) will be created the night of the Interview Due Date and sent the next day.
2. Interview Not Held Date will be entered on the Interview Tracking row if no Interview is recorded as Held by the 30th day following the Interview Create Date.
3. The Alert `Case Pending 30 Days – Review for Denial' will be created when the case(s) is Pending and no Interview Held Date by the 30th day following the Application Received Date.

Creating the NOMI Manually (Change)

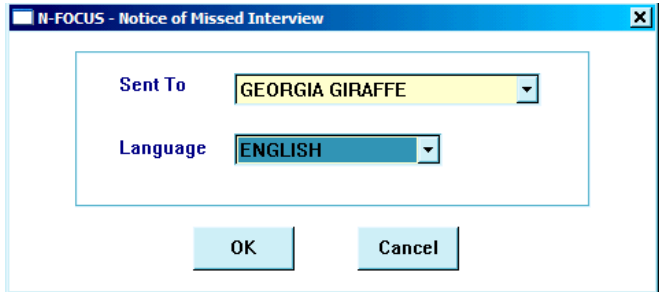
Creating a manual notice is for transition purposes only. Create a manual notice if the due date was prior to the 11/14/2010 Release since the batch job will not pick those up. Otherwise, let the system create the notice as it is designed to do.

If it is necessary to create the NOMI manually, follow the steps below:



1. On the Detail Master Case window, select Actions>Interview Tracking.
2. Select the appropriate row from the List Interview window.
3. Click the Open icon. The Detail Interview Tracking window will display.
4. Select Actions>Create Notice of Missed Interview. The Notice of Missed Interview pop-up displays.
5. Select the correct person from the Sent To drop down.

6. Select the appropriate Language option.
7. Click OK.
   The Notice of Missed Interview will be created in batch that night and mailed the following work day.



Review Tracking (NEW)

Review Due Date

As is currently, the Review Due Date will continue to be created and updated by the system or worker in the Mainframe and the Expert System. N-FOCUS will continue to create the 1st review due date when the initial budget is run. The worker will manually update the review due date either in the Mainframe or in the Expert System with subsequent reviews.

Review Application Due Date

The **Review Application Due Date** will be automatically created when the `Expiration of Certification Period or Eligibility Review Due' notice, the `Medicaid Long Term Care Review' form and the `Children(s) Medical Review' forms are mailed on the 20th day of the month prior to the Certification Period ending or the Review being due. (These notices indicate to the client that they should return the form or submit an application by the first of the following month).

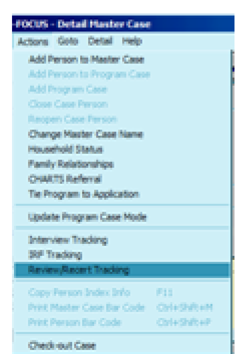
The Review Application Due date will post as the 15th of the month the Review is due for all cases except SNAP. This date is only entered by the system, workers cannot enter this date.

Review Application Received Date

The **Review Application Received Date** will be recorded in Review Tracking when the application (paper or e-app) is TIED. The Review Application Received Date can only be updated by tying an application and indicating that it is a Review application. Staff will not be able to record the Received Date.

The Review/Recertification window has been changed to allow for a system of Review Tracking for AABD, ADC, CC, EA (Emergency Assistance), MED, SSAD and SSCF program cases.

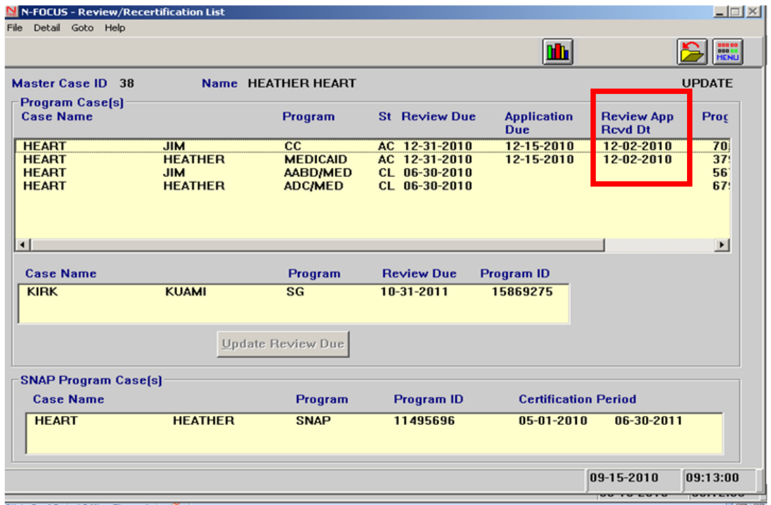
1. From the Detail Master Case window, select Actions>Review/Recert.
   The Review/Recertification List window will display.



Recording the Review Application Received Date (Change)

The Review Application Received Date will be recorded in Review Tracking when the application (paper or e-app) is TIED. The Review Application Received Date can only be updated by tying an application and indicating that it is a Review application.

Note: Staff will **not be able to record the Received Date**. NFOCUS will do that automatically when the app is tied.

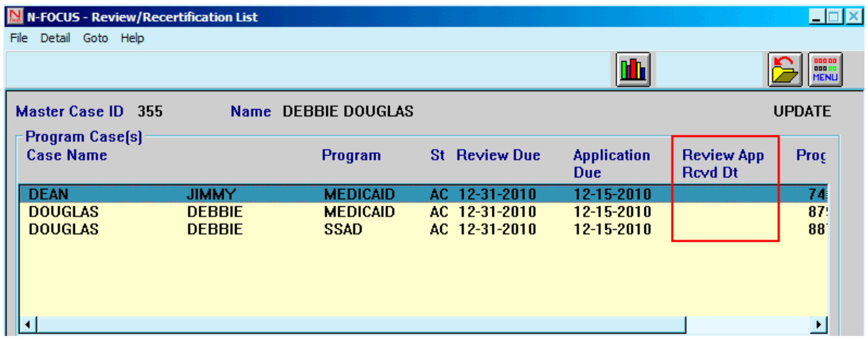


- As currently, the Review Due Date will continue to be created and updated by the system or worker in the Mainframe and the Expert System.
  - NFOCUS will continue to create the 1st review due date when the initial budget is ran. The worker will manually update the review due date either in the Mainframe or in the Expert System with subsequent reviews.
- The Review Application Due Date will be automatically created when the 'Expiration of Certification Period or Eligibility Review Due' notice, the 'Medicaid Long Term Care Review' form and the 'Children's Medical Review' forms are mailed on the 20th day of the month prior to the Certification Period ending or the Review being due.
  - These notices indicate to the client that they should return the form or submit an application by the first of the following month.
- All program cases (except SNAP) that meet the conditions to receive these notices/forms will have a Review Application Due date of the 15 of the month the Review is due.

