# TABLE OF CONTENTS

1. **Introduction** ................................................................. 5  
   - Internet Explorer settings .............................................. 6  
   - Internet Explorer trusted sites .................................. 10  
   - Other Internet Explorer Versions ............................. 12  
   - Internet Explorer Find Function .......................... 15  
   - Pop-up Blocker ..................................................... 16  
   - Autocomplete Function ........................................... 17  
   - Copying and Pasting from Microsoft Word ............ 18  

2. **Accessing CMS through the Web** ........................................ 21  
   - Log-in/Time Out .................................................. 22  
   - Change Password ............................................... 23  
   - CMS System Attributes .................................... 25  
   - Commonly Seen Screen Objects .......................... 26  
   - Luminist Access ................................................. 28  

3. **Client Search** .................................................................. 29  
   - Search Results ..................................................... 31  

4. **CMS Summary** .................................................................. 33  
   - Transfer/Change of CARC ....................................... 35  

5. **Client Notes (CLNO)** .................................................... 37  
   - New Client Note Screen ....................................... 38  
   - View/Edit/Print Client Note Screen on Old Client Notes .................................................. 39  

6. **Alerts** ........................................................................... 41  
   - New Alert/Edit Alerts .......................................... 42  
   - View alerts by case load ....................................... 43  
   - Overdue Alerts (On Client Search Screen) ............ 45  

7. **FSSP** ........................................................................... 47  
   - FSSP Add/Edit Goals Page .................................... 48  
   - FSSP Add/Edit Services Page ............................. 50  

8. **Work Activities** ............................................................ 53  
   - Add/Edit Activity Hours ....................................... 57  
   - Closing the Work Activity/CMS Case .................. 60  

9. **Payment History** .......................................................... 63  

10. **EIS Summary** ............................................................... 67  

11. **Case Notes (CANO)** .................................................... 69  

12. **PASS I Child Care Request Processing** ......................... 71
First Time Request for a Family .......................................................... 73
Ongoing Requests for a Family ...................................................... 82
New Provider Requests ............................................................... 85
13. Action History .............................................................................. 87
14. Glossary of Terms ...................................................................... 91
SECTION 1
INTRODUCTION

This Case Management System (CMS) user guide is an overview of the current functions within CMS and is designed for all users. The User Guide is updated periodically by Sys Ops staff. Each page of the guide will indicate the date which the individual page was updated. If you encounter problems with the User Guide, please notify Sys Ops at EIShelp@Alaska.gov. As with all other emails to the Help Desk, please include the term “CMS” in the subject line.

Separate policy guides may be released by the individual contractors and agencies performing case management for the State of Alaska (SOA). CMS will assist Case Managers, Eligibility Technicians, Employment Specialists, and Administrators with the steps to assist families who are currently on the Alaska Temporary Assistance Program (ATAP) and those eligible for Post-Employment Case Management (PECM) with their pursuit of self-sufficiency. CMS maintains action history data within the system for a maximum of two years. CMS is used in conjunction with the Eligibility Information System (EIS) /Jobs Automated System (JAS) system for approving limited supportive services and referring clients to CMS.

To understand this document, it is assumed the reader has some familiarity and background knowledge of the policy and procedures governing case management and should have attended case management training offered by their office or the SOA.

CMS is an internet based system. It is designed to show available fields when operated “maximized” for full screen use. You may also use the F11 key for a full screen toggle. The CTRL+F function can also be used to find data on screens. Printouts from the system are done using your default MS Windows printer and are optimized when printed in landscape orientation. You must ensure your cursor is in the correct screen position or frame on your screen prior to pressing the print button.
The navigation buttons or tabs in CMS are on the left side of the screen to ease movement between screens and to allow for future expansion. The tabs will change based on the function you’re attempting to complete. Once you have selected a client using the client search tab, the tab area will populate with the authorized functions based on the user’s security profile. You may leave any screen by pressing a different tab button or by logging out.

When using the system, you may experience a red highlighted box or validation message. You can move your mouse over the red area for a text box explaining the error.

If you are unable to resolve the issue after reviewing the red error message, contact the EIS Help Desk at EIShelp@Alaska.gov. Include a description of the problem in the email and be sure to have “CMS” somewhere in the email subject line to help automatically route your CMS requests to the person working the CMS desk.

**NOTE:** The system is designed to automatically fix some issues when the action is tried again. If you encounter a system error or “bug” you should try the same action at least twice before reporting the problem to the EIShelp@Alaska.gov.

**INTERNET EXPLORER SETTINGS**

Several settings in your local Internet Explorer (IE) can impact the functions of CMS. Below is an example of the IE Version 11 settings. IE is the recommended browser for CMS. IE versions older than IE 11, Safari, Chrome and Firefox users may experience other problems with CMS due to their internet browser. If your internet explorer progress bar appears as if it is always loading, you need to have your IT staff update your system with Microsoft hot fix 925973.
ADVANCED SETTINGS

While you have Internet Explorer open, select the Internet Options under the Tools tab. Once you have selected Tools, a pop-up window will display; select the ‘Advanced’ tab at the top of the pop-up.

The following is a listing of recommended settings found in the advanced tab of Internet Explorer for CMS.
INTERNET EXPLORER TRUSTED SITES SETTINGS

CMS should be added to your Internet Explorer trusted sites to allow for the system to function without encountering issues.

The following changes are recommended but users should check with their local computer support staff if they have questions.

While you have Internet Explorer open, select the Internet Options under the Tools tab. Once you have selected Tools, a pop-up window will display; select the Security tab at the top of the pop-up.

Once the Security tab is displaying, click once on the Trusted Site check mark to toggle the screen to the Trusted Sites information. Then press the Sites button.
The following websites should be added if not already appearing.

1. *.state.ak.us will enable all state of Alaska sites to be handled by the Trusted Sites settings.
2. https://dpasyops.dhss.alaska.gov is the location of the CMS programs.

Once the sites have been added, you need to confirm the settings of the Trusted Sites security. From the pop-up with the Trusted Sites checkmark, press the Custom Level button. This will display a pop-up of the security settings for the Trusted Sites. You will need to adjust any setting that says “disable” to “prompt” or “enable” (if no prompt is listed).
Once the settings have been updated, press the OK button. You then need to close all sessions of your Internet Explorer for the changes to take effect.

**OTHER INTERNET EXPLORER VERSIONS**

Web browsers other than Internet Explorer (IE) are used at the user's own risk.

CMS was designed for IE 6. When using newer versions, you may see a problem on various screens when using free text boxes. If you see a display problem, you should ensure your IE settings are set to display sites in “compatibility view”. You may add the CMS site using the Capability View Settings option.
Use the tools menu option to go to “compatibility view settings” and add the CMS site address to the listing if necessary.
You may add the site by clicking the add button on the Change Compatibility View dialogue box.
INTERNET EXPLORER FIND FUNCTION (CTRL + F)

Users can use the CRTL and F keys to activate the IE Find function. The Find function helps when searching through client notes or other screens. Click the small x to the left of the find box to turn off the search function.
POP-UP BLOCKER

Users must ensure their IE pop-up blocker has been set to accept pop-ups from CMS.

You may either tell the IE software to allow pop-ups when encountered on CMS, or add the CMS site to the allow sites using the IE Tools option and pop-up options.

Add the site dpasysops.dhss.alaska.gov and dpaworks.dhss.alaska.gov to allow all pop-ups from CMS.
AUTOCOMPLETE FUNCTION

Users may wish to activate their IE AutoComplete function to allow for the search screen to remember previous case numbers and names. To activate, select the IE Tools menu then the Internet Options. When the menu appears, select the tab for Content then press the AutoComplete Settings button. Once the options appear, ensure the option for “forms” is checked. Then press OK twice. IE needs to be closed and restarted for the change to take effect.
COPYING AND PASTING FROM MICROSOFT WORD

Occasionally you will encounter issues when trying to copy from MS Word and paste into non-Microsoft programs. This is usually caused by the use of “smart quotes”. An indicator of this is when you see a “%” symbol and a number instead of the quotation marks on the Word document. If you encounter this, you need to change two settings in your MS Word.

With MS Word running, select the Windows button on the top left hand side of the screen and press the button for Word Options.

For MS Word 2013, choose ‘File’ from the menu followed by the button for Options.
When the menu appears select Proofing and then press the Auto Correct Options button.

When the AutoCorrect menu appears, you then need to make sure the “Straight Quotes” with “smart quotes” option is not selected in both the ‘Autoformat’ and ‘Autoformat As You Type’ tabs. Then press ok twice to leave the Windows options. You will need to restart MS Word for the options to take effect.
SECTION 2
ACCESSING CMS THROUGH THE WEB

CMS security is maintained by user profiles, which allow or deny access to different portions of the system. Users are assigned a Security Key and Password to be entered on the main sign-on screen. **Do not share your password with other users.**

Security access is requested through the SOA Work Services Representative who then notifies Systems Operations (Sys Ops) for setting up accounts.

**NOTE**
**CMS IS AVAILABLE 7 AM TO 7 PM MONDAY THRU SATURDAY. IT IS NOT AVAILABLE ON SUNDAY MORNINGS FROM 7 TO 11 AM DUE TO SYSTEM BACKUPS.**

**WARNING**
**ANY OTHER WEB USE, DOWNLOADING MUSIC, OR HAVING MULTIPLE WEBSITES OPEN AT THE SAME TIME AS CMS WILL SLOW DOWN YOUR CONNECTION WITH CMS.**

From any internet page, enter the CMS address listed below or enter the one provided to you:

https://dpasysops.dhss.alaska.gov/cms_net4

Once you have entered the correct CMS address you will see a screen as shown above.
LOG IN/TIME OUT

INFORMATION DISPLAYED: When first logging into CMS or when a time-out occurs, you will see the above screen. Time-outs occur when there has been no action in CMS for 60 minutes. Any changing of tabs or any save action will reset the timer. The only page on which the time-out will not occur is the login screen itself. When logging back in, the system will redirect you back to the last screen that you were accessing.

