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# *N-FOCUS Major Release*

## *Economic Assistance*

### *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.

## **Table of Contents**

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General Interest and Mainframe .....	4
Security Changes for Master Case (Change) .....	4
Access when the Master Case is Restricted (New) .....	5
Adding the Restriction (New).....	6
Note Regarding UC Mode and Work Tasks (New).....	8
Removing the Restriction (New) .....	8
EA Queue and MC Restriction (New).....	8

Search Options (New).....	8
Mainframe Programs for a Restricted Master Case (New) .....	12
Expert system Changes to a Restricted Master Case (New).....	13
If a Person is in Multiple Master Cases (New) .....	13
Auto Suggest of Tie Reason (Change) .....	13
Tie Paper Application Program Case Window .....	13
Detail Staff Person Email Address (Change) .....	14
Address History Window (Change).....	15
Employment First (Changes) .....	15
Remove EF Education Level from Expert System.....	15
Disable Monthly EF Participation Tracking if no Education Level Completed .....	16
<b>Resource Development.....</b>	<b>16</b>
Add Program Services to Medicaid Organization (Fix).....	16
<b>Developmental Disabilities .....</b>	<b>17</b>
Eligibility Determination Process (Change) .....	17
Developmental Disabilities Document Management (New) .....	18
<b>ACCESSNebraska.....</b>	<b>18</b>
CBI: Add Index Date of Most Recent Document (Change) .....	18
User Account (UAM) Project (Change) .....	18
Email Notification Correspondence.....	18
CBI to use New Software (Change) .....	19
Close ADC with a Zero Grant and Phantom AABD Budgeting (fix) .....	19
Phone Application to Print in English and Spanish (Change) .....	19
Add Earned Income Verification Request to CBI notices .....	19
Remove Earned Income Verification from Printable Forms and E-Applications .....	19
<b>Interfaces .....</b>	<b>20</b>
Interfaces (Change) .....	20
<b>Correspondence.....</b>	<b>20</b>
New Expert System Notices (New) .....	20
List Correspondence Window (Fix) .....	20
<b>Alerts .....</b>	<b>20</b>
Developmental Disabilities Alerts (New) .....	20
Returned Mail Alerts 535 and 536 (New) .....	20
Monthly MESA and Related Alerts (Change) .....	21
Alert #399 (Change) .....	21
Alert 360- UC Case Now Assigned (Change).....	21
Alert #312 (Change).....	21
<b>Document Imaging .....</b>	<b>22</b>
Indexing Categories (New) .....	22
Developmental Disabilities Document Imaging (New) .....	22
<b>Expert System .....</b>	<b>22</b>
MESA for New Energy Year (Change) .....	22
MESA for SNAP (Change) .....	22
SNAP MESA Notice (Change) .....	22

Next Review Date Will Not be Set by MESA (Change) .....	22
Exit Task Message for SNAP (Change) .....	23
Collections (Change) .....	23
Auto Suggest of Tie Application Reason (Change) .....	23
Case Maintenance Task>Case Actions (Change).....	24
Case Maintenance Task>Case Actions>Reopen Button.....	24
Case maintenance Task > Review/Recertification (Change) .....	26
Child Payee Detected (Change) .....	27
AABD Child Payee Detected (Change) .....	28
ADC and AABD Budgeting Within Other AABD/PMT Cases (Fix) .....	30
LIHEAP (Change) .....	30
Red X on LIHEAP Case Information Task (Change) .....	30
LIHEAP Budgeting Disabled for “Other Assistance” types if Household Member	
Sanctioned (Change).....	31
LIHEAP Budgeting – Valid Provider Check (FIX) .....	31
Remove Central Office Approval for LIHEAP Payments (Change) .....	33
Allow Worker to Budget "Other Assistance" LIHEAP Case to Pay Client (Change) ....	33
No Longer have PA Cases (Change) .....	34
LIHEAP Using SNAP Income (Change) .....	34
“Other Assistance” Budgets Using Income Calculations (Change) .....	34
No LIHEAP Expenses (Change) .....	35
CSE Sanction Not Imposed Reason Window Restriction (Change) .....	35
Overpayment Creation (Fix) .....	35

## 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.

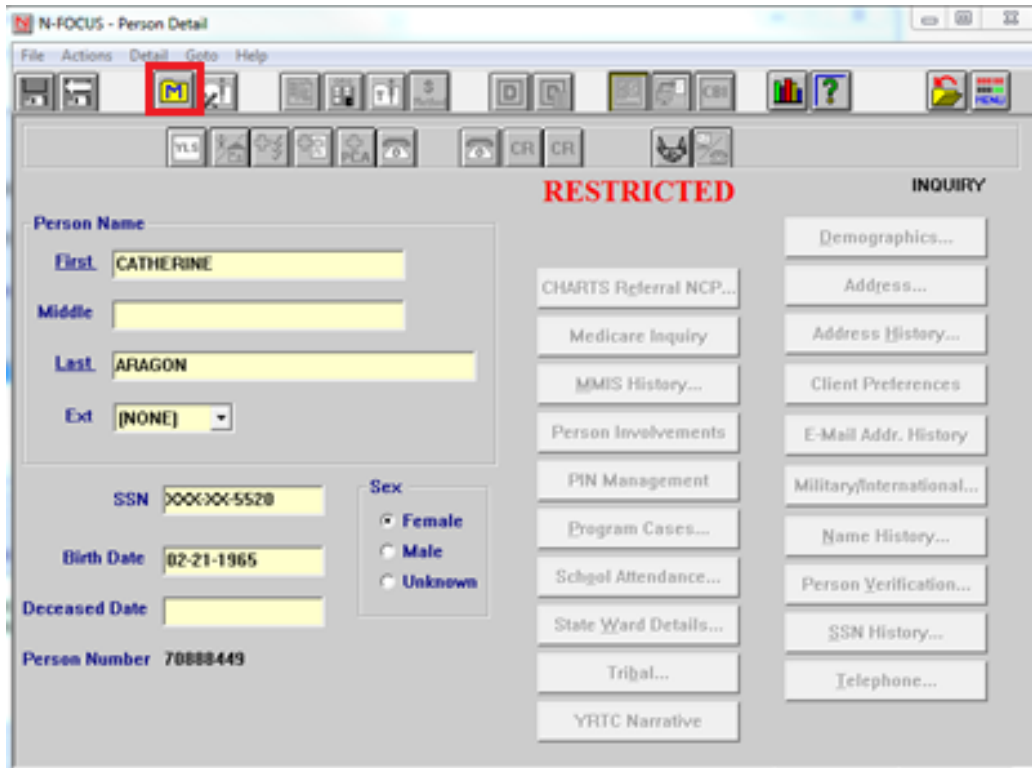
This gives users a visual cue of the need for thorough confidentiality regarding the client.

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**

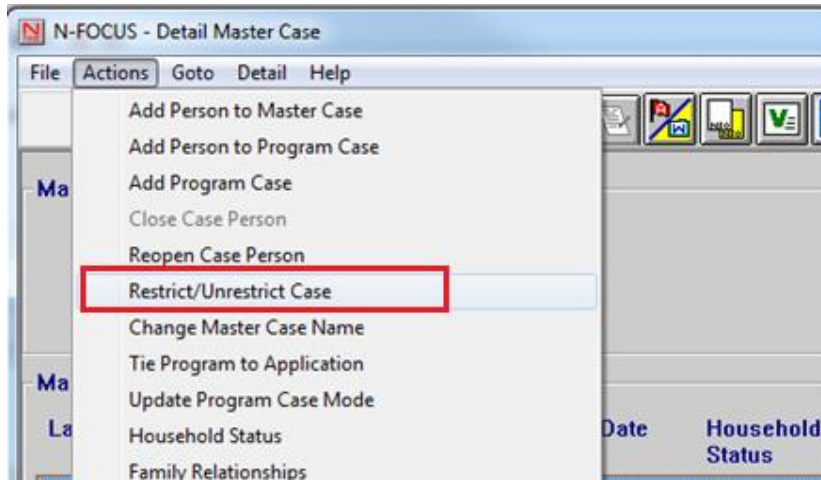
If the logged worker is not assigned to any program cases in the Master Case, their access depends upon their Security. EA and MLTC worker will have Inquiry only status. The only Icon enabled will be the Assignment Icon, which allows users to determine who the Assigned Worker is. They will not be able 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

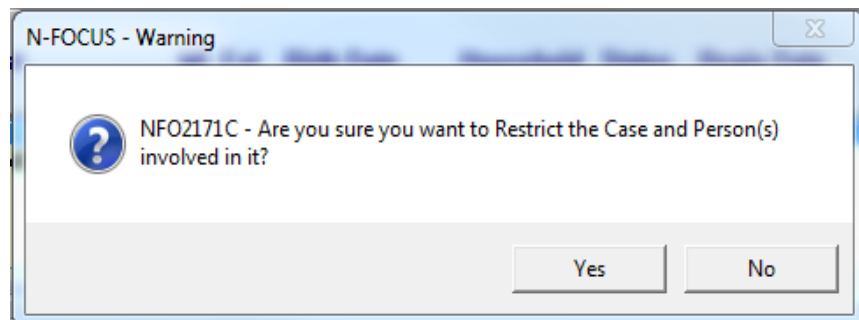
The security of other staff, such as Supervisors, CFS workers, App Management staff, Tribal Protection and Safety workers, Hot Line workers and Policy and Program Specialists, gives them full access even if they are not the Assigned worker of a program case.