Viewing Review Application Due/Received Dates in the Mainframe and Expert (New)

This new functionality provides the ability to view The Review Application Due and Received Dates in the following locations:

- Detail Master Case Window - Review/Recert Tracking

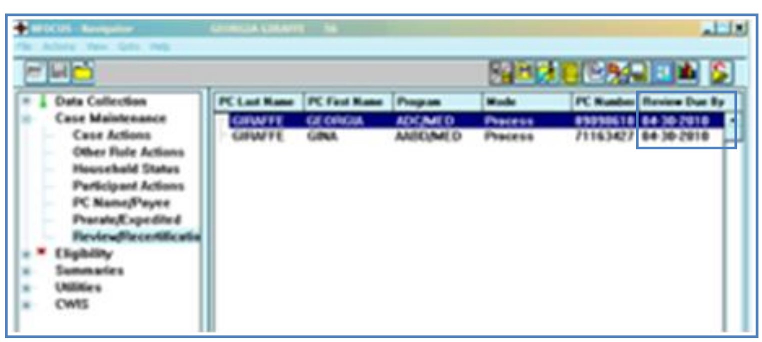


- Expert System Navigator Window - Review/Recert task

The Review/Recert task in the Expert System will now contain Review Tracking data that is also collected in the Mainframe. The Review Application Due Date and the Review Application Received Date will be updated in both the Mainframe and Expert System Review/Recertification tasks.

Review Application Not Received by the Due Date (New)

When no Review Application Received date is recorded by the Due Date, a batch program will run the night of the Review Application Due Date (the 15th of the month) and create an Alert "No App Rcv. A review application was due for <ADC, AABD, MED, CC, SSAD, SSCF> and has not been received." This Alert is meant to prompt the worker to review for case closure as no eligibility review has taken place.



Note: Assigned cases will continue to receive Alerts on the first of each month when the Review is past due.

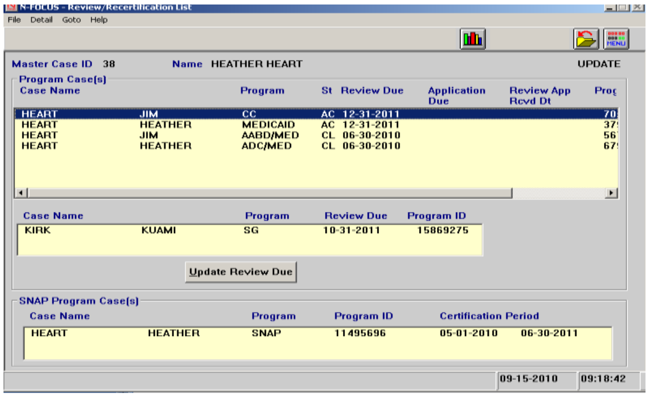
Updating Case Review Date (No Change)

There has been no change to this. When the Review is completed the worker will update the Review Due Date in one of three locations:

- Detail Master Case window
- Expert System Navigator Window
- Budget Authorization window in Expert System for AABD, ADC and Medicaid program cases

View History of Review Actions (New)

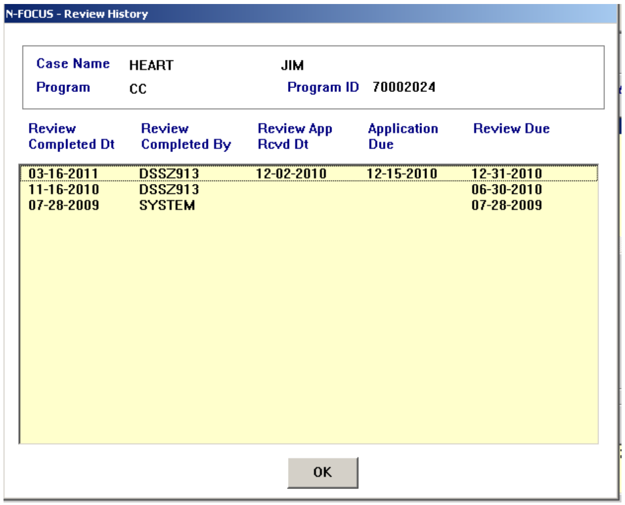
Updating the Review Due Date to the next Review Date will move the current row to History.



Note: Since cases are no longer going to be assigned. This will make is easier to identify who took the action and when.

1. Navigate to Review/Recertification List window
2. Select the applicable row you want to view History
3. Select Detail>History.

The Review History window displays.



TMA QRF Tracking (Change)

QRF Tracking is available for both Universal Caseload and Assigned Medicaid cases with a Transitional Medical Assistance begin date that is within the past year.

The QRF is created on the 15^{th} of the month and is due the 10^{th} of the following month. An instance of QRF Tracking is created when the QRF is sent to the client. QRFs are sent as follows:

- Requesting income from months 1, 2 and 3 of TMA is reported on a QRF in month 4 to determine eligibility for month 7 of TMA.
- Requesting income from months 4, 5 and 6 of TMA is reported on a QRF in month 7 to determine eligibility for months 8, 9 and 10 of TMA.
- Requesting income from months 7, 8 and 9 of TMA is reported on a QRF in month 10 to determine eligibility for months 11 and 12.

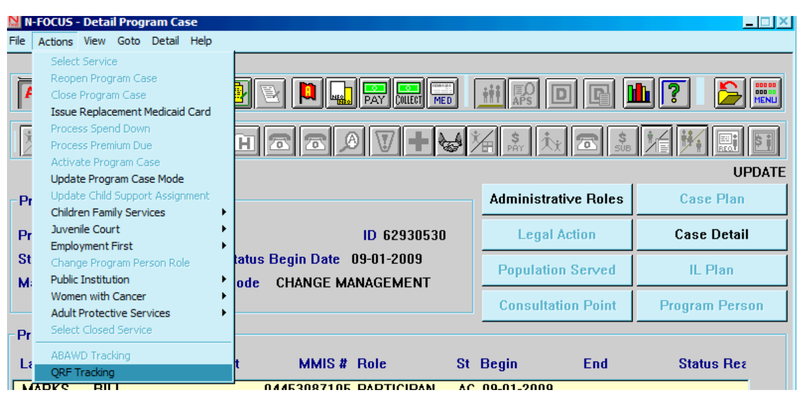
Creating QRF Tracking

Most instances of QRF Tracking will be created when the QRF is mailed by the system on the 15^{th} day of the month. When the QRF is received by the agency, the QRF Received Date will be recorded by a worker.

