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# *N-FOCUS Major Release*

## *MLTC*

### *August 7, 2016*

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A Major Release of the N-FOCUS system is being implemented August 7, 2016. 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.

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

**Developmental Disabilities and Resource Development Programs:** N-FOCUS users who work directly with Developmental Disabilities programs and Resource Development. Those who work with the related Medicaid cases and functions should read these sections.

**Note:** These sections will only appear when there are tips, enhancements or fixes specific to Development Disabilities Programs and Resource Development.

**Interfaces, Correspondence, Alerts and Document Imaging:** All N-FOCUS users should read these sections.

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

**Note:** When new functionality is added to N-FOCUS that crosses multiple topics (ie General Interest and Mainframe, Alerts, Correspondence, Interfaces, Alerts, Document Imaging, Expert System etc) the functionality will be described in one primary location. Alerts, Work Tasks and Correspondence etc that are part of the new functionality and will be documented in the location that best describes the entire process and may also be discussed in the topic specific area.

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## General Interest and Mainframe

### Security Changes for Master Case (Change)

N-FOCUS is establishing a method to secure information and mask other identifying information for clients, who due to involvement in a domestic violence situation or another type of confidential situation need to have the access to their information in N-FOCUS restricted. When the Master Case and Persons are Restricted, the word **RESTRICTED** will display in red on the Detail Master Case window and on the Person Detail window of persons who are In the Household, Pending or Active in Program Cases in the MC.

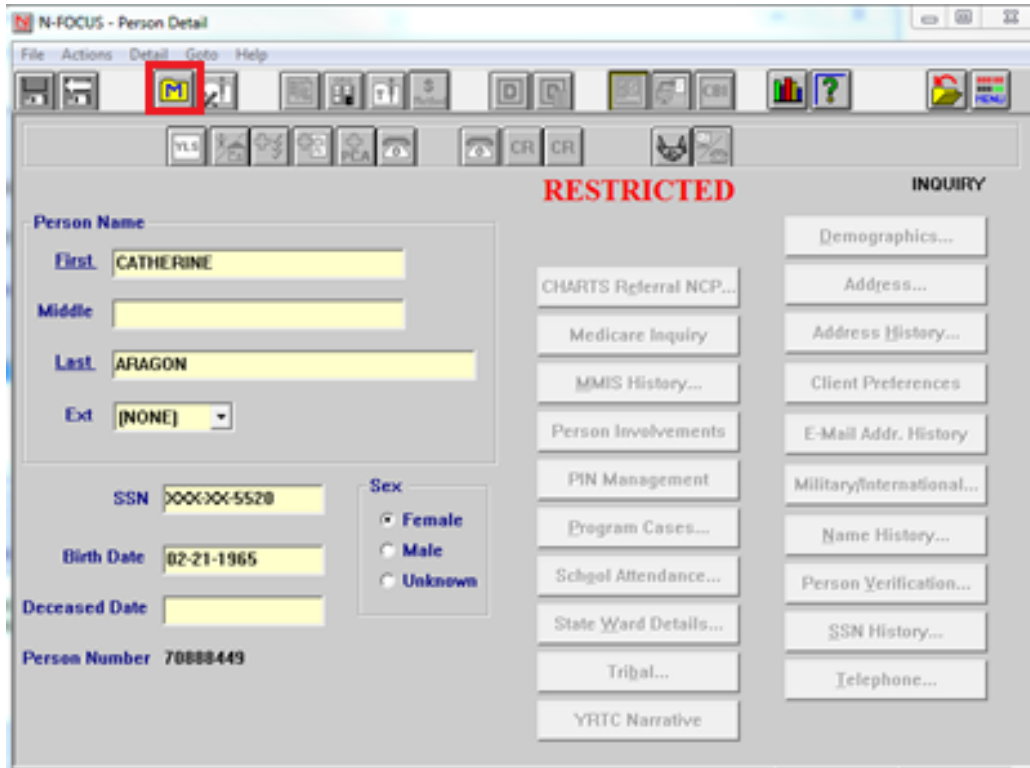
This gives users a visual cue of the need for thorough confidentiality regarding the client.

When the Restriction is added, the ability to view information and work in the Master Case will be dependent upon the security of the user. See the section Security Access after a Restriction has been added for more information.

Picture of Master Case and Person Detail windows with restriction added, and the logged on user does not have the ability to view information. The Master Case will be in Inquiry status, with only the Assignment Icon enabled. This allows them to determine who the Assigned worker is. Users can not view narrative, budget summaries, Interface information, or flow to the Program Cases.



The only Icon enabled on the Person Detail window will be the MC icon, allowing users to go to the Detail Master Case window, where they can determine who is the assigned worker. No other icons or buttons will be enabled. Only the last four digits of the SSN will display.



### Access when the Master Case is Restricted (New)

When a Master Case is Restricted, the access for users is dependent on either their Security or if they are the Assigned worker of a program case in the Master Case.

#### **Assigned Worker**

If the logged on worker is the Assigned worker or Additional Worker of at least one program case in the Master Case, the Master Case will be in Update status and all Buttons and Icons will be enabled for them. They will be able to view all information and work both in the Mainframe and Expert systems.

#### **Unassigned Worker**

If the logged worker is not assigned to any program cases in the Master Case, their access depends upon their Security. EA and MLTC worker will have Inquiry only status. The only Icon enabled will be the Assignment Icon, which allows users to determine who the Assigned Worker is. They will not be able to view any Program Case information, Interfaces, Narrative or Budget summaries. They will be unable to check out the Master Case to Expert.