### 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.

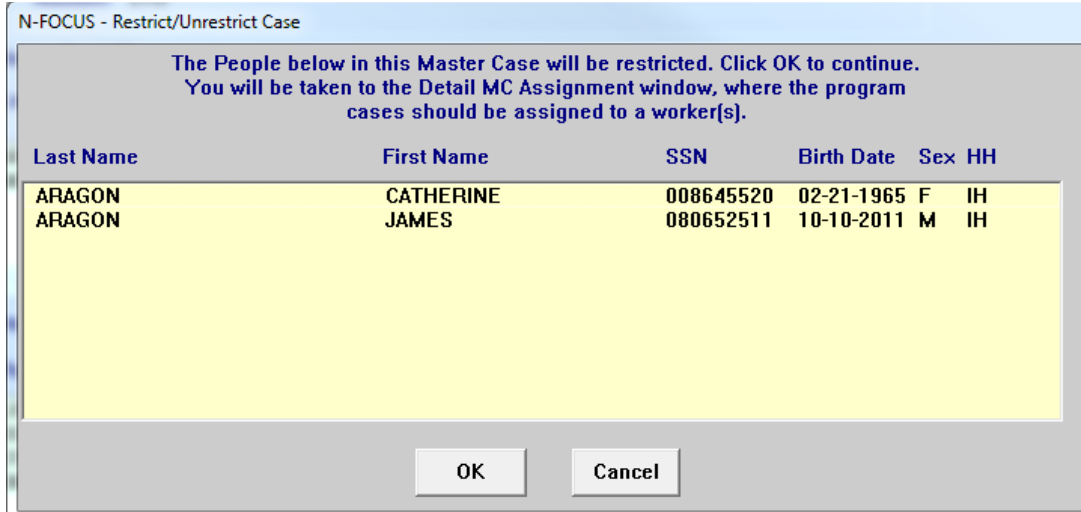


The next window will ask users to confirm they want to restrict the Master Case. If Yes is selected, the Restrict/Unrestrict Case window opens.



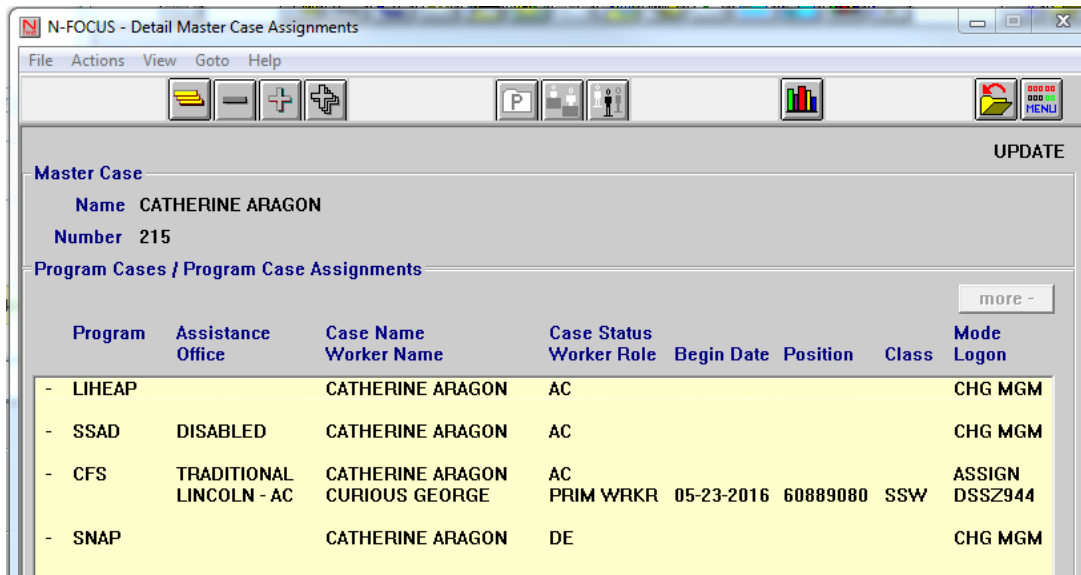
The Restrict/Unrestrict window displays all person in the Master Case who are Pending or Active in a program case or In the Household. (There is no need to highlight any of the persons displayed on the window.)

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:

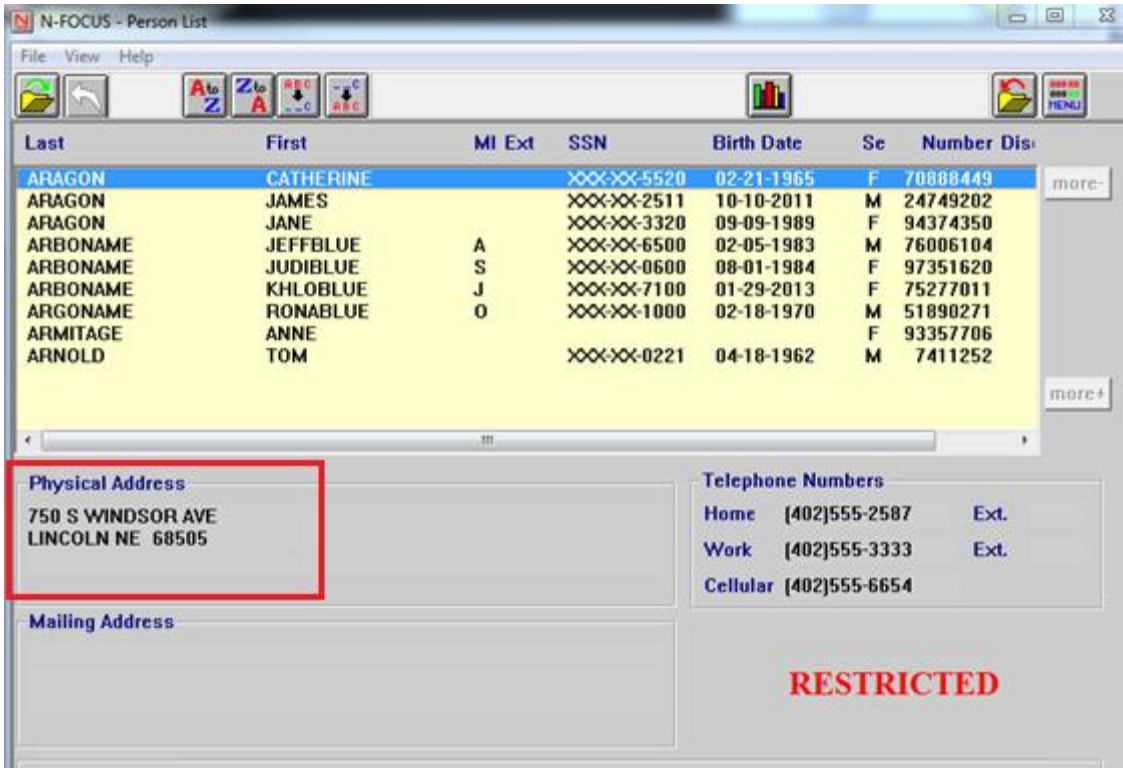
When searching by name, when the Person List opens, if the user selects a person on that window who is Restricted, no physical, mailing or email address or telephone information will display. The word **RESTRICTED** displays. They can open to the Person Detail window, where they can flow to the Detail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

The screenshot shows the 'N-FOCUS - Person List' window. The main table lists individuals with columns for Last, First, MI Ext, SSN, Birth Date, Se, and Number Dis. The first row is highlighted in blue, and the rest are yellow. Below the table, there are sections for 'Physical Address', 'Mailing Address', 'Email Address', and 'Telephone Numbers'. The 'Physical Address' section is highlighted with a red box. The 'Telephone Numbers' section shows 'Home Ext.', 'Work Ext.', and 'Cellular'. The word 'RESTRICTED' is displayed in red text at the bottom right of the detail view.

