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

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.

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General Interest and Mainframe Topics

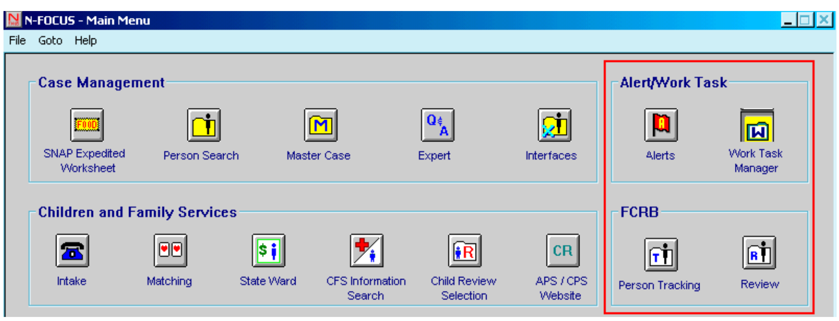
Many changes have been made to N-FOCUS to accommodate the Customer Service Centers (CSC) and the Universal Caseload (UC) concept that is beginning to take effect in November 2010. These release notes provide an overview of the changes to N-FOCUS in relation to Universal Caseload. Changes not related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

For information regarding these changes that are specific to staff who will continue to maintain an Assigned Caseload, please refer to the Release Notes for Assigned Workers.

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.

Refer to the Work Tasks and Work Task Manger for more information regarding the new Work Task Manager icon.



Office and Position Changes (New)

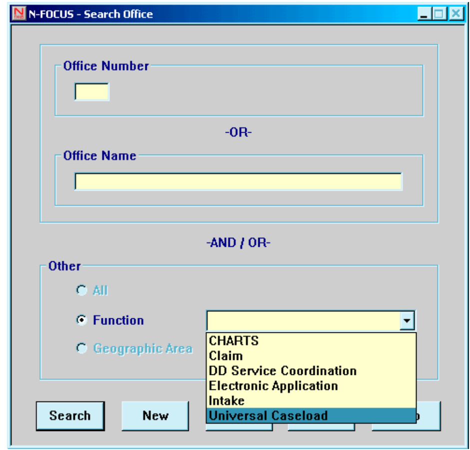
Many changes for Office and Position were released in July. The following information is a combination of a review of those changes and additional information regarding functionality and security level required for various functions.

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 has also been removed. If a case moves from one office to another, the assignment can be transferred to the new Office.

Search Office - Office Function (Change)

A new Office Function of Universal Caseload has been added to offices that are ready to move to the Universal Caseload system. This designation will help N-FOCUS determine, during case registration or adding/reopening of a case, whether a case should be in Assigned or UC Mode.

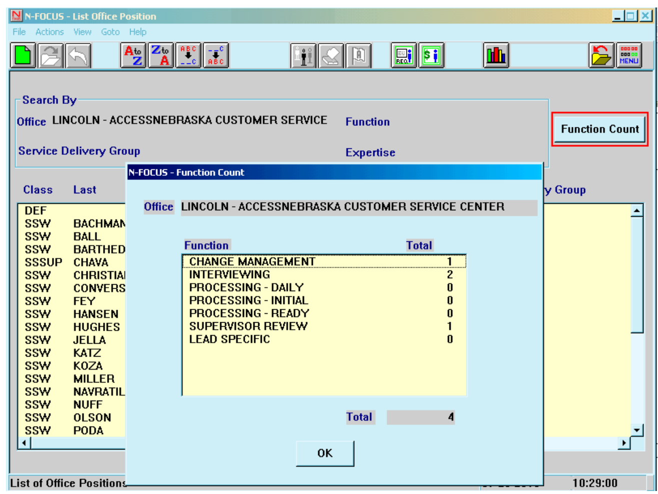


Once an office function is set to Universal Caseload, a case that is registered, added, reopened or tied to a review application by anyone in that office, will be set to a UC Mode, based on the rules developed.

Refer to the Mode section of this document for further explanation.

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.

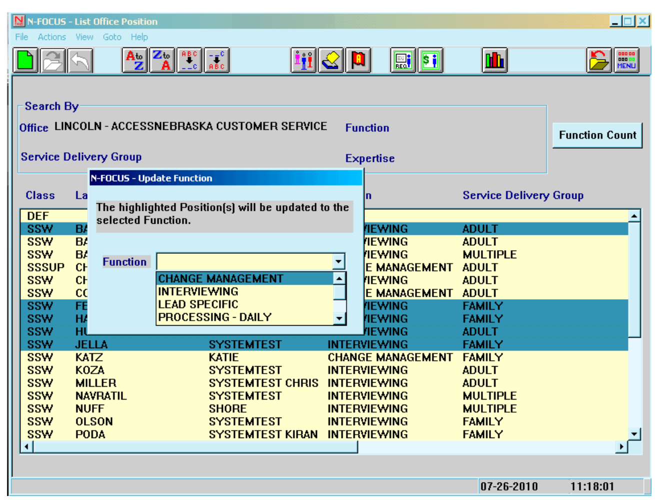


The Function Count button will display the number of positions that have been assigned to the various UC Functions within the selected office.

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

Updating Function (New)

Only a supervisor or lead worker has the security level required to update Worker Function.



Note: When a worker's designated Function is changed, the change will remain in effect until a Supervisor or Lead Worker changes it.

The following steps will be followed when updating worker Function:

1. Select the Staff for whom the Function is to be updated. Either one or multiple rows may be selected.

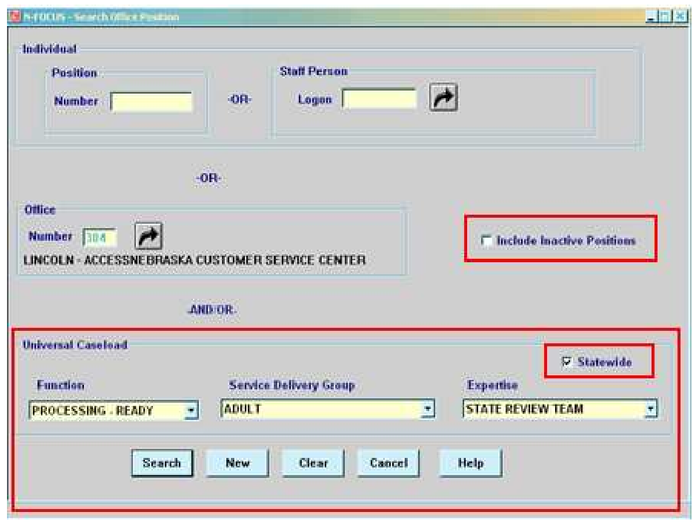
2. Select Actions>Update Function
   The Update Function pop-up will display.
3. Select the appropriate Function from the drop-down.
4. Click OK.
   The change will be reflected on the List Office Position window.

   Warning Message - If one or more of the selected workers have not been assigned a Service Delivery Group, a pop-up message will display. Each worker must be assigned a Function and Service Delivery Group through the Detail Office Position window prior to being transferred to a different Function.

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.

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

To facilitate the routing of Work Tasks, Office Positions in the Universal Caseload will have a particular Function and Specialization designation.

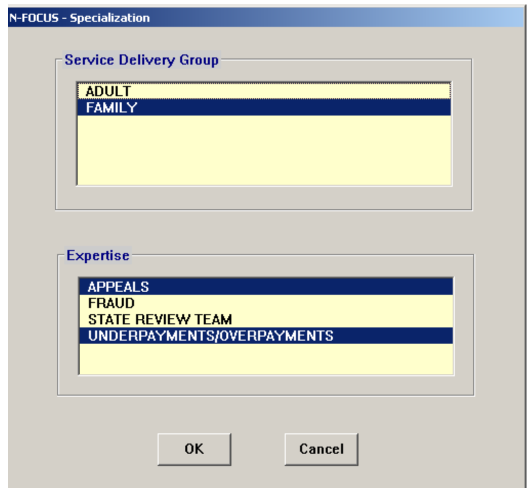
The options available for the Function field include the following:

- Change Management
- Interviewing
- Lead Specific
- Processing Initial

- Processing Daily
- Processing Ready
- Supervisor Review

Once a Function has been selected, click the Specialization button to access the Specialization options.

Specialization will further facilitate the routing of Work Tasks. Each worker Function must have at least one Service Delivery Group selected (Adult or Family).

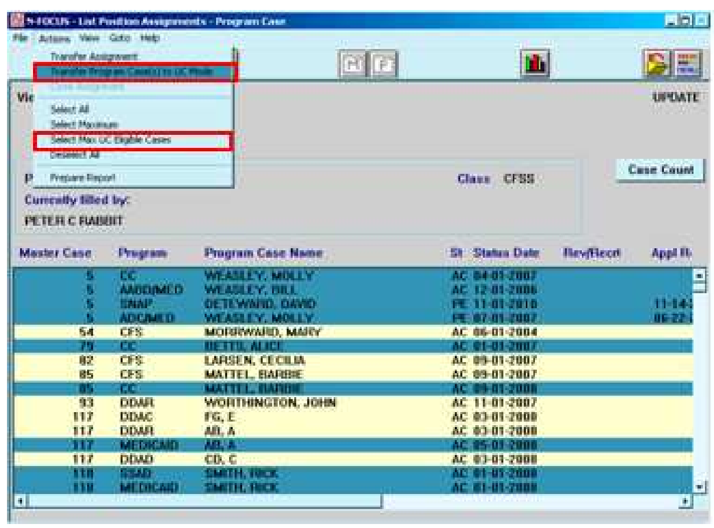


Workers with specific skills in complex areas will have one or more areas of Expertise as well. Expertise is an optional selection.

Note: A staff person's Function and Specialization may be changed throughout the day to accommodate the needs of the CSC. Only Supervisors and Lead Workers have the ability to change Function and Specialization information for a Position, however, all staff has the ability to view the information.

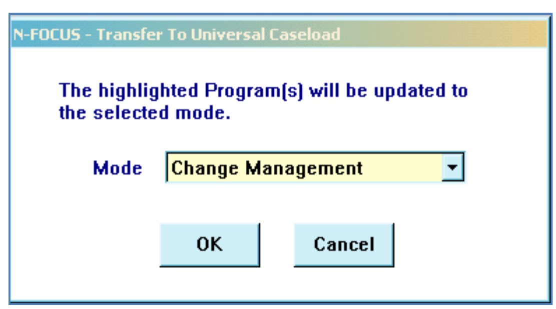
List Position Assignments Window - Transferring Cases to Universal Caseload (New)

Note: Only a supervisor or lead worker will have the security level to transfer caseloads from an assigned position to the Universal caseload.



Two new options have been added to the List Position Assignment Program Case window Actions menu. They are Select Max UC Eligible Cases and Transfer Program Cases to UC Mode. To transfer assigned cases to the Universal Caseload, follow these steps:

1. Select Actions>Select Max UC Eligible Cases.
   N-FOCUS will automatically select the first 75 UC eligible program cases to be transferred to a UC Mode.
2. Select Actions>Transfer Program Cases to UC Mode.



The Transfer to Universal Caseload pop-up will display.

3. Select the appropriate Mode.
4. Click OK.
   The selected cases will be transferred to UC Mode.

Note: Program case mode can also be changed from Assigned to UC via the Update Program Case Mode actions on either the Detail Master Case or Detail Program Case window. Only a supervisor or lead worker will have the security level to do this.

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 usually an automated process, however, workers have the ability to override the selected Mode or change Mode as necessary.

Non-UC Program Cases are designated with a Mode of Assigned. 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. If there was a previous primary casework assignment, it will be end dated. Changing Mode to a UC option only affects the Primary Work Assignment. Other assignments (Additional Worker, Accounts Receivable Worker etc) are not affected.

Note: A UC Mode Program Case can only be changed to an Assigned Mode from the Assignment windows from Detail Master Case Window, the Detail Program Case Window or the List Position Assignments Window.

Only Supervisors and Lead Workers have the ability to change a case from Assigned to Universal Caseload from the List Position Assignment Window or the Action>Update Program Case Mode on the Detail Master Case and Detail Program Case Windows.

Program Cases Being Converted to Universal Caseload (New)

The following list indicates which Programs can 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)

Program Case Mode (New)

The following table indicates how Program Case Mode is determined:

Program Case Mode	Description
Assigned	The Program Case is not part of the Universal Caseload and is assigned to either a Default Office Position or to a specific Worker.
Interviewing	The UC Program Case requires an Interview and the Interview has not been completed.
Processing	The UC Program Case is in the information gathering phase of the case lifecycle. If the Program Case required an interview, the interview has been completed.
Change Management	The UC Program Case has been activated, denied or closed.

A Mode can be automatically changed by an action that a worker will complete. There will usually be a confirmation window that will display to confirm the Mode change. Mode can also be changed by batch programs that run at night.

Master Case Mode (New)

Each Master Case is also designated with a specific Mode. The Master Case Mode is based on the Program Case Modes within the Master Case. Master Case Mode is only used for directing Work Tasks. (Refer to the Directed Work Task section for further explanation.)

