



DHH - MEDS UNIT

LA MEDS Maintenance & Enhancement

ED-1f-Renewals

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Revision Summary

The following revisions have been made to the document since it was first published:

Date	Description of Change	By
3/30/2004	Create initial spec from SIR924	Lizette Nel
3/30/2004	Add PF5 – Sort key to REDTQ to change sort sequence to be by SSN – SIR980	Lizette Nel
5/7/2004	Add PF7 – RmemD to RENEW to go to Renewal Details by Member – SIR1054.	Lizette Nel
6/7/2004	Show the same renewal level for multiple certs on the same case with the same renewal date – SIR1058.	Lizette Nel
6/21/2004	Add REDTQ hotkey on RENEW – SIR1072	Lizette Nel
8/5/2004	Add Phone moreable on Client info pop-up – SIR1099	Lizette Nel
8/5/2004	Change transaction id of REDTQ to RNEWQ – SIR1105	Lizette Nel
8/5/2004	Add CERT hotkey to Renewal Maintenance – SIR1106	Lizette Nel
8/17/2004	Additional Food Stamps Renewal Detail lines will now be shown for each adult IU member.	P.Crowley
8/24/2004	Do not show initial renewal level on RNEWQ for OCS certs – SIR1075	Lizette Nel

Date	Description of Change	By
2/7/2005	If an IU Member is an invalid person, do not add the IU Member as a Renewal Member (SIR1150).	Lizette Nel
4/4/2005	Add changes for LaHIPP (SIR867)	Lizette Nel
5/6/2008	Update Renewal Screens section (SIR1478)	Lauren O'Neil
3/31/2011	Documentation cleanup (SIR1701)	Jacobus Badenhorst

Renewals Subsystem

The Renewal subsystem consists of the following functions:

- Renewals by Caseload / Parish
- Renewal Documentation by Caseload / Parish
- Renewal Documentation Maintenance
- Renewal Members
- Renewal Details by Source
- Renewal Details by Member

Initial Renewal Level

An algorithm is implemented that uses the stated policy rules to make an initial determination of the Renewal Level appropriate to a Cert. This determination only sets an initial renewal level for a Cert. Further investigation of the current situation may lead to the Analyst elevating the actual renewal level used.

The Initial Renewal Level initially determined is displayed on the RNEWQ screen as the "Lvl" column, and on the Renewal Maintenance screen as the "Initial Level".

Figure 1 on page 8 illustrates the rules for when a Cert can be renewed Ex Parte. This diagram represents the set of all Type Cases, divided up into three major groups, SSI, SSI-Related, and C-Related. Each of these groups is further divided into subgroups of Type Cases that have similar rules for when Ex Parte renewals are permissible.