Security Key Enter your security key issued by Systems Operations which starts with CMSxxxx.

Password Enter your password. If your password expires, you may still use it using the Change Password function. You are required by the system to change your password every 90 days.

Change Password Click to change your password for CMS. Passwords are limited to 8 characters. You must complete all four of the information blocks to change your password.

Login Click to login once you have entered your security information.

Contacts Links for email addresses of various office contacts and includes a link to the instructions for getting access to CMS. Ensure you include “CMS” in the subject line of any email.
Broadcasts Area  The large white area used by Sys Ops for system notices to users. The area will not be shown when there are no broadcasts.

**CHANGE PASSWORD**

**NOTE - USERS MAY STILL CHANGE THEIR OWN PASSWORD AFTER IT HAS EXPIRED. PRESS THE CHANGE PASSWORD BUTTON AND COMPLETE ALL FOUR BOXES TO CHANGE YOUR PASSWORD AT ANY TIME.**

![Image of Change Password Function](image)

**INFORMATION DISPLAYED:** Upon receiving your initial password from Sys Ops, you must access the change password function and set a new password. You enter the change password function by pressing the change password button on the login screen. Then enter the information in all four of the blocks to change your password. Once you have changed your initial password, a prompt will be displayed every 3 months advising you to change your current password.

- **Security Key**  Enter your assigned Security Key.
- **Password**  Enter your assigned password (asterisks will display as you type).
- **New Password**  Enter your new password of 7 or 8 characters (asterisks will display as you type).
- **Verify New Password**  Re-enter your new password (asterisks will display as you type).
- **Login**  Click the Login button or press the enter button to access the case management system and to change your password.
Cancel

Click to disregard your request to change your password and return to the login screen.
CMS SYSTEM ATTRIBUTES

There are several features in CMS available to the user. A screen may have several of these attributes at the same time.

INFORMATION DISPLAYED: Once you’ve reached the CMS site, this screen will be displayed. Several options are available.

1) Broadcast Area  
Used by Sys Ops to make announcements for all users to view during login. This area will not be displayed if there is no announcement.

2) Security Section  
Area used to login or to change your password.

3) Internet Explorer Tool Bar  
The Internet Explorer (IE) Tool Bar back button can be used to return to previous screens and to print to your default printer.

4) Internet Explorer Address Bar  
Displays the Internet/Web address you are currently viewing. Sys Ops may ask for this address if you are having connection problems.

5) Log Out Button  
Used to log out of the system. The button can be used on any screen. **Do not use the red “X” to log out of CMS.**

6) Contacts  
Links for email addresses of office contacts and a link to the CMS access request forms.
COMMONLY SEEN SCREEN OBJECTS

1) Selection Tabs  Used to navigate between different screens of CMS. When initially logged in, most users will only see the Client Search and the User Guide tabs. Once a client has been selected, this area will populate with the functions allowed for your security profile and the office the client is assigned.

2) Drop Down Box  Click the down arrow to the right of the field. Select the desired option. This will highlight the selection and it will be entered in the field. Drop down boxes may also control the availability of other buttons.

3) Data Box  Boxes where users enter data for input or searching.

4) Command Buttons  Buttons used to execute an action. Also known as enter buttons.

5) User Notifications  Notifications are directed to an individual user. In this example, the user is getting a notification that their password will expire 2/4/2018. These notifications will appear in red letters.
6) Validation Errors

When an incorrect entry has been made or a required value is not entered, a Validation Error will display in a red highlight. Hover your mouse over the highlighted field title or field to view the error reason. A box will display listing the conflict of input. You may also see a red comment text appear when the validation error concerns more than one field.

Check Box

(not shown) A box used to indicate an action on a case. The client not signing their FSSP is an example of a check box.
Luminist Access

Luminist is a separate system used by some CMS staff to access state reports to include the Monthly and Weekly caseload reports. A separate user ID and security key is required to access Luminist.

To access Luminist use your Microsoft Internet Explorer using the same settings as previously used for CMS and access the following link: https://luminist.state.ak.us/luminist/luminist.html


If you receive an edit indicating your password is no longer valid, e-mail EIShelp@Alaska.gov to have your Luminist password reset. Please remember to have “CMS” somewhere in your email subject line to help automatically route your request to the person working the CMS desk.
SECTION 3

CLIENT SEARCH

The first step in using CMS is to find the client on which you need to take action. All users can access the Client Search function.

INFORMATION DISPLAYED: After logging in, the Client Search screen is displayed. You will also see any overdue alerts (due today or earlier) associated with your Personnel Control Number (PCN). You can sort the overdue alerts by clicking on the column titles. For example, clicking once on the Overdue Alert Message title will alphabetize the messages and clicking a second time will reverse the order of the messages.

Clients can be searched for using several different types of identifying information. The recommended method is either by client ID or SSN. If you need a wider search result, you may enter the first few letters of a client’s name. Once you have entered the identifying info, press the search button. If only one client is found with that identifying info, you will be taken directly to the CMS Summary Screen. If more than one client is returned, you will have an option to select an individual client from the list. Only clients with a current or past JAS involvement can be displayed in CMS.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID</td>
<td>Enter the client ID, if known. This is the number that starts with a 06 and is ten digits long.</td>
</tr>
<tr>
<td>SSN</td>
<td>Enter the Social Security Number (SSN) to search for the desired client.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter at least the first two letters of the last name to search by last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter a portion of the first name to redefine your search results.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Enter the DOB to refine your search results.</td>
</tr>
</tbody>
</table>
Gender: Drop down menu to allow for refining your search results.

Search: Press the Search button once you have entered the desired search criteria.

Clear Fields: Used to start a new search by clearing the data fields.

Client Search Tab: Selecting the client search tab on the left side of the screen acts the same as the Clear Fields button. Pressing the Client Search tab, while having a client selected, will clear the client data from the screen without logging the user out of the system. This is useful for clearing client data before a different client is interviewed.

Choosing an Alert to work

Alerts listed in the Overdue Alerts may be acted on. Click the underlined word for the alert you want to work with.

Select: Used to navigate to the CMS Summary screen for the client indicated by the overdue alert.

Edit: Used to edit the overdue alert associated with the client.

Delete: Used to delete the overdue alert.

Hide Alerts: Allows the user to hide the overdue alerts listed on the screen. This feature was added for when workers have a client sitting at their desk. Once hidden, the button will display Show Alerts to allow the alerts to be turned back on.

If you choose to use the AutoComplete function of Internet Explorer, you may see a listing of previous search criteria you used. In the above example, a previous client number is displayed. You may then use your arrow keys to select this number. This feature is also available on the other fields of the Search screen.

Entries in the drop downs may be deleted by using your keyboard arrow keys and the delete button.
SEARCH RESULTS

INFORMATION DISPLAYED: After pressing the Search button, a search results window may be displayed. The above example was the result of a last name search for Smith. Once you have located the client you want to view, use the select button on the left side of the results window to view the client’s records.

Select Used to select the client you want to view.

Client ID Displays a list of client IDs found using your search criteria.

Last Name Displays the last name of clients returned based on the search criteria used.

First Name Displays the first name of clients returned based on the search criteria used.

MI Displays the middle initial of clients returned based on the search criteria used.

Date of Birth Displays the DOB of clients returned based on the search criteria used.

SSN Displays the social security number of clients returned based on the search criteria used.

Gender Displays the gender of clients matching the entry on the Client Search screen.

Alias “Y” indicates this is an alias name for a client.

Duplicate “Y” indicates this client number has been identified as a duplicate client number. If you select the duplicate, you will be taken to the correct client number.
<table>
<thead>
<tr>
<th>Correct Client Number</th>
<th>Displays the correct client ID for duplicate clients.</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAS Program Type</td>
<td>Indicates if the client is involved in the Employment and Training (ET) or the JOBS (JB) JAS programs. <em>Only individuals involved in a JAS program will be listed in CMS.</em></td>
</tr>
</tbody>
</table>
SECTION 4
CMS SUMMARY

Once the client has been identified using the search function, users will be taken to the CMS summary screen. At this point, other tabs may be displayed on the left side of the screen depending on the user’s security profile and the office to which the client is assigned.

NOTE
CASE INFORMATION DISPLAYED WILL BE FROM THE LAST CMS INVOLVEMENT FOR THE CLIENT AND MAY NOT REFLECT THE LATEST EIS CASE INFORMATION. YOU MAY NEED TO CLOSE THE OLDER CMS CASE AND CONTACT THE ELIGIBILITY TEAM TO DO A NEW CMS REFERRAL.

INFORMATION DISPLAYED: This screen displays an overview of the client’s CMS records. The screen will adjust for each type of JAS involvement. If a client has an E&T program involvement, the Food Stamps information will be displayed. If the client has an ATAP involvement, the ATAP involvement will be displayed even if the client has a secondary Food Stamps involvement. The Work Services Program Status was added and is displayed under the Case Number link. This status displays the current status of the Work Activities/CMS Case.