The following table indicates how Master Case Mode is determined:

Master Case Mode	Description
Assigned	All Program Cases in the Master Case are in Assigned Mode.
Interviewing	At least one case is in Interviewing Mode and no other Program Case is in Processing Mode, and no other Active or Pending Program Case is in Change Management Mode.
Processing	At least one Program Case is in Processing Mode.
Change Management	At least one Program Case is in Change Management Mode and no other Program Case is Processing or Interviewing Mode.

Viewing Program Case Mode (New)

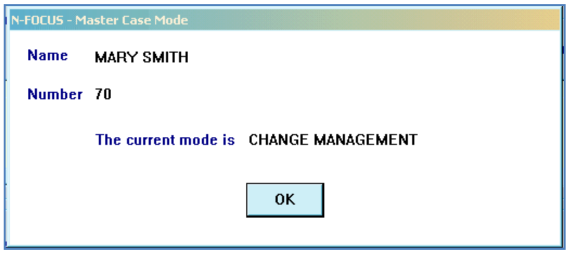
Mode designation can be viewed on the following windows:

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

Viewing Master Case Mode (New)

To view Master Case Mode, follow these steps:

1. Navigate to the Detail Master Case window.
2. Select Detail>Master Case Mode.
   The Master Case Mode window will display.



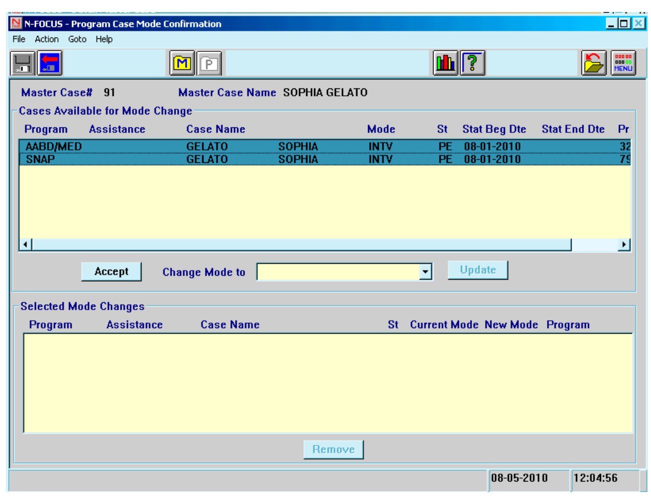
Transferring UC Mode to Assigned Mode – Alert (New)

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.

Program Case Mode Confirmation Window (New)

The Program Case Mode Confirmation window will display when a Master Case is registered and when a review application is tied in a Universal Caseload office. This window gives the option to either confirm or change the system generated Mode for each Program Case.

Note: In most cases, the Mode should be accepted. Only change the Mode on if specifically instructed to do so by a Supervisor or Lead Worker.



Accepting Program Case Mode (New)

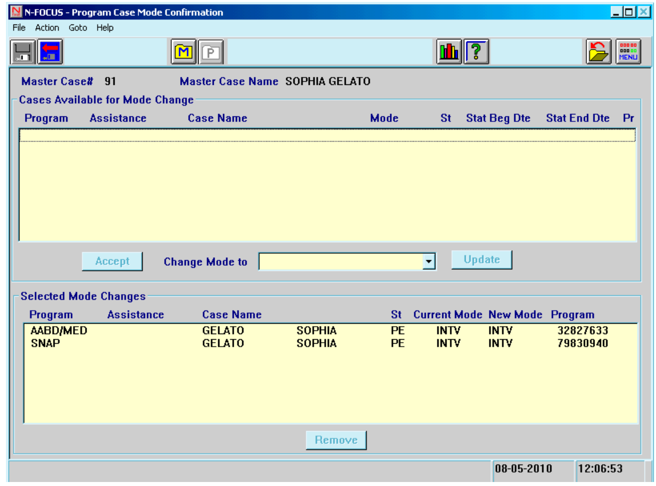
To accept Program Case Mode on the confirmation window, follow these steps:

1. Select the Program row(s) in the Cases Available for Mode Change section.
   The Accept push button will become active.
2. Click the Accept push button.

The Program row(s) will move to the Selected Mode Changes section.

3. Select Save and Close.

Note: If an error is made in selecting Programs to which you will accept the system generated Mode, highlight the Program in the Selected Mode Changes section and select the Remove push button. The Program will return to the Cases Available for Mode Changes section of the window.



You will need to accept or change the Mode for each Program Case displayed.

Program Case Mode Management Window (New)

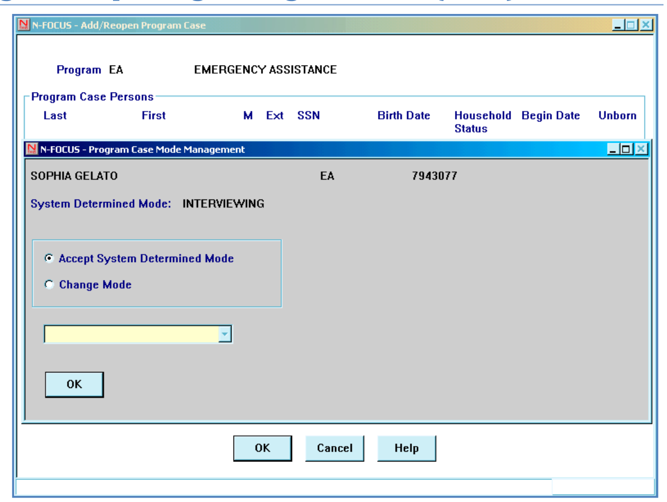
When a Program Case is added or reopened in an UC Office, the Program Case Mode Management Window will display. This window is used to accept or change the system generated Mode designation for the new Program Case.

Note: Only change the Mode on this window if specifically instructed to do so by a Supervisor or Lead Worker.

Accepting Program Case Mode when Adding or Reopening a Program Case (New)

To accept the System Determined Program Case Mode, select the OK push button.

To change the System Determined Program Case Mode, select the Change Mode radio button and select the new Mode from the drop down field. Select the OK push button.



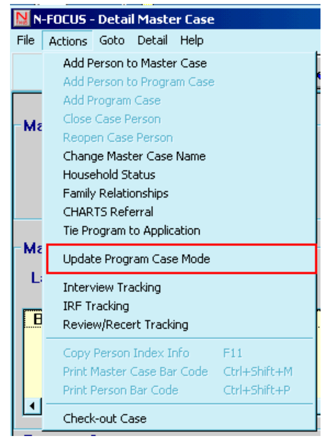
Set Program Case Mode Window (New)

Occasionally workers will need to manually change Program Case Mode. When this action is taken, a Work Task may also need to be manually created because Alerts/Work Tasks are not created when a Mode is changed on this window. Changing Program Case Mode can be completed from either the Detail Master Case window or the Detail Program Case window.

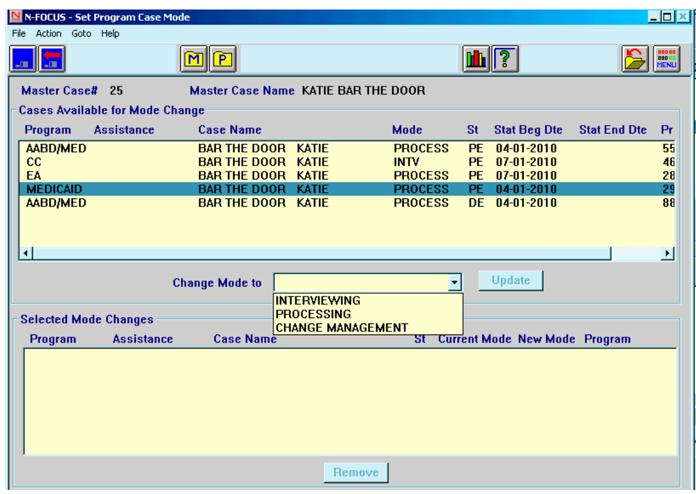
Setting Program Case Mode (New)

To change Program Case Mode, follow these steps:

Note: These steps can be followed from either the Detail Master Case or Detail Program Case window.



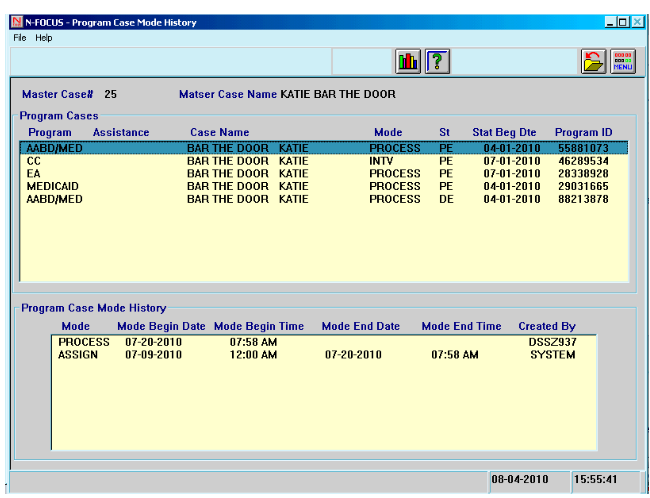
1. Select Actions>Update Program Case Mode.
   The Set Program Case Mode window will display. The top half of the window displays all of the Program Cases that are available to be changed to UC, within the Master Case, with their current Mode designation.
2. Select the Program Case for which the Mode is to be changed. One or multiple Program Cases can be selected.
3. Select the new Mode from the `Change Mode to' drop down list.
4. Select the Update push button.
   The selected Program will move to the Selected Mode Changes section at the bottom of the window.
5. Click Save or Save and Close.



Note: If an error is made in selecting Programs to change, highlight the Program in the Selected Mode Changes section and select the Remove push button. The Program will return to the Cases Available for Mode Changes section of the window.

Program Case History Mode Window (New)

The Program Cases section will list all program cases within the Master Case (UC and Assigned). When a Program Case row is selected, the History of that row will display in the Program Case Mode History section at the bottom of the window.

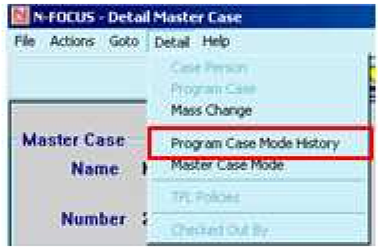


The Program Case Mode History section will show each time the Mode of a Program Case is changed. The history will indicate the Mode Begin and End Date, Begin and End Time and whether the change was made by a worker or the system.

Note: The Program Case History Mode Window is a display only.

To view the Mode history of a Program Case, follow these steps:

Note: These steps can be followed from either the Detail Master Case or Detail Program Case window.



1. Select Detail>Program Case Mode History.
   The Program Case Mode History window displays.
2. Select a row from the Program Cases section of the window.
   The Program Case Mode History will display in the bottom section.

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 and Work Tasks. 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 and that the correct Mode and Work Tasks are created.

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

Refer to the Mode Section and the Work Task Manager section of this document for further explanation of Mode and Work Tasks.

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 Note 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.
4. A Work Task `Interview Not Held Review for Closure' will be created 2 days prior to the 10 Day Notice of Adverse Action cut off when the case is in the Active status and no Interview Held date is entered.

- **Mode Change**: All cases will have the mode changed to Change Management, when the case is denied.

  Exception – If a SNAP case is denied for `Failed to Appear for Interview/appointment' or Failed to Provide Information' the case will remain in Interviewing or Processing Mode. A batch program will change the Mode of the SNAP case to Change Management 60 days from the application received date.

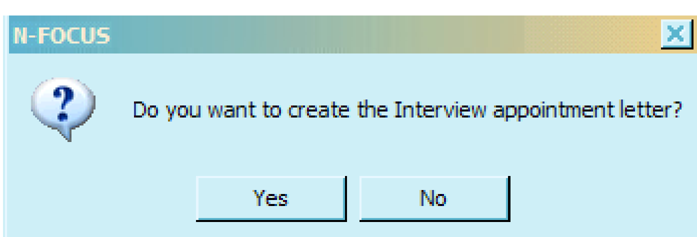
- **Work Task**: For cases requiring an interview for the Eligibility Review (cases in Active, Spend down or Premium Due status) and have no Interview Held date entered by the Due Date, a batch program will run 2 days prior to 10 day adverse action cut off and will create a Work Task 'Interview Not Held - Review for Closure'.

Note: During the budgeting process, if the case mode is Interviewing and no Interview data has been recorded in the previous 45 days, the following Interview Tracking window will display. The worker will enter the Interview Date, Type and Reason. Refer to the Expert System section of this document for further explanation.

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.

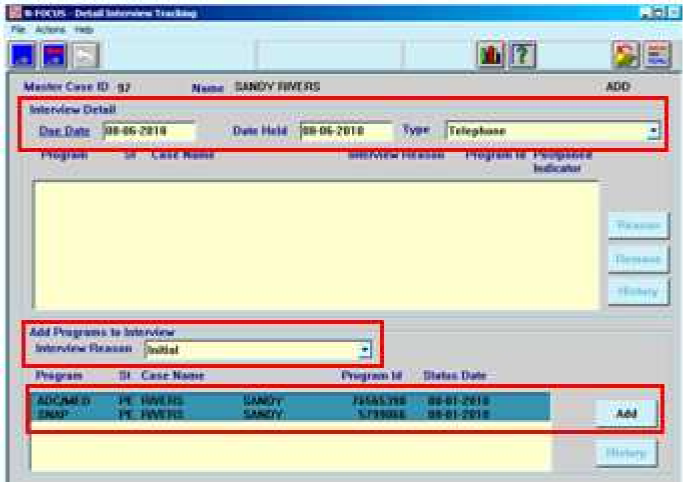
1. From the Detail Master Case window, select Actions>Interview Tracking.
   The List Interview window will display.
2. Select the New icon.
   An Interview Appointment Letter pop up window will display.