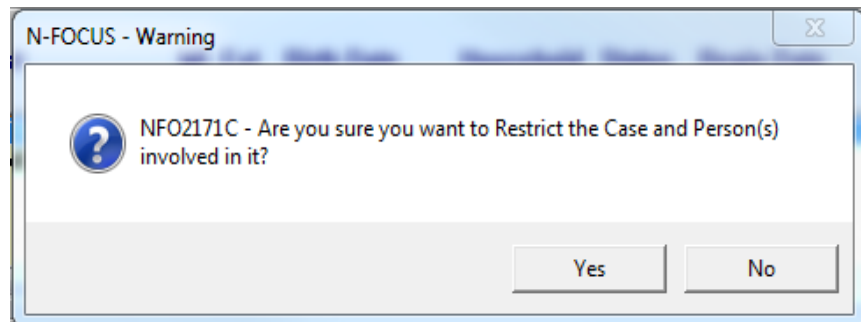
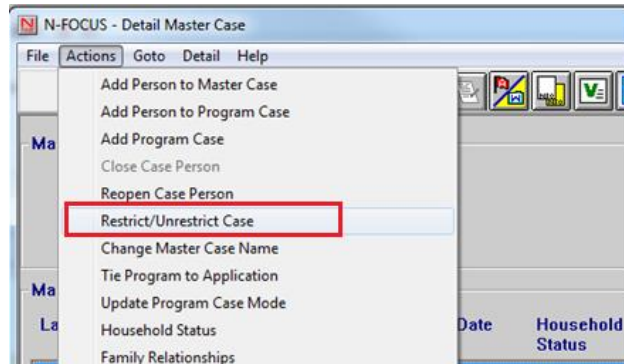
#### **Other Workers**

The security of other staff, such as Supervisors, CFS workers, App Management staff, Tribal Protection and Safety workers, Hot Line workers and Policy and Program Specialists, gives them full access even if they are not the Assigned worker of a program case.

## Adding the Restriction (New)

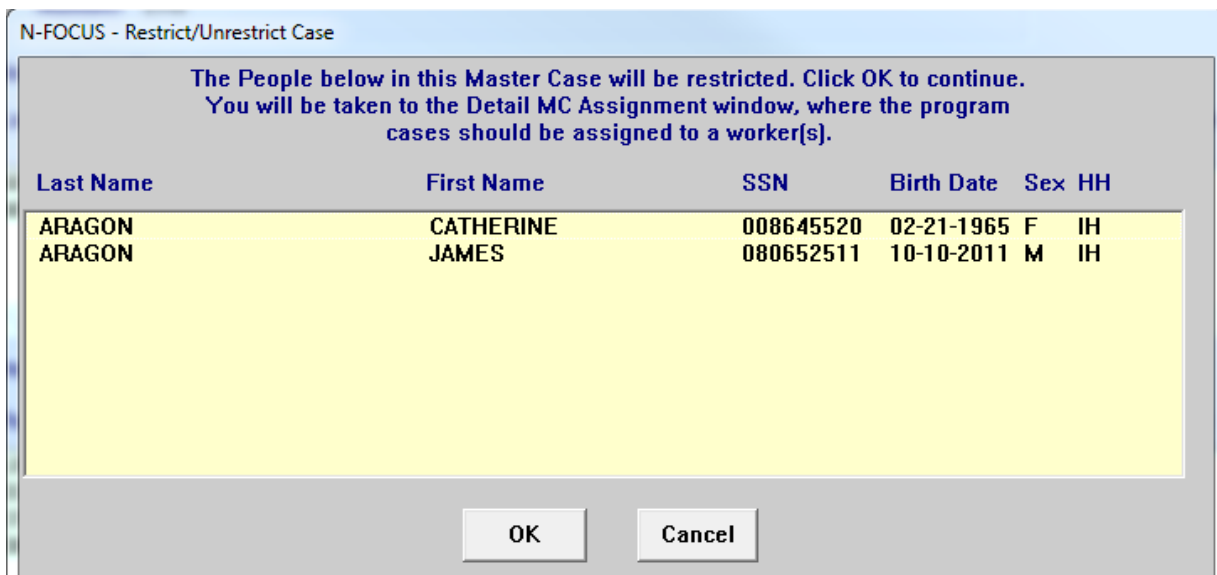
The Restriction can be added only by Supervisors. When a decision has been made to add the Restriction to the Master Case and the Persons in the Master Case, click Action>Restrict/Unrestrict Case.

The next window will ask users to confirm they want to restrict the Master Case. If Yes is selected, the Restrict/Unrestrict Case window opens.



The Restrict/Unrestrict window displays all person in the Master Case who are Pending or Active in a program case or In the Household. (There is no need to highlight any of the persons displayed on the window.)