Last	First	MI Ext	SSN	Birth Date	Se	Number Dis
ARAGON	CATHERINE		XXXX-XX-5520	02-21-1965	F	70880449
ARAGON	JAMES		XXXX-XX-2511	10-10-2011	M	24749202
ARAGON	JANE		XXXX-XX-3320	09-09-1989	F	94374350
ARBONAME	JEFFBLUE	A	XXXX-XX-6500	02-05-1983	M	76006104
ARBONAME	JUDIBLUE	S	XXXX-XX-0600	08-01-1984	F	97351620
ARBONAME	KHLOBLUE	J	XXXX-XX-7100	01-29-2013	F	75277011
ARGONAME	RONABLUE	O	XXXX-XX-1000	02-18-1970	M	51890271
ARMITAGE	ANNE				F	93357706
ARNOLD	TOM		XXXX-XX-0221	04-18-1962	M	7411252



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 Person will not appear on the List Window:

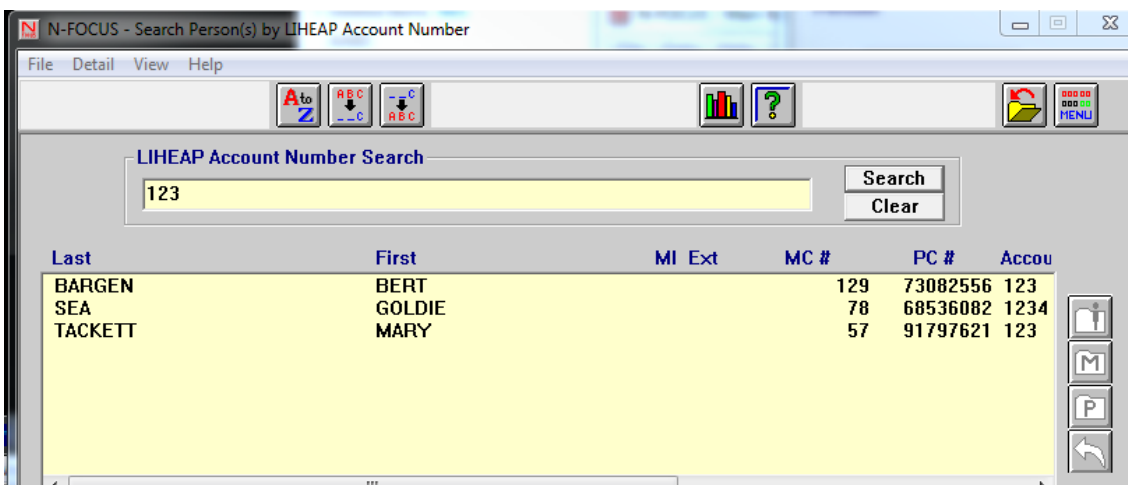


If the user has Security to view restricted information or is the Assigned worker for a program case in a Restricted MC, they will be able to view information for a Restricted Person.

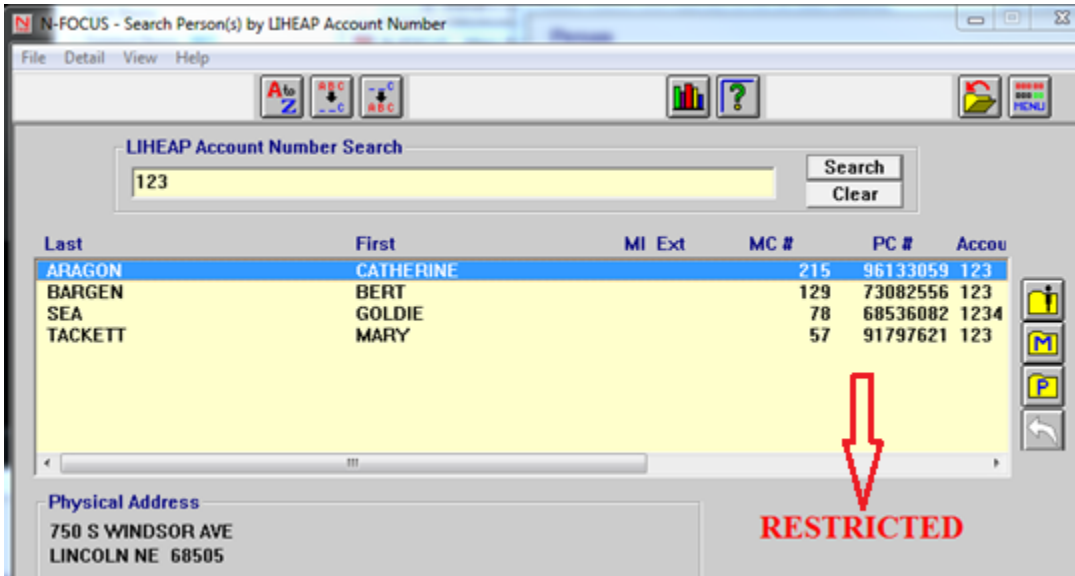


**Search by Account:**

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:

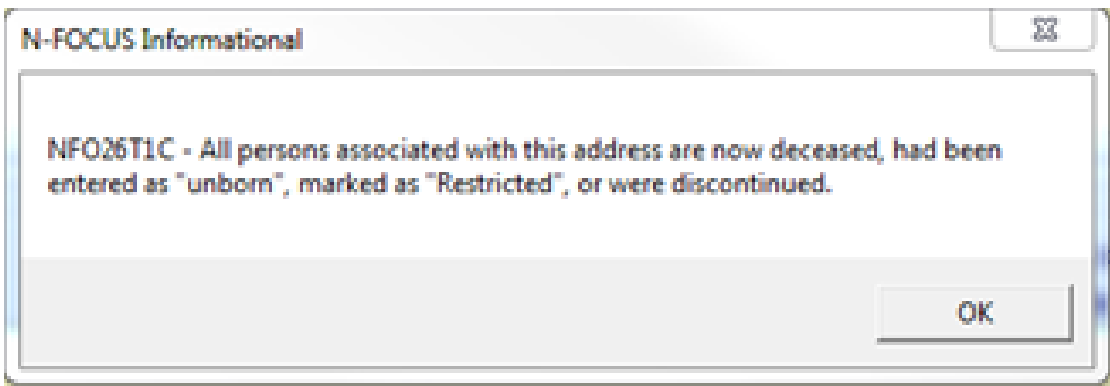


This user's security gives them access to all Master Case information, including Restricted Master Case information. When the row is highlighted, if the Master Case is Restricted, the term RESTRICTED appears to remind the user of the need to limit the information provided to callers.

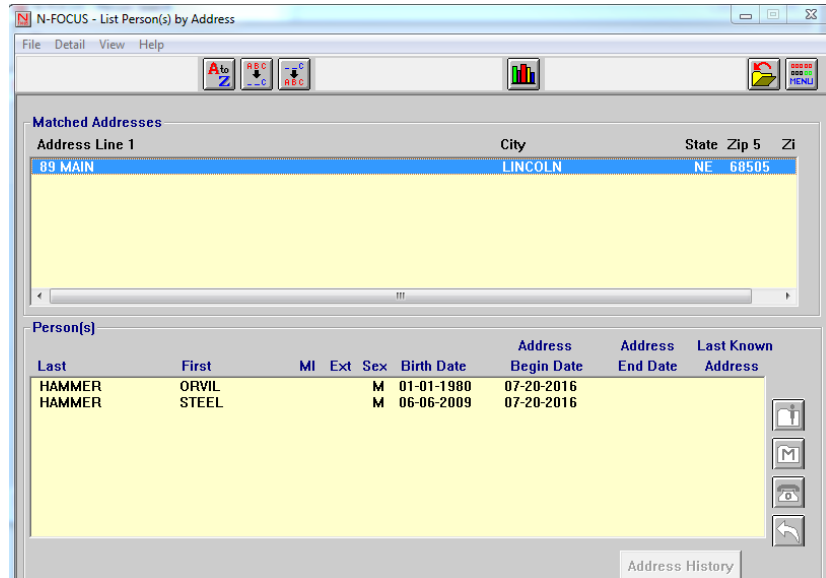


### Search by Address

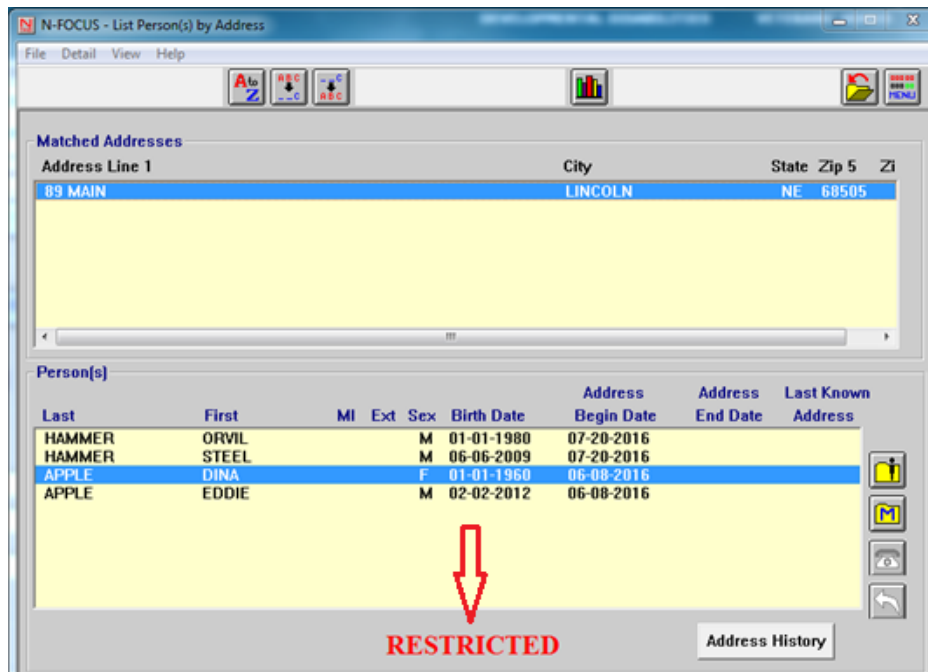
If all persons with that address are Restricted, then the following message appears:



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 Master Case (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 Master Case (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, 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.