3. Select No.
   The Detail Interview Tracking window will display.

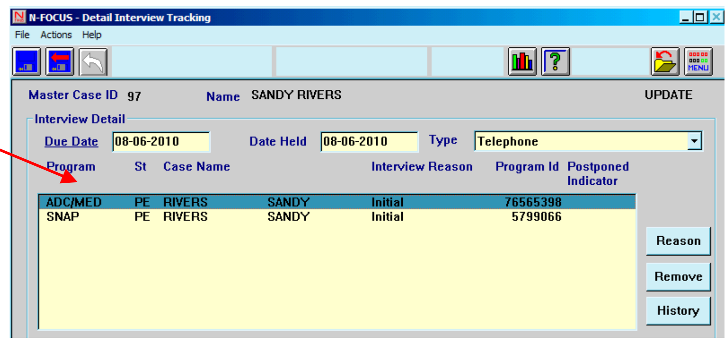
4. Enter the Date Held field. The Due Date field will default to the same date.
5. Select the interview Type from the drop down field.
6. Select the Interview Reason from the drop down field. (Duplicate, Initial or Review/Recert)
7. Select the Program Case(s) from the Add Programs to Interview section at the bottom of the screen.

   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.
11. Mark the Work Task `Interview Needed' or `Interview Needed – Expedited Snap' as Completed.

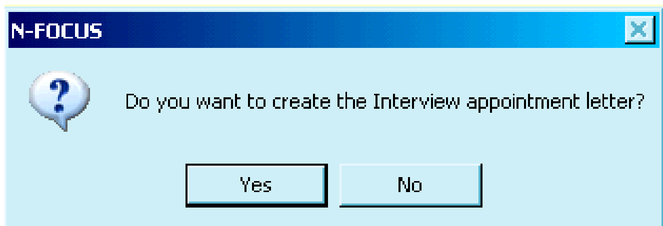
- **Mode Change**: When the Interview Held Date is entered, the Mode changes to Processing.
- **Work Task**: Original Work Task marked as Completed. If all Verifications are available, the worker will create a manual Work Task `Case Ready for Final Processing'. (Refer to the Creating a Work Task section of this document.) If Verifications are requested, a new Work Task will be created when the information is received. This informs the Processor that the case is ready for action.

Creating an Interview Appointment Letter (Change)

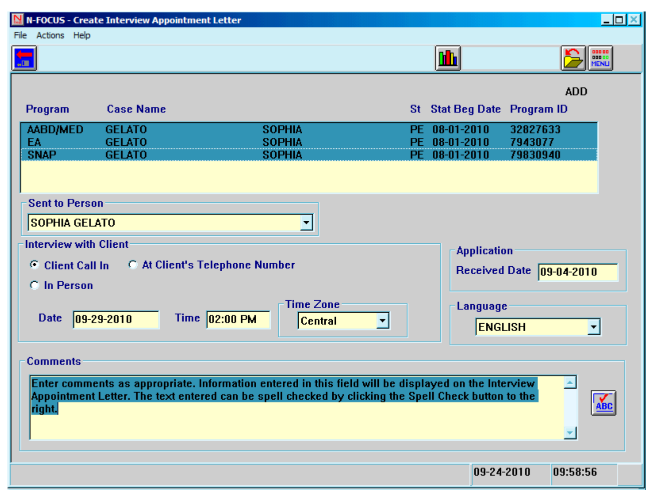
If the applicant is not contacted by DHHS on the initial phone call, the Interviewer will need to send a letter requesting the Applicant call the office. Creating an Interview Appointment letter will create an instance of Interview tracking. The Interview Appointment letter will no longer be created 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.



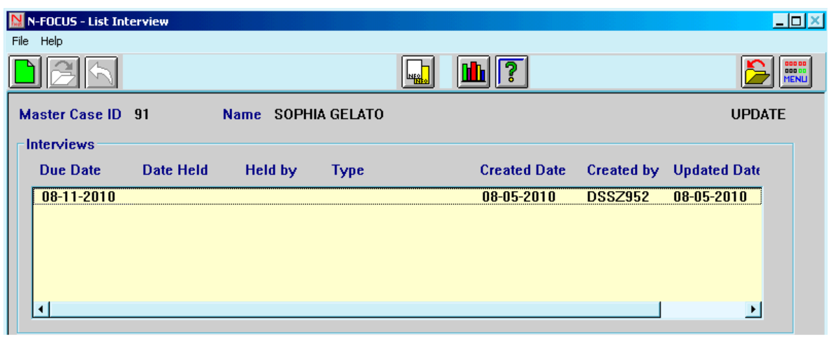
3. Select Yes.
   The Select Worker Name pop up window will display. **Do Not select a different worker name**.
   Note: Even though this window displays, when you are dealing with a Universal Caseload case, ACCESSNebraska information will display on the letter. This pop-up will be removed for Universal Caseload cases in March 2011.
4. Click OK.
   The Create Interview Appointment Letter window will display.



5. Select the Program Case row(s).
   One or multiple rows may be selected.
6. 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.
7. 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.

8. Enter the designated Date, Time and Time Zone for the interview.
   Note: Office policy will designate dates and times to schedule interviews.
9. 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.
10. 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.
11. Enter Comments as appropriate.
    Information entered in this field will display on the Interview Appointment letter.
12. 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.



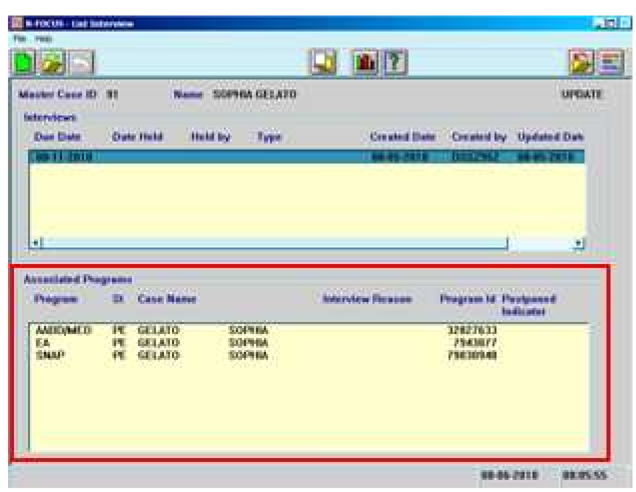
13. Mark the Work Task `Interview Needed' or `Interview Needed – Expedited Snap' as Completed.

- **Mode Change**: No.
- **Work Task**: Original Work Task marked as Completed.

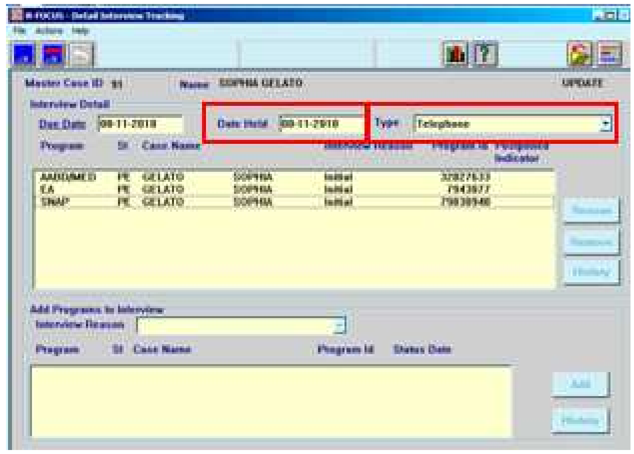
Documenting the Interview Held after the Appointment Letter is Sent (New)

Once the interview is held, the Interviewer must update the Interview Tracking. Doing so will keep the Notice of Missed Interview from being sent, will change the Mode from Interviewing to Processing and will keep the Work Tasks "Interview Not Held-Review for Closure and Interview Not Held – Review for Denial" from posting.

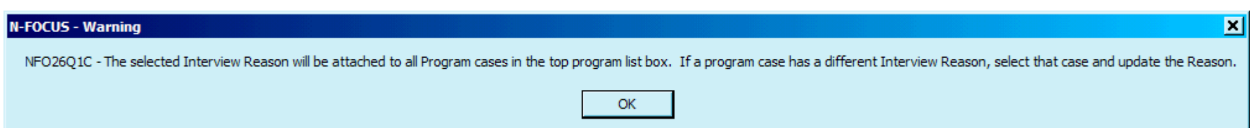
To document an Interview Held, complete the following steps:



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.

- **Mode Change**: When the Interview Held Date is entered, the Mode changes to Processing.
- **Work Task**: If all Verifications are available, the worker will create a manual Work Task `Case Ready for Final Processing'. (Refer to the Creating a Work Task section of this document.) If Verifications are requested, a new Work Task will be created when the information is received.

Note: The following will occur if the Interview Held Date is NOT entered:

- A Notice of Missed Interview will be sent if no Interview Held date is entered by the Due Date.
- The Work Task "Interview Not Held- Review for Closure " will be posted 2 days prior to 10 day adverse action deadline when the mode is Interviewing and the case is in Active, Spend down or Premium Due status and is a ADC, AABD, CC, EA, MED, SSAD pr SSCF case.

- The Work Task “Interview Not Held – Review for Denial” will be posted if the case is pending and it is 30 days since the Application Received Date.
- 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.
- The Interview Type “Not Held” will be posted on the associated Interview Row when no Held Date is posted by the 30th day from the Interview Create Date.

Automated Notice of Missed Interview-NOMI (New)

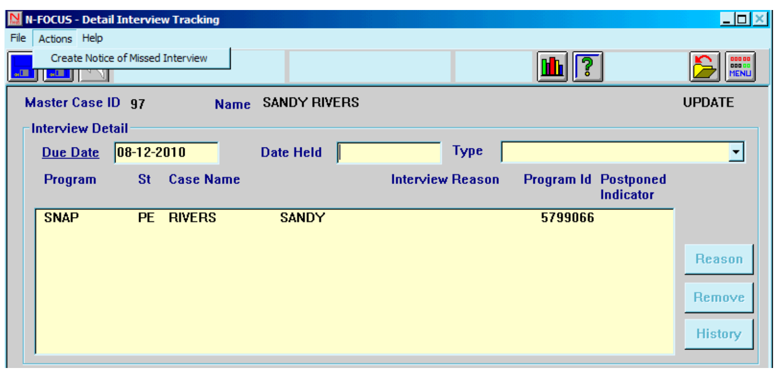
A Notice of Missed Interview (NOMI) will be created when no Interview Held Date is entered by the Due Date. The letter will be automatically generated in batch by the system the night of the Due Date and mailed the following work day.

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.

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.

- **Mode Change:** Program Case remains in Interviewing Mode except for Children's Medical Assistance and AABD SSI FBR cases that have been in Interviewing Mode due to association with another program case. Children's Medical Assistance and AABD SSI FBR cases will change to Processing Mode as they do not require an Interview
- **Work Task:** The Work Task "New Case" will be created for the Children's Medical Assistance or AABD SSI FBR cases that go to Processing Mode.

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.

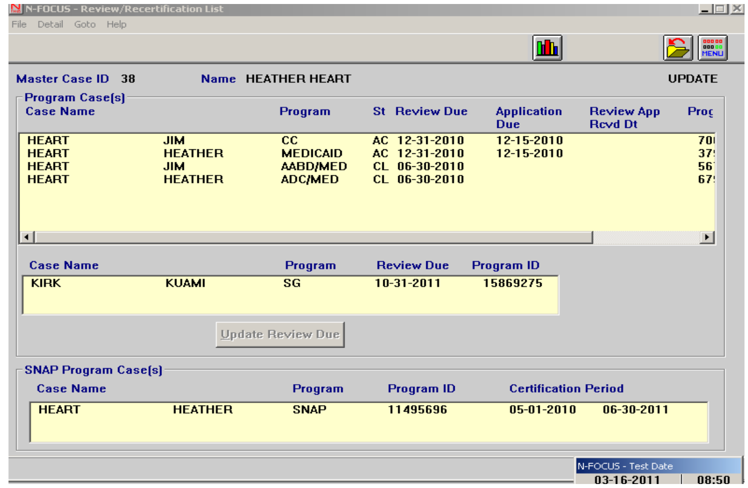
Review Application Received Date

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.

   - 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.
     - o 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.