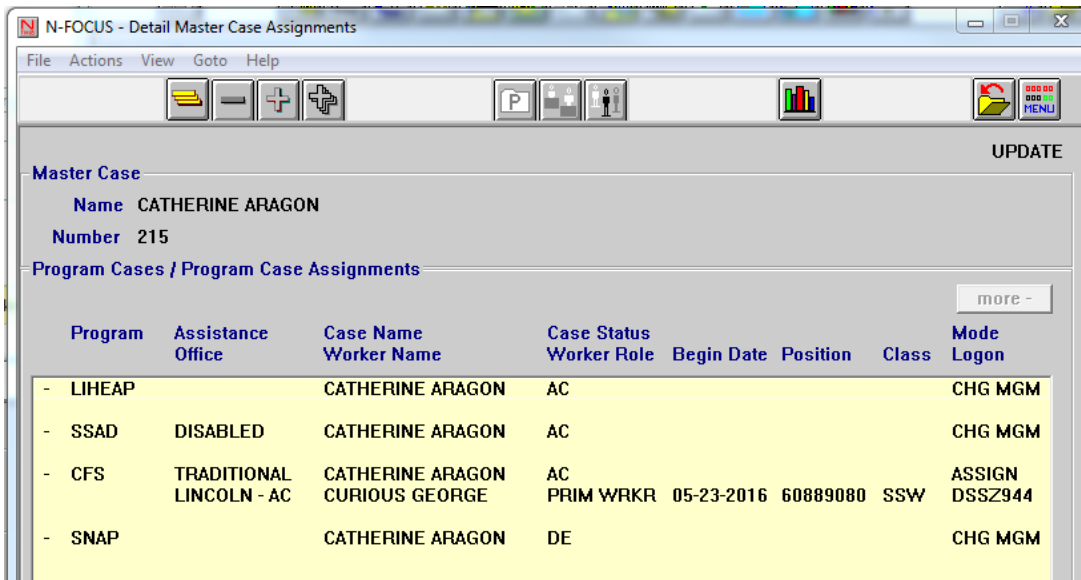
These persons will be Restricted.



When OK is selected, the user is taken to the Detail Master Case Assignment window, where the program cases should be assigned to a worker. All program cases in the Master Case

regardless of status, (PE, AC, CL or DE) should be assigned to workers during the process of setting the Restricted Indicator, however it is not mandated.

**It is possible to only assign some program cases and leave others in UC mode, but it is not recommended as Program Cases in UC mode may generate Work Tasks.**



### Note Regarding UC Mode and Work Tasks (New)

If a program case remains in UC Mode after the Restriction is added to the MC, and Work Tasks are created, users who accept Work Tasks from the Work Task Manager would be unable to work these as they are not the assigned worker for the program case. It is recommended that all program cases are Assigned to eliminate the creation of Work Tasks and any existing Work Tasks should be accepted and completed at the time the program cases are assigned.

### Removing the Restriction (New)

Removing the Restriction can be done by Supervisors, by selecting the Restrict/Unrestrict option from the Actions dropdown list on the Detail Master Case window. This action will also remove the Restriction from the persons in the MC.

### EA Queue and MC Restriction (New)

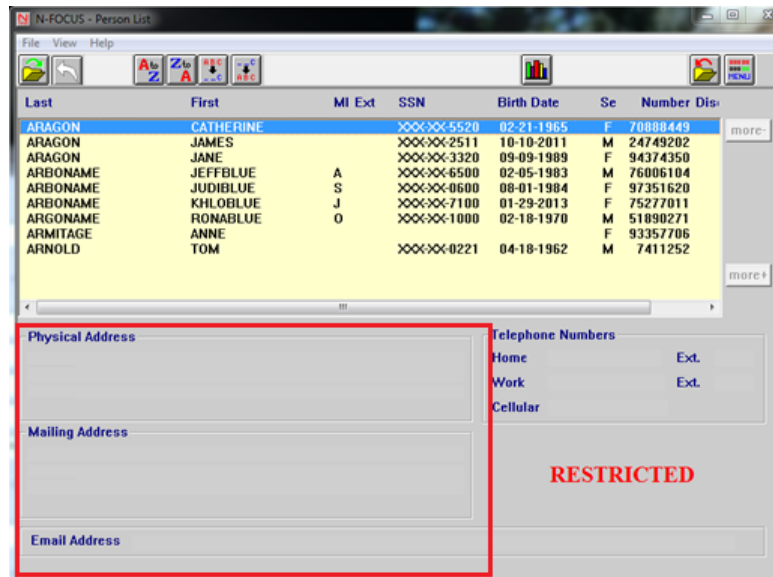
If the Master Case is in the EA Processing Queue when the Restriction is added and the Assignment is not changed, the Program Case(s) will be auto-assigned to the worker receiving the Master Case from the Queue. If the Program Case(s) should be assigned to a different worker, it can be done by the worker who received the Master Case.

## Search Options (New)

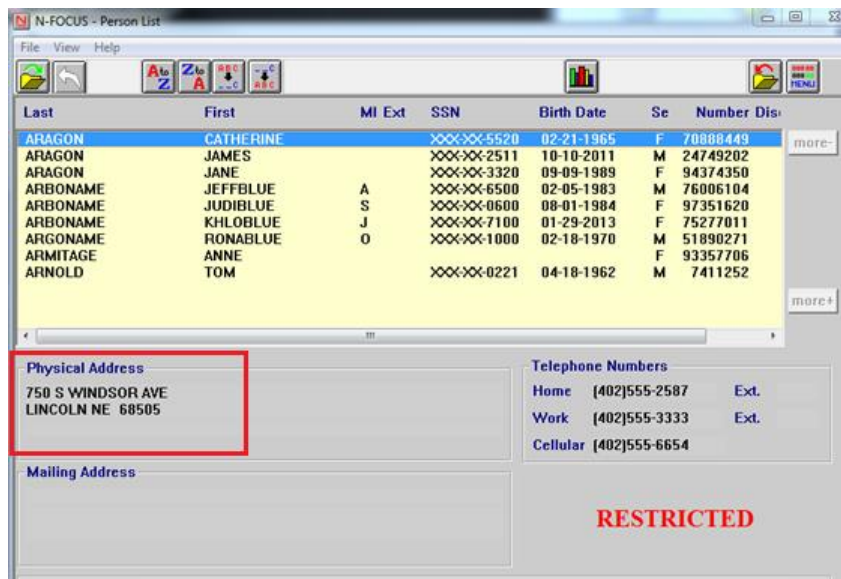
The information appearing on the Search windows will vary depending on the user's security.