The screen may not list the address information if the client is not in your assigned office or if you have a limited security profile. None of the information on this screen is changeable.
The EIS Program Information displays the status of the various programs to include AF (ATAP), FS (Food Stamps), ME (Medicaid) associated with the listed case number. The latest Child Care (P0, P1, P2, or P3) program involvement will be displayed. A P0 indicates the client has a child care application in received status, a P1 indicates client is on PASS I assistance, a P2 indicates the client is on the PASS 2 assistance program (former ATAP client), and a P3 indicates the client is on the PASS 3 assistance program. The program status os also displayed. An OP indicates the program is open, an RE indicates an application has been received, a PE indicates the case is pended for information, a SU indicates the case is suspended and a CL indicates the program has been closed.

If you want to know the name of the office doing eligibility for the case or doing the case management, you can hover your cursor over the office number on the screen for additional information as seen below.

```
AF Case Information
Office: 051   Unit: 1   CaseLoad: 21
Case Assigned to: CLERK, BETHEL
TA Counter: 2   BA Counter: 0

Case Manager Information
Office: 906   Unit: 9   CaseLoad: 97
Case Manager: NINE STAR ENT. (WTW)
```

**Baby Counter** – The screen shot above also displays the number of months already used by the household toward the 12 month Baby limit as of the last AF payment. If a discrepancy is found between the actual months and the displayed months used, you need to notify the EIS Help desk with the correct information so that the records may be updated. Emails should be directed to: EIShelp@Alaska.gov.

Please remember to have “CMS” somewhere in your email subject line to help automatically route your CMS requests to the person working the CMS desk.

**Case Number** - A link used to display the other family members of the EIS case which are also in the JAS/CMS system. After clicking on the case number link, you will receive another window as shown below. You may then use the select option to switch to that person’s CMS file. The client’s name will change on the page title when you switch clients. You may also close the window without making any changes. The system will adjust the available tabs to the new client based on the user’s security profile and the office where the client is currently assigned.
Transfer/Change of CARC

If you want to transfer the client's case to another worker, select the Transfer button on the Client Summary screen. Once the button has been pressed, you will see the screen below. You can then input the office, unit and caseload of the new worker.

If you transfer the case to a caseload outside of the area/office you have access to and then decide you need the case back, you need a supervisor to transfer the case back to your caseload.
SECTION 5
CLIENT NOTES (CLNO)

The Client Notes (CLNO) function of CMS is used by Case Management staff to record contact with clients and any associated actions. Client notes are only visible to workers using CMS. CMS workers may enter personal information in client notes since only that client may request copies of the client note.

INFORMATION DISPLAYED: After selecting the Client Notes tab on the left, a listing of client notes will be displayed. You may start a new client note by pressing the new Client Note button. You may view and print client notes by using the select hyperlink for the Client Note. You may edit or delete client notes you created on the same day they were created.

WARNING
SELECTING A DIFFERENT TAB BEFORE YOU SAVE YOUR CLIENT NOTE WILL RESULT IN THE LOSS OF ANY CLIENT NOTE INFORMATION.

<table>
<thead>
<tr>
<th>New Client Note</th>
<th>Used to start a new client note.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Used to select the client note you want to view/edit/print.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays the date the client note was created.</td>
</tr>
<tr>
<td>Time</td>
<td>Displays the time the client note was created.</td>
</tr>
<tr>
<td>Subject</td>
<td>Displays the title of the client note as entered by the worker.</td>
</tr>
<tr>
<td>Author</td>
<td>Displays the name of the person who made the client note.</td>
</tr>
</tbody>
</table>

An author of System Generated or Sys Gen indicates the client note was created as part of an automated system process.
NEW CLIENT NOTE SCREEN

INFORMATION DISPLAYED: After selecting individual client notes or after pressing the New Client Note button, the system displays the client note screen and any available buttons depending on the age of the client note and the user’s security profile. You may edit and delete your own client note on the same day it was created.

Exit (save)  Used to return to the listing of client notes. Also saves changes to the client note when you are the author and you are viewing the client note on the same day it was created.

Save Client Note  Saves any changes to your client note and returns you to the listing of client notes. Button will not be displayed on an old client note or on case notes when you are not the author.

Print (save)  Allows user to display and print client notes using Acrobat Reader. This button also saves any changes made to the client note. When finished with the reader, you will need to close the Reader using the red X in the upper right corner of its display.
Spell Check (save) Button used to correct spelling using a standard dictionary. Button is only visible when making or editing a client note. A popup window for the spelling dictionary is shown below. The Spell Check button also saves any changes made to the client note.

Delete Client Note Button to delete client note on the day you created it. Button will not be displayed on other people’s client notes or on older client notes. You will be prompted for a confirmation of the deletion prior to the client note being deleted.

Cancel (not saved) Used to abandon any client note not previously saved. Will return to the client note listing.

Subject A free text box that allows you to enter the subject of the client note. This box cannot be changed on old client notes or on client notes that were created by someone else.

Created by Lists the author of the client note.

Date/Time Lists the date and time the client note was created.

Comments Free text field for inputting your client note.

VIEW/EDIT/PRINT CLIENT NOTE SCREEN ON OLD CLIENT NOTES

Exit Will display on case notes older than today or on client notes you did not create. It will not save any changes to client notes viewed.
Print

Uses the same print function as above but does not save any changes since the client note has already been finalized in the system.
SECTION 6
ALERTS

The CMS Alerts are used by staff to view, create, edit and delete reminders for actions. Alerts can be CMS based (appear only in CMS), EIS based (appear only in EIS for eligibility staff) or both appear in both CMS and EIS. Anyone can edit and delete any alert as long as their security profile allows them to access the client’s records.

USING THE ALERTS TAB

INFORMATION DISPLAYED: After selecting the alerts tab on the left, a list of alerts will be displayed. You may create a new alert, edit and delete current alerts, view alerts by a caseload or view all overdue alerts assigned to the current worker’s ID. The alerts may be sorted by column by pressing the title of the column. Alerts beginning with a “C” are CMS/Client alerts and alerts beginning with “E” are EIS/case alerts. Older alerts may not have a C/E identifier.

New alert Used to set a new alert.

View Alerts by Caseload Used to display all the alerts for a specific caseload.

View Overdue Alerts Used to display all overdue alerts for the current CMS user

Edit Used to edit an alert. Once the alert is displayed, you may change the date or text of the alert.

Delete Used to delete the alert. No warnings are given prior to the system deleting the alert.

Alert Due Indicates the date the alert is due or when the worker wants a reminder.

Alert Message Displays up to 28 characters in this field for user’s message.
Creator Name Displays the name of the person who created the alert. Older alerts may display “unknown” if the system isn’t able to determine who created the alert.

Created Indicates the date the alert was created.

NEW ALERT/EDIT ALERT

INFORMATION DISPLAYED: After selecting ‘New Alert or selecting an alert to edit, the Edit Client Alert sub screen will be displayed, at which time you can enter the initial alert information and date or change existing alert information. Only today’s date or future dates may be entered.

Save Used to save the information and return to the alerts listing.

Cancel Cancels the current function and returns to the alerts listing.

Alert due date The date you wish to have the alert due. The alert listing can be sorted by this date. Only today’s date or future dates may be used. Several different date formats are available for use. For example 4/1, 4.1, 4/1/09, 4-1-09 are all acceptable formats for dates within CMS.

Cal A calendar function is available for assisting with dates.

Date created A display of the date the author created the alert.

Alert message A field for inputting the alert message you wish to display. The box is limited to 28 characters.

Author name A display of the author’s name.
CMS/EIS alert

Check boxes to indicate the type of alert you wish to create. The system defaults to the CMS only alert. You may check the box to indicate where you want the alert to be displayed. For example, if you want the alert to only display in CMS, you would only select the CMS box. An EIS Alert will also be displayed in CMS to show that it has been sent to EIS. Once the alert has been saved the check box is not changeable.

VIEW ALERTS BY CASELOAD

INFORMATION DISPLAYED: Users may also view both client and EIS case alerts using the View Caseload Alerts button. Input the caseload by caseload numbers and press ‘Go’ to view the caseload. This will display all alerts for this caseload. You may also filter alerts for a caseload by date if you want to view future alerts for a time period when a worker may be away.

View Client Alerts Returns to the client alerts view for the client indicated at the top of the screen.

FSO Full Service Office number for the agency you wish to view.

Unit The single digit unit number for the caseload.

Caseload A two digit number to identify the single caseload to view.

Go Used as an enter button to view the caseload.

Clear Clears the fields to view a different caseload.

Start Date Optional start date for filtering alerts. Date will auto populate with 1/1/1990.

End Date Optional end date for filtering alerts. Date will auto populate with 12/31/2199.
INFORMATION DISPLAYED: Once the Go button is pressed, a listing of all alerts for the caseload will display in due date order. The data may be sorted by clicking on the column title. The data displayed is similar to the client alert section. You may leave the screen by pressing a different tab on the left or the View Client Alerts button.

INFORMATION DISPLAYED: To obtain a list of all alerts within a specific time period, enter a start/stop time period and press the Go button. This option is useful for time periods when workers have scheduled absences.
OVERDUE ALERTS (ON CLIENT SEARCH SCREEN)

INFORMATION DISPLAYED: When users initially log into CMS, any overdue alert associated with their PCN will be listed. Should a caseload be assigned to the wrong PCN, for example a DOL EIS PCN instead of a DOL CMS PCN, the alerts will not be displayed when the DOL worker logs into CMS with their CMS Security Key. Once users see the alerts, they may then take action on the alerts. Only alerts which are overdue will appear on this list.