## Auto Suggest of Tie Reason (Change)

The following changes have been made to the Tie Paper Application Process:

## 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.

N-FOCUS - Tie Paper Application to Program Case

File Actions Goto Help

Application

Form Type EA-117 Application for Assistance Number [ ]

Application Received Date 07-07-2016 Applied For [ ]

Type Paper Application

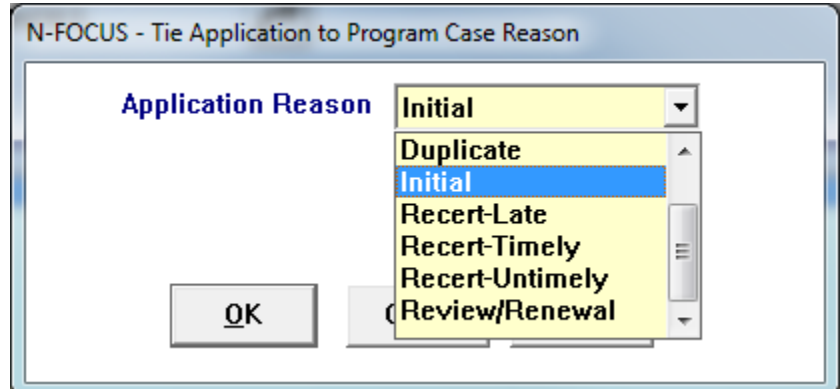
Applicant BRADY MARKS

Program Case

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

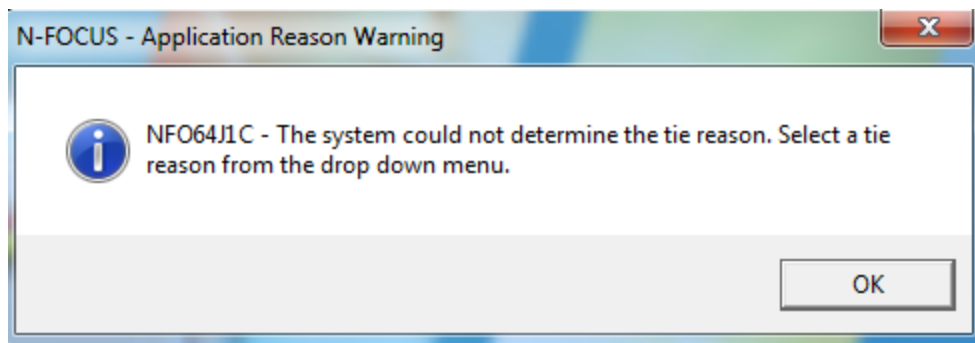
Tie

- Select the Tie button
- The new Tie Application to Program Case Reason pop-up window will display with the suggested Application Reason for the following Programs:
- AABD Payment
- ADC
- Child Care
- SSAD
- SSCF
- SNAP



You can select a different Application Reason if appropriate

**Note:** If N-FOCUS cannot determine an appropriate Application Reason, a message will display. The worker will then select the appropriate reason from the drop down list.



**Note:** N-FOCUS will suggest the Tie Reason for the following programs:

- AABD Payment
- ADC
- Child Care
- SSAD
- SSCF
- SNAP Program Cases

### [Detail Staff Person Email Address \(Change\)](#)

E-Mail addresses have been added to the Detail Staff Person window for CFS Specialist so an assigned worker in a CFS Program Case will have their e-mail address automatically printed in the Common Referral, Relative Notification and Relative Notification Follow-Up Letter.

## Address History Window (Change)

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

## Employment First (Changes)

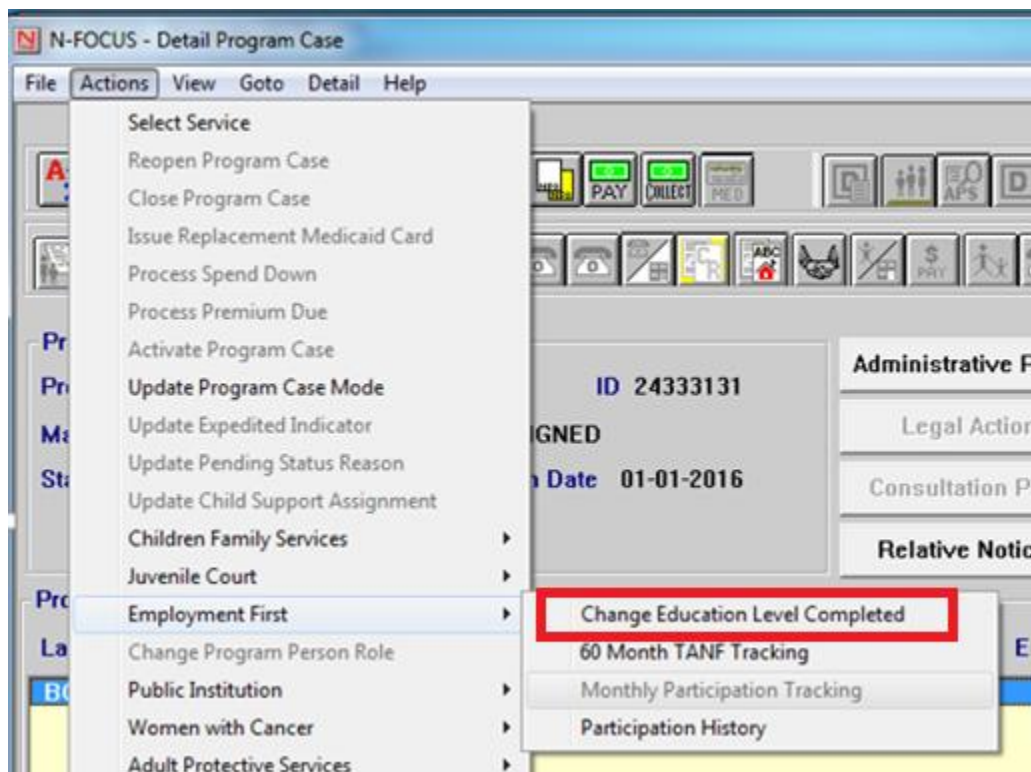
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### Remove EF Education Level from Expert System

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Entry of Education Level information for Employment First (EF) has been removed from the Expert System task list.

Entry of education level completed will only be able to be performed through the Employment First program case. Go to the Actions drop down, select Employment First, then Change Education Level Completed (as shown below).





## Disable Monthly EF Participation Tracking if no Education Level Completed

The ability to update EF Monthly Participation Tracking will require that an “Education Level Completed” entry be made for that EF participant. When adding an EF Program Case through Expert System, there is not a requirement to indicate an education level completed in the case actions process. When the case is checked in after adding the EF Program Case, until a user goes through the Mainframe EF program to “Update Education Level Completed” the “Monthly Participation Tracking” option will not be enabled in the Actions menu (see below).



## Resource Development

### 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.

## 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)

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.

## Close ADC with a Zero Grant and Phantom AABD Budgeting (fix)

ADC grant cases will close if the prorated budgetary need is zero. This will occur both with combined processing of an actual AABD case with ADC and also when AABD budgeting occurs within the ADC. EF cases will close the first of the following month after ADC auto closes.

**Note:** It is very important that the come up month after the combined or launched AABD budget within the ADC is processed. Normally the system will guide through this process in budgeting the come up month. If for any reason this occurs in the come up month the following month should be selected and budgeted. This will ensure that all appropriate grant cases are closed along with the EF program case.

## Phone Application to Print in English and Spanish (Change)

EA Phone Application and EA E-Application will be available in both English and Spanish for printing regardless of the language selection when the application is completed. Language selection will be prompted each time and EA E-Application or EA Phone Application PDF is launched. English will be set as the default.

## Add Earned Income Verification Request to CBI notices

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.

## Remove Earned Income Verification from Printable Forms and E-Applications

Blank earned income verification requests have been removed from ACCESSNebraska printable forms and EA E-application. Customers will need to request an earned income verification form be created and mailed for assistance in verifying income. This change was made as forms were being received without identifying information.

## 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.

## Correspondence

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### New Expert System Notices (New)

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Expert System Notices have been updated to be written in a manner that is more easily understood by our clients, and to include information relating to ACCESSNebraska. Previously issued versions of the correspondence are not affected so re-prints will not reflect the changes.

### 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 (Alert 530)
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.

## 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. When 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)

## Alert #399 (Change)

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Only certain workers in the Central Office have the security to create a LIHEAP refund. When a refund is finalized an alert is created to the worker. The person creating the refund now has an option to not create an alert when they know that the refund should not be reissued.

## Alert 360- UC Case Now Assigned (Change)

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This Economic Assistance alert has been discontinued.

## Alert #312 (Change)

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Change alert #312, cooperating with CSE, to look at current status instead of high dated status for the alert creation. If the person/case is active on the processing date but set to close in the future, they still want the alert created.