Note: Workers who have been using QRFs to request income verification for other types of cases should use Verification Tracking if the case is not in TMA.

Updating QRF Tracking (Change)

As the QRFs and supporting documentation are being received by the agency, the Received Date will need to be recorded in the QRF Tracking window. This will prevent the QRF Due Alert from being created.



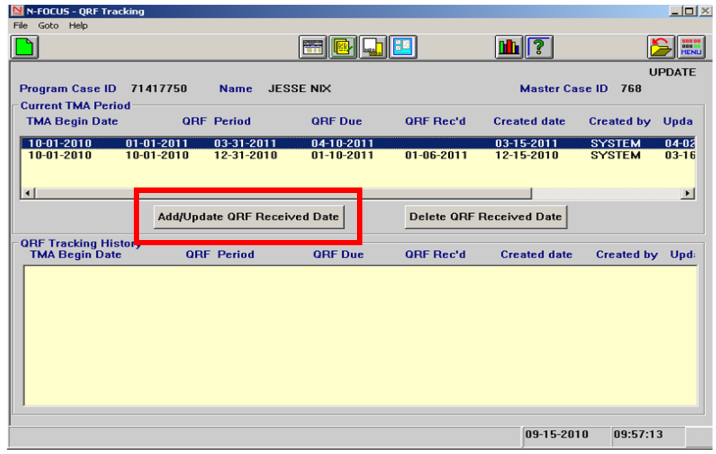
1. Navigate to the Detail Program Case window of the associated Medicaid case.

   Note: This case must have had a TMA begin date within the last year.

2. Select Actions>QRF Tracking.

The QRF Tracking window will display.

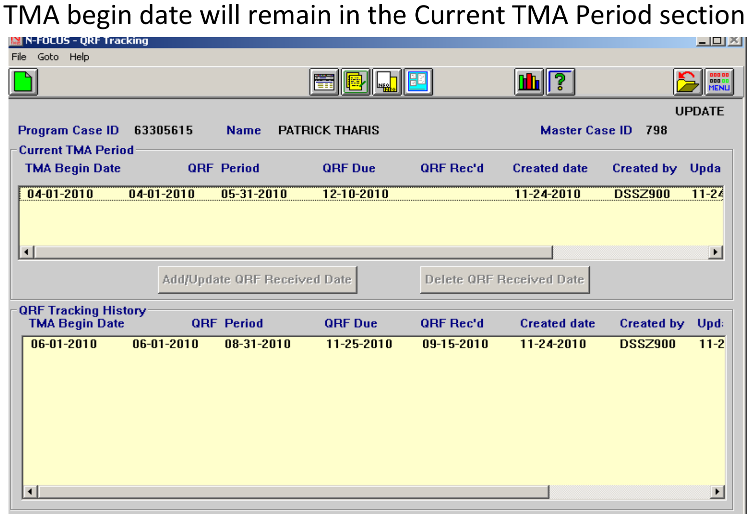
3. Select the applicable QRF Due row.
4. Select Add/Update QRF Received Date.



5. Enter QRF Received Date.
6. Select OK.
   The QRF Rec'd Date will display in the QRF Rec'd column.

QRF Tracking History (New)

Each QRF tracking row with the same TMA begin date will remain in the Current TMA Period section at the top of the window.



Once a new TMA begin date is created in budgeting, the rows attached to the former TMA begin date will move to the QRF Tracking History section at the bottom of the window.

Note: History rows cannot be updated or moved back to the Current TMA period list box.

Manually Creating QRF Tracking

A manual Quarterly Report Form (QRF) will no longer be created in Correspondence. Since most instances of QRF will be creating automatically, creating a manual QRF is not expected to be used very often. Should the need arise to manually create QRF, follow these steps:

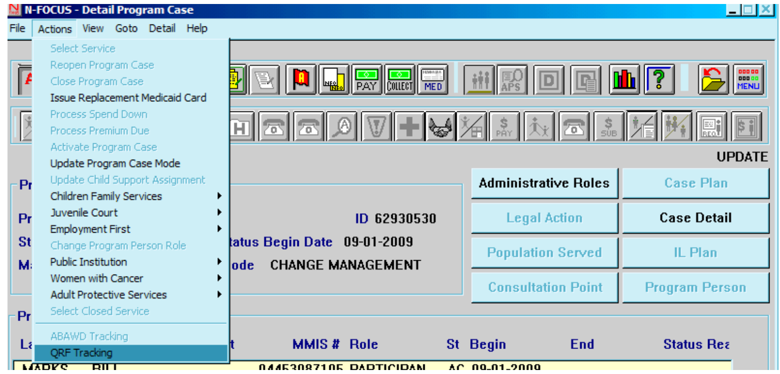
If there is not a current instance of TMA, the worker will not be able to create a QRF.

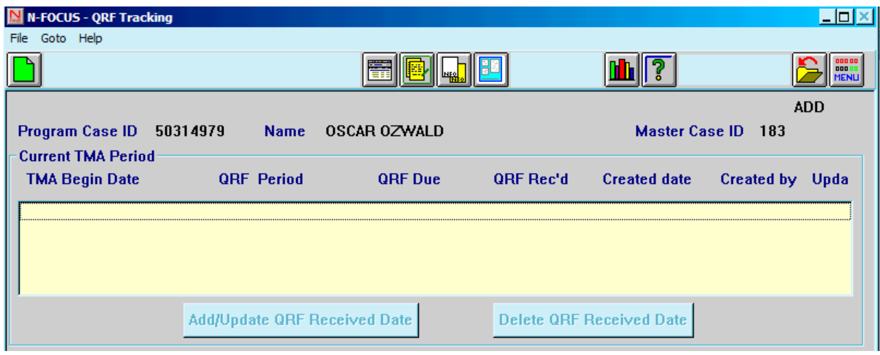
1. Navigate to the Detail Program Case window of the associated Medicaid case.

   Note: The case must have had a TMA begin date within the last year.

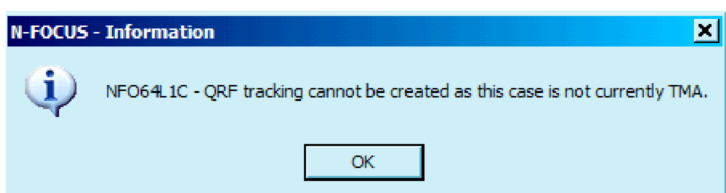
2. Select Action>QRF Tracking. The QRF Tracking window will display.