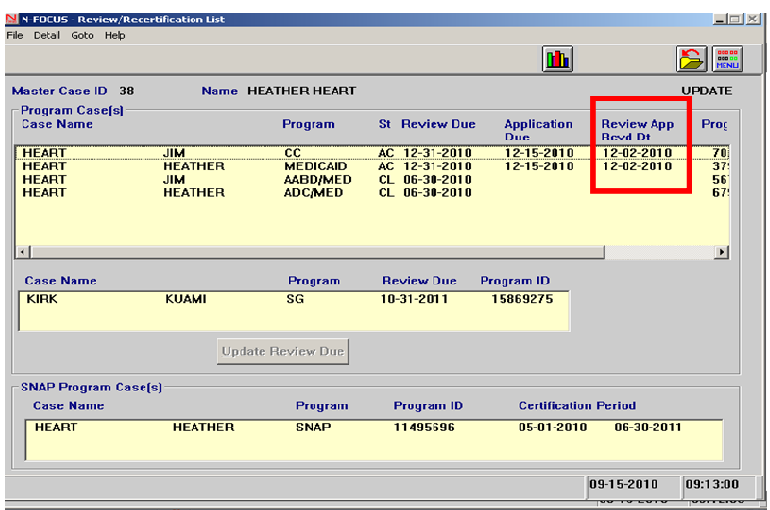


- The Review Application Due Date will be automatically created when the 'Expiration of Certification Period or Eligibility Review Due' notice, the 'Medicaid Long Term Care Review' form and the 'Children's Medical Review' forms are mailed on the 20th day of the month prior to the Certification Period 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.

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.

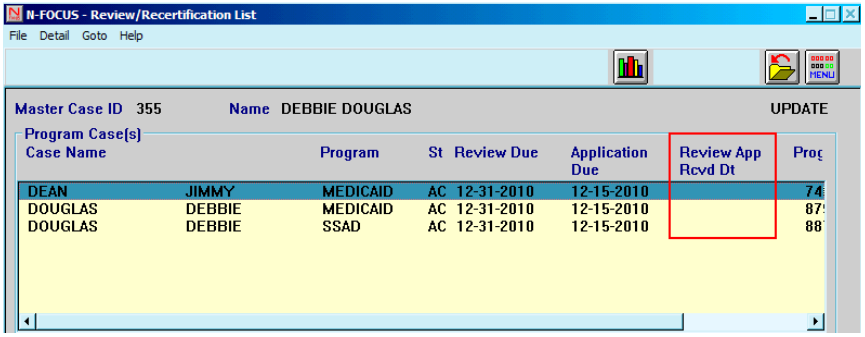


- **Mode Change**: Changed to Interviewing or Processing depending on whether the case requires an interview for Review processing.
- **Work Task**: Depending on the Mode, a Work Task 'Interview Needed' will be created.

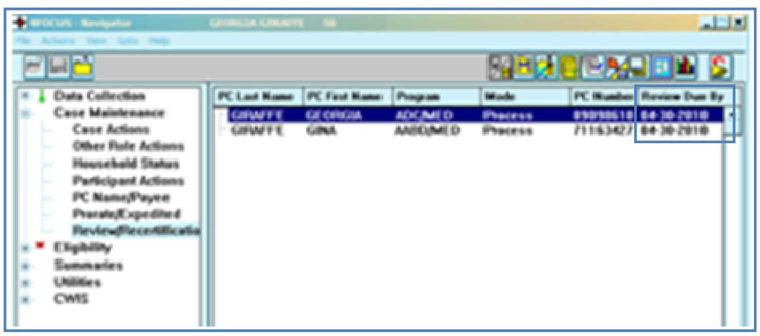
Viewing Review Application Due/Received Dates in the Mainframe and Expert (New)

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 (Change)

An Alert "No App Rcv. A review application was due for <ADC, AABD, MED, CC, SSAD, SSCF> and has not been received" will be created when no Review Application Received date is recorded by the Due Date. on the night of the Review Application Due Date (the 15th of the month). 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.

- **Mode Change**: No
- **Work Task**: Alerts Exist

Review Interview Not Held (Change)

For UC cases requiring an Eligibility Review, in which the Review Application has been received, an interview scheduled and a Notice of Missed Interview (NOMI) sent and no Interview is recorded by 2 days prior to 10 day adverse action cut off, a Work Task will be posted “Interview Not Held - Review for Closure.

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

- **Mode Change**: Change Management
- **Work Task**: No

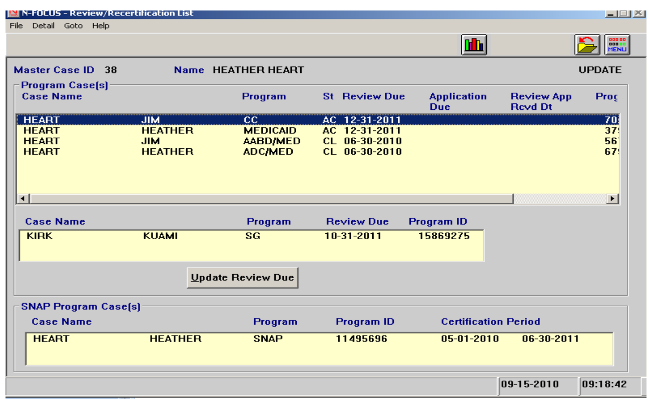
View History of Review Actions (New)

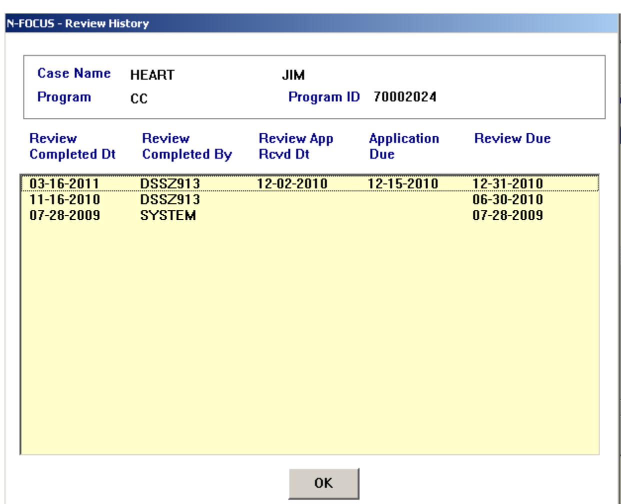
Updating the Review Due Date to the next Review Date will move the current row to History.

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 15th of the month and is due the 10th 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 15th day of the month. When the QRF is received by the agency, the QRF Received Date will be recorded by a worker.

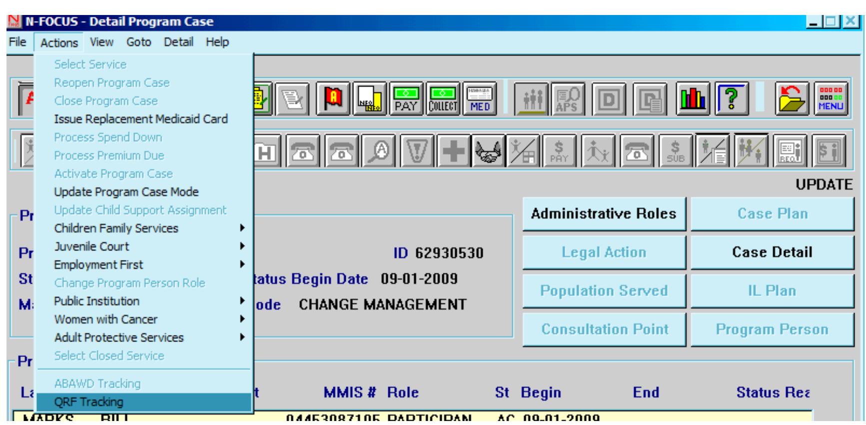
Note: Workers who have been using QRFs to request income verification for other types of cases should use Verification Tracking if the case is not in TMA.

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.



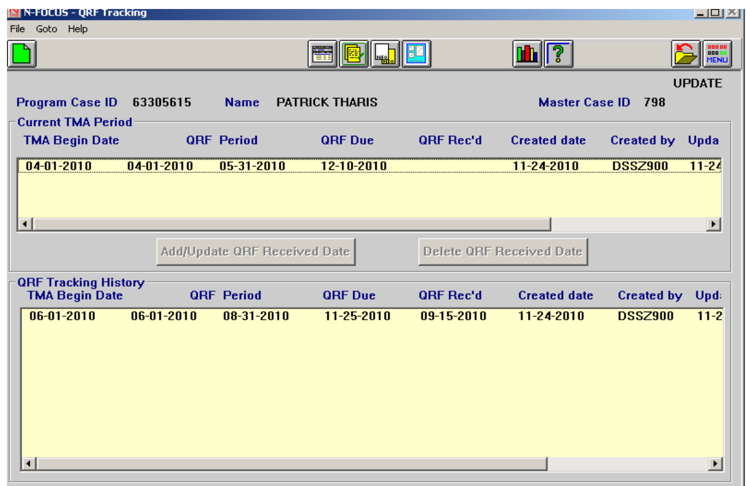
2. Select Actions>QRF Tracking.
   The QRF Tracking window will display.
3. Select the applicable QRF Due row.
4. Select Add/Update QRF Received Date.
   Enter QRF Received Date.
5. Select OK.
   The QRF Rec'd Date will display in the QRF Rec'd column.

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.



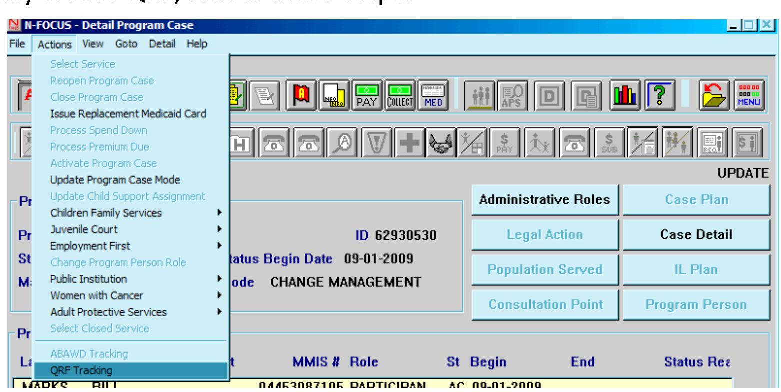
Manually create QRF Tracking

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:

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

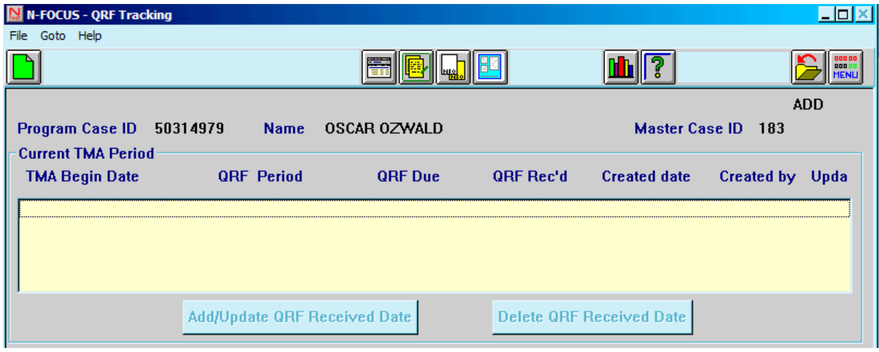
   Note: The case must have had a TMA begin date within the last year.

2. Select Action>QRF Tracking.

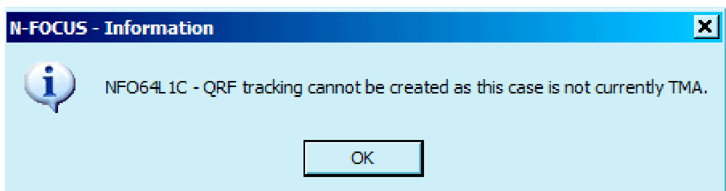


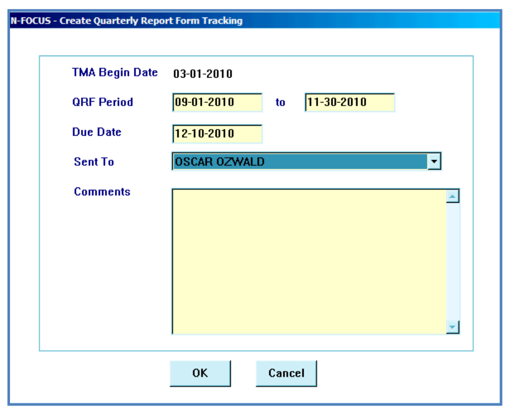
The QRF Tracking window will display.

3. Select the New icon.



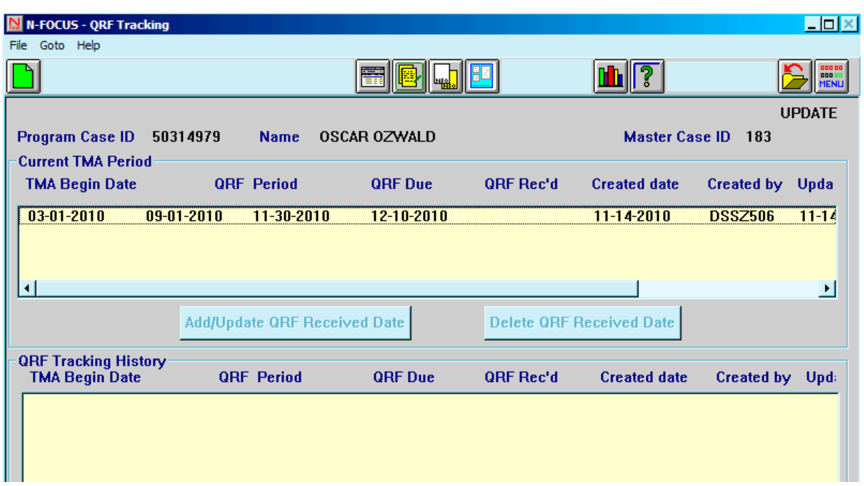
The following message will display if you try to create a QRF for a Medicaid Program Case that is not currently TMA.