Hide Alerts  Allows the user to hide the overdue alerts listed on the screen. This feature was added for situations where workers have a client sitting at their desk. Once hidden, the button will display Show Alerts to allow the alerts to be turned back on.

Number of alerts  The total count of overdue alerts for the user who has signed in. Users should take action on alerts to keep their overdue alerts low. **Should a user have an excessive amount of overdue alerts, they may notice their system running slower as CMS must go out and retrieve the data on all of the alerts that are overdue.**

Select  Used to navigate to the CMS Summary information for the client whose alert is being displayed.

Edit  Used to navigate directly to the alert. Allows for editing of the alert being displayed.

Delete  Deletes the overdue alert. **No warning is displayed prior to the alert being deleted.**

Overdue Alert Message  Gives the text associated with the alert. May be clicked on by the worker to sort the alerts by message.
Alert Due
Gives the date the alert was due. The alerts are sorted with the oldest alert on top of the list. Workers may click on the column title to sort the list again in reverse order.

Client Name
Displays the client’s name associated with the alert.

Here are some alert hints to assist in making the overdue alerts more useful:

1. Use an alert due date well into the future for alerts needing placed on case as a long term reminder. For example, use 1/1/2049 as a due date if you wish an alert to be saved on a client but not displayed on the overdue alerts section.

2. Users should review all alerts for clients when the client’s work services case closes. Consider deleting any alert which no longer applies.

3. Keep your overdue alerts list small by keeping up on your alerts.

4. Make sure the wording is clear on your alerts since they are transferred to another worker when the client’s case is changed to another caseload.

5. Choose an alert due date which will allow users time to initiate the desired action. For example, if you wish to have a new FSSP done for a client by 12/1/18, consider setting the alert 7 days prior or 11/23/18.

6. Any alerts saved to the EIS system will also be displayed in CMS. However, any alerts saved to CMS system only will be shown only in CMS.
SECTION 7

FSSP

The Family Self-Sufficiency Plan (FSSP) function of CMS is used by Case Management staff to document the client’s development of their self-sufficiency plan and the associated actions. Once a plan is signed, no further changes to the plan are allowed in the system. FSSP Addendums are used to supplement existing plans with additional actions needed by the client in addition to the current FSSP.

NOTE

FIELD STAFF ARE NOT ABLE TO DELETE AN FSSP. AN FSSP MUST EITHER BE SIGNED OR MARKED THAT THE CLIENT DID NOT SIGN THE FSSP BEFORE THE SYSTEM WILL ALLOW A NEW FSSP TO BE STARTED. ONLY ONE FSSP MAY BE CREATED FOR EACH CALENDAR DAY.

INFORMATION DISPLAYED: After selecting the FSSP tab in the left pane, a list of the client’s plans will be displayed. If the client is new and has no previous plan, the list will be blank. You may start a new FSSP by pressing the New FSSP button.

- New FSSP: Used to create a new FSSP. Button will not be displayed when the last FSSP or addendum has not been signed or marked that the client did not sign (CDNS).
- Select: Allows users to view the individual FSSP for editing or printing.
- Start Date: Start date for the FSSP.
- Employment Goal: The title/Employment goal from the FSSP.
- Goal Date: The date the actions on the FSSP should be completed.
Signed Date  
Date the FSSP/addendum was signed by the client. If the date signed is blank the New FSSP button will not be displayed. If you need to create a new FSSP before the previous FSSP was signed you need to mark the FSSP as client did not sign (CDNS) the FSSP.

Addm  
The addendum number for each FSSP. You are allowed up to six addendums for each signed FSSP. If more than six addendums are necessary a new FSSP should be created.

FSSP ADD/EDIT – GOALS PAGE

INFORMATION DISPLAYED: After selecting the Select button on the FSSP list or the New FSSP button, you will be taken to the FSSP Add/Edit screen. From this screen you will enter the goals, steps, services and target dates. A calendar function is available for each date field. Once the FSSP is “signed” by inputting a date signed on the Services page, the FSSP cannot be changed. Users are not allowed to delete an FSSP.

Return to list  
Return to the FSSP list screen. Changes are not saved. If you are creating a new FSSP, a blank FSSP will be saved.

Print Preview  
Allows users to view and print the FSSP using their default Windows printer. An example is shown below. This will also save any changes.
Update

Saves any changes made to the FSSP. Switching between the Services and Goals pages will also save any changes.

Addendum

An indicator of which addendum this is. Indicator will show “O” for the Original FSSP and a number for each addendum.

Plan Start Date

Enter the start date for this FSSP.

Goal Date

Enter the final goal date for this FSSP.

Emp Goal

Enter the employment goal for this FSSP. This will also be displayed on the FSSP list page.

SpellCheck

A basic spell check program for all fields.

Goal/Steps

Goals and steps are entered for progress towards the employment goal. Each step is given a start date and a review or target date.

Add Addendum

(See below) A button used to add an addendum. Button will only be shown on a FSSP/addendum that has been signed.
Services Used to change views to the services fields. Button will also save any changes.

FSSP ADD/EDIT – SERVICES PAGE

INFORMATION DISPLAYED: The FSSP Services page can be accessed by selecting a FSSP and then selecting the Services Button on the right side of the FSSP. The Services screen is used to indicate any service the client will need to obtain self-sufficiency, who will arrange the service, who will provide the service and who will pay for the service. This is also the screen where you may enter the next case management appointment. The screen functions are similar to the FSSP Goals screen with the following exceptions;

Goals Used to return to the FSSP Goals screen. It will also save any changes made to the Services screen.

Work Req. Status A drop down menu to indicate the client’s work status. There are three options;

- Required to work – no exempt date is allowed
- Exempt from work – exempt date is required
- Exempt but will volunteer – exempt date is required

Exempt Thru Date If the client is exempt from work activities enter the last day of the exempt period here. This field will be unavailable and colored gray when you have selected the client is required to work in the Work Requirement Status above.

Appointment Date Enter the next case management appointment date.

Time Enter the time for the next case management appointment.

Additional Info A free text field that can include the location of the client’s next appointment or a reminder of what to bring.

Page Revised 9/1/2018
Client Did Not Sign (CDNS)

A check box to indicate the client failed to sign the FSSP. This will allow a new FSSP to be started. Will be displayed as CDNS on FSSP listing.

Date Signed

Enter the date the client actually signed the FSSP. This will allow a new FSSP or addendums to be added for the client.
SECTION 8
WORK ACTIVITIES

The Work Activities function of CMS is used by Case Management staff to record the countable activities for their clients and to OPEN/CLOSE the CMS case. These activity hours are critical to ensure financial credit is given for the work provided by each contractor. Per contractual obligations, hours must be entered by the 12th of each month.

NOTE
IF YOU NEED A CHANGE TO THE START DATE OF A NEW REFERRAL, CONTACT THE OFFICE ASSIGNED TO THE CASE.

IF A WORK EXEMPTION CODE IS ENTERED INTO THE EIS SYSTEM WITHOUT THE CASE MANAGER CHANGING THE CMS PROGRAM STATUS TO OPEN, THE CMS CASE WILL CLOSE (WITH A “JR” STATUS) AND THE CLIENT WILL NO LONGER APPEAR ON THE CASELOAD REPORT. YOU WILL THEN NEED TO CONTACT THE ELIGIBILITY TEAM TO DO A NEW REFERRAL FOR CMS.

INFORMATION DISPLAYED: After selecting the Work Activities tab on the left, of the most recent month will be displayed. Case managers may enter hours by using the select button on current activities or by adding new activities. Only the first nine activities input are utilized for federal reporting. Workers can initialize into a future month on this screen as well.

Init Month: Used to move the CMS/JAS case ahead into a future month.
Add Activity: Used to add work activities into the system.
Del Month Used to delete the displayed month. Can only be used when no activities exist. You may need to delete an activity before being able to delete the month.

Update Saves the latest changes to the screen.

Month Displays a drop down list to allow workers to change to another month in which the client had an open JAS involvement. After the 19th of the month, the previous month’s hours cannot be changed. You may still add the “NR” activity in a prior month to allow the case to be initialized forward to the current month.

Current Month Indicates the month the client’s case is sitting in.

Program Displays the CMS program the client is involved in. JB is for Jobs/ATAP and ET is for Employment and Training/Food Stamps.

Pgm Status Drop down to change the program status. The available status options are; OP=Open, CL=Closed, SU=Suspended (used for penalty rsn and alert), TR=Transfer, RG=Registered, and JR=JOBS refusal.

Program Status Date Shows the date the program had been changed.

Start Date Shows the start date for the last or current program.

Close Date Shows when the client’s involvement in CMS ended. Will display zeros when the client is active in CMS. If you are closing a case, you are required to input a day in the month shown in the current month field.