### Person Search:

When searching by name, when the Person List opens, if the user selects a person on that window who is Restricted, no physical, mailing or email address or telephone information will display. The word Restricted displays. They can open to the Person Detail window, where they can flow to the Detail MC window to determine who the Assigned worker is.



If the user's security allows them access the restricted information, then the address information will display.





## Search by Phone

If their security does not give the user access the restricted information, the Restricted Person will not appear on the List Window:



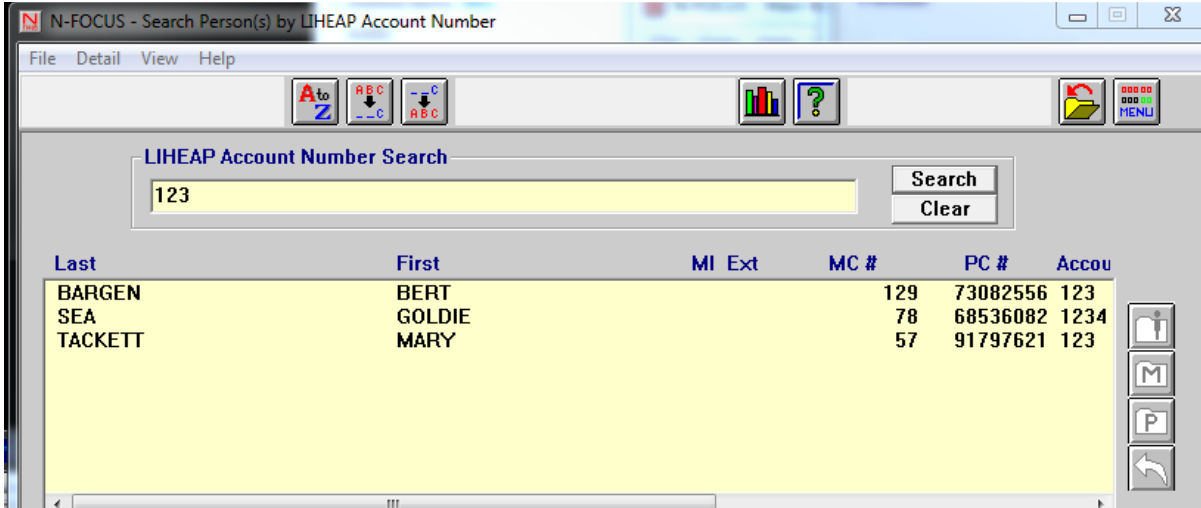
If the user has Security to view restricted information or is the Assigned worker for a program case in a Restricted MC, they will be able to view information for a Restricted Person.



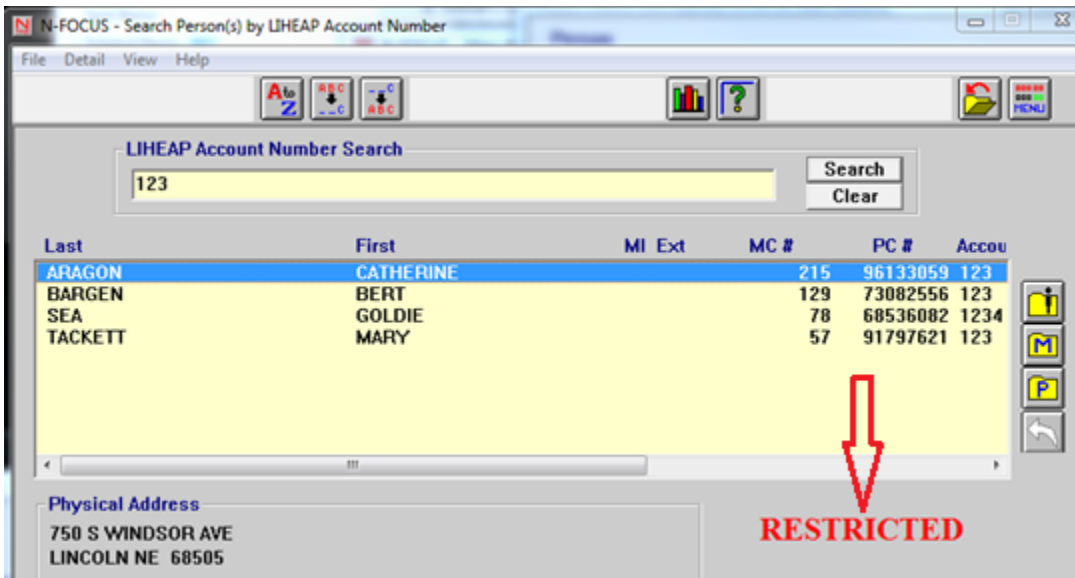


### Search by Account:

If the user doesn't have the security to view restricted information, it will not be included in the data. This user's security allows them to only view information regarding Restricted Master Case if they are the assigned worker to one of the program cases in the Master Case:

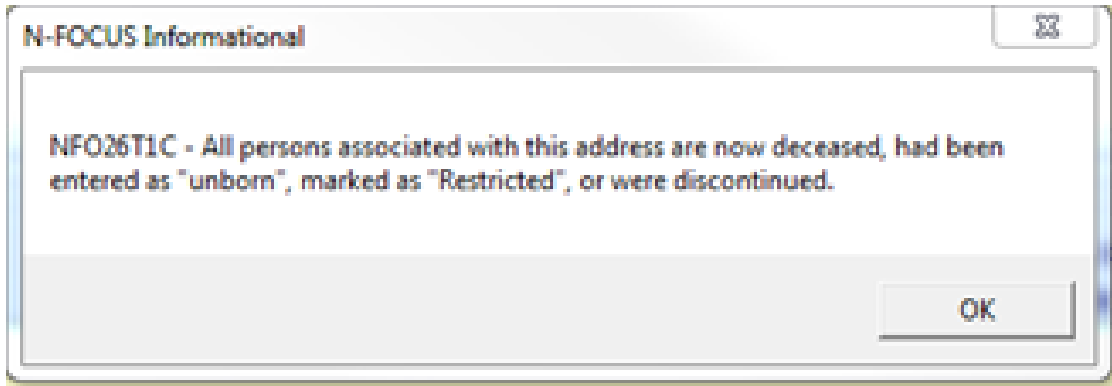


This user's security gives them access to all Master Case information, including Restricted Master Case information. When the row is highlighted, if the MC is Restricted, the term **RESTRICTED** appears to remind the user of the need to limit the information provided to callers.

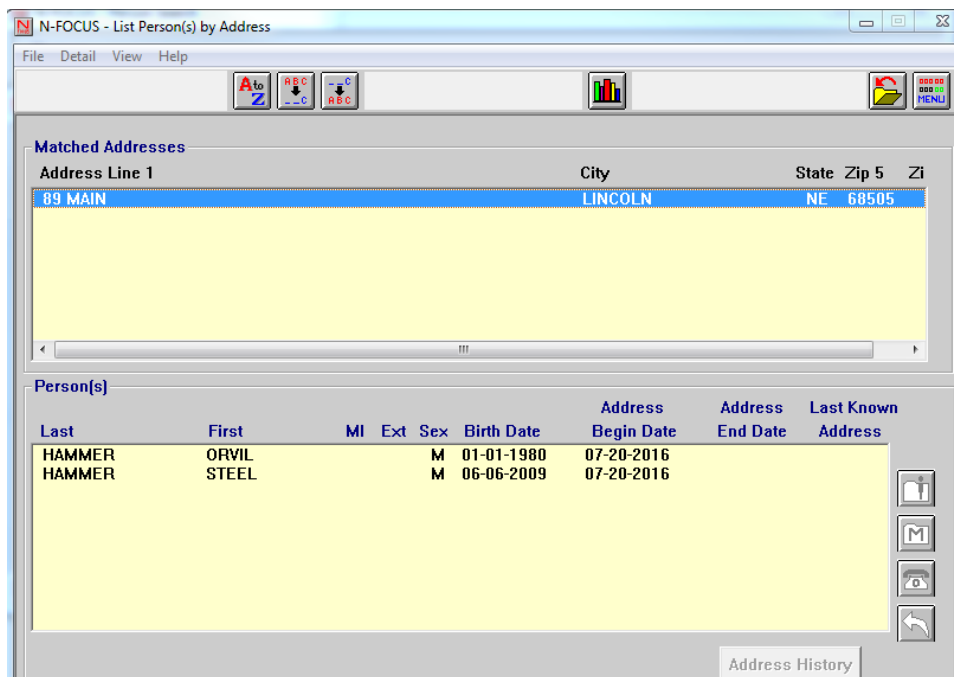


## Search by Address

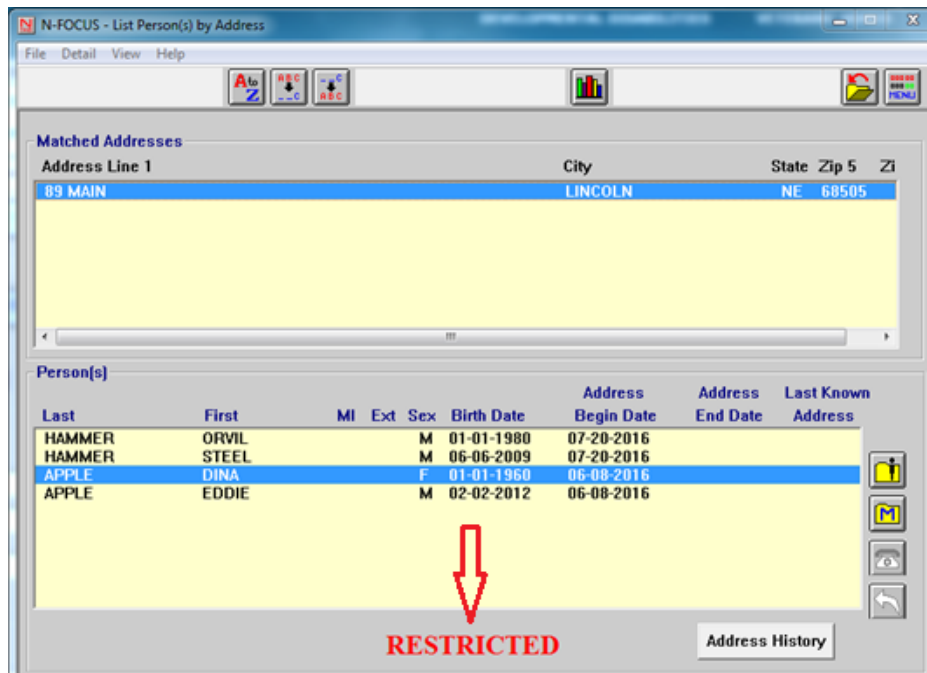
If all persons with that address are Restricted, then the following message appears:



If some of the persons with that address are in a Restricted Master Case and others are in a Master Case that is not restricted, only the Persons who are not restricted will display:



If the worker's security gives them access to view information for a Restricted Master Case and Persons, then the window will display all persons at that address.