3. Select the New icon.

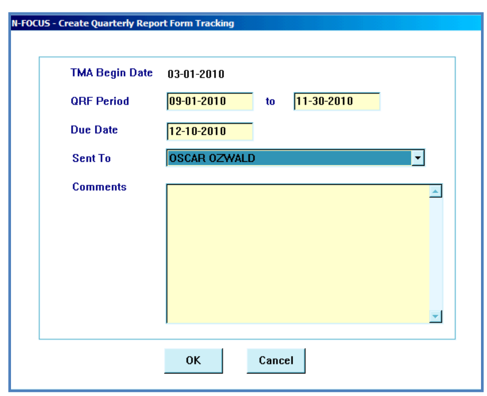




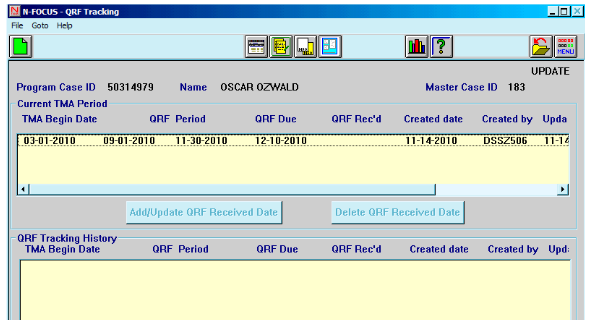
The following message will display if you try to create a QRF for a Medicaid Program Case that is not currently TMA.



4. Enter the QRF Begin and End Dates.
5. Enter the QRF Due Date.
6. Select the Sent To Person.
7. Enter Comments as necessary.
8. Click OK.



A QRF form will be created and sent through batch processing and a QRF tracking row will be created on the QRF Tracking window.



TMA/QRF Alerts (Change)

The following Alerts are created for QRF Tracking:

- When no QRF Received Date is entered by the 15th day of the QRF Due month, an Alert will be posted on the 16th of the month informing the worker to review for case closure.
- The TMA Alert will only be created in month 6 informing workers to run a budget for month 7. It will no longer be run on month 11 of TMA. There won't be an Alert in month 8 for months 4, 5 & 6. (This is the same as before.)
- A Review Alert will be set at the end of the 12 month TMA period.
    - Previously the Review Alert was being set incorrectly. At the end of 12 months of TMA the Medicaid case will have a Review Due letter sent and the review will be processed like any other review.

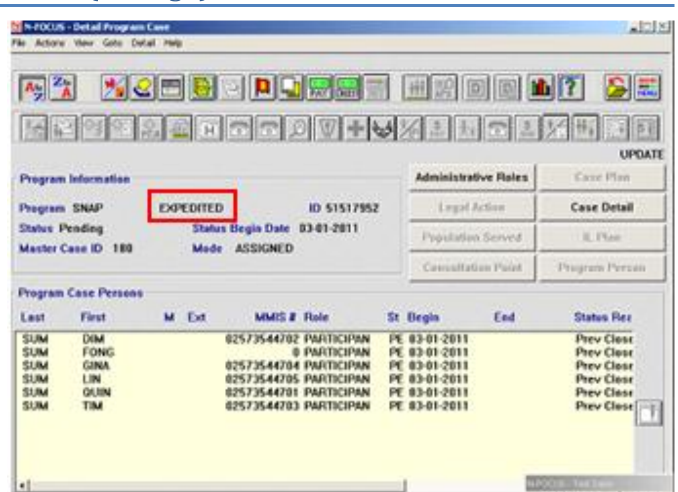
Verification Tracking (Change)

In November 2009, the new Verification Request/Tracking window was implemented. This allows workers to create the Verification Request document and track receipt of the received verifications.

A Verification Due Alert will now only display the day following the Verification Due Date when the instance of Verification Tracking Status is **Open**. Before this release the Alert displayed with the instance of Verification Tracking was closed or open. If the instance of Verification Tracking is closed, the Alert will no longer display. To prevent the Alert from being generated, workers need to update the Verification Tracking for all received Verifications. Once all requested Verifications are documented (checked off on the window) the instance of Verification Tracking will be Closed and no additional Alert will be created based on the Verification Request.

SNAP Expedited Display on Detail Program Case (Change)

When the SNAP case is pending and has been indicated as Expedited, the word Expedited will display on the Detail Program Case window of the associated SNAP case. Once the case is no longer pending Expedited will no longer display.



Automated change from SNAP Expedited to Not Expedited

The status of an Expedited SNAP case will change from Expedited to Not Expedited when the following occurs:

- The SNAP case is in Pending Status with Expedited Indicator of Y.
- Interview Tracking must have an Interview Due Date which is later than the Application Received Date.
- On the night of the 7th day from the Application Received Date the Expedited Indicator will change to NO. (The count begins the day after the application received date counts as day. If the 7th day falls on a weekend or state holiday, change the indicator the previous business day.)
- An automated Narrative will be created indicating that the case has been changed from Expedited to Not Expedited.

SNAP Overpayment and the Case Representative (Change)

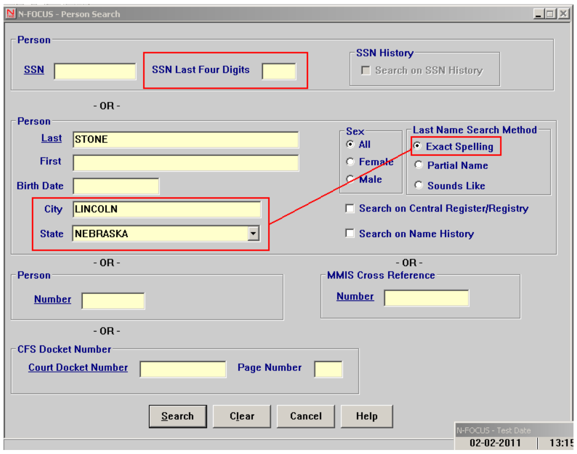
When creating an External Overpayment in the Mainframe part of N-FOCUS, persons who are listed as case representatives in a SNAP case can be selected as the Responsible Person for the Overpayment.

Person Search Window (Change)

The Person Search criteria have been expanded to include the SSN Last Four Digits.