Cls Rsn Drop down used when closing a client’s CMS case. Will display the reason on closed cases. Available closure reasons are;

- DF – Deferred due to lack of office capacity
- DV – Ended due to domestic violence
- EX – Exempt
- IR – Invalid referral
- MH – Ended due to mental health
- MR – Met E&T requirements
- NA – Never appeared at work search
- NC – Noncompliance/not cured
- NE – TA/FS case closed reasons other than employment
- SA – Ended due to substance abuse
- SB – Ended due to other substantial barriers
- WK – Ended due to work/employment

Page Revised 3/1/2013
<table>
<thead>
<tr>
<th><strong>Penalty Rsn</strong></th>
<th>Drop down menu for the different penalty reasons available to workers. Penalties are used mainly for noncooperation. Users must place the case in a suspended (SU) status before the penalty reason field becomes available. Once a reason is selected, an EIS alert is sent to the ET. Available penalty reasons are;</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS – Child support noncooperation</td>
<td>EA – Didn’t comply with employment assessment</td>
</tr>
<tr>
<td>ET – Didn’t comply with other requirements for E&amp;T</td>
<td>IP – Intentional program violation</td>
</tr>
<tr>
<td>JQ – Job quit or refused job</td>
<td>JS – Didn’t participate in job search</td>
</tr>
<tr>
<td>SA – Minor parent failed to attend school</td>
<td>SS – Didn’t develop, sign or comply with FSSP</td>
</tr>
<tr>
<td>WA – Didn’t participate in other work activity</td>
<td></td>
</tr>
</tbody>
</table>

| **Vol** | Used to indicate a client is voluntarily participating in the program when not required to do so. Defaults to N or No. Users may change the field to Y or Yes. |

<table>
<thead>
<tr>
<th><strong>Ex Rsn</strong></th>
<th>Display of the exemption reason for a client not to participate in a program for the month selected in the drop down menu. These reasons are display only and are set by the ET using EIS. The available activity exemption codes vary for each program. This item will change based on month selected. They are;</th>
</tr>
</thead>
<tbody>
<tr>
<td>BA – Baby exemption (JB)</td>
<td>CA – Caretaker disabled adult (JB)</td>
</tr>
<tr>
<td>CC – Inappropriate childcare (JB)</td>
<td>CD – Caretaker disabled child (JB)</td>
</tr>
<tr>
<td>CH – Child included in ATAP HH (JB)</td>
<td>CP – No childcare funds (JB)</td>
</tr>
<tr>
<td>DV – Active Division of Voc Rehab case (ET)</td>
<td>HD – Family Hardship (JB)</td>
</tr>
<tr>
<td>IC – Ill or incapacitated (Both ET and JB)</td>
<td>NC – Non-Compliance; disqualification (ET)</td>
</tr>
<tr>
<td>NW – Exempt from work registration (displays when WR code entered in EIS)(ET)</td>
<td>PG – Pregnant 2nd/3rd trimester (ET)</td>
</tr>
<tr>
<td>RM – Remote location (ET)</td>
<td>SB – Substantial Barriers to employment (ET)</td>
</tr>
<tr>
<td>SW – Sheltered workshop employee (ET)</td>
<td>TR – No transportation funds (JB)</td>
</tr>
</tbody>
</table>
Office  The office the case is assigned for case management.
Unit  The unit the case is assigned for case management.
Caseload  The individual caseload the case is assigned for case management.
Case Mgr Assigned  The name of the person conducting case management.
Monthly Activity Data  Area of the screen which displays the work activities and their associated hours.
Select  Used to edit the individual activity listed on the screen.
Notes  A text area used by workers to record information of significance to an ET or CM staff. No alert or attention device is received by the ET when notes are added. This area may also be used for CM staff to indicate a note to another CM staff concerning the client’s work activities.

NOTES ON CASELOAD REPORTS:

1. The weekly caseload report (HESWJ50P) runs Friday evenings. Any changes made to a client prior to 7 pm on Friday will be reflected on the report which is available on Luminist.

2. The monthly caseload report (HEWMJ50P) runs the 12th of each month and will reflect data for the prior month. The caseload the client is assigned on the last day of the report month will be the caseload listed for the client. This report is also available on Luminist.

3. Neither the weekly nor the monthly caseload reports are used to determine participation rates/payments. Participation rates are determined using the ATAP Data Download (HESM020P) which runs the first Saturday of each month following the 11th. This report reflects data from the previous month.

4. The monthly WSQRDATA (HESM021P) report is used by QA staff to establish case lists to be pulled for QA processing. The “Whisker” report runs on the 12th of each month but contains less data than the monthly caseload report.

5. Two Parent (2P) clients who are not assigned to the same caseload will not be listed together in the same office. You may use the search feature of Luminist to find clients by their client numbers.
ADD/EDIT ACTIVITY HOURS

NOTE
THE SCREEN WILL ALLOW WORKERS TO INPUT MORE THAN NINE ACTIVITIES, HOWEVER ONLY THE FIRST NINE WILL BE INCLUDED ON STATISTICAL REPORTS. WORKERS SHOULD USE THE START AND STOP DATES TO REFLECT THE TIME PERIOD FOR THE HOURS ACCUMULATED. DO NOT REPEAT AN ACTIVITY FOR EACH DAY OF THE MONTH.

INFORMATION DISPLAYED: After selecting the Add Activity button on the Work Activities screen the above screen will be displayed. This screen allows workers to add and update work activities and their hours. The top portion of the screen is display only and cannot be changed by the worker. The bottom section of the screen can be updated by the worker. The selected month field indicates the month the system is attempting to update. You may change the month using the month drop down menu on the main work activities screen.

Cancel Button used to leave the screen without saving changes.

Program Indicates which program is currently open for the client. ET = employment and training, JB = the JOBS or ATAP program. This field is read only. If the open program is incorrect for the client you are serving, you will need to close the CMS case and have the ET do a new referral to the correct program in CMS.

Program Status Indicates the current program status and is read only on this screen. You may change the program status on the main work activities screen.

Pgm Start/End Date Displays the start and end dates for the client. If the program is ended, you may not enter hours. These fields are read only.

Current Month Displays the latest month the client’s JAS case is in. In the above example, the JAS case is in 5/09 but the worker is inputting hours in the selected month of 4/09.
Selected Month

Month the worker picked from the drop down menu on the work activities screen. This is the month the worker is trying to add or edit activity hours.

Add Comp

Button used to add the client’s activity and return to the work activities screen.

Activity

Drop down menu of allowable activities by program type (ET or JB). Some activities have limits which should be tracked by the case manager. The allowable codes are:

**ET Activity Codes**

- AS – Initial Assessment
- B3 – Remediation
- E3 – English as a second language
- E6 – GED Preparation, Adult
- E7 – Literacy improvement
- J1 – Independent work search
- S2 – Gap due to good cause
- VC – Vocational counseling
- V1 – Vocational training

**JB Activity Codes (cont)**

- JH – Job search/readiness holiday
- J3 – Structured work search
- NP – Not participating
- NR – New referral
- OA – OJT excused absence
- OH – OJT holiday
- OJ – On-the-job training
- PA – Job skills training excused absence
- PH – Job skills training holiday
- P1 – Post Secondary education
- P3 – Job skills training
- RA – Education related to employment excused absence
- RH – Education related to employment holiday
- SE – Self-employment
- SW – Seasonal work
- S2 – Gap in participation
- VA – vocational education excused absence
- VC – Vocational counseling
- VE – Vocational education
- VH – Vocational education holiday
- WA – Work experience excused absence
- WH – Work experience holiday
- WK – Paid employment
- WS – Job Start
- WX – Work Experience
- X1 – Contractual Work search

**Sched hours**

Enter the number of hours the client is scheduled for the activity. Some activities do not require this information and the fields have been protected from requiring input.
Act Hours
Enter the actual number of hours the client has performed the activity. Some activities do not require this information. Any previous hours can be entered but, they may not be reported if they were entered after the normal data collection time period.

Hourly Wage
Enter the hourly wage for the selected activity. Some activities do not require this information.

Start Date
Enter the start date for the selected activity. The start date must be in the selected month shown and must be on or after the program start date.

End Date
Enter the end date for the selected activity. The system defaults to the last day of the selected month shown. To carry an activity into a future month (formerly auto thru), change the end date to the date the activity will end as long as it does not exceed 12 months into the future. The field will not accept 99/99/9999.

Cal
A popup calendar used to select dates on various screens.

Provider
A text box that allows users to input up to three letters to indicate which person input the data. Users can enter their initials in this box or information as directed by their agency. This field is optional for all activities.

Contractor
A drop down box to select the user’s organization. This field is optional for all activities.

Delete button
This button is only displayed on an activity which has already been entered into the system. Once all activities in a month have been deleted, the month will also be deleted.
CLOSING THE WORK ACTIVITY/CMS CASE

When a client's involvement with case management ends, case managers must close the work activities screen for the client(s). Failure to close the case will cause processing problems on future involvements.

WARNING
DO NOT CLOSE THE CMS CASE UNTIL ALL ACTIONS FOR THE CASE ARE COMPLETED. WHEN THE CMS CASE IS CLOSED ANY FUTURE ACTIVITY DATES WILL BE "PULLED BACK" TO THE CLOSURE DATE AND ANY ACTIVITY THAT ONLY EXISTS IN A FUTURE MONTH WILL BE REMOVED.

INFORMATION DISPLAYED: The work activities screen displays the status of a client's CMS case. If a case is listed as closed (CL), the worker may reopen the case but the case will reopen in the last month listed in the month field. Cases with old closure dates should be treated as a new referral and left in closed status on CMS. A new referral should be initiated in EIS to open the client's CMS case.

Pgm Status
Change the program status to the appropriate code available in the drop down menu.

Close Date
Select the date you the case should be closed. Only today's date or a date in the past can be entered.
Cls Rsn  Select the reason code from the available drop down listing.  
Here are the closure reasons;

DR – Deferred due to office capacity  
DV – Domestic Violence  
EX – Exempt  
IR – Invalid Referral  
MH – Mental Health  
MR – Met Requirements  
NA – Never appeared at work search  
NC – Non-compliance  
NE – Not employment  
SA – Substance abuse  
SB – Significant barriers  
WK – Work
THIS PAGE INTENTIONALLY LEFT BLANK
SECTION 9
PAYMENT HISTORY

The Payment History function of CMS is used by Case Management staff to display Supportive Service JAS payment records. The records are not changeable through CMS. Payments are authorized in the EIS JASP system.