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.



- **Mode Change:** No change
- **Work Task:** - Yes – "Alerts Exist" will be created on the night of the 15th of the month if there is a QRF due date from the 11th day of the previous month to the 10th day of the processing month that doesn't have a QRF received date.

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 (New)

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 whether the instance of Verification Tracking was closed or open. If the instance of Verification Tracking is closed, the Alert will no longer display.

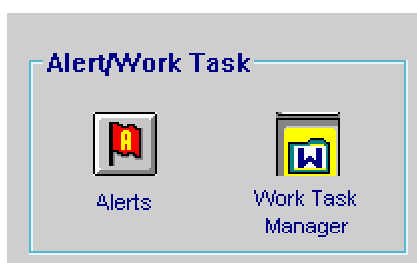
To prevent the Alert from being generated, workers need to update the Verification Tracking for all received Verifications. Once all requested Verifications are documented (checked off on the window) the instance of Verification Tracking will be Closed and no additional Alert will be created based on the Verification Request.

- Mode Change: No
- Work Task: Yes - "Alerts Exist"

Work Task Manager (New)

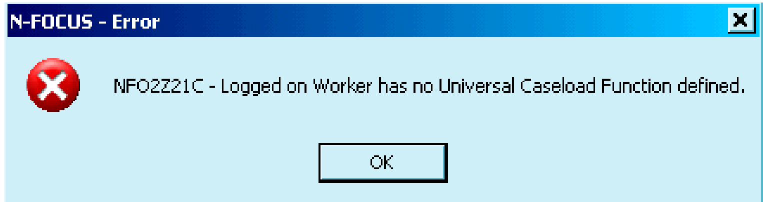
Accessing the Work Task Manager (New)

UC staff will receive their Work Tasks based on their Office Position Function, Language, and Service Delivery Group. Work Tasks display is accessed via the Work Task Manager. To open the Work Task Manager, click the Work Task Manager icon located on the N-FOCUS Main Menu.



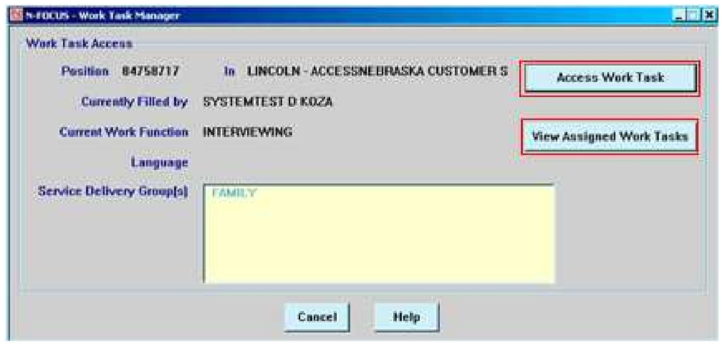
When the Work Task icon is selected by a staff person whose position is assigned a Universal Caseload Function, the Work

Task Manager will display. If the staff person's position is not assigned to a Universal Caseload Function, the following error message will display.



Work Task Manager Window (New)

The Work Task Manager will display the position assignment information, including the position number, location, staff person's name, function and Service Delivery Group(s). The Language field will remain blank unless the staff person is Spanish speaking.



UC staff will access their Work Tasks and view currently assigned Work Tasks by selecting the associated buttons.

Access Work Task Button (New)

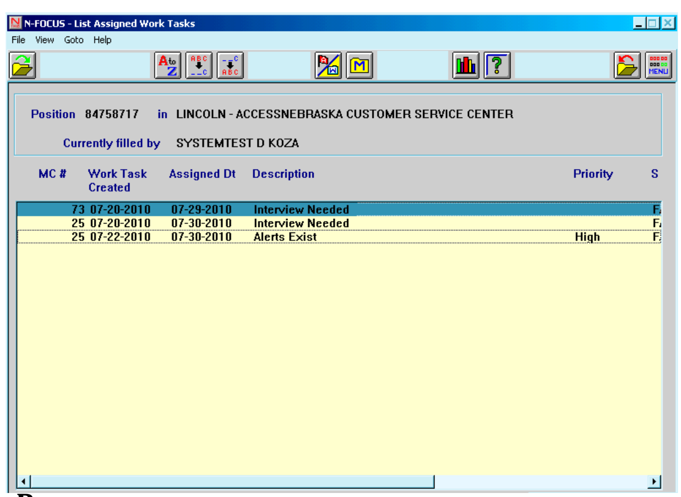
When a staff person selects the Access Work Task button one of the following will occur:

- The worker will be taken to the Master Case window where the List Master Case Alerts/Work Tasks Window will display the next Work Task(s) to be worked.
- If the staff person already has more than 10 Work Tasks in Working Status, a message will display indicating the worker must act on their existing Work Tasks prior to accepting another one.
- If there are no Work tasks that match the worker's Function, Service Delivery Group and Language the message `No Matching Work Task Found' will display.

Refer to the List Master Case Alerts/Work Tasks window section for further details.

View Assigned Work Tasks Button (New)

When a staff person selects the View Assigned Work Tasks Button, one of the following will occur:



- If there are no Work Tasks assigned to the staff person's position, the message `No Work Tasks are assigned to this position' will display.
- If there are Work Tasks assigned to the staff person's position,

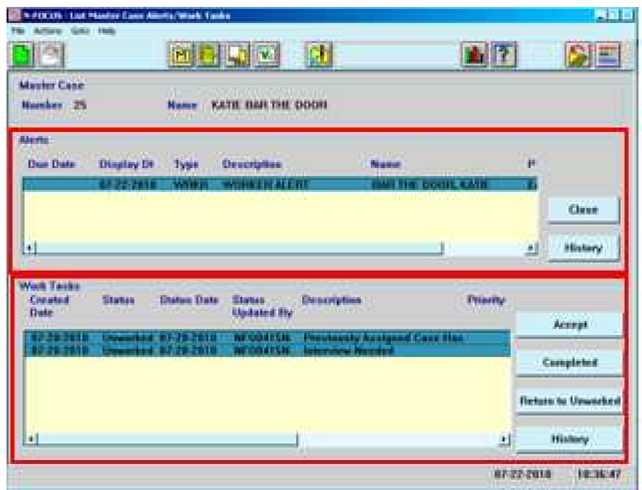
the List Assigned Work Tasks window will display.

Note: Up to 10 Work Tasks can be assigned to a worker. An example of why this may be necessessary is if the worker is waiting for a return phone call to complete the Work Task. There should not be many of these types of situations.

A daily administrative report will show how many Work Tasks remain in Working status overnight and how many remain in this status longer than one (1) business. Workers who have Work Tasks assigned for more than one business day will be listed.

List Master Case Alerts/Work Tasks Window (New)

The Alerts icon from the Detail Master Case window has been changed to a combined window displaying both the Work Tasks and Alerts. Work Tasks will only display if a case is in the Universal Caseload.



The List Master Case Alerts/Work Tasks window can be opened from the following locations:

- Work Task Manager Window – Access Work Task Button
- List Assigned Work Tasks Window
- Detail Work Task Window
- Detail Master Case Window

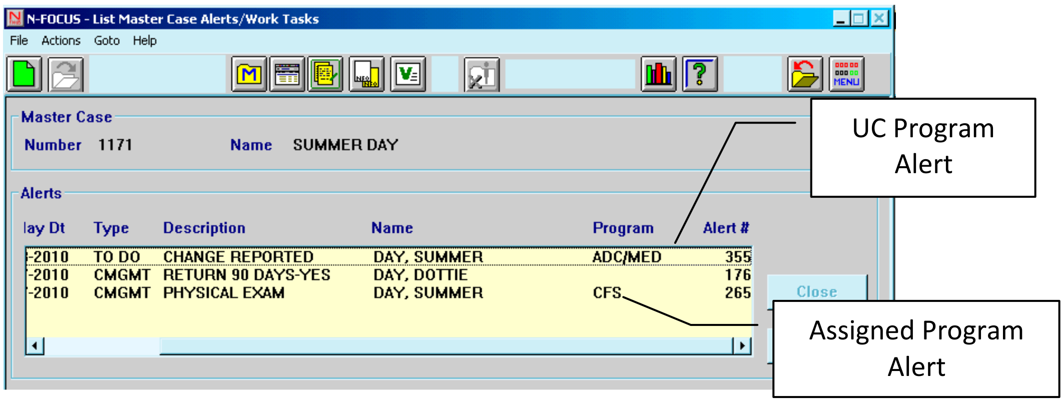
This window will display the Open Alerts and Unworked Work Tasks associated with the indicated Master Case.

The Alerts displayed are all of the Alerts associated to all of the Program Cases within the indicated Master Case. Both UC and Non-UC Program Alerts will display on this window. Refer to the `Alerts' section of this document for further information.

All Work Tasks created for this Master Case display. Refer to the Work Tasks section of this document for further explanation of Work Tasks.

Alerts (Change)

When a staff person receives a Work Task, there may or may not be Alerts displayed. If there are Alerts listed, it is the UC workers responsibility to complete the work associated with Alerts related to the programs on which they are working. Those Alerts should then be closed once the required actions have been taken.

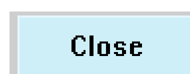


An `Alerts Exists' Work Task will be created when an Alert is created. Not all alerts will create a work task. Some will just post to the case.

Example A CSE Sanction Not Imposed Alert will not create an `Alerts Exist' Work Task if the case is still pending because no action needs to be taken until eligibility is determined.

Only one `Alerts Exist' Work Task will be created regardless of the number of Alerts until that Work Task is Completed.

Closing an Alert (Change)



It is important to only close the Alerts related to the programs you are working with, when you have completed the associated work. When the Alert is Closed, it will be removed from the List Master Case Alerts/Work Task window and display as history on the List Master Case Alert window in Closed Status.

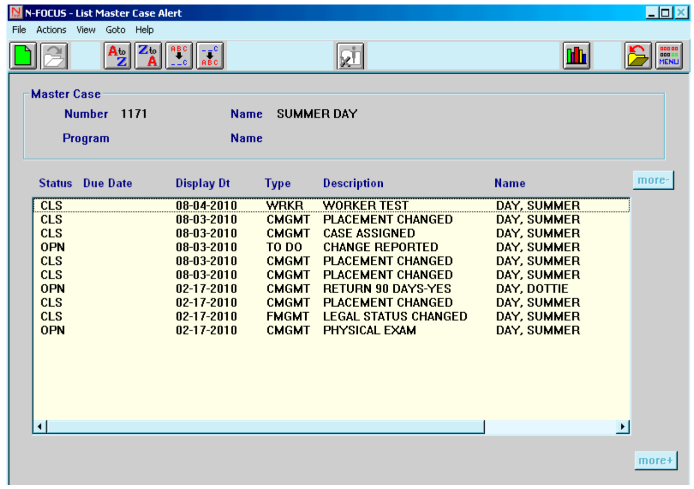
To close an Alert, follow these steps:

1. 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 can be closed by any worker. Consequently, if an `Alerts Exist' Work Task is created and no Alerts are displayed or if an Assigned Worker has an Alert on the List Position Alerts and it does not exist on this window, check the History window.

Viewing Alert History (Change)

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, do the following:

1. Click the History button.
   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.

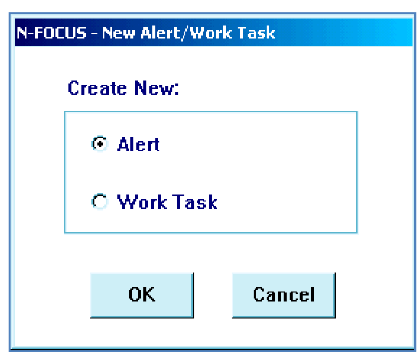
Creating a New Alert (Change)

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 for either Program.
- 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.

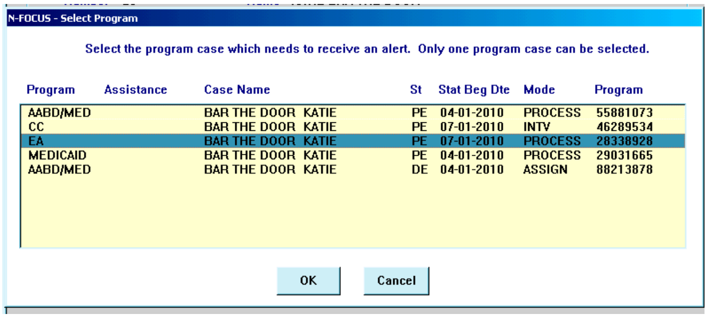


To create a new Alert from the List Master Case Alerts/Work Task window, follow these steps:

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.