## 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.

### Developmental Disabilities Document Imaging (New)

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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

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### MESA for New Energy Year (Change)

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The energy year codes have been updated for the new energy year.

### MESA for SNAP (Change)

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If MESA detects the new budget would lower the benefit amount it will not authorize the new budget. Alert 526 (MESA SNAP Adverse Action) will be created. A worker will need to run the budget and create a notice.

### SNAP MESA Notice (Change)

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The SNAP MESA for the August Major Release will change the reporting category from Change Reporting to Simplified Reporting. With this MESA a notice will be created. If the only change made in the MESA run is the change in reporting Category, the notice will state the change in reporting and the reason states “Reason found below or in Comment section”. The following text will be included:

Text:

Your reporting category has changed effective <Month, Day, Year> to <Reporting Category> due to program standard changes. Your benefits remain <Benefit Amount>.

### Next Review Date Will Not be Set by MESA (Change)

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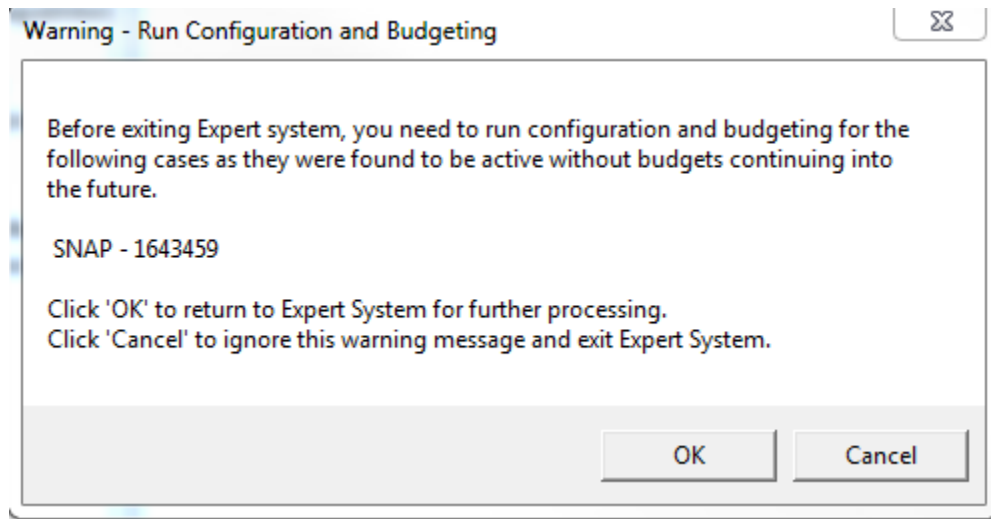
MESA will no longer update the Next Review Date for ADC, AABD and CC Program Cases.



## Exit Task Message for SNAP (Change)

---

In the April Release, all programs but SNAP were part of a pop up message that is displayed when the worker goes to exit Expert System and there are budgets missing with the Active program case. For this release, SNAP has been added to the Pop up message. If SNAP is active but there are no budgets to go with the case they will receive the following message when they select the Exit Button: “Before exiting Expert System, you need to run configuration and budgeting for the following cases as they were found to be active without budgets continuing into the future.”



## Collections (Change)

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ADC program cases that are have Overpayments created for the reason ‘Retention of Child Support’ will always keep the Repayment Method of Recoupment even though the program case has been closed.

## Auto Suggest of Tie Application Reason (Change)

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The following changes have been made to the Tie Application Process in the Expert System:

**Note:** N-FOCUS will suggest the Tie Reason for the following programs:

- AABD Payment
- ADC
- Child Care
- SSAD
- SSCF
- SNAP Program Cases

## Case Maintenance Task>Case Actions (Change)

---

When a Program Case is added, follow these steps:

- Navigate to the Tie Application Window
- Select the appropriate Application Type from the drop down
  - The Reason field will automatically populate with the application reason of Initial.

**Note:** You can select a different application reason if appropriate.

- Complete other fields as appropriate.
- Click OK.

The screenshot shows the 'Tie Application' window in the NFOCUS - Navigator application. The window title is 'BRADY MARKS 385'. On the left, there is a list of programs: 599 CHIP, AABD/PMT, ADC, CC, EF, FW, IL, LIHEAP, MEDICAID, RETRO MED, and SNAP. Below this is a 'Participant(s):' field with 'MARKS B'. The main area contains several fields: 'Application Type:' (dropdown menu set to 'Paper Application'), 'App Rec'd Date:' (text box with '07-07-2016'), 'App Number:' (text box), 'Program Case Assistance Code:' (dropdown menu), 'Paper Application Form Type:' (dropdown menu), 'Reason:' (dropdown menu set to 'Initial'), and 'Applicant Name:' (text box with 'MARKS BRADY'). At the bottom right, there are three buttons: 'OK', 'Cancel', and 'Help'. The 'OK' button is highlighted with a red box.

## Case Maintenance Task>Case Actions>Reopen Button

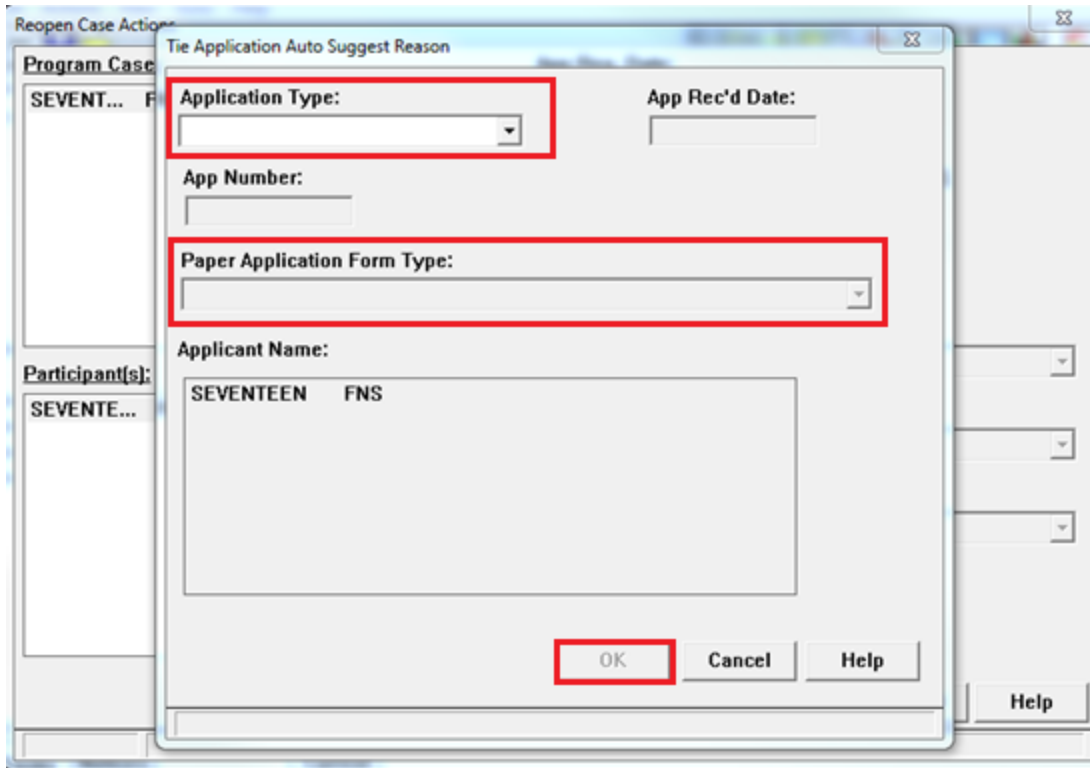
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When a Program Case is reopened, follow these steps:

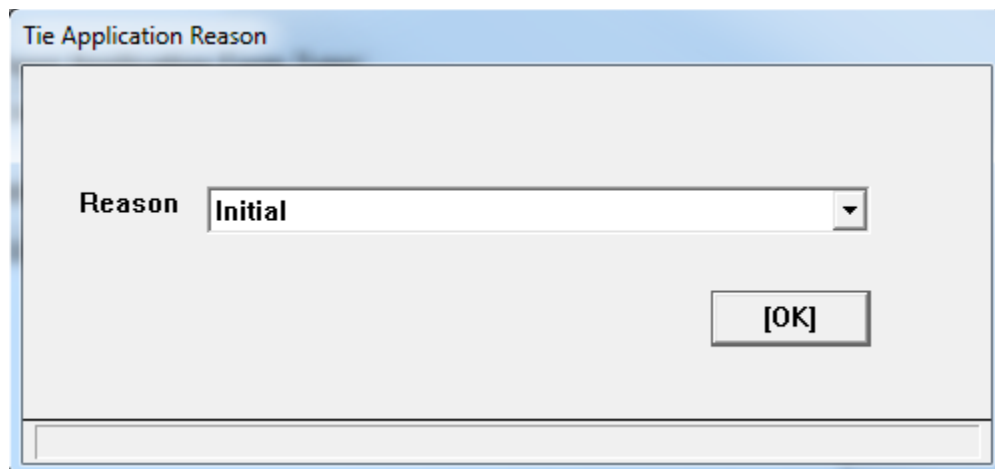
- Navigate to the Tie Application Suggestion Reason window.