### Mainframe Programs for a Restricted MC (New)

When a Master Case contains only a mainframe Program Case; when the Program Case is Closed and the Person is made Out of Household, the Restriction remains on the Master Case.

### Expert system Changes to a Restricted MC (New)

- Only the Assigned worker or a worker with Security allowing them to work in the Master Case, can check out the Master Case to the Expert System.
- When a person is added or re-opened to a Program Case in Expert, when the Master Case is checked in, they will have the Restriction added to them.
- When a person is closed in all Program Cases and made Out of Household, when the Master Case is checked in, the Restriction will be removed from that person.
- If the person remains Active in at least one Program Case, or their Household status is In Household, the Restriction will continue even if the person is closed in other Program Cases.

### If a Person is in Multiple Master Cases (New)

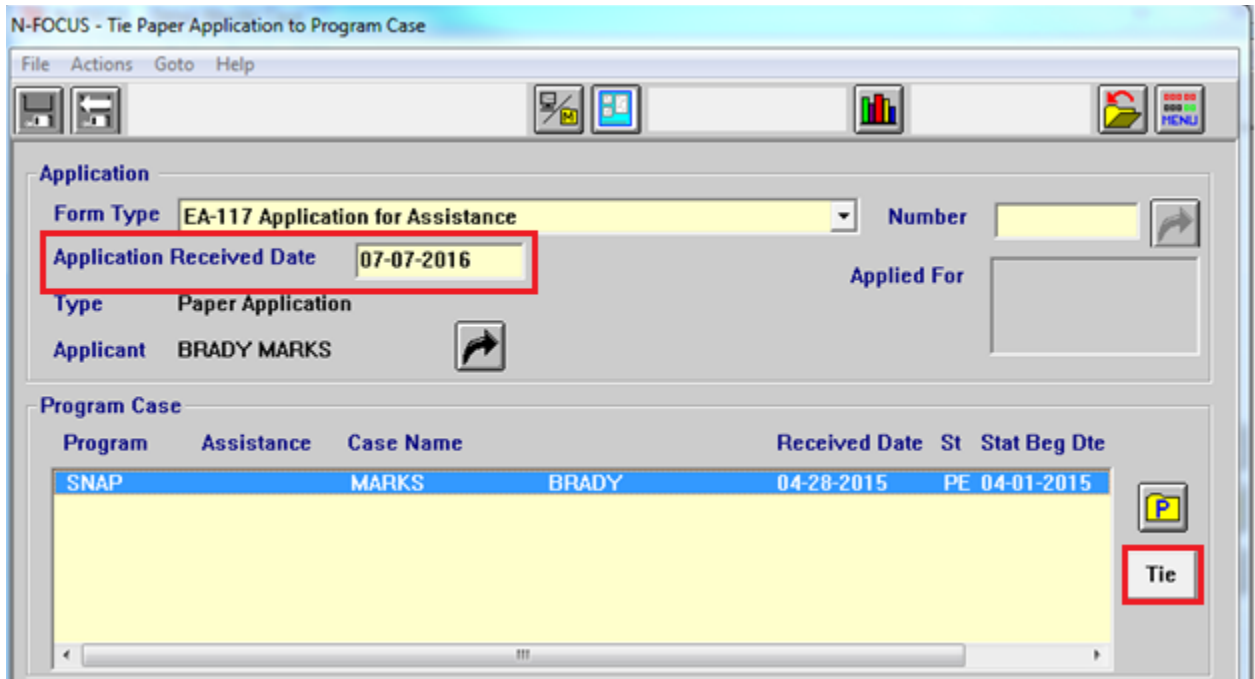
If a person is Restricted in a Master Case, and also in another Master Case which is not Restricted when users view the Unrestricted Master Case, Restriction will display on the Person Detail window, but all Icons and Buttons will be enabled. They will be able to check out the Master Case and work in Expert.

## Tie Paper Application Program Case Window

The following changes have been made to the Tie Application to Program Case window:

- The Application Received Date field now must be entered by the Worker in order for the Tie button to become active.

**Note:** This change affects all Economic Assistance and Medicaid Program Cases.



The screenshot shows the 'N-FOCUS - Tie Paper Application to Program Case' window. The 'Application' section includes a 'Form Type' dropdown set to 'EA-117 Application for Assistance', a 'Number' field, and an 'Application Received Date' field containing '07-07-2016'. Below this is the 'Type' field set to 'Paper Application' and the 'Applicant' field set to 'BRADY MARKS'. The 'Program Case' section displays a table with columns: Program, Assistance, Case Name, Received Date, St, and Stat Beg Dte. The table contains one row: SNAP, MARKS, BRADY, 04-28-2015, PE, 04-01-2015. A 'Tie' button is located at the bottom right of the window, highlighted with a red box.

Program	Assistance	Case Name	Received Date	St	Stat Beg Dte
SNAP	MARKS	BRADY	04-28-2015	PE	04-01-2015

## US Citizenship/Immigration (Change)

On the US Citizenship/Immigration Request window, it is no longer mandatory to enter an Alien Number when the Documented Non-Citizen or Naturalization Certificate are selected.


## Address History Window (Change)

The Address History window was getting full and not displaying all addresses. You may now scroll down to see up to 200 addresses.