Note: Worker generated Alerts will create a High Priority `Alerts Exist' Work Task on the Display Date selected.



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.

Work Tasks (New)

Work Tasks that display indicate work needed to be completed on the Master Case. A Work Task may be created from an Alert or may be created from another type of action taken in N-FOCUS or manually by a worker. There are two types of Work Tasks, Directed and Non-Directed.

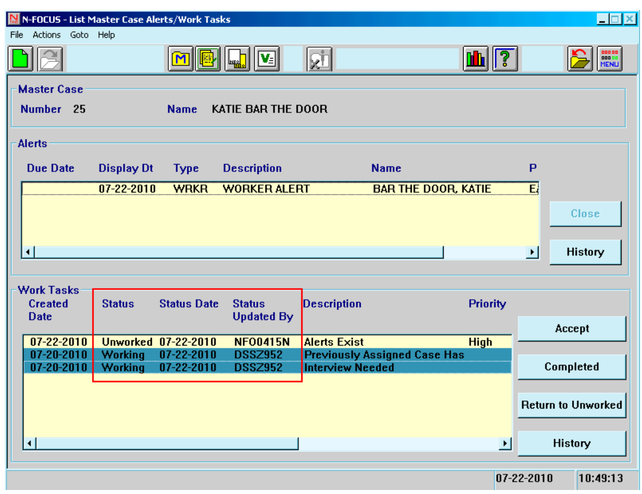
As Work Tasks are created, accepted and completed Tracking Functions within N-FOCUS will move the case along through the case lifecycle by updating Mode and creating new Work Tasks.

Accepting a Work Task (New)

Work Tasks can be multi-selected by clicking each row.

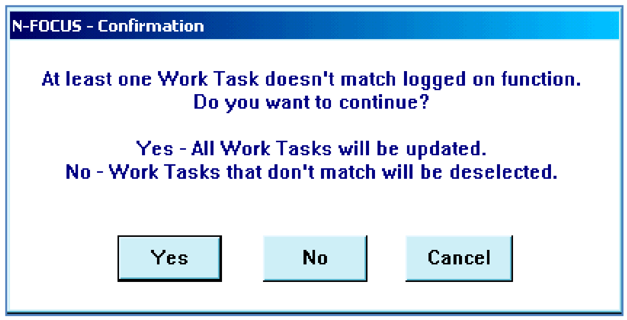
To Accept a Work Task, follow these steps:

1. Select the Work Task(s).
   One or more Work Tasks may be selected at a time.
2. Click the Accept button.
   - The Status will change from Unworked to Working.
   - The Status Date will show the current date.
   - The Status Updated By will display your Staff Person Logon ID.



N-FOCUS will verify if the Work Tasks you select to Accept are appropriate to your Position in the following ways:

- If a non-supervisory staff person selects the Work Task `Supervisory Review’, a message will display indicating the worker’s position does not have the Supervisory Review function. The Work Task will be deselected.
- N-FOCUS will compare the worker’s position function with the Work Task. If at least one selected Work Task does not match the position function, the message `At least one Work Task doesn’t match logged on function. Do you want to continue?’ will display.
  - The worker has the option of accepting all the Work Tasks or only accepting the Work Tasks that match their position function.



Once a Work Task is accepted, access the windows within N-FOCUS that are needed to complete the task. You can navigate directly to various windows within N-FOCUS from the List Master Case Alerts/Work Tasks window by using the toolbar icons or the Goto menu.

Note: If two people pull up the same Work Task, the first one to mark it as `Working’, by clicking the Accept pushbutton, will be the person to whom the Work Task is assigned. The second worker’s window will not refresh until they try to accept the same Work Task. The window will then refresh, and will show the Logon ID of the worker who first accepted the Work Task in the Status Updated By column. If the second worker does not take note of the Logon ID in the Status Updated By column, they may believe they are the worker assigned to the Work Task.

Because of randomization that takes place in the programming within N-FOCUS, the likelihood of this occurring is minimal and will become even more so as more cases are added to the Universal Caseload. It is important, however, for staff to make it a habit of looking at the assigned Logon ID in the Status Update By column to ensure they are working on Work Tasks to which they have been assigned.

Detail Work Task Window (New)

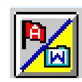
The Detail Work Task window will display the program or programs that pertain to the specific Work Task on 15 of the 24 available Work Tasks. To access this window, do one of the following from the List Master Case Alert/Work Task window:

- Highlight the appropriate Work Task and click the Open icon
- Double click the appropriate Work Task

Returning to the List Master Case Alert/Work Task Window (New)

Return to the List Master Case Alert/Work Task window by clicking the Alerts/Work Task toolbar icon.

The Alerts/Work Task tool bar icon is located on the following windows:



- 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

Completing a Work Task (New)

When the work associated with the Work Task is completed, the worker must complete the Work Task to remove it from their Work Task List.

To Complete a Work Task, follow these steps:

1. Select the Work Task.
2. Click the Completed button.
   The Work Task will be removed from the list.

Note: When the Work Task is completed, the Mode of the case will be updated as appropriate. All of the fields on the Detail Work Task window will disable, except for the Return to Unworked push button.

Returning a Work Task to Unworked (New)

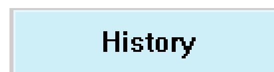
There may be times when it is determined that a Work Task that was Accepted by you should not be worked by you. This may be due to a conflict of interest or some other circumstance. Should this occur, you will need to reject the Work Task by returning it to Unworked status.

To Return a Work Task to Unworked status, follow these steps:

1. Select the Work Task.
2. Click the Return to Unworked button.
   The Work Task will be removed from the list and presented to the next staff person who matches the required Language, Function and Service Delivery Group for the Work Task.

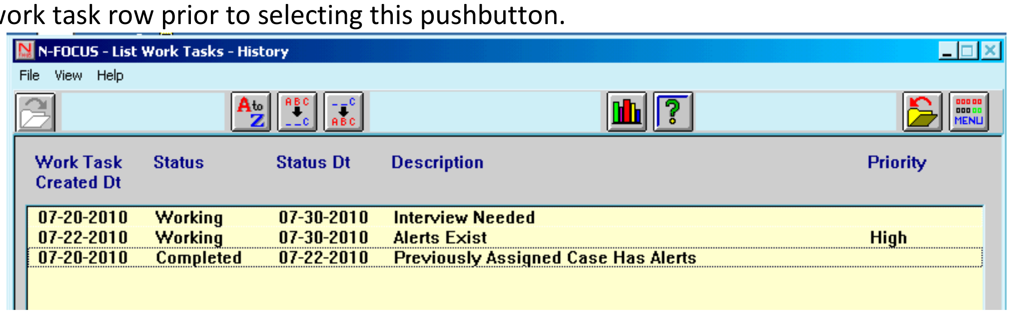
   Note: The Logon ID of the worker who returned a Work Task to Working Status will display in the Status Last Updated By field until another person accepts the Work Task.

Viewing Work Task History (New)



Viewing work task history may be beneficial in helping the worker to become familiar with the case and the actions which have taken place.

To view the history of a Master Case's Work Tasks, click the History pushbutton. It is not necessary to select a work task row prior to selecting this pushbutton.



Directed Work Tasks (New)

Work Tasks are directed in four different ways:

1. Directed to a worker based on the worker's position Function, Service Group and Language
2. Directed to a Supervisor
3. Directed to a Lead Worker
4. Directed to a Master Case Mode

The following table outlines Work Tasks and the specifics of how they are directed:

Work Tasks Directed to Interviewing		
Work Task	**Priority**	**Description**
Interview Needed – Expedited SNAP	High	This is a high priority Work Task created when an application is register and tied that contains Expedited SNAP.
Interview Needed		This is a Work Task created when an application is register and tied that contains at least one program which requires an application, but does not contain a SNAP application which requires expedited processing.
Interview Not Held – Review for Denial	High	This is a batch created high priority Work Task which will be created when an application for a program case requires an Interview and that interview has not been held in the first 30 days.
Interview Not Held – Review for Closure		This is a batch created Work Task when an active case being reviewed requires an interview and that interview has not been completed.

Work Tasks Directed to Processing - Initial		
Work Task	**Priority**	**Description**
New Case		This Work Task will be created when an application is registered and tied for a case (Initial or Review) that does not require an interview. It can also be manually created if necessary. The receiving worker will determine what verifications are needed and will send a Verification Request, or if all verifications were sent, will manually create a `Case Ready for Final Processing' Work Task to indicate the case is ready to finish the eligibility determination.

Work Tasks Directed to Processing Daily		
Work Task	**Priority**	**Description**
Failed to Attend Initial EF Appointment	High	This is a high priority Work Task that will be manually created by Employment First (EF) staff when an applicant does not attend an initial EF appointment.
EF Contract Signed		This is a Work Task that will be manually created by EF staff to notify ACCESSNebraska that the ADC client has signed the EF contract.

Work Tasks Directed to Processing Ready		
Work Task	**Priority**	**Description**
Case Pending 30 Days – Review for Status	High	This Work Task is a high priority, batch created Work Task when a case has had an interview, but is still pending after 30 days.
Case Ready for Final Processing		This Work Task is manually created, usually by an Interviewer or Processer, to indicate that the case is ready to finish the eligibility determination or redetermination. Priority can be manually set to High before saving if the case is nearing it's deadline for processing.

Work Tasks Directed to Supervisor Review		
Work Task	**Priority**	**Description**
Sanction Recommended	High	This is a High priority, manually created Work Task that an EF Worker will
Supportive Service Request	High	This is a manually created Work Task that will be created when Supportive Services need supervisor approval.

Work Tasks Directed to a Lead Worker		
Work Task	**Priority**	**Description**
Review Case for Customer Appeal		This Work Task will be manually created by any worker who receives information that a customer is appealing a decision. A Lead Worker in Processing will assign themselves as an Additional Worker to the case and will handle preparations for the appeal. This Work Task can only be worked by a Lead Worker.
State Review Team Request		This Work Task will be manual created by any worker who receives information that a customer needs State Review Team involvement. A Lead Worker will assign themselves as an Additional Worker to the case and will gather information necessary to send to the State Review Team. This Work Task can only be worked by a Lead Worker.

Work Tasks Directed to a Lead Worker		
Work Task	**Priority**	**Description**
Case Has Under/Overpayment		This Work Task will be manually created by any worker who becomes aware that a case has under or overpayments that need to be worked. A Lead Worker will assign themselves as an Additional Worker to the case and will run budgets to create the overpayments and create an Accounts Receivable. This Work Task can only be worked by a Lead Worker.

Work Tasks Directed to Master Case Mode **If MC Mode = Interviewing, will go to an Interviewer** **If MC Mode = Processing, will go to Processer – Daily** **If MC Mode = Change Management, will go to a Change Manager**		
Work Task	**Priority**	**Description**
Alerts Exist		This is a Work Task that is created online or in batch when an alert, identified as needing Work Task notification, is created. There are 101 alerts that have been identified as needed for a UC case. Of those 101 alerts, 63 of them will create a Work Task. There may be multiple alerts for a Master Case but only one Unworked `Alerts Exist' Work Task.
Case Pending 45 Days – Review for Status		Batch Work Task run when an ADC case has been pending for 45 days.
Case Pending 60 Days – Review for Status		Batch Work Task run when any UC case has been pending for 60 days.
Case Pending Over 90 Days – Review for Status		Batch Work Task run when any UC case has been pending for more than 90 days.
Duplicate Application Received		This is an online Work Task that will be created when an application is tied with the reason of Duplicate.
EF Referral Needed	High	This is a high priority, batch created Work Task that is created if an ADC interview has been held but no EF referral has been made. It may also be manually created if necessary.
Energy Application Received	High	This is a high priority, manually created Work Task that will be created if an application is received for Energy.
Previously Assigned Case Has Alerts		This is an online Work Task that will be created when a case goes from Assigned to Universal Caseload and still has open alerts.

Work Tasks Directed to Master Case Mode **If MC Mode = Interviewing, will go to an Interviewer** **If MC Mode = Processing, will go to Processer – Daily** **If MC Mode = Change Management, will go to a Change Manager**		
Work Task	**Priority**	**Description**
Sanction Approved		This is a manually created Work Task that a Supervisor will creat4e when they approve than a sanction should be imposed on a customer. They will need to identify the program case.
Supportive Service Decision	High	This is a manually created Work Task that a Supervisor will create when they have made a decision on a Supportive Service Request. Details will be included in the narrative.

Manually Created Work Tasks (New)

Workers, Lead Workers and Supervisors will need to create work tasks in order to move a Master Case through to the next step in processing. The Priority indicator can be set to High, if applicable, before saving the Work Task.