The City and State fields have also been added to the Person section of this window. In order to use the City and State fields as part of the criteria, the following criteria must be followed:

- City and State can only be entered if the search is Exact Spelling
- If you enter City, you must enter State
- You can search for State without including the City
- The Person's Last name must be included in the search criteria

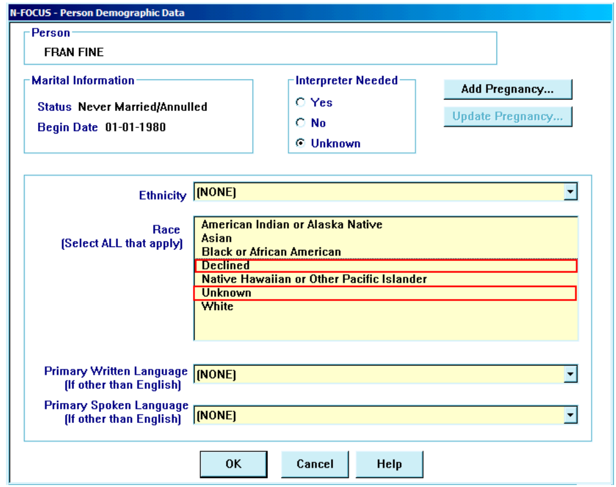


Person Demographics Data Window - Race Code (Change)

The option of `Other' has been removed from the selection list for the Race field. The options of `Declined' and `Unknown' have been added. This change has been made in order to collect more accurate Race information.

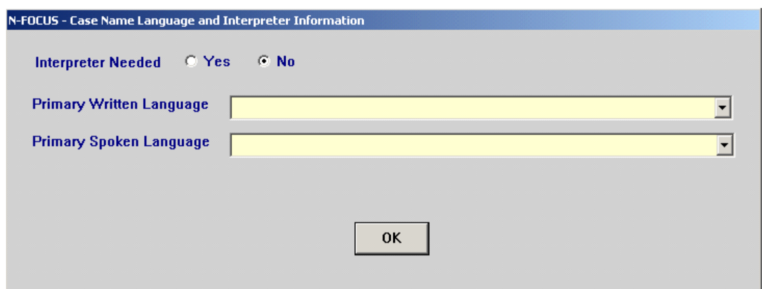
Multi selecting of in the Race field is allowed.

Note: There will not be a conversion of Person's whose Race is currently indicated as `Other'. Please make corrections to this field as the Person's Demographic information comes to your attention.



Gathering Language and Interpreter Information (New)

The Case Name Language and Interpreter Information window will display when a Program Case Name is created or changed, if the Interpreter Needed (Y or N) information was not previously recorded for the Case Name Person.



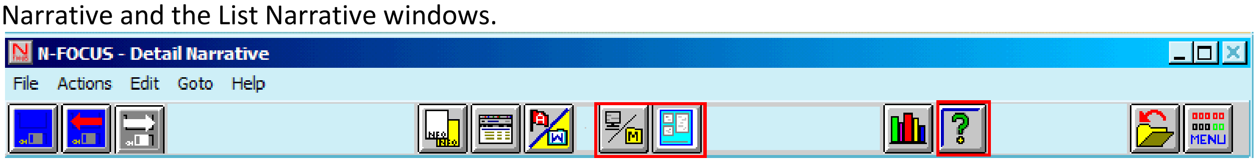
Standardized Narrative (Change)

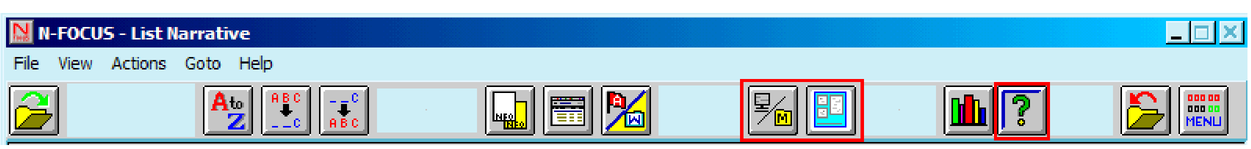
When the Subject area `Closed' is selected, the Subheading section will be a list of common closing reasons from which to choose.

When the Subheading `Living Arrangement' is selected, a list of possible living arrangements will be displayed.

Detail Narrative Window Icons Added (Change)

The E-App Application Summary icon and the Document Imaging icon have been added to the Detail Narrative and the List Narrative windows.





Tie Application (Change)

Tie Application for Reopening Cases (Change)

When reopening an SSAD, SSCF or EA case in the Mainframe you will be able to tie the Tie Program to Application window will display.

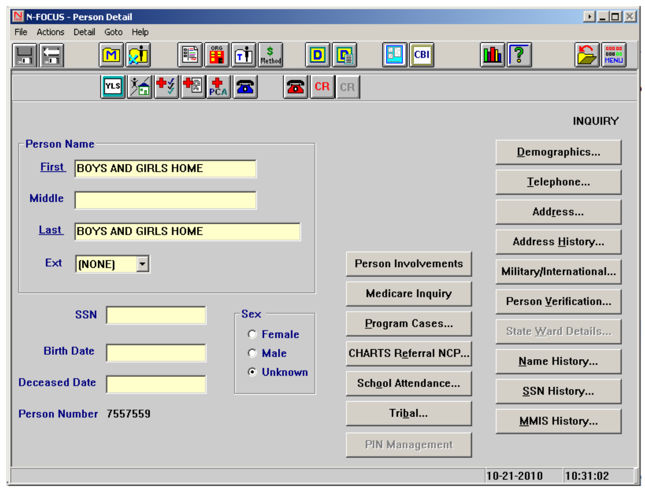
SDX Interface (Tip)

If the SDX Interface is not displayed, complete a SVES request and the information in the SDX Interface will return.

Organizations Added as Person (Tip)

Please make sure that an Organization is not added as a Person. Should this be entered in error, please contact Production Support so it can be corrected.

The screen print shown to the right is an example of this error from N-FOCUS Production.



Closing Service Provider (Tip)

Do not close a Service Provider on an Organization unless you are the Assigned Worker or have spoken to the person who is the Assigned Worker and received agreement that the Service Provider should be closed.

Correspondence

Notifying Clients of Universal Caseload (New)

Correspondence will be automatically sent to clients informing them when their case is transferred to the Universal Caseload. It will also inform them that future contact should be made to the ACCESSNebraska toll free telephone number and address provided

A new letter will automatically be sent when a case is changed from Assigned to UC Case Mode.

UC Mode for correspondence will be defined as a case in Interviewing, Processing, or Change Management. This indicates there is neither a primary worker assignment nor a designated office. An Assigned mode for correspondence indicates there is an Assigned Worker and Office.

Correspondence (Obsolete)

The Initial Appointment Letter and the Review/Recertification Letter will no longer be available.

