

General Information Memorandum

ISD-GI 12-76

TO: ISD Employees

FROM:  Ted Roth, Director, Income Support Division

RE: CTS, QAPro and Common Processing Errors

DATE: October 23, 2012

CC: ISD Employees

As preparations continue for the conversion from ISD2 to ASPEN, help is needed to ensure the best data transfer possible. Using our current electronic systems correctly will assist in this effort. This GI provides information on the Client Tracking System (CTS), the QAPro address validation system and common processing errors and how to avoid them.

CTS

Each ISD staff member has access to CTS. The notes field in CTS will be transferred into the ASPEN system; ISD2 notes will not. Therefore, it is critical that every client interaction or action taken on a case be tracked in CTS. Initial and date your entry, be thorough and concise and keep acronyms to a minimum. Please ensure that CTS is being used in accordance with the guidelines provided in GI 11-2.

QAPro

Each ISD staff member has access to QAPro. QAPro is used to validate client addresses. As cases are registered or changes in addresses are reported, use of QAPro will reduce the number of address errors found in ISD2. Information regarding correct entry of an address can be found in GI 08-39 and instructions for using QAPro can be found on the L Drive\Approved Packets\Trainers\QAPro Address Verification Data Entry.pdf.

Common Processing Errors

There is a team that has been established to clean up incorrect data that is the result of the following common processing errors. When you encounter this information in the system, please make sure that you are performing the action that is required so as not to add to the cleanup efforts.

Soundex Current Indicator Errors

Action Required: Before a case is registered or a client is added to an existing case, use the S function in ISD2 to see if the client is already in the system. On the LIST screen, check for the X in the client id section in the V column. The X means that the information in ISD2 has been verified in Soundex.

Medicaid COE's Overdue More Than a Month and Still Active

Action Required: If you are reviewing a case and notice that the recertification is past due for a Medicaid category, complete the C and F function to recertify the case. Please refer to GI 12-33.

Clients Named Baby Girl, Baby Boy or Bad Match

Action Required: Do not use the Z function to process a Category 31 Newborn Application, instead, use the A, G, and H function. Verify the correct name of the baby before processing the 31. Do not process with Baby Girl or Baby Boy as the child's name. Use the date of birth of the child as the application date, not the date of the notice that is sent from the hospital. Also, do not name a client Bad Match. If you have issues with a Soundex Name Clearance, contact the ISD2 Help Desk.

Invalid or Non-Standard Addresses

Action Required: Use QA Pro for both the mailing and the physical address. Check the address on all categories.

MADM Screen

Action Required: Use the MADM screen correctly by coding the spouse as a 1 and a child as a 2. Never register more than one person for a Category 40 or 45. Please refer to GI 12-33.

Clients Exist in ISD2, SDX, and LIHEAP with Different Demographic Data

Action Required: Check ISD2 to see if the client information is already in the system using an S function. On the LIST screen, check for the X in the client id section in the V column. The X means that the information in ISD2 has been verified in Soundex. If they are known to ISD2, use that information for LIHEAP.

Same Individual with Multiple Internal ID's in ISD2

Action Required: Check ISD2 to see if the client information is already in the system using an S function. On the LIST screen, check for the X in the client id section in the V column. The X means that the information in ISD2 has been verified in Soundex.

Verification of Citizenship Pending > 90 days

Action Required: If there is a P on the LIST screen in the client section in the V column, take appropriate action in accordance with policy. Please refer to IPP 10-03.

CTS Records with SSNs Not in ISD2

Action Required: Make sure that the SSN in CTS matches the one in ISD2. Copying and pasting the SSN from ISD to CTS is the best way to ensure that you enter it correctly.

School Attendance Verification

Action Required: If you have a child that is 5 and turning 6 before the SR, at recertification, the child needs to be coded as an F on the DEM2 screen which indicates that they are a full time student. If a child turns 18 prior to their graduation, enter a graduation date on the DEM2 screen to ensure continuation of TANF benefits.

Children Incorrectly Coded as B Causing the Child to Have an Invalid TANF Counter

Action Required: Make sure that teen parents are coded correctly on the FACL screen. If mom and dad are members of the household, the teen parent would be coded as an S or a D. If the mom and dad are not members of the household, the teen parent is coded as an A and mom and dad are coded as P. Please double check on all relationships prior to finalizing a case.

Invalid SSN Claim #'s / Medicare #'s / Railroad Retirement #'s

Action Required: Make sure to use the correct claim number from Sourceex. The claim number on the FMM1 screen should be identical to the claim number on the UE11 screen.

Benefit Start Date is Blank on the FACL Screen

Action Required: If there is no start date on the FACL screen, please contact the Help Desk.

MAMS Screen and Cost of Living

Action Required: Check the cost of living on the MAMS screen. Amounts in this field might be too high due to the cost of living raise and therefore not counting any income towards eligibility. Enter the old amount of social security on the UE11 screen and the new cost of living adjustment on the MAMS screen.

Earned and Unearned Income Screens

Action Required: Use the correct income code on the EI and UE11 screens.

Category 1, 3 and 4 Medical Extensions

Action Required: First make sure that the client qualifies for an extension. Then proceed by approving the correct category. Category 001 denotes an SSI recipient who qualifies as elderly (65 or older). Category 003 denotes an SSI recipient who qualifies due to blindness. Category 004 denotes an SSI recipient who qualifies due to disability.

Client Data Shows They Live on a Reservation and There is No Reservation in That County

Action Required: If clients live on a reservation, confirm that the Race code on the LIST screen and the Address screen information is correct.

If you have any questions regarding this information, please contact Diane Rivera at (505) 827-7228 or Diane.Rivera@state.nm.us.