The following are the Work Task Descriptions that area available to be manually created:

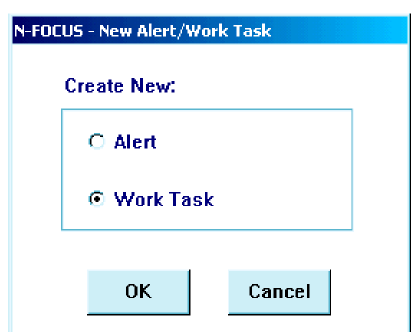
- Case Has Under/Overpayments
- Case Ready for Final Processing
- EF Contract Signed
- EF Referral Needed
- Energy Application Received
- Failed to Attend Initial EF Appointment
- New Case
- Provider Approved/Denied
- Review Case for Customer Appeal
- Sanction Approved
- Sanction Recommended
- State Review Team Request
- Support Service Request
- Support Service Decision

When a Work Task is created, the N-FOCUS will read the language of the Master Case Person and the ages of the active household members to automatically set the Language and Service Delivery Group fields. The Service Deliver Group can be changed if it is determined that the composition of the household has changed.

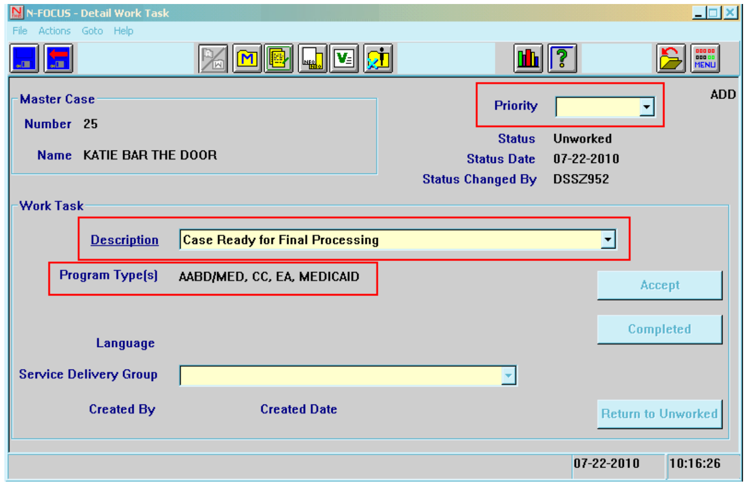
Creating a Work Task (New)

To create a new Work Task 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 Work Task radio button.
3. Click OK.
4. Select the Priority from the drop down, if appropriate.



Note: Selecting the Priority is only necessary if the Work Task is to be designated as a High Priority.



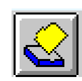
5. Select the appropriate Description from the drop down.

   Note: For several of the Work Tasks, including `Case Ready for Final Processing' a `Select Programs' pop up will display requiring you to select the applicable Programs. The selected Program Types will display in the Program Type(s) field.

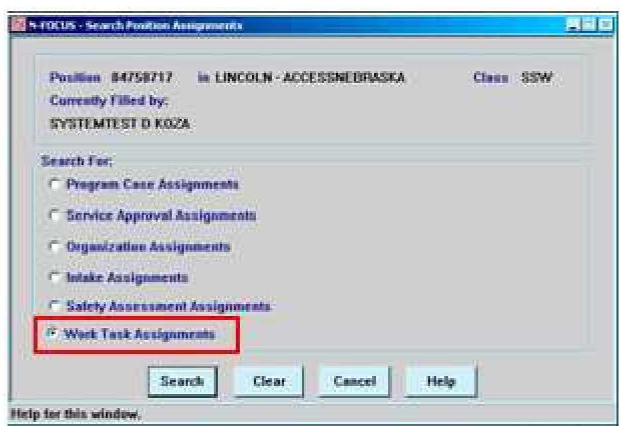
6. Click Save or Save and Close.

   Note: Once the Work Task has been saved, only Supervisors and Lead Workers have the security level required to change the Priority of a Work Task.

List Assigned Work Tasks Window (New)

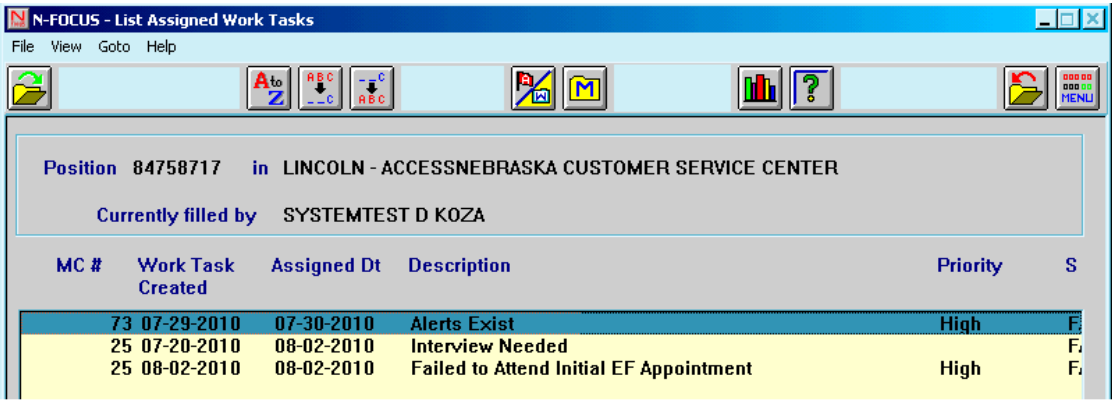


In the event of an unexpected absence, Supervisors and Lead Workers have the ability to see if a worker has any Work Tasks in working status. To view a worker's list of assigned Work Tasks, follow these steps:



1. From the worker's Detail Office Position window, click the Assignments icon.
   The Search Position Assignments window displays.
2. Select the Work Task Assignments radio button.
3. Click Search.

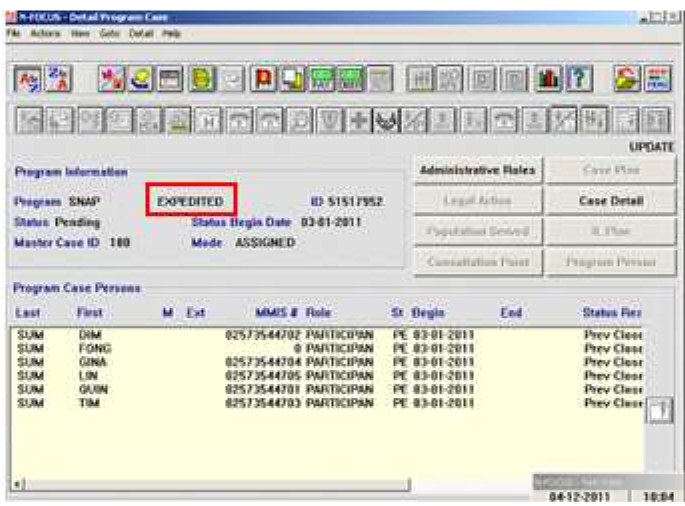
If the worker does not have any Work Tasks assigned to them, a message `No Assigned Work Tasks Exists' will display. If the worker has Work Tasks assigned to them, the List Assigned Work Tasks window will display.



Note: The above steps can also be followed from the List Office Position window by selecting the worker from the list and clicking the Assignments icon.

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.



SNAP Automated change from 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)

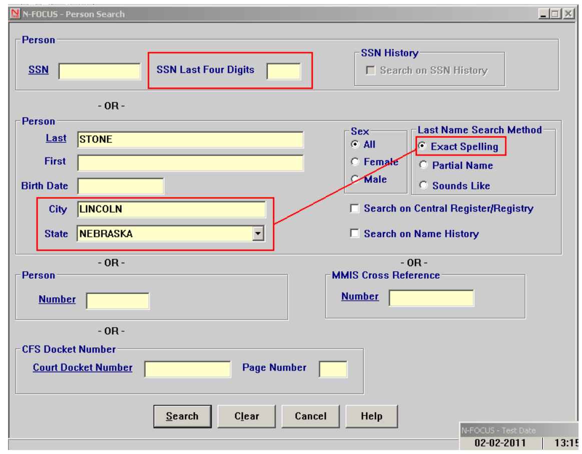
When creating an External Overpayment in the Mainframe part of N-FOCUS, persons who are listed as case representatives in a SNAP case can be selected as the Responsible Person for the Overpayment.

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

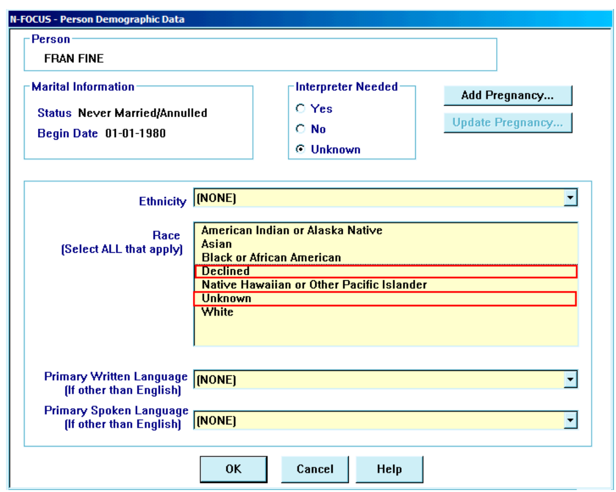


Person Demographics Data Window - Race Code (Change)

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

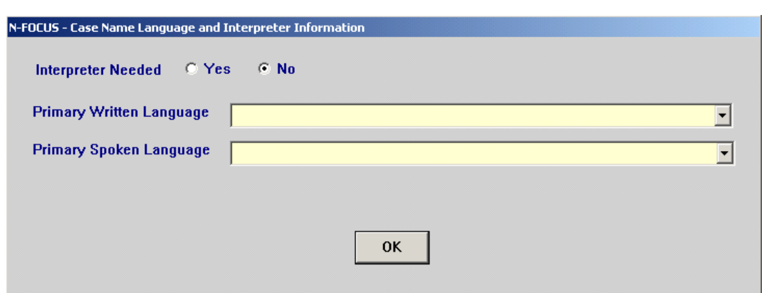
Multi selecting of in the Race field is allowed.

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)

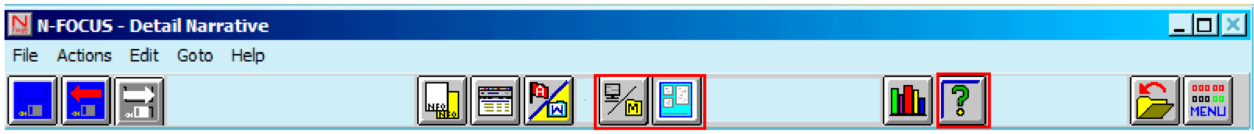
The Case Name Language and Interpreter Information window will display when a Program Case Name is created or changed, if the Interpreter Needed (Y or N) information was not previously recorded for the Case Name Person (as indicated in the above screen print of the Person Demographic Data window).



Work Tasks created for the Master Case will reflect the Primary Spoken Language of the Master Case Person.

Detail Narrative Window Icons Added (Change)

The E-App Application Summary icon, File Director icon and the Help icon have been added to the List Narrative and Detail Narrative windows.



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 display.

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.

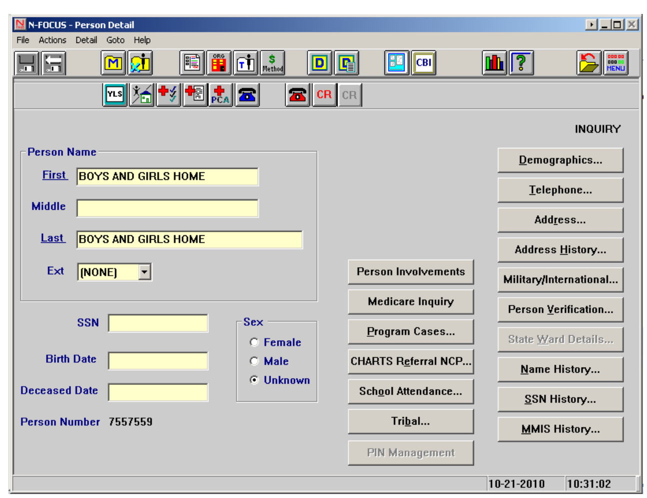
SDX Interface (Tip)

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

Select Worker Name

When creating new correspondence in the Universal Caseload, you will continue to see the Select Worker Name window. Click OK and continue. The correspondence will still contain the Universal Caseload information as indicated above.

This pop-up window will be removed with the March 2011 release.

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 – CFS and Speednote – EA.

- **Speednote – EA** is available from Detail Master Case, Detail Program Case, Detail Accounts Receivable, and Detail Service Needs Assessment.

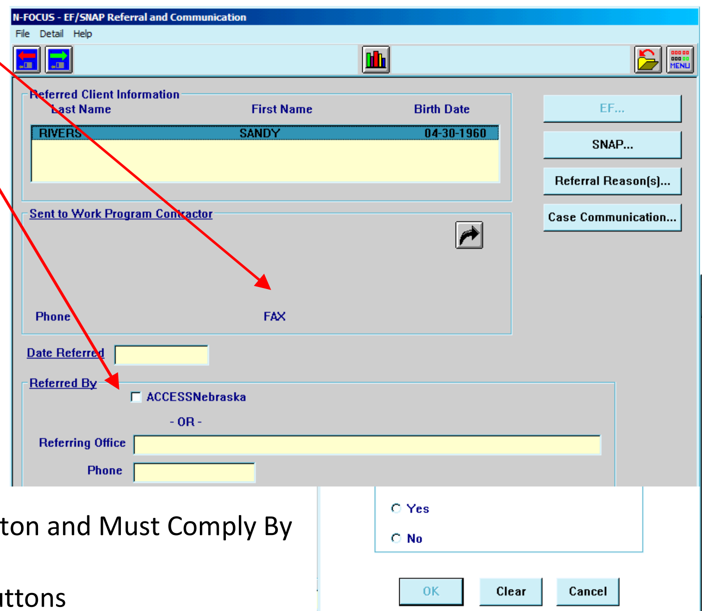
- **Speednote – CFS** is available from Detail Program Case, Detail Allegation and Detail Organization & Home Details.