Assigned Correspondence (No Change)

Correspondence created for an Assigned Case will continue to use the traditional Return Address for the Office of the assigned worker and the Standard Header (Case Number, Case Name, Contact -Worker Name, Office Phone #, Office Fax #, Toll free # , Date of Notice and Mail Date).

Return Address of Assigned Worker Example:
Department of Health and Human Services
PO box 446
Ainsworth NE 69210

Standard Header Example:
Case Number – 00000018
Case name – Joe Smith
CONTACT - CHILLI P WILLIE
Phone Number - (402)387-2523
Toll Free Number - (402)374-3838
Date of Notice - MAY 24, 2002
Mail Date - MAY 24, 2002
Reprint Date - MAY 25, 2002

Universal Correspondence (Change)

Correspondence created for a case in the Universal Caseload will use ACCESSNebraska as the Contact information. The telephone number will be the toll free VRU number, and the return Address will be the appropriate ACCESSNebraska Document Imaging Center (ANDI) PO Boxes based on the zip code of the Program Case Name recipient.

Return Address of Universal Caseload Example:
Department of Health and Human Services
PO Box 85801
Lincoln NE 68501-5801

Contact Information Example:
Case Number – 00000018
Case Name -- Joe Smith
CONTACT: ACCESSNebraska
Phone Number – (800)383-4278
FAX Number –) ANDI Hub Number
Date of Notice - MAY 24, 2002
Mail Date - MAY 24, 2002
Reprint Date - MAY 25, 2002

Claims Correspondence

N-FOCUS Billing Document (DHHS 5N)

The NFOCUS Provider Claim Form, DHHS-5N has been revised in the following manner:

- As a cost reduction measure, the instructions for completion of the 5N will no longer be printed on the back of each page of this multi-page form. Rather, the instructions will be available in English and Spanish on an instruction card, form FA-90-ES. This document may be ordered from Central Storage in Lincoln and it will be available in the near future via the public DHHS Claims Processing website.

- The front of the DHHS-5N has been modified in that the “Owner Tax No.” field has been eliminated from the form and replaced with the legal notice which was formerly on the back of the DHHS-5N.
- Other fields were slightly modified insofar as size and location on the 5N.
- The ACCESSNebraska toll free phone number has been added at the bottom of this form.

To support Universal Caseload (UC) service delivery and to account for program cases no longer assigned to a Primary Worker, the Office listed will be determined by the following criteria:

- For UC Eligible Program Cases (even if not yet converted to Universal Caseload): CC, EA, SNAP, SSAD, SSCF and PASS
    - The Office is determined from the Program Case Name’s zip code cross-referenced to an Office that has been designated for Claim Review.

- For Non-UC Program Cases (remain assigned to a Primary Worker): EF, DD cases, Medicaid waivers, CFS, IL, FW, JC, APS, Guardianship and Adoption cases
    - The Office listed on the Billing Document is the Office of the Primary Worker for the program case.

The new version of the DHHS-5N will be used once the current supply is used up, during the month of November. Both versions of the 5N will continue to be accepted.

Public Claims Processing Website

The following information, on several other topics related to NFOCUS providers, has been added to the public Claims Processing website http://www.dhhs.ne.gov/fis/ClaimsProcessing/ -

1. A series of questions and answers related to direct deposit and use of the US Bank® ReliaCard® Visa® debit card.
    - We strongly suggest that when local office or external partner staff receives inquires about how direct deposit or the ReliaCard work, that the inquirer be referred to the above mentioned website, or mail the inquirer an electronic or printed copy of the Q&A. If local office or external partner staff is unable to answer the provider or client question, then, direct client or provider to Kathi Tiede or Tom Ryan at Central Office.

2. Access to the FA-100 and FA-84 forms. One of these forms must be used for NFOCUS providers when they wish to use either direct deposit or the ReliaCard as their method for receiving their provider payments. (In addition, if cash grant clients wish to receive their payment by way of direct deposit or the ReliaCard, they are to use the FA-100.)
    - The FA-100 will no longer be available through the DHHS Support Services website, nor from Central Storage in Lincoln. Rather, it is to be downloaded or printed from the Claims Processing website if needed.

3. There is a location on the website where providers or staff may check to see when preprints were mailed out.
   Example: if a provider receives a monthly, preprint, they may check it at the approximate time the monthly is normally mailed rather than calling their RD

staff or Central Office. (The website also has the option to receive an email when this information is updated.)

Speednote (Change)

Speednotes have been separated into two options, Speednote – EA and Speednote – CFS.

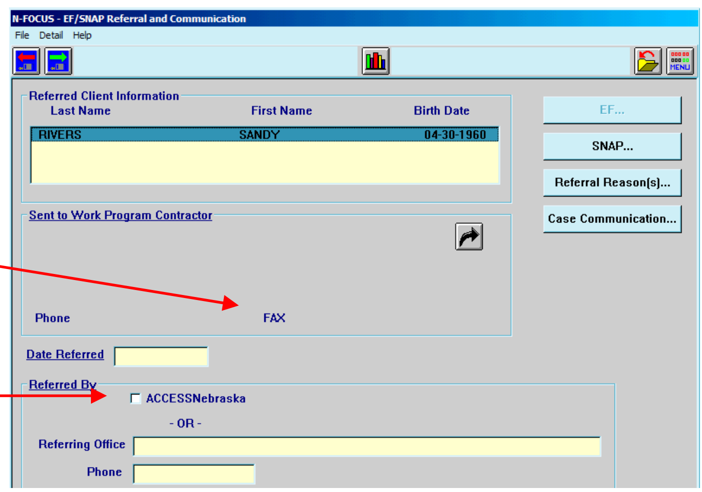
- **Speednote – EA (Economic Assistance)** is available from Detail Master Case and Detail Program Case.
- **Speednote – CFS (Children & Family Services)** is available from Detail Program Case, Detail Allegation and Detail Organization & Home Details.

Both types of Speednotes can be printed locally or in batch. If the case from which the Speednote is created is part of the Universal Caseload, the return address will display the ACCESSNebraska address and phone. If the Program Case is assigned, the return address will reflect the Assigned Workers information.