<table>
<thead>
<tr>
<th>PAYMENT HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Search</strong></td>
</tr>
<tr>
<td>Client Id: 0900037382</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Start Month Used to start a search for a particular time period. It will default to 01/0000 to show all benefit records.

End Month Used to reduce the number of records displayed by selecting an ending date. Defaults to 99/9999 to show all benefit records.

GO Used in conjunction with the start and end months to retrieve and display payment records requested.

Ben Month Displays the month and year of the payment.

Auth Date Displays the date the payment was authorized.

<table>
<thead>
<tr>
<th>Ben Month</th>
<th>Auth Date</th>
<th>Type</th>
<th>Vendor Name</th>
<th>Max Auth</th>
<th>Verif Amt</th>
<th>Verif Date</th>
<th>Disc Status</th>
<th>Status Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/2002</td>
<td>07/26/2002</td>
<td>CC</td>
<td>A RELATIVE</td>
<td>3.00</td>
<td>3.00</td>
<td>08/26/2002</td>
<td>Request</td>
<td>07/31/2002</td>
</tr>
<tr>
<td>08/2002</td>
<td>08/26/2002</td>
<td>CC</td>
<td>BEFORELAND CENT</td>
<td>4.00</td>
<td>4.00</td>
<td>09/26/2002</td>
<td>Request</td>
<td>07/31/2002</td>
</tr>
</tbody>
</table>

INFORMATION DISPLAYED: After selecting the Payment History tab on the left of the screen, a listing of payment records will be displayed. Each column title may be clicked for sorting of the data displayed. The screen will be blank if there are no payment records.
Type Displays the type of service the payment was for. The following are allowable types:

AR – Auto Repair
AT – Assessment Testing *
BE – Basic Education *
BT – Bus Tokens
CI – Car Insurance
CL – Counseling Services *
CM – Case Management Services *
CS – Community Services/Job Sampling *
DL – Driver’s License
ES – Emergency Shelter
GR – Grooming
GV – Gas Voucher
IC – Interview Clothing
JD – Job Development and Placement *
JS – Job Search Assistance/Placement *
LS – Life Skills Training *
OJ – On-The-Job Training
PL – Professional License
PO – Post-Employment Services *
PR – Pre-Employment Skills Training *
RL – Relocation
RM – Remedial Medical
ST – Special Tools/Equipment
SU – Startup Costs
TH – Train to Hire *
TR – Transportation
TU – Vocational Training *
WA – Work Adjustment Services *
WS – Wage Supplementation *
WT – Trial Hire *
YE – Youth Enrichment Activities

* = indicates payments can only be made directly to a contractor and not to the client
<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>The name of the business or person receiving the payment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Auth</td>
<td>The maximum amount the business may bill the SOA.</td>
</tr>
<tr>
<td>Verif Amt</td>
<td>The allowable amount of the bill approved for payment.</td>
</tr>
<tr>
<td>Verif Date</td>
<td>The date the bill has been approved for payment.</td>
</tr>
<tr>
<td>Doc Status</td>
<td>The current status of the document/bill for services. The following are the allowable statuses;</td>
</tr>
<tr>
<td></td>
<td>Not Requested – Bill not selected by EIS Batch job</td>
</tr>
<tr>
<td></td>
<td>Request – Bill selected for payment on next run</td>
</tr>
<tr>
<td></td>
<td>Rejected – Didn’t pay for a variety of reasons</td>
</tr>
<tr>
<td></td>
<td>Issued – Check has been sent out</td>
</tr>
<tr>
<td></td>
<td>Redeemed – Check has been cashed</td>
</tr>
<tr>
<td></td>
<td>Cancelled – Cancelled when lost or stolen</td>
</tr>
<tr>
<td></td>
<td>Stop Pay – Payment has been stopped</td>
</tr>
<tr>
<td></td>
<td>Expired – Request has exceeded the allowable age</td>
</tr>
<tr>
<td></td>
<td>Deleted Request – Has been requested to be reversed</td>
</tr>
<tr>
<td>Status Date</td>
<td>The date of the last status of the bill.</td>
</tr>
</tbody>
</table>
SECTION 10
EIS SUMMARY

The EIS Summary tab is used by Case Management staff to review information used in the benefit determination by the eligibility staff. This data is informational and may not display the entire information or the logic used by the ET in the eligibility determination. The month being displayed may be changed using the drop down menu. Ages displayed are based on today’s calendar date not the month used in the drop down menu. NOTE: the EIS Summary is the only area for a case manager to view someone’s social security number.
SECTION 11
CASE NOTES (CANO)

The Case Notes (CANO) function of CMS is used by Case Management staff to view case notes entered in EIS. Case Notes should not contain any personal information since any member of the case may request copies of the Case Note.

INFORMATION DISPLAYED: After selecting the Case Notes tab on the left, a listing of case notes will be displayed. You may start a new case note by pressing the New Case Note button. You may view and print case notes after selecting them. You may edit case notes that you have created on the same day they were created. You may also delete case notes you created on the same day they were created.

NOTE
CASE NOTES (CANO) HAVE THE SAME FUNCTIONALLY AS CLIENT NOTES (CLNO). PLEASE REFER TO THE SECTION ON CLIENT NOTES FOR FURTHER DETAILS ON THE FUNCTIONS OF THE BUTTONS WITHIN THE CASE NOTES SCREEN.

New Case Note Allows users to enter a new case note. Remember that case notes may not contain personal information and copies of case notes may be requested by any member in the case.

Case Number Displays the EIS case number for this client.

Select Used to select the case note you wish to view.

Date Displays the date the case note was created.

Time Displays the time the case note was created.

Subject Displays the title of the case note.

Author Displays the name of the person who created the case note.
SECTION 12
PASS I Child Care Request Processing

Parents Achieving Self-Sufficiency (PASS) I requests have been added to the functionality of CMS starting with the benefit month of 8/2011. Staff whose duties require them to submit a PASS I request are given a unique security profile which allows additional functions to be displayed within CMS to assist in the automated process of submitting the request directly into the Integrated Child Care Information System (ICCIS). Even though there is now an automated process, the manual submission of PASS I requests can still be done as a last resort.

NOTE
CMS WILL ALLOW PASS I REQUEST PROCESSING FOR CHILDREN AND ADULTS WITH SOCIAL SECURITY AS LONG AS THE ELIGIBILITY STAFF HAVE ENTERED THE SOCIAL SECURITY INCOME INTO EIS. CONTACT THE DPA Field Service office IF YOU HAVE PROBLEMS WITH INCORRECT INCOME CODING.

When using CMS to process PASS I requests (CC1), the case manager has the ability to;

- View the current status of the CC1 request.
- Have client notes automatically entered on CC1 submission.
- Receive client alerts directly from child care staff on anomalies.
- View and print CC1 forms.
- View and print Child Care Authorization Documents for clients.
- Cancel submitted request electronically.
EIS SUMMARY SCREEN

The submission of a PASS I (CC1) request begins on the EIS Summary Screen. This screen was selected since most of the family's data has already been collected by the system.

- Users should see a new PASS I Request button if they are authorized to submit a request for PASS I. Users without PASS I access will not see the button.

- **Users need to confirm they have the correct month listed in the benefit month drop down listing.** If the correct month is not displayed because it is a future month, use the latest month displayed with coding in the TA column under the Household Members section.

- If you receive an error indicating “Household Has Changed”, you probably have not selected the correct month for the month of care on the EIS Summary screen. You should not use a template and should use the “new request” button after selecting the correct month on the summary screen.
When a family has no prior history of an electronic CC1 request, you must submit a “new request” using the following method:

1. Using the CMS EIS Summary screen, select the earliest month in the benefit month drop down and then press the PASS I Request button.

2. Once you have pressed the PASS I Request button, you will be taken to the PASS I Child Care Request list. Since there has not been any prior automated request on this family the list will be blank.

3. Press the New Request button to display the PASS I Request Detail screen.
4. When the New Request button has been pressed the PASS I Request Detail screen will be displayed. Users need to complete the request using the drop downs or fill in boxes. The following are some system shortcuts and rules:

- Requests are only allowed for one month at a time.
- Using the calendar function for the start date will populate the end date.
- The system will automatically pull family members based on their information in CMS and EIS. Agency name is from the caseload to which the family is assigned.
- Keyboard shortcuts have been programmed so using the TAB button or pressing the beginning letter of the input (Like pressing "w" when inputting work experience) will automatically select the needed data.
- You may pend or save the CC1 form at any time. Pending the form will retain
the data and do limited data validation steps. Saving the CC1 will also perform the full validation/error check process.

- CC1 forms may be changed until the request has been ‘Accepted’ in ICCIS. This allows case managers to update a request without cancelling and resubmitting the request up to the point of the request being ‘accepted’.
- Once action is taken on the CC1, the case manager must cancel the old CC1 request and resubmit a new request with the updated information.

5. Begin completing the request by confirming the Care Begins and Care Ends dates.

6. Enter the phone number for the case manager and the family.

7. Under the Work Activity section, use the drop down to select the first adult. Once an adult is selected, the remaining fields are available for data entry.

- CMS will only display those activities eligible for child care.
- Activities can be selected by pressing the first letter of the activity. For example, pressing "W" for work then select work experience for the activity.
- If you have the "Autocomplete" function turned on for Internet Explorer, the data may be displayed as you begin to type.
- Once all the data has been entered, press the Add button to retain the data for this person. You may Edit and Delete the data as needed. You may also Clear the data if you made an error. Activity data is not added to the form until the Add button is pressed.
Each adult is required to have an activity before the form can be submitted. The system will not allow forms to be submitted without each adult having an activity.