## Healthcare Marketplace Application New Address Type – Residency (Change)

The Healthcare Marketplace Application has been updated to capture a residency address. If a person has provided an address outside of the state in which they were applying, a residency address will be collected and used to determine eligibility. When an applicant has a home and residency address, the residency address should always be used as the applicants' home address in N-FOCUS.

Start Section		
<b>Contact Information-ALBERT D'SOUZA</b>		
<b>Home Address</b> 123 MAIN ST DOVER, DE 19901	<b>Mailing Address</b> 123 MAIN ST DOVER, DE 19901	 <b>Residency Address</b> 196 OLD BRIDGE RD NEWPORT NEWS, VA 23608
<b>Phone/Email</b> 555-555-1212 (Home) (preferred)	<b>Language</b>	<b>Contact Preference</b> Mail
<b>Household Members</b>		

Family and Household Section			
<b>Address Information</b>			
<b>Name(s)</b>	<b>Home Address</b>	<b>Name(s)</b>	<b>Mailing Address</b>
JAMIE D'SOUZA 01-24-1964	45 WATER ST ANNAPOLIS, MD	ALBERT D'SOUZA 01-24-1964	123 MAIN ST DOVER, DE
ALBERT D'SOUZA 01-24-1964	123 MAIN ST DOVER, DE		
<b>Name(s)</b>	 <b>Residency Address</b>		
JAMIE D'SOUZA 01-24-1964	196 OLD BRIDGE RD NEWPORT NEWS, VA		
ALBERT D'SOUZA 01-24-1964			

## Resource Development

### RD - Add Program Services to Medicaid Organization (Fix)

Resource Development staff were able to add new Services for a MED Org by entering the number of the Service. MED Orgs must have Services added through Decision Point. This has been fixed. When workers try to add a new service, they will receive a message "Worker not allowed to pick this service, this service must be provided by Maximus".

## Developmental Disabilities

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### Eligibility Determination Process (Change)

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Enhancements have been made in N-FOCUS to assist in tracking the eligibility determination process for the Division of Developmental Disabilities. This analysis/development effort will continue with future releases.

This release includes:

Selected DD Staff will have the security to scan documents which are used for eligibility determination into the following categories:

- DD Adaptive Testing
- DD Appeal
- DD Application
- DD Correspondence
- DD IDR
- DD Medical
- DD other
- DD Psychological
- DD Special Education

Five (5) New Alerts:

1. DD Scanned Mail Received (Alert 529)
2. DDSC (Developmental Disabilities Service Coordination) case assignment changed (Alert 528)
3. Eligibility determination set to Eligible for DD client in N-FOCUS (Alert530)
4. 20 days since application received date in DDSC case but no Eligibility Determination recorded (Alert 531)
5. 30 days since application received date in DDSC case but no Eligibility Determination recorded (Alert 532)

The ability to add/change information on the DD Service Request Window has been removed. It is read only, and contains only historical information. Six reports dependent upon this information were discontinued.

A history of the Eligibility Determination has been added to display using the Details drop down on the Developmental Disabilities window. This history window will include the determination (eligible or not eligible) the determination date, who recorded the eligibility information and when. Currently only the current instance of DD Eligibility Determination is displayed.

The new DD paper application form number (DD-10) has been added to N-FOCUS so that this paper application can be tied to a DD program case. When tying to a DD case, the tie reasons will be limited to either Initial or Duplicate. When DD receives approval, the paper application in fillable PDF format will be placed on the ACCESSNebraska website so that individuals can complete the paper application and mail or email it to the Developmental Disabilities Office.

An electronic application is in the process of being developed for future release.

## DD - Developmental Disabilities Document Management (New)

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Developmental Disabilities (DD) will now utilize N-FOCUS for Document Imaging. Workers without DD security will have inquiry only access (read only) for these categories and will not be allowed to add images with this DD specific categories.

The following Categories have been added for the Developmental Disabilities Program:

- DD Application
- DD Correspondence
- DD Psychological
- DD Special Education
- DD Medical
- DD Adaptive Testing
- DD IDR
- DD Appeal
- DD Other

## ACCESSNebraska

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### CBI: Add Index Date of Most Recent Document (Change)

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ACCESSNebraska Client Benefit Inquiry (CBI) will display the “Last document received:” date. This will be that last date a document was received for the household.

**Example:** A parent has income verifications scanned 8/1/2016 and a child has a school schedule scanned on 8/2/2016. The date displayed for the Last document received will be 8/2/2016.

### User Account (UAM) Project (Change)

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New messages specific to the account have been added to guide the ACCESSNebraska user:

- PIN retrieval option has been added.
- Email delivery process has been developed to send PIN to users to their verified address.
- During the email address verification process, if the PIN is inactive it will be emailed to the user for quick access.

### Email Notification Correspondence

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Effective August 17, 2016, a new Correspondence will be sent to notify clients they must have an active ACCESSNebraska Account in order to begin receiving email notification of correspondence.

Clients who have not been through the entire account activation process (their PIN is inactive) and have been signed up for Email Notification of Correspondence for more than 30 days will receive a letter notifying them of need to fully active their ACCESSNebraska account and the steps needed to be taken by the client to activate their account.



## CBI to use New Software (Change)

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Client Benefit Inquiry via ACCESSNebraska will be updated to a new software. All functions will be the same only the view may appear slightly different. This is in preparation of future mobile device usage.

## Add Earned Income Verification Request to CBI notices

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The earned income verification form is no longer available online in a blank format. Customers will need to request a form to be mailed ensuring that their identifying information is complete. The forms will be viewable and printable online in CBI.