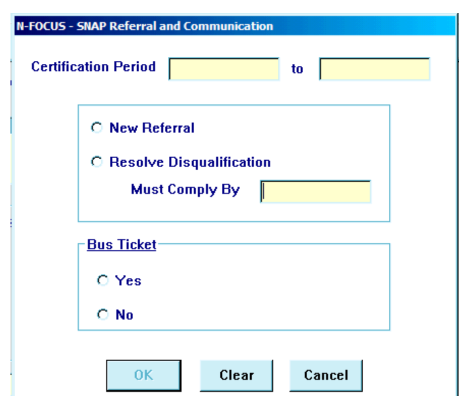
EF/SNAP Referral and Communication WP-1 (Changes)

The following changes have been made to the EF/SNAP Referral and Communication (WP-1):

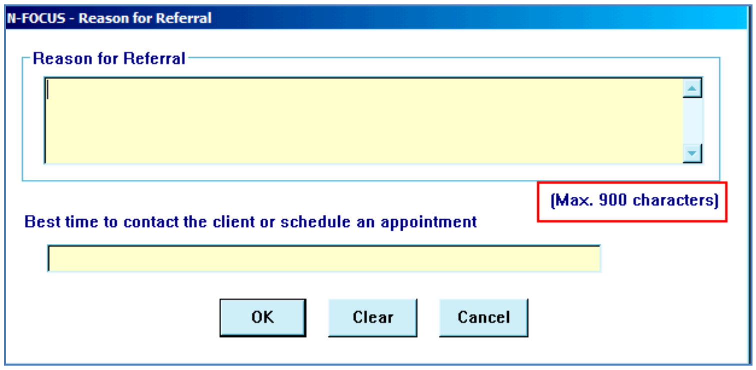
- References to the Food Stamp Program (FSP) have been changed to SNAP.
- The FAX Number has been added to the window and the correspondence.
- ACCESSNebraska has been added to the Referred By field.



- The SNAP Referral and Communication is no longer in use but the window has been changed to contain the following:
  - Certification Period
  - New Referral radio button
  - Resolve and Disqualification radio button and Must Comply By date field
  - Bus Ticket needs radio buttons



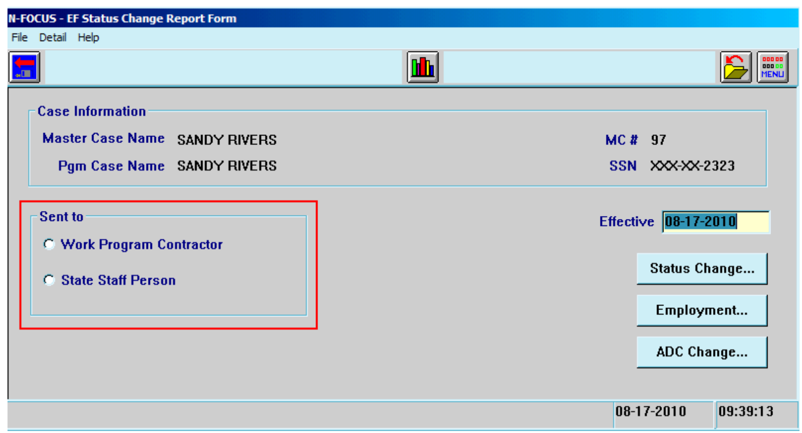
- The Reason for Referral text box has been expanded to contain a maximum of 900 characters as compared to the previous 300 character maximum.



EF Status Change Report Form - WP-3 (Changes)

The following changes have been made to the EF/FSP Status Change Report (WP3):

- The WP3 will no longer be used by SNAP for Employment and Training.
- The Sent to Worker Program Contractor and State Staff Person is now selected with a radio button.
- The Sent By information is no longer requested.
    - Refer to the Correspondence Changes for Universal Caseload to see how the contact information will be documented.

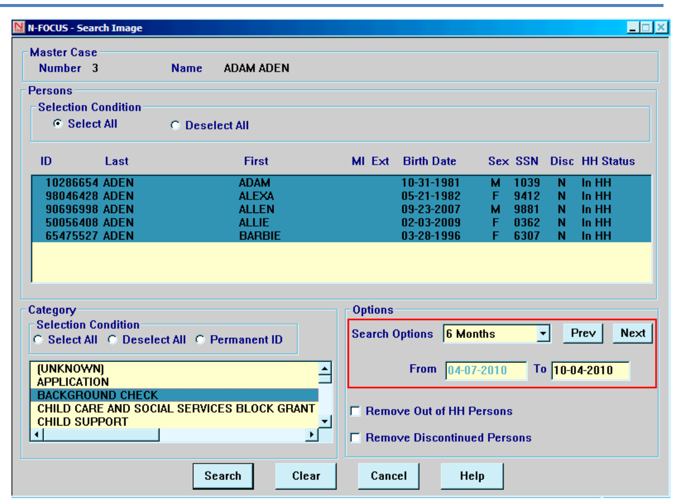


Document Imaging

Search Options (Change)

The following changes have been made to the Options section of the Document Imaging window:

- Search Options Drop Down Field – The available options are Week, 6 Months or Enter Dates. These options are updatable. Anytime staff want to change the option, they may do so.
    - Week

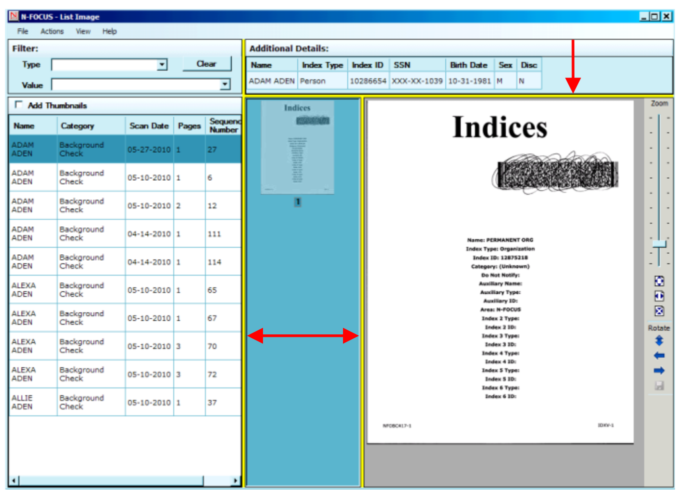


        - The default option when navigating to the Search Image window from List Master Case Alerts/Work Task window
            - Week will reflect the most current 7 days in the From and To fields
    - 6 Months
        - The default option when navigating from all windows except the List Master Case Alerts/Work Task window
    - Enter Dates
        - This option is selected when staff want to select a time period other an a week or 6 Months
        - The time period selected cannot exceed 180 days
- Prev and Next Buttons
    - Only enabled when the Search Options drop down is Week or 6 Months
    - Clicking these buttons will change the From and To fields to the Previous or Next week or next 6 month period, based on the Search Options field
        - The From date is always calculated
            - The From date cannot be less than 11/01/2009
        - The To date can be changed
            - The time period selected cannot exceed 180 days
            - The To date cannot be greater than the current date

Note: There have not been any changes to the Perm ID search criteria. If the Perm ID Category is selected, From and To dates are not allowed. This search will return all Perm ID images.