**Note:** When a Program Case is Reopened, on the Tie Application Auto Suggest Reason window, the Reason field has been removed.

- Enter information as appropriate
- Select OK

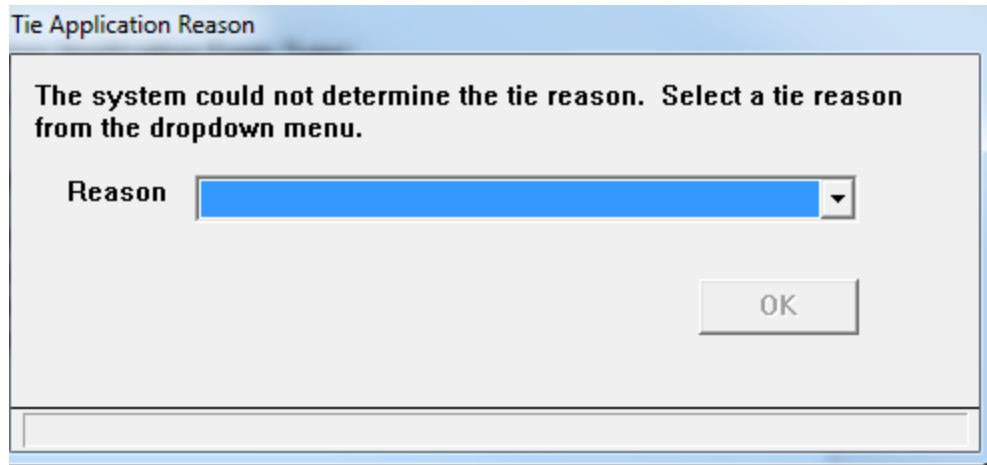


- The Tie Application Reason pop up window will display with the suggested Application Reason.



- Change the application reason as appropriate
- Click OK

**Note:** If N-FOCUS cannot determine an appropriate Application Reason, a message will display. The worker will then select the appropriate reason from the drop down list.



### [Case maintenance Task > Review/Recertification \(Change\)](#)

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When a Program Case is being reviewed or going through recertification, follow these steps:

**Note:** This change affects both the Recertification and Review Tabs.

- Complete the Tie Application Auto Suggest Reason window as appropriate.

**Note:** The Application Reason field is no longer shown on this window.

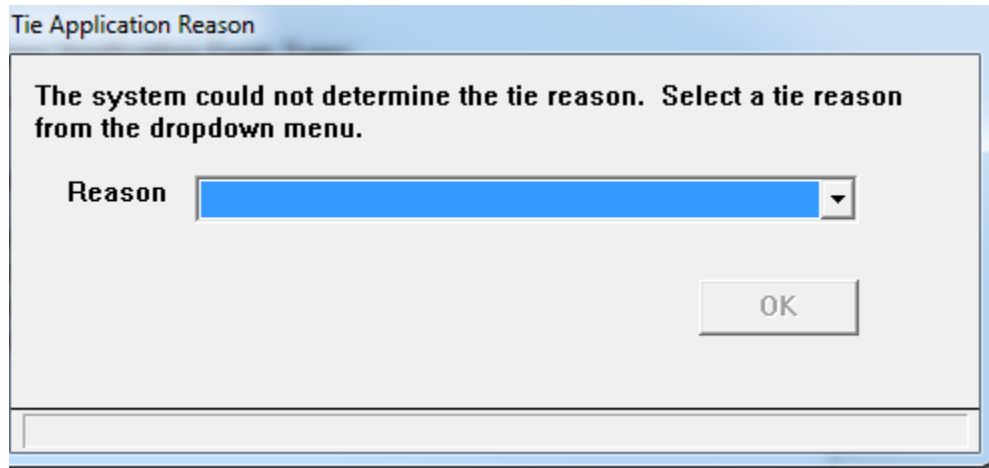
- Click OK.
- The Tie Application Reason pop up window will display with the suggested Application Reason.
- Change the application reason as appropriate.



- If the system suggest Review/Renewal and there is not a review due date listed on the Review Tracking Window in N-FOCUS, they system will populate the Review Application Received Date. If the system does not suggest Review/Renewal, and it is

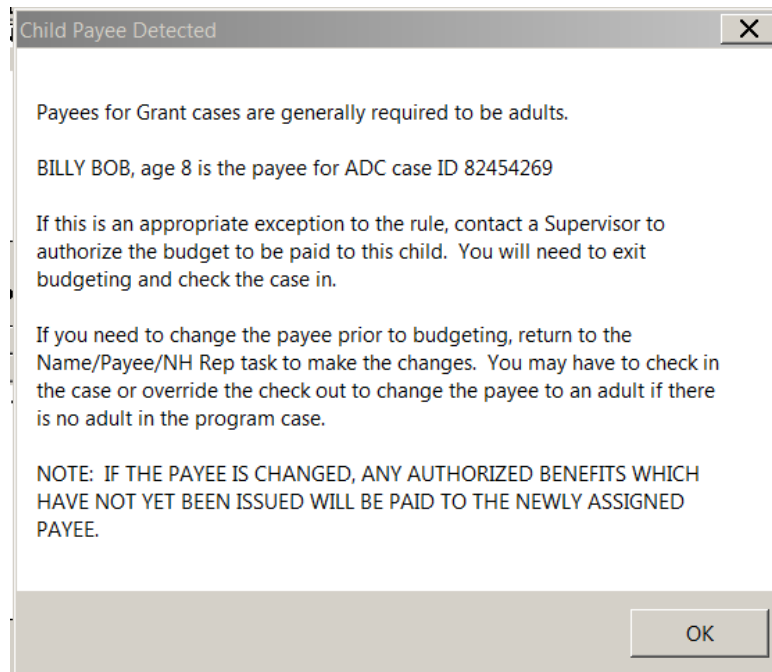
manually changed to that tie reason and there is not a Review Application Received Date listed in the Review Tracking Window in N-FOCUS, the system will not populate a Review Application Received Date.

**Note:** If N-FOCUS cannot determine an appropriate Application Reason, a message will display. The worker will then select the appropriate reason from the drop down list.



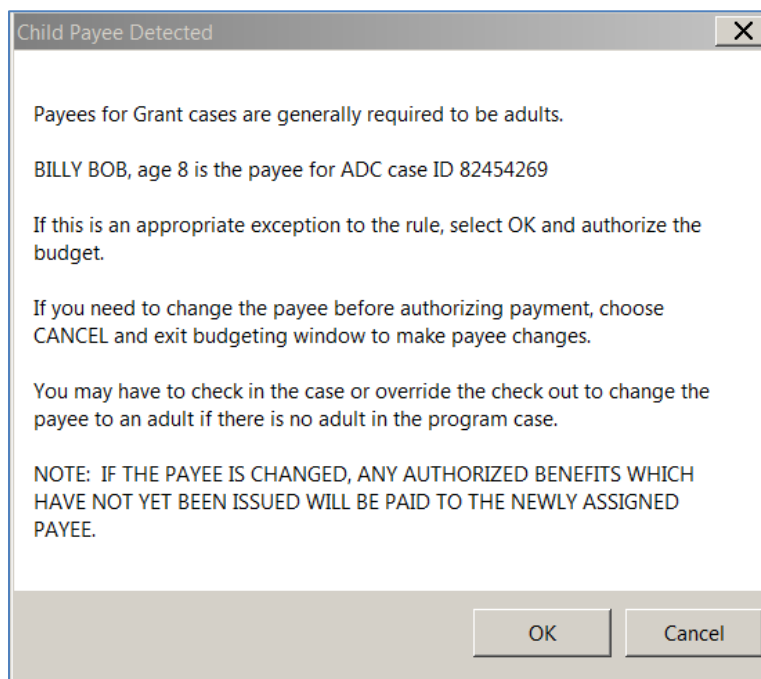
### Child Payee Detected (Change)

A change has been made to not allow authorization of an ADC budget if the program has a payee set up who is under age 19, as of the day that the budgets are being run on, regardless of which month is being budgeted. The Child Payee Declined message will be presented to users who have less than supervisory security clearance.



Workers will not be able to proceed with authorizing the budget without taking further action to either, as the message states, check the case in and contact a supervisor to run and authorize the budget, or update the payee to a non-minor person in the master case.

If a user who has supervisory security clearance runs budgeting for an ADC program case with a minor payee, the following message will be presented:



After confirming that the minor payee is set up correctly, the supervisor can select the OK button to authorize the budget, or follow the instructions as outlined in the message to update the payee for the program case.