8. Under the Child Care Request Detail section, use the drop down to select the first child needing care.

- Searching for a facility may be done by clicking on the Search link under the facility phone column.

- You may search by name or by facility phone number. This information available includes all open facilities in the ICCIS system.

- If the facility is not found or is new, it will need to complete the ICCIS approval process. A button titled New Facility will be displayed. The New Facility request should only be done for the initial care month and the following months should not be submitted until the provider is approved by CCPO. This process will be discussed in a later section.

- Workers may draft and pend their CC1 request for a new provider for subsequent months but they should not be submitted until the Child Care worker provides a provider number. If future months are submitted, expect
the request to be rejected by child care staff.

9. Once you select the facility, the facility information is included on the form and you may now complete the level of care using the remaining fields.

- The system has been programmed with the business rules concerning the types and amount of care that are allowed. If a red box is displayed, move your mouse over the red box for an explanation.

- Once the Child Care Request details have been entered, press the Add button to retain the information.

- Should the child need care from a second facility or an additional level of care from the same facility (FT and PT), it should be added as a separate line. The Copy Facility function allows the user to add the same facility to the next line of care without performing another facility search.

- Additional children are added in the same method as the original child.

- If you want to add comments to the CC1, they may be included in the Comments section. Comments added are also included on the automated client notes. The Comments section is generally used for additional care
justification, not to restate information the form already contains.

10. Should the child require care under the Alaska IN program, complete the appropriate fields in the Alaska IN! Supplemental section of the request form.

11. Once all data has been entered, press the Save button on the top of the form. This will perform the data validation check.

12. Move your mouse over the red box for further explanation of any error identified.
13. Once the form has been saved, reviewed and ready to go, press the Submit button. The status will change and the request sent for action. The status is a real time status of the PASS I request. ‘Save’ indicates the case manager has saved the data but has not submitted the request. ‘Submitted’ indicates the CC1 request has been sent for action.

14. The ‘CC1 for this period already exists’ warning message will be encountered if the Pass I request has already been submitted for the same month and has not already been rejected.

Choosing to submit this request will cause it to be rejected due to the prior request. The proper method of submitting this request is to choose ‘No’ followed by ‘Return to list’ option. Select the Pass 1 request for the same month from the list and select ‘Cancel Request’. Once the request has been cancelled, select the Saved Pass I request and submit the new request. You should not receive the warning when submitting this request.
15. If you return to the PASS I list, the submitted request will be displayed. Note the request number and revision letter which are unique identifiers for this request. You may select the request to enter the View Mode.

![Image of Request For PASS I Child Care](image)

16. If you press the Select button from the PASS I list, you are able to view the CC1 request. The first screen shown here is considered the View Mode. From the View Mode you may:

- Edit the request, if it has not been submitted.

- Use the request as a template for a future request. This will copy all the household and provider information onto a new request but level of care will still need to be completed. Should you attempt to use this method for a month in which the household members have changed, you will receive an error message “Household info has changed”. You will need to create a new request.

- Revise a rejected request. A rejected request should also have a client note in the system containing the rejection reason.

- Cancel the request.

- Print the CC1 form if you need a copy for the family's hard copy records.

- View the client notes.

- Submit the request directly from the view mode if no changes need to be made.
17. For the above case, the request had been accepted and then later approved. Once the request has been approved, case managers may view and print the Authorization Document from the PASS I Child Care Request List screen. Using the Print button on the Request for PASS I Child Care screen will allow the user to print the CC1 request (not the Authorization Document).

18. From the PASS I request list you may press the View Authorizations button to display a listing of the authorization documents approved for the family.

19. After pressing the View Authorizations button a list is displayed and the case manager may click on the View button to view the document created by the child care worker.
Viewing and printing the Authorization Document is done using the Internet Explorer Browser. Close the current tab to return to the previous CMS screen.

**ONGOING REQUESTS FOR A FAMILY**

Once the initial request has been submitted for a family, case managers have a choice of the method used to create a New Request for the new month.

1. You may create a completely new request by pressing the New Request button. You will be required to enter all data into the request form for the family. This method should be used when there's a change to the people in the household. This is the method described in the ‘First Request For A Family’ section of this document.

2. You may also use a previous request as a template so the system will complete most of the data entry for you. To use the template method, select a prior request by using the select button on the PASS I Child Care Request List screen. Try to pick a request that closely resembles the new request you need (correct family members or facility).
3. Once a previous request is displayed, press the Use As Template button.

NOTE:
IF YOU RECEIVE A RED EDIT INDICATING YOUR START IS INVALID, THE CLIENT’S ATAP HAS PROBABLY CLOSED AND REOPENED. CHECK THE CASE NOTES FOR MORE INFORMATION. IF THIS IS THE CASE, YOU WILL NEED TO USE THE NEW ATAP START DATE AND ATTENDANCE AUTHORIZATIONS FOR THE ENTIRE PERIOD.
4. The system will import the available data from the previous request but the case manager will need to complete the dates and confirm any phone numbers are correct. Once the data has been reviewed the case manager may save and submit the request. The remaining process is the same as previously discussed.
REQUESTS FOR NEW FACILITY/FACILITY NOT FOUND

1. If you receive an edit that no facility was found while completing the request, press the cancel on the Facility Search box and save your request at this time.

2. After you've saved your request, return to the search box and conduct the second search using the other search method (phone or name). The New Facility button will be displayed and can be pressed if the facility wasn't found using the second search method.

3. Press the New Facility button. Another pop-up will appear for the case manager to enter the information about the new provider. Once the information has been entered and the Send Request button pressed, the new provider request will be sent. This should be done one time per facility and only in the initial month of care. Once a new provider number has been provided, subsequent care months may be submitted.
4. Pressing the Send Request from the New Facility button creates a client note.

5. The New Facility information is contained in the client note. The child care worker will place the request for PASS I on hold until the provider can be contacted. The provider must complete the CCPO requirements.

6. After the provider is assigned a number, the case manager will receive another client note and/or alert to finish the original PASS I request using the new provider number.

7. Once the new provider number is received, the case manager may submit the CC1 requests for months following the initial requests.
SECTION 13

ACTION HISTORY

The Action History tab in CMS allows users to view previous actions taken on a client’s case. The action history records a limited number of screen actions and does not record every action or screen viewed. The wording used in the item field was finalized on 12/24/09, so entries prior to this date may have terms no longer used. CMS maintains action history data within the system for a maximum of two years.

INFORMATION DISPLAYED: This screen displays a summary of the actions taken on a client’s CMS case. The screen can be scrolled up and down using the internet scroll feature or you may limit the months displayed by changing the start and end months on the top of the screen.

Print

Used to create a report for printing using the Adobe Reader software. The report is printed once you click ‘yes’ in the pop up window.

Start/End Month

Used to limit the display of information displayed. This will also limit the amount of data printed using the print button or screen prints. Clicking on the Action History link on the left side of the page will reset this page to default values.
Screen | Lists the four letter screen identifier for CMS. Some of the screen codes you may see but are not limited to:
---|---
WACT - Work Activities
FSSP - Family Self Sufficiency Plan
CLNO - Client Notes
JOMO - JAS Set Month (in EIS)
ALRT - Alerts
CANO - Case Notes
CCPA - Child Care Authorization
CASU - Transfer/CARC
SSPA - Supportive Services Payment Authorization

A (Action codes) | Display of CMS and EIS codes indicating the type of action taken. The codes are listed on the top right hand side of the screen.

Date/time | The date and time the action was taken. The system records the time to the closest minute. Any actions taken within the same minute may not be listed in the order the actions were taken.

Pgm | Program related to action taken. Displays either JB for the Jobs program or ET for the Employment and Training program.

BenMon | The month that was acted on. Some actions may not require a month to be recorded so a zero will be displayed. For example, a change in work activities is taken for a particular month, but a client note is not dependent on any given month.
Item

A short explanation of the action taken. The item should be used in conjunction with the action field to determine if a change was made or if the person only viewed a screen.

Blank items are from EIS actions because EIS doesn’t record “Item info”.

Here are a few examples:

Main – CL NE Status to OP, this indicates the main screen of the work activities has been changed from closed for NE status to an open status.

Activity WK – Start 12/24/09 25 hrs $7.25, this indicates the work activity of WK was added with a start date of 12/24/09 with 25 actual hours at $7.25 PH. Scheduled hours are not recorded.

Initialized Month – 12/09, this indicates the case was initialized into December of 2009.

Name

Displays the name of the worker who took the action.