List Image Window – Splitter Bars (Change)

When the splitter bars are moved on the List Image Window, the configuration will remain once the window is closed and display in the same configuration the next time the window is open. This has caused some viewing problems if the splitter bar was moved off the viewable screen. Because of this issue, the splitter bars will now be limited as to how far they will be able to be moved.



Scanned Document Alert

Items scanned for persons in ADC, AABD, CC, EA, SNAP, Med or SSAD cases will create alert # 361, ‘Mail Received’ for all categories except `Applications’ and `Unknown”. The text will be ‘Mail has been scanned for persons in the Master Case. View by going to Document Imaging.’ Only one alert will be created for each Master Case. It will cover all mail for any person in the Master Case, so the search for imaged documents needs to include all members of the household. Workers who receive the alert will need to notify any other workers who need to be aware of the mail. UC cases will receive an ‘Alerts Exist’ Work Task when this alert is generated.

Electronic Application

Electronic Application Being Handled by Application Managers

Electronic Applications will no longer be associated to the Lincoln, Omaha – 1101 South 42nd Street Office, Crete, York, Seward, Papillion or Wahoo Local Offices. Electronic Applications for clients who indicate they reside in Douglas, Sarpy, Lancaster, Saline, Saunders, Seward or York counties will be handled by Application Managers in the two document Imaging Centers.

The E-App routing that will begin with the November release is as follows:

- E-Apps for clients living in Douglas and Sarpy Counties will be routed to the Omaha Document Imaging Center
- E-Apps for clients living in Lancaster, Saunders, Saline, York and Seward Counties will be routed to the Lincoln Document Imaging Center

Electronic Applications received from counties not listed above will continue to go to the designated office until the office is converted to the Universal Caseload.

Expenses No Longer Used to Determine Expedited SNAP (Change)

Due to recent SNAP policy changes, the following expenses will no longer be used when determining whether or not the case is expedited:

- Other Shelter Expenses,
- Condominium/Association Fees,
- Property taxes on home (if not included in mortgage)
- Homeowners insurance (if not included in mortgage)

Citizenship – Selecting the State Where the Person was Born (Change)

When it is indicated that a person is a US Citizen, they are asked to provide the State of birth. Rather than have a single text box option available for all people listed on the E-App, there will be a selection field available for each person whom the applicant indicates is a US Citizen.

US Citizens born outside of the United States will be able to make a selection of `Outside US'.

Race Code Options (Change)

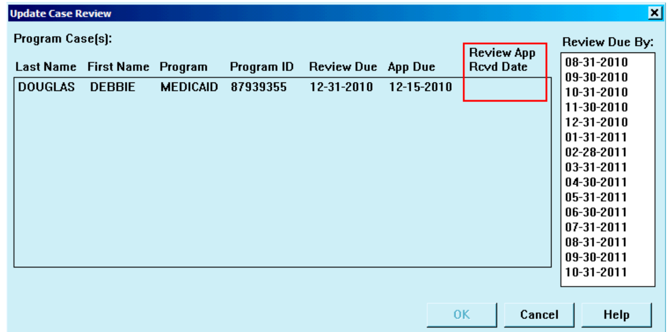
New race codes for Declined and Unknown were added to replace the option of Other. Within N-FOCUS, this information is viewed in the Person Detail, Person Demographics Data window.

Review Tracking

Viewing the Application Received Date in Expert System (Change)

The Review/Recert Task in the Expert System will contain Review Tracking data that is also collected in the Mainframe. The Review Application Due Date and the Review Application Received Date will be updated in both the Mainframe and Expert System Review/Recertification tasks by the system. These dates are not updated by workers.

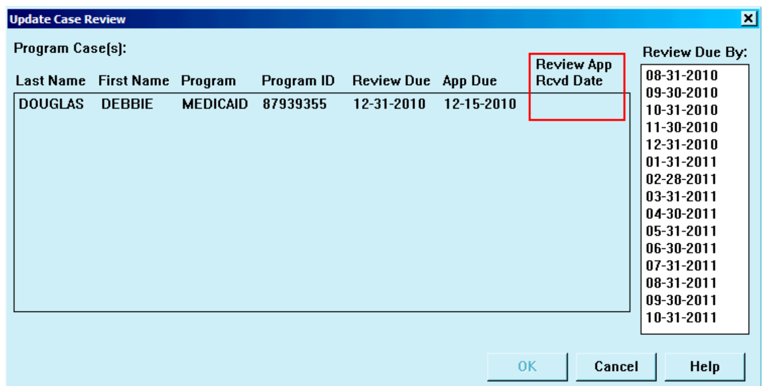
Note: Refer to the General Interest and Mainframe Topics section of this document to see how to view the Application Received Date in the Mainframe.



Updating Case Review Date (Change)

When the Review is completed the worker updates the Review Due Date in the Expert System at the following locations:

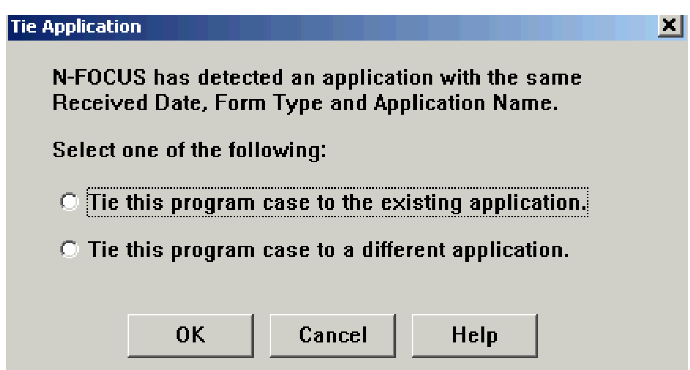
- Review Recertification in the Expert System or
- Budget Authorization in the Expert System for ADC, AABD or Medicaid cases or
- Review Recertification in the Mainframe



When the Review Due Date is entered the system will mark the row of Review Tracking as Completed and move the row to History. The actions can be tracked in History from the Detail Interview Training window.

Tie Application (Fix)

When N-FOCUS detected an application with the same Received Date, Form Type and Application Name during the Tie Application process from the Review/Recertification tab, the Tie Application pop up selection would need to be selected for each Program Case that was selected. This has been fixed. You no longer need to click OK multiple times on this window.



Running Budget for a Child Care Case (Tip)

If there is an active Child Care Program Case, run the budget even if there are no current service authorizations. Running the budget may impact the family fee or category.