### [AABD Child Payee Detected \(Change\)](#)

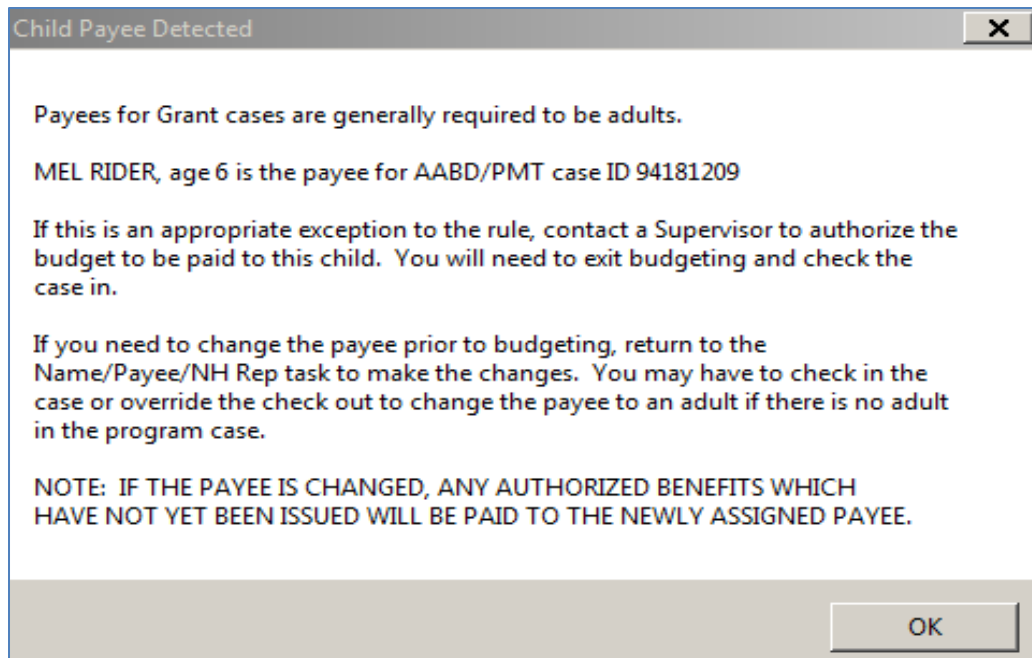
---

A change has been made which will no longer allow workers to authorize AABD budgets if the payee for the program is a minor, meaning an individual under the age of 19. The payee must be 19 years of age for the entire month for which the AABD budget is being authorized.

**Example:** If the payee is age 19 on the 2<sup>nd</sup> day of the month they are considered a minor and will not be allowed to be the payee for that month, but can be made the payee for the following month.

If the payee is 19 on the 1<sup>st</sup> day of the month for which the budget is being authorized, they are not considered a minor and can be the payee for the AABD program.

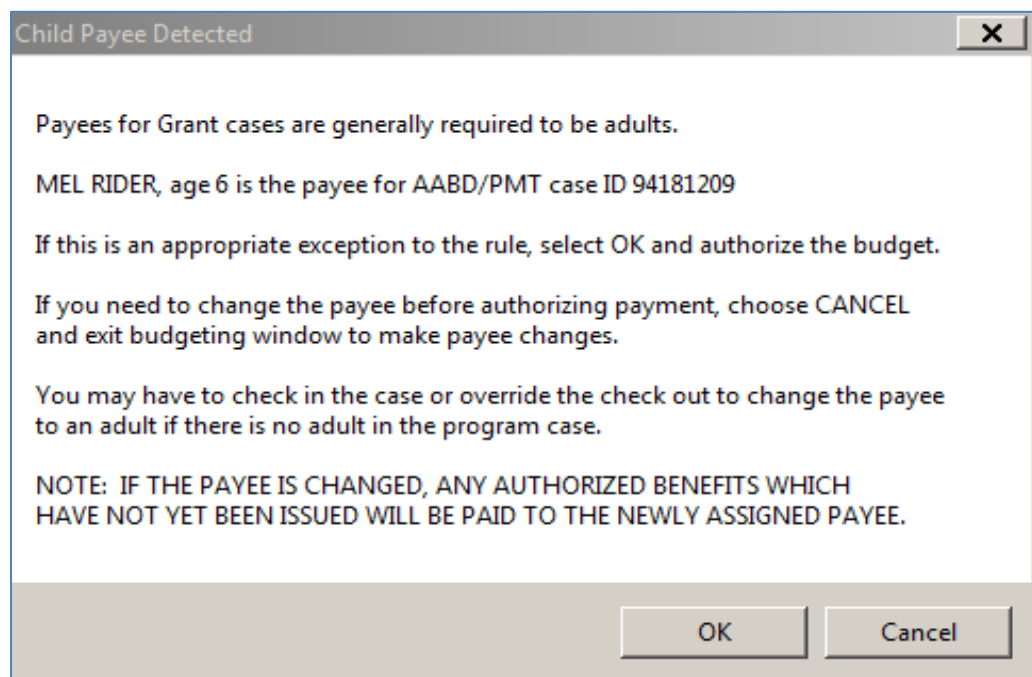
Workers will receive the following message if the payee for the AABD program is a minor in the month that is being authorized.



The worker will not be allowed to authorize the budget without taking one of the actions in the message.

- Update the payee - OR
- Check in the case and contact a supervisor to run and authorize the budget if there is an exception that allows the payee to be a minor

When a Supervisor runs budgeting for an AABD program with a minor as the payee, they will receive the following message.





The supervisor can cancel out of authorization and update the payee for the AABD program, as stated in the message. If the Supervisor confirms the AABD program meets the exception to have a minor as the payee, they can select OK, which will authorize the budget with the minor as the payee.

### ADC and AABD Budgeting Within Other AABD/PMT Cases (Fix)

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AABD budgeting within ADC cases will now recognize other persons not in a financial role to other Household members. Elderly or no relative living with an ADC and AABD eligible family no longer will need to have their AABD/PMT case budgeted in a separate MC.

### LIHEAP (Change)

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#### Red X on LIHEAP Case Information Task (Change)

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N-FOCUS has added new instances for when a **RED X** will be placed on the LIHEAP Case Info task.

##### **New Address:**

The first will occur when a new address has been entered in mainframe for the LIHEAP program case name person. Upon the next checkout of the case, a **RED X** will appear on the “LIHEAP Case Info” task so that the user is required to review the dwelling type to ensure the payment level is correctly referenced for the new address.

##### **Living Arrangement**

The second is when the user makes an update to “Living Arrangement” in the Expert System. If worker selects “Update” in the task, and then selects “OK”, regardless of if new information was entered, or if the old information was simply retyped, then a **RED X** will be placed on LIHEAP Case Info task.

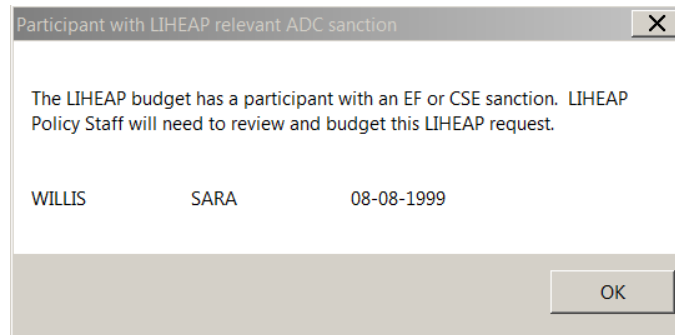
**Note:** Once the **RED X** on LIHEAP Case Info has been cleared, it will be important for the user to further review the Accounts/Provider task to ensure current information is included, or to request updated account information and then update that information once verifications are received.

\*\*\* If an address change or living arrangement change has been detected by Expert System, a **RED X** will appear on the “LIHEAP Case Info” task even if a LIHEAP program case does not exist in the master case. Since the **RED X** will only prevent the ability to budget LIHEAP programs, no action will need to be taken by the user to clear those **RED X** instances prior to budgeting any other EA or MED programs. If a LIHEAP program case is pended/activated, then the user will need to address any existing **RED X** instances.

## LIHEAP Budgeting Disabled for “Other Assistance” types if Household Member Sanctioned (Change)

---

If an energy household member has a current dated CSE or EF type sanction, when attempting to run LIHEAP budgets for Crisis, Deposit or Repairs the user will be presented with the following message:



The user will need to contact Central Office policy staff in order to have the case reviewed. Only Central Office staff will have the security level clearance to allow the ability to run and authorize budgets, if appropriate, when one of these sanction types is present.