PRINTING ACTION HISTORY

Once you have pressed the print button you will be asked to confirm if the dates are correct. This helps prevent printing excessive history amounts. Dates are changed using the Start/End month on the top of the screen.
Once you have pressed the ‘Yes’ to confirm the dates to be printed, a new tab will open with the report PDF that was requested. This tab will allow you to print only limited pages by selecting which page to print using the file/print option or you may print the entire report using the print button on the toolbar. Close the tab when you are finished with the report. If your system is configured correctly, CMS should still be open when the tab is closed.
# SECTION 14

## GLOSSARY OF TERMS

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert</td>
<td>A dated, action-item reminder associated to a case or to a client. These alerts may also be called “C” or “client” alerts for CMS or “E” or EIS/Case alerts for alerts for EIS.</td>
</tr>
<tr>
<td>ATAP</td>
<td>Alaska Temporary Assistance Program (state cash program)</td>
</tr>
<tr>
<td>Auto populate</td>
<td>The data in some fields will be system generated and will not require input by the worker.</td>
</tr>
<tr>
<td>Case Worker</td>
<td>Also known as the Eligibility Technician. A State of Alaska (SOA) employee who determines eligibility and benefit amounts and authorizes the benefits. This staff member will also input penalty information for the Case Manager into the EIS system.</td>
</tr>
<tr>
<td>Case note (CANO)</td>
<td>System- or user-generated note used to record actions or history in the EIS system. Case notes are kept forever, unless deleted at the database level. The case note creator may edit or change the case note until midnight of the day entered -- it is then &quot;frozen.&quot; Case notes should not contain personal information on clients since any member of the case may request the entire case record.</td>
</tr>
<tr>
<td>CCPO</td>
<td>Child Care Program Office. The office which manages the child care program.</td>
</tr>
<tr>
<td>CDNS</td>
<td>Client Did Not Sign. A term used on the FSSP to indicate an FSSP or addendum was developed but for some reason the client did not sign the agreement. Using the CDNS will allow the New FSSP button to be displayed.</td>
</tr>
<tr>
<td>Check box</td>
<td>A box in CMS that users can check to turn options on and off.</td>
</tr>
<tr>
<td>Client</td>
<td>Refers to individuals applying for or receiving public assistance with DPA. &quot;Client&quot; and &quot;Member&quot; are functionally synonymous.</td>
</tr>
<tr>
<td>Client ID</td>
<td>Identifying number assigned to each member or person that is registered in EIS or the Child Care Assistance system. May also be called the member ID.</td>
</tr>
<tr>
<td>Client note (CLNO)</td>
<td>System- or user-generated note used to record actions or history in the CMS system. Client notes are kept forever, unless deleted at the database level. Its creator may edit a user-generated client note until midnight of the day entered -- it is then &quot;frozen.&quot; Client notes may contain person information on clients since only the individual client may request client records for themselves.</td>
</tr>
<tr>
<td>DPA</td>
<td>Division of Public Assistance. A unit of the Department of Health and Social Services of the State of Alaska that administers the public assistance and child care programs.</td>
</tr>
<tr>
<td>Drop Down box</td>
<td>A list of options that allows for the selection of one to populate a field.</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Duplicate</td>
<td>A second client ID number on the same individual. Usually caused by users conducting an incomplete search for clients prior to adding a “new” client to the system. Contact the Help Desk to resolve duplicate client situations.</td>
</tr>
<tr>
<td>EIS</td>
<td>Eligibility Information System. The computer system used by DPA to determine eligibility and to authorize Supportive Service payments and the child care PASS 1 program. The EIS system is also the system where client information is maintained.</td>
</tr>
<tr>
<td>Eligibility Technician</td>
<td>Also known as the Case Worker. A State of Alaska (SOA) employee who determines eligibility and benefit amounts and authorizes the benefits. This staff member will also input penalty information for the Case Manager into the EIS system.</td>
</tr>
<tr>
<td>Error Message</td>
<td>If a field requires an entry, or the date that was entered was incomplete or if an error in formatting is found, the system will display an error by highlighting the field in red. Position your mouse over the error for further information.</td>
</tr>
<tr>
<td>E&amp;T</td>
<td>Employment and Training. The CMS subprogram for Food Stamp clients. Will be listed as E&amp;T or ET in CMS. If a case manager needs to have this changed to JB, the CMS case will need to be closed and a new referral to the JB program will need to be done by the eligibility team.</td>
</tr>
<tr>
<td>FSSP</td>
<td>Family Self-Sufficiency Plan. A plan developed between a client and a case management agency to assist the family moving off of assistance. The plan generally addresses steps, goals and services to assistance the client in reaching self-sufficiency.</td>
</tr>
<tr>
<td>H&amp;SS</td>
<td>Health and Social Services. A department of the SOA government.</td>
</tr>
<tr>
<td>ICCIS</td>
<td>The Integrated Child Care Information System. The statewide system for processing and issuing PASS 1, PASS 2 and PASS 3 child care benefits.</td>
</tr>
<tr>
<td>Initial Application Date</td>
<td>The application process does not begin until DPA receives the application. Thus, the Initial Application Date is either the stamped/postmarked date or the date the application was physically received by staff or a SOA representative.</td>
</tr>
<tr>
<td>JAS</td>
<td>Jobs Automated System. Now integrated within EIS.</td>
</tr>
<tr>
<td>JASP</td>
<td>The Jobs Automated System Payment system. Integrated within the EIS system and is used to enter Work Services information for Temporary Assistance clients.</td>
</tr>
<tr>
<td>JB or JOBS</td>
<td>Job Opportunities and Basic Skills Program. The CMS subprogram for ATAP clients. Will be listed as JB program on CMS. JB program is mainly worked by contractors or grantees.</td>
</tr>
<tr>
<td>-----------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>NFAP</td>
<td>Native Family Assistance Program. Cash Assistance Program for Native families run by Native Corporations. Similar to the SOA ATAP program but individual native corporations establish the rules for their NFAP programs.</td>
</tr>
<tr>
<td>Open for entry</td>
<td>These fields may also be referred to as “open text” or “free text”. Entry in these fields may not be limited to specific coding or requirements. Policy may set formatting. Depending on space available, input may be limited.</td>
</tr>
<tr>
<td>PASS</td>
<td>Acronym for Parents Achieving Self Sufficiency. The State Child Care assistance program.</td>
</tr>
<tr>
<td>PASS I /PASS 1</td>
<td>Child care assistance for families on welfare. To qualify the family must be on welfare and participating in an eligible activity. Lasts as long as eligible for ATAP and are in an eligible activity. Case Managers need to identify when families are eligible for PASS I and process the PASS 1 request in CMS. Families may qualify for the PASS 2 program depending on the ATAP closure reason.</td>
</tr>
<tr>
<td>PASS II /PASS 2</td>
<td>12 month child care assistance after having been on PASS I. PASS II family pays part of the amount (co-pay or contribution). In the system you may see this listed as P2.</td>
</tr>
<tr>
<td>PASS III /PASS 3</td>
<td>PASS 3 can be used by anyone with an eligible activity that also meets the income criteria. PASS 3 assistance does not have a time limit. PASS 3 families may pay co-pays. The co-pay depends on size of family and income. Child benefits stop at the end of the child’s 13th birthday month, unless developmentally challenged in one way or another which needs to be documented. Developmental eligibility can last through the month ending of their 19th birthday. In the system you may see this listed as P3.</td>
</tr>
<tr>
<td>PASS NEW</td>
<td>Status of a new Child Care application. No authorizations are allowed in this status. In the system you may see this listed as P0.</td>
</tr>
<tr>
<td>Password</td>
<td>A unique identifier set up initially by Sys Ops that can be changed by the user. The password will require changing every 90 days. A notice will display on the sign-on screen to alert the user. Used in conjunction with the User ID or Security Key.</td>
</tr>
<tr>
<td>Program</td>
<td>&quot;Program&quot; is a DPA/EIS term for any of the public assistance programs administered by the Alaska Division of Public Assistance.</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Program End Date</td>
<td>The date which assistance ended or will end.</td>
</tr>
<tr>
<td>Radio button</td>
<td>Button that allows for selection of only one item</td>
</tr>
<tr>
<td>Refresh</td>
<td>Internet Explorer function that reloads an internet page</td>
</tr>
<tr>
<td>Relationship Code</td>
<td>In CMS, the relationship of a family member to the Family entity. The only values are P1, P2 and CH.</td>
</tr>
<tr>
<td>Renew Date</td>
<td>Eligibility for all programs must be reviewed periodically. This is normally the Renew or Renewal Date. Can also be called the recertification date for some programs.</td>
</tr>
<tr>
<td>Renewal Application Received Dated</td>
<td>The date the Renewal Application is received.</td>
</tr>
<tr>
<td>ROI</td>
<td>Release of Information</td>
</tr>
<tr>
<td>Screen Size</td>
<td>To accommodate the CMS application the screen must be maximized and the screen pixels set at 1024 x 768. If not, a horizontal scroll bar may display on the screens.</td>
</tr>
<tr>
<td>Scroll Bar</td>
<td>A bar that displays to the right of a field. By sliding the scroll bar or clicking the up or down arrows viewing of more information is available.</td>
</tr>
<tr>
<td>Search</td>
<td>You must ‘inquire’ or search for a member or facility before entering data. You will not be able to navigate within CMS unless you have indicated a specific member or facility.</td>
</tr>
<tr>
<td>Security Key</td>
<td>A unique series of numbers and/or letters assigned to each worker as part of their security profile allowing access to the various areas of the State of Alaska Computer Network</td>
</tr>
<tr>
<td>SOA</td>
<td>State of Alaska</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number.</td>
</tr>
<tr>
<td>System Generated Alert</td>
<td>An alert generated by CMS itself when system information changed and CMS was programmed to generate an alert.</td>
</tr>
<tr>
<td>TANF</td>
<td>Temporary Assistance for Needy Families (Federal Program). A Federal Government block grant used to run the Alaskan ATAP program.</td>
</tr>
<tr>
<td>Validation Error</td>
<td>Occurs when data is missing or does not meet the required format associated with the field in CMS. Will display a red highlighted area. Position the computer mouse over the red area for an explanation of the error.</td>
</tr>
<tr>
<td>Verification Code</td>
<td>The way in which certain documents or information is verified. AG-Agency, CC-Collateral Contact, CS-Client Statement, VV-Visual Verification or HC-Hard Copy.</td>
</tr>
</tbody>
</table>