For the August release, these forms will be displayed under the program which it was created, under the Notices tab. Income verification request should be created in the program case. Forms created in the master case will not display. If the household has more than one program, select the program based on your standard operating procedures.

To view the form, the customer will need to select My Account from ACCESSNebraska main menu and login. They must have an account validated with PIN to view Benefit Inquiry. Benefit inquiry could list multiple master cases depending on administrative roles the person logged in has. They will need to scroll to find the appropriate master case and program case. The notices tab is located in the case detail section of each program.

For a future enhancement, it is anticipated a new tab on the current benefit summary will be created that will display all earned income verification forms from each program.

## Interfaces

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### Interfaces (Change)

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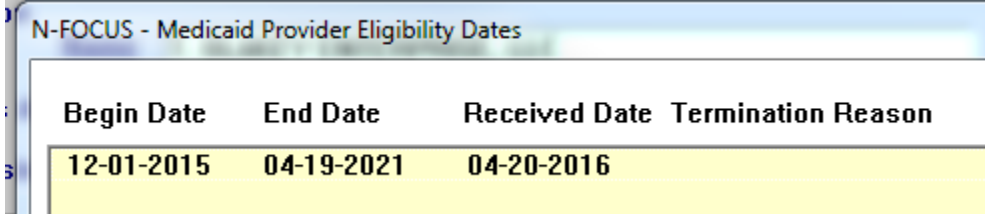
The 40 Quarters button will be disabled if the person does not have a Social Security Number.

Problems with 40 Quarters requests have been fixed.

### Medicaid Provider Eligibility Date (Fix)

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When Update transactions are received from the Provider Eligibility interface, N-FOCUS was not updating the Received Date. The Received Date displays the date the interface transaction was received. This has been fixed.



Begin Date	End Date	Received Date	Termination Reason
12-01-2015	04-19-2021	04-20-2016	

## Correspondence

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### List Correspondence Window (Fix)

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The List Correspondence window was not displaying the User ID of the person who created Service Authorizations. This has been fixed.

## Alerts

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### Developmental Disabilities Alerts (New)

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The following alerts are new for Developmental Disabilities:

Five (5) New Alerts:

1. DD Scanned Mail Received (Alert 529)
2. DDSC (Developmental Disabilities Service Coordination) case assignment changed (Alert 528)
3. Eligibility determination set to Eligible for DD client in N-FOCUS (Alert530)
4. 20 days since application received date in DDSC case but no Eligibility Determination recorded (Alert 531)
5. 30 days since application received date in DDSC case but no Eligibility Determination recorded (Alert 532)

### Returned Mail Alerts 535 and 536 (New)

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Returned Mail has been added as a new document imaging category. When mail is categorized as Returned Mail a Return Mail Rcvd alert will be created. Alert #535 for EA and #536 for MLTC.

**Note:** To view the Return Mail Process document which outlines steps to be taken by MLTC workers, click the following link:

<http://dhhsemployees/sites/MLTC/EligInit/EligStaff/ProcessProcedure/Returned%20Mail%20Process.pdf>

## Monthly MESA and Related Alerts (Change)

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A number of changes have been made to Monthly MESA in the past few months regarding which Master Cases are selected for the Monthly MESA to process. The changes include:

1. ALL MESAs will not run when any program case or person in the Master Case has a change for which budgets have been run in the come up month plus one. This is because when workers had made changes (such as closing a person in the come up month plus one) and MESA ran for the come up month, the action for the come up month plus one was negated.  
  
Alert 534 for Medicaid and Alert 533 for Economic Assistance will be created indicating that a worker needs to look at the case and incorporate any SDX or BDE changes and run budgets for the come up month and the change for the come up month plus one. (New with the August release)
2. Monthly MESA will not select the case or run the budget if the below Alerts have been created. Alerted workers should examine the change and take the appropriate actions. (Part of the April batch release)
  - a. Alerts 324 and 456 indicating SSA Benefits are suspended
  - b. Alerts 325 and 457 indicating SSA Benefits have been adjusted
3. Monthly MESA will not select the case or run the budget if there is an SSI Status Change. Alerts 35 and 527 will be created indicating an SSI Status Change. Alerted workers should examine the change and take the appropriate actions. (Part of May interim release)
4. Monthly MESA will not select the case or run the budget if there is a change regarding 1619b. Alerts 36 and 37 indicating 1619b Eligibility and Ineligibility continue to be created notifying workers of this change. Alerted workers should examine the change and take the appropriate actions. (Part of the April batch release)

## Document Imaging

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### Indexing Categories (New)

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The following new Indexing categories have been added.

**Returned Mail** – Use this category when categorizing mail that has been returned to the agency. New Alerts #535 and #536 have been created for this new category. Please refer to the Alerts section of this document.

**Corrective Action Plan** – Use this category for N-FOCUS ORG's and ORG related persons.

### Document Imaging New Category for Child Welfare (New)

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A new document imaging category called Corrective Actions Plans has been added to document imaging. This category is to be used for Orgs and Org Related Persons.

## Developmental Disabilities Document Imaging (New)

Developmental Disabilities (DD) will now be utilizing N-FOCUS for document imaging. Nine (9) new categories specific to DD have been added. Workers without DD security will have inquiry only access (read only) for these images and will not be allowed to add images with this DD specific categories.

Please refer to the Developmental Disabilities section of the Release Notes to view the categories.

## Expert System

### TMA (Fix)

When a participant wasn't getting reconfigured from a failed TMA, the budget would become "ready only," and not close the participant. This issue has been fixed to ensure that the failed participant gets closed and all others are reconfigured into another category.