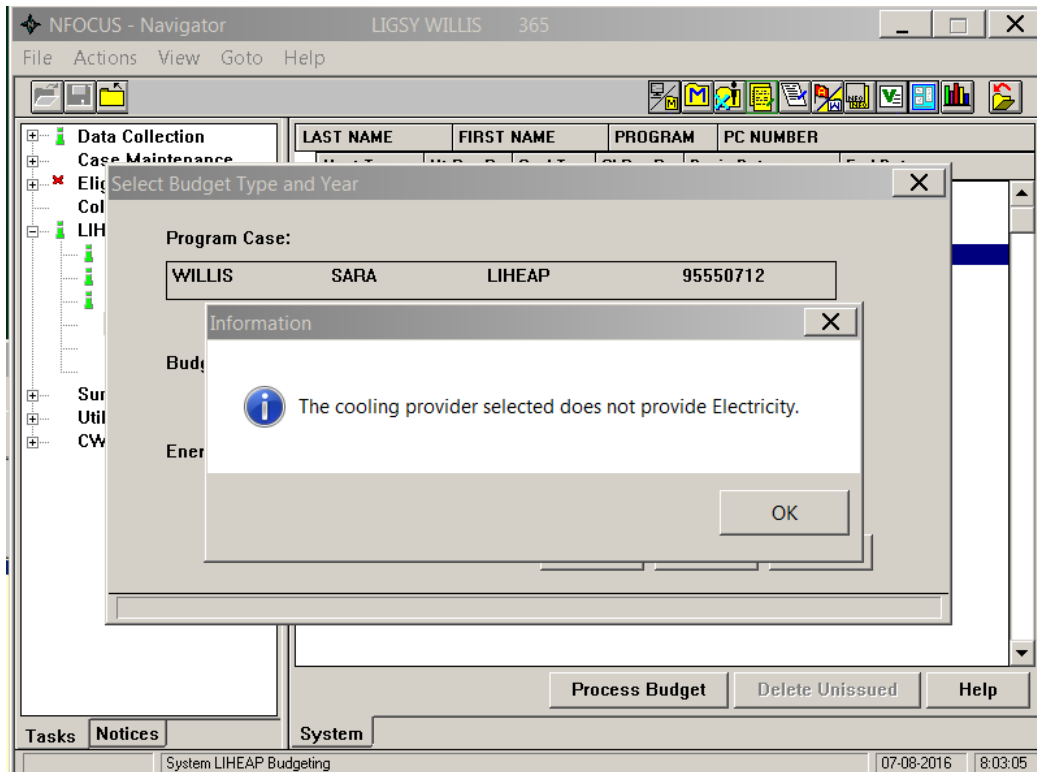
Users will not receive the message when running budgets for either a Heating or a Cooling budget type. Additionally, MESA budgeting will not be interrupted due to a current CSE or EF sanction type being in place for one of the LIHEAP household members.

## LIHEAP Budgeting – Valid Provider Check (FIX)

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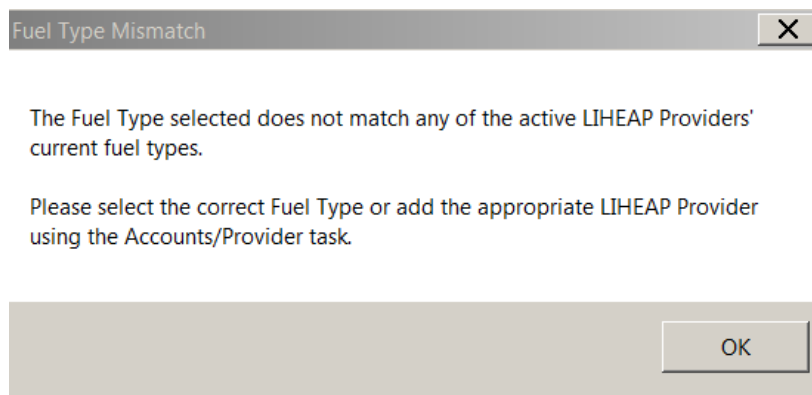
A production issue was discovered following a MESA energy run where LIHEAP payments were not being issued out as a result of LIHEAP budgets being authorized to providers who had been updated to no longer be providing the fuel type that budgets were being authorized for. (Example: Household had a heating provider entered for their account who was a propane provider, but later that organization had propane removed as a fuel type.)

MESA would set an alert as the provider needed to be reviewed, however, when user attempted to budget, N-FOCUS logic allowed the budget to be run and authorized for heating and cooling. A new warning message has been added which will display in instances when user is trying to run a Heating or a Cooling budget for a household when the entered provider for that budget does not have a matching fuel type loaded for the organization.



## PROCESS CHANGE

If a non-matching fuel type LIHEAP provider is entered and a user is trying to run a Crisis or Deposit type budget, the user will be presented with the following warning message following the “Crisis Questions” window in budgeting:



A user will be allowed to select ‘OK’ here and will then be taken to the “LIHEAP Budget Amount and Payee” window.

As this was identified late in the current release process, users should implement the following process:

- User should select “Cancel” when taken to the “LIHEAP Budget Amount and Payee” window. User should then return to the “Accounts/Provider” task to either select an alternate provider or to change the Pay Provider setting to “no” if it is appropriate for N-FOCUS to make the deposit/crisis payment directly to the client (following field operations and policy direction).

**Note:** A fix for this situation is currently planned for the next major release date: 12/4/2016

### [Remove Central Office Approval for LIHEAP Payments \(Change\)](#)

A change has been made to remove the need for Central Office approval of payments for the energy year that exceed \$1500 with the current payment that is trying to be authorized. The stop will still occur for SSW users, but the SSW will now need to have a supervisor authorize the new budget, removing the need to contact Central Office for approval on these types of situations.

### [Allow Worker to Budget "Other Assistance" LIHEAP Case to Pay Client \(Change\)](#)

SSWs can now run and authorize a Crisis, Deposit, or Repair budget and set it to pay the client. After budgeting has been run, the budget's status will be set to Pending Approval which will place a **RED X** next to the Approve Budget task. The budget will still need to be approved by a user with supervisor security clearance or greater.

## No Longer have PA Cases (Change)

LIHEAP budgeting rules related to PA households have been removed from the system. Users will no longer see indication of PA or Non-PA household's on benefit summaries for budgets run after this release. All LIHEAP program cases will have eligibility determined using the same rules.

## LIHEAP Using SNAP Income (Change)

The LIHEAP program income guidelines are now based on SNAP rules. This means that income types that are considered for SNAP program eligibility will also be considered for LIHEAP eligibility. Income types have been updated in N-FOCUS to read income for both programs in the same way. Changes were required to the "Other income" types. The instances for Earned, Self-Employ Gain, Self-Employ Loss, Unearned, SE Farm Gain, SE Farm Loss which existed separately for SNAP and LIHEAP have now been combined on the selection list and will require only a single entry to count for both programs under the SNAP / LIHEAP other income types (see below):

Owner			Type
MORNING	WHITNEY	06-28-1989	SNAP / LIHEAP Unearned
MORNING	CAYDEE	08-22-2007	

**Important:** If a case has an entry of one of the "LIHEAP Only" income types, that instance will be able to be updated, but when LIHEAP Budgeting is run, that income will not be pulled in. If it is still an appropriate income type for the case, the user will need to ensure that there is an entry for the corresponding SNAP / LIHEAP income type in order for LIHEAP budgeting to include that income.

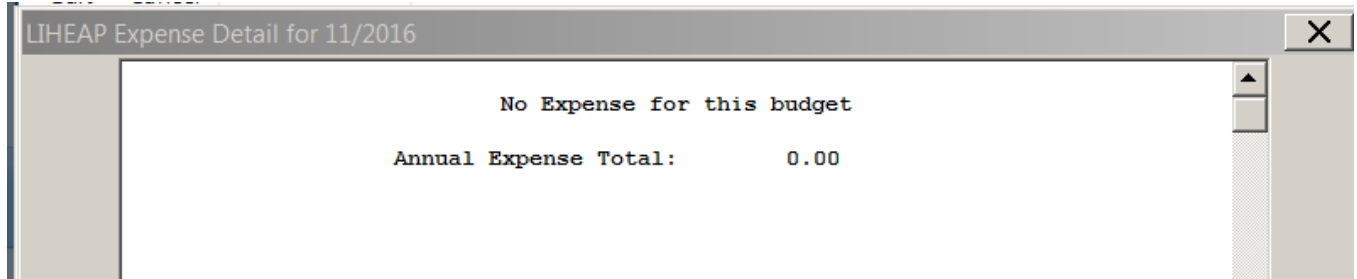
## "Other Assistance" Budgets Using Income Calculations (Change)

Budgeting of LIHEAP Other Assistance types (Crisis, Deposit, or Repair) will now require income calculations to be completed, as is done with heating or cooling budgeting. If the Master Case has an Active SNAP case with the same ARP's that are in the LIHEAP program, and there is not a current heating/cooling budget to copy, the option of "Copy SNAP income" will be presented in the calculation type selection list. If the income test passes, then user will be asked to enter the amount that is being approved (as has always been the process). If the income test fails, the budget will fail and the user will not have the option to enter an approval amount.

### No LIHEAP Expenses (Change)

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LIHEAP budgeting no longer considers expenses in eligibility calculations. Any LIHEAP budgets run after the release date (regular or recalculated) will show \$0 expenses on the benefit summary (regardless of what is entered in the “expenses” task). The LIHEAP Expense Detail window will indicate “No Expense for this budget” even if expenses were entered on the case.



Additionally, updates have been made to the income and payment tables and will begin to appear with LIHEAP budgets run for benefit months starting October, 2016.

### CSE Sanction Not Imposed Reason Window Restriction (Change)

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The ability to change or remove a CSE Sanction Not Imposed reason has been limited to users with supervisory level security or higher. This change has resulted in the “Not Imposed RSN” and the “Remove Not Imposed RSN” buttons to be disabled if the current user’s security level is lower than “supervisor”.

### Overpayment Creation (Fix)

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In some situations Financially Responsible individuals in the program case were not in the Overpayment Responsible Party pick list. This has been corrected.