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.

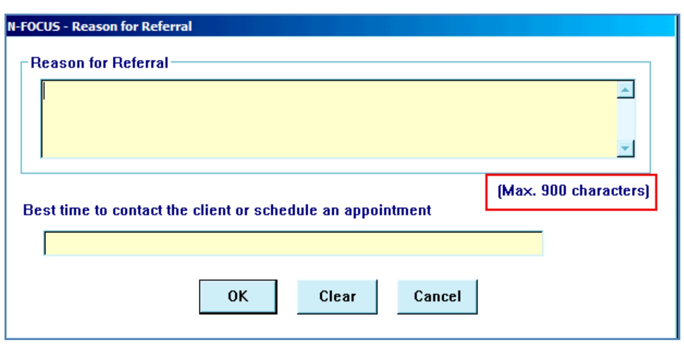
EF/SNAP Referral and Communication WP-1 (Changes)

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

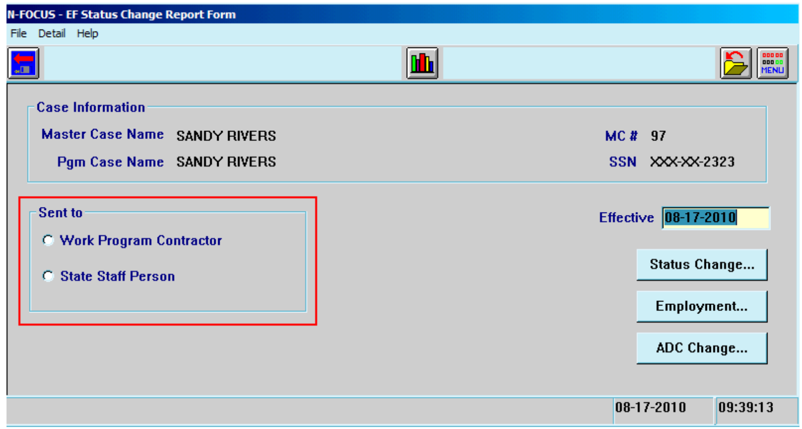
- References to the Food Stamp Program (FSP) have been changed to SNAP.
- The FAX Number has been added to the window and the correspondence.
- ACCESSNebraska has been added to the Referred By field.
- The SNAP Referral and Communication window is no longer in use but the window has been changed to contain 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):

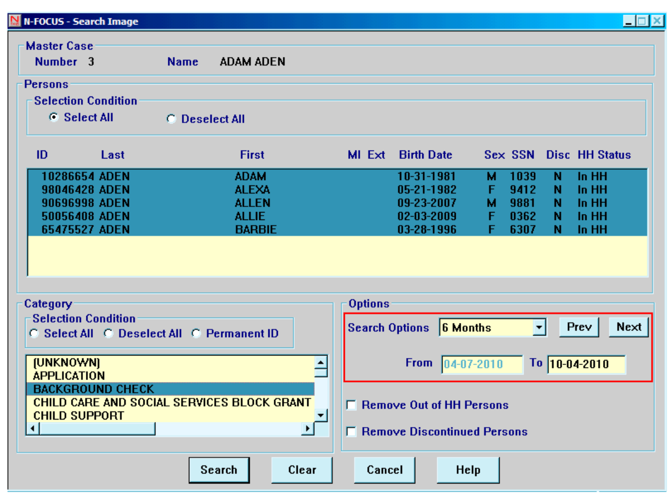
- The WP3 will no longer be used by SNAP for Employment and Training.
- The Sent to Worker Program Contractor and State Staff Person is now selected with a radio button.
- The Sent By information is no longer requested.
    - Refer to the Correspondence Changes for Universal Caseload to see how the contact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



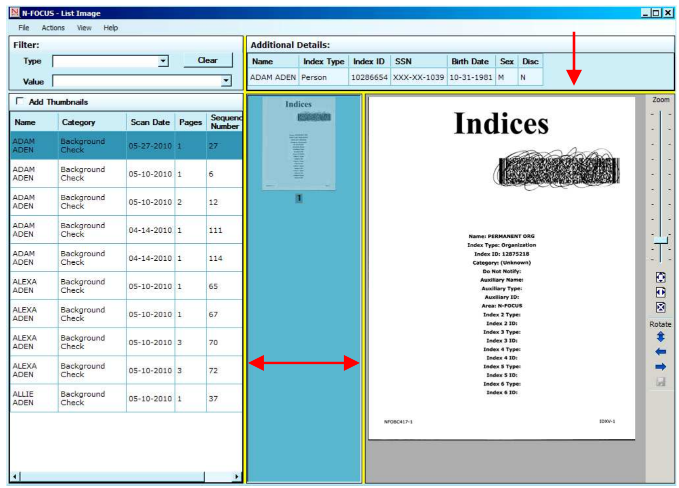
- Prev and Next Buttons

- 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 opened. 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.

Administrative Reports for Universal Caseload Monitoring (New)

The following administrating reports will be generated daily, weekly and monthly to assist Supervisory and Lead Worker staff in monitoring the Universal Caseload staffing requirements.

Daily Administrative Work Task Report

This report will give a high level view of the work and available work force. The report has sections for both Work Task information and staffing information and will display how many `Unworked’, `Completed’ and `Working’ Work Tasks there are at the beginning of each business day as well as the total UC staff positions by function.

Supervisory and administrative staff will be able to use this report to determine if staffing levels and assignments to functions are adequate for the number of Work Tasks being generated by N-FOCUS case events. Search criteria will be available to search by Office or Geographical area and function, service delivery group and/or language.

This report will be used in conjunction with the Weekly Work Task Report and Monthly Work Task Reports.

Weekly Administrative Work Task Report

The information which will be included in the Weekly Work Task Report is the number of Work Tasks which were created for the previous week (i.e. Create Date = Monday, Tuesday, etc) and the number of Work Tasks which were Completed during the previous week (i.e. Status is Completed and Status Date = Monday, Tuesday, etc), as well as a summary of Staffing positions by language, function and Service Delivery Group. This report will be available each Monday.

The report addresses the quantity of new and completed Work Tasks for each day so that supervisory and administrative personnel can understand how to allocate staff. This report is to be used to support the monitoring and adjustment of Universal Caseload work by supervisory and administrative staff.

This report will be used in conjunction with the Daily and Monthly reports, to determine if staffing levels and assignments to functions are adequate for the number of Work Tasks being generated by N-FOCUS case events.

Monthly Work Task Activity Report

This monthly report will be generated the first Monday of each month and will contain information outlining, for each worker, a count of how many Work Tasks of each type, language, and service delivery group were completed. Each different Work Task that the worker completed will be listed. If a person did not complete a particular Work Task type, that type will not be listed.

There are two versions of this report, Monthly Work Task Activity Report – Supervisor and Monthly Work Task Activity Summary – State. The information in the reports will available to be viewed by supervisory level, office level, Service Area level, and State Level.

The Monthly Work Task Activity– Supervisor Report is broken down by specific Work Task, priority, language and average completed per business day. This report will show how much work related Work Tasks to each worker accomplished during the month and can be used by Supervisors to monitor, train and adjust staff expectations and assignments.

The Monthly Work Task Summary – State Report indicates totals of how many Work Tasks were completed by all workers during the calendar month. The categories of this report are Work Tasks Directed to Function or Undirected in addition to detail regarding Service Delivery Group, Priority and Language. The Summary includes a table of how many total Work Tasks were created during the calendar month throughout the State.

This report will be used in conjunction with the Daily and Weekly reports, to determine if staffing levels and assignments to functions are adequate for the number of Work Tasks being generated by N-FOCUS case events.

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’.

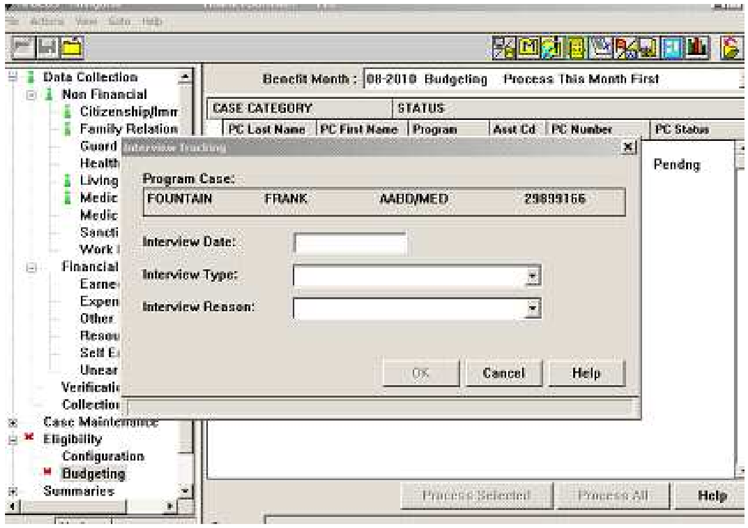
Race Code Options (Change)

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.

Expert System

Interview Tracking in Expert System for UC Program Cases Only (New)

Interview Tracking information is collected for pending ADC, AABD, MED and CC on the Universal Caseload.



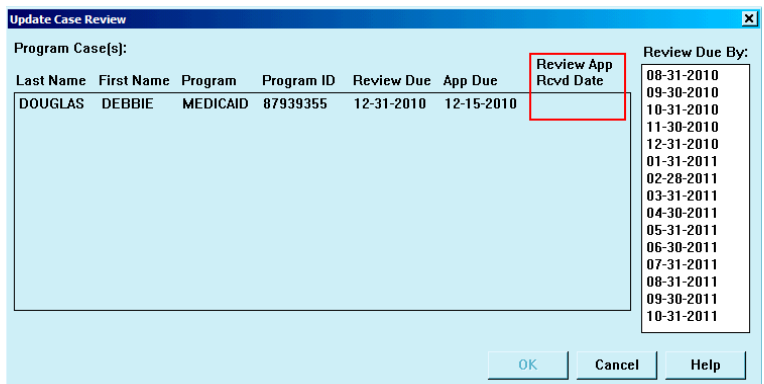
During the budgeting process, if the case mode is Interviewing and no Interview data has been recorded in the previous 45 days, the following Interview Tracking window will display. The worker will enter the Interview Date, Type and Reason.

When the case is checked in, a row of Interview Tracking will be created.

Review Tracking (Change)

Viewing the Review Application Due and Received Date in Expert System (Change)

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 by the system. These dates are not updated by workers.

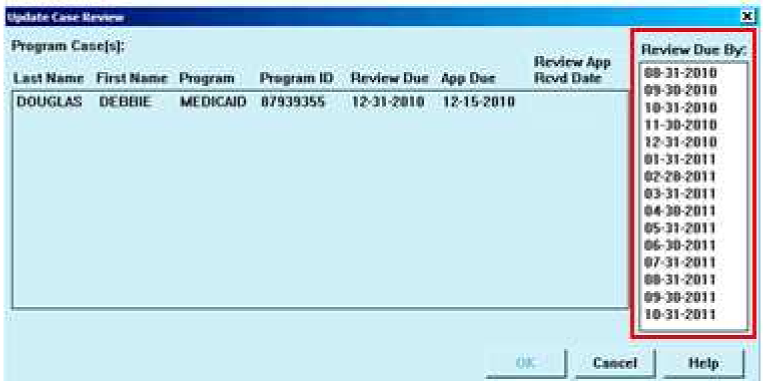


Note: Refer to the General Interest and Mainframe Topics section of this document to see how to view the Application Received Date in the Mainframe.

Updating Case Review Date (No Change)

When the Review is completed the worker updates the Review Due Date in any of 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

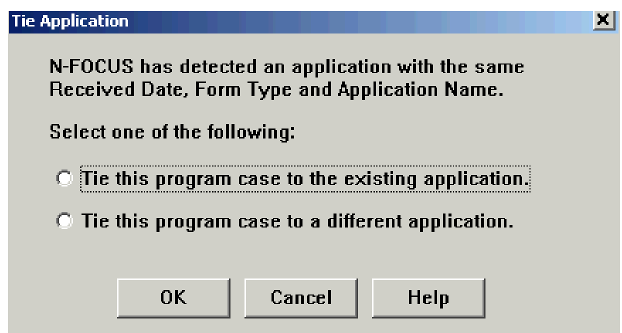


When the Review Due Date is updated the system will mark the row of Review Tracking as completed and move the row to History. The actions can be tracked in History from the Detail Review Tracking window.

- **Mode Change**: Changed to Change Management
- **Work Task**: No

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.