Ex Parte Renewal Rules

Exparte Renewal Rules The Set of All Type Cases

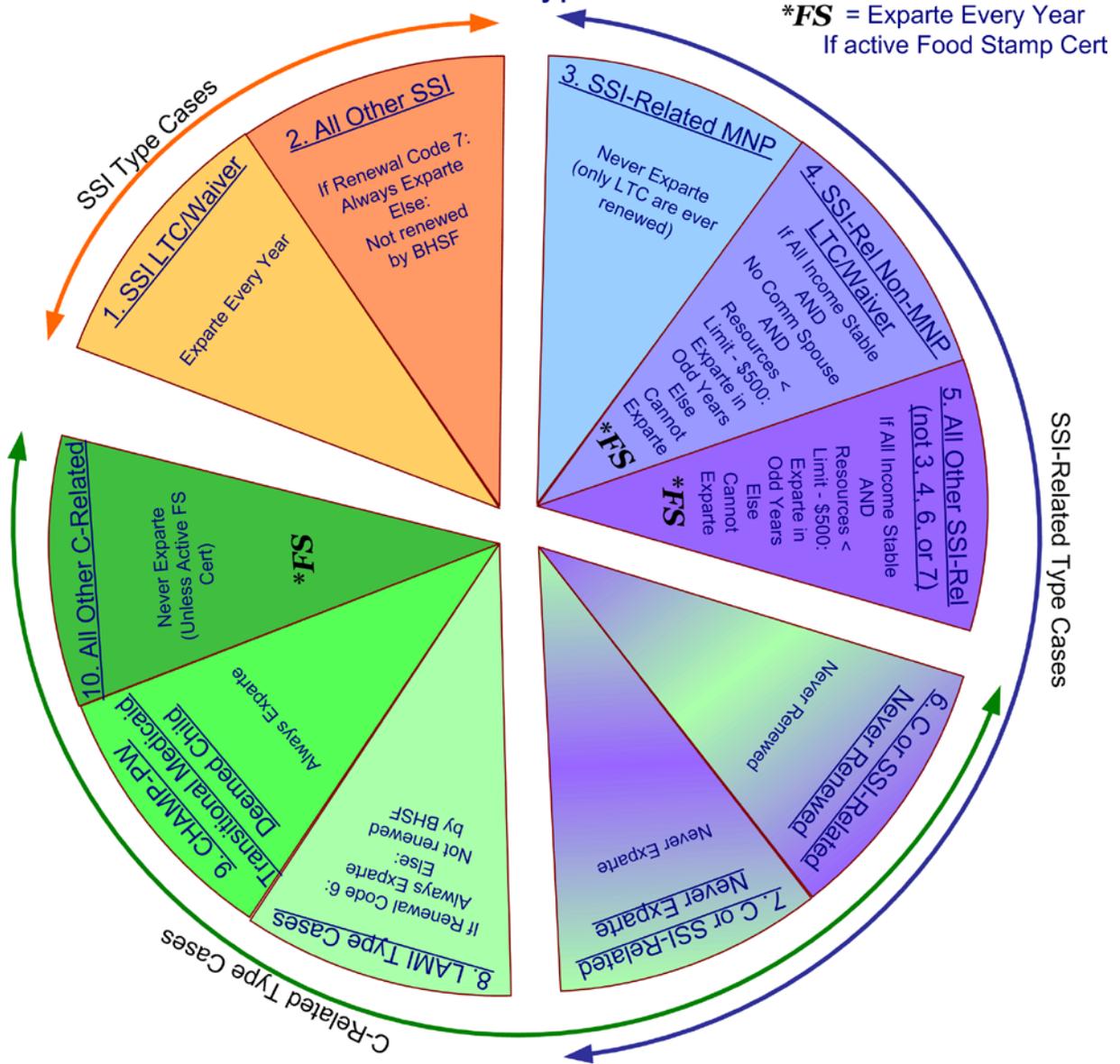


Figure 1 – Ex Parte Renewal Pie

The title of each segment describes the Type Cases that fall into that group, while the smaller text within the segment describes the rules that, based on the particular situation of each Cert, determine whether that particular Cert can be renewed Ex Parte.

Determining the Initial Renewal Level for a Cert

This section documents the rules used by the system to make the decision as to the Initial Renewal Level for a Cert. These conditions are evaluated in the order shown here. In other words the Initial Renewal Level applicable to a Cert is determined by the first of the following rules that determines a level for the Cert:

1. If the Cert has Renewal Code 2 (Adv./Incomplete), the system needs to look at the prior value of the Renewal Code in order to determine what to do. The system looks back through the history of Renewal Code changes, and uses the prior value to determine the Renewal Level as detailed in the following steps. If no history of the prior value of Renewal Code can be found, the Renewal Code is considered to be blank (no value) for the following steps.
2. If the Cert has Renewal Code 4 (Adv/Pnd Closure), 5 (Adv./DHH Appeal), or 9 (Adv./SSA Appeal) the system will not determine a Renewal Level, since these Renewal Codes indicates that some action regarding the future of the Cert has already been taken. Certs with these Renewal Codes cannot be included on a Renewal.
3. If the Cert that has Renewal Code 8 (Elig Evaluation), the Initial Renewal Level is '1' (Ex Parte).
4. If the Cert that has Renewal Code 10 (SDX Mcaid Elg Q), 12 (12 Mo Cont Elig), or 13 (OCS Closure), the Initial Renewal Level is '2' (Regular).
5. If the Cert has Renewal Code 6 (LAMI Closure), the Initial Renewal Level is '1' (Ex Parte).
6. If the Cert has Renewal Code 7 (SSI Closure), the Initial Renewal Level is '1' (Ex Parte).
7. If the TCAS "Ex Parte Renewal – Always if Active FS" field is 'X' and an active Food Stamp Certification exists for the Case, the Initial Renewal Level is '1' (Ex Parte).
8. If the TCAS "Ex Parte Renewal – Frequency" field is blank, the Initial Renewal Level is '2' (Regular).
9. If the TCAS "Ex Parte Renewal – Frequency" field indicates "Odd years only", and the Cert has Renewal Code 11 (Ex Parte), the Initial Renewal Level is '2' (Regular).
10. If the TCAS "Ex Parte Renewal – Check Stable Income" field is 'X' and budgets are required, and on the current budget there is either some Earned Income or some non-stable unearned income, the Initial Renewal Level is '2' (Regular).
11. If the TCAS "Ex Parte Renewal – Check no Comm Spouse" field is 'X' and budgets are required, and there is a "Community Spouse", the Initial Renewal Level is '2' (Regular).
12. If the TCAS "Resource Limits" field is populated, and the Client's known resources are within \$500.00 of the applicable limit for eligibility, the Initial Renewal Level is '2' (Regular).
13. For any Cert that doesn't meet one of the conditions above, the Initial Renewal Level is '1' (Ex Parte).

Summary of Rules

This is a brief summary of the information just presented, in a more compact format. These conditions are evaluated in the order shown here. In other words the Renewal Action applicable to a Cert is defined by the first of the following rules that applies to the Cert:

Situation	Initial Renewal Level
1. Current Renewal Code '2' (Adv./Incomplete), must determine what the Renewal Code was before it was set to '2', and continue with following rules	If no history of prior Renewal Code found => '2' (Regular)
2. Current Renewal Code is 4, 5, or 9.	Blank (no value).
3. Renewal Code 8.	'1' (Ex Parte)
4. Renewal Code 10, 12, 13	'2' (Regular)
5. LAMI Closure	'1' (Ex Parte)
6. SSI Closure	'1' (Ex Parte)
7. Active Food Stamp certification for Case	'1' (Ex Parte)
8. TCAS Ex Parte Renewal Frequency indicates "never Ex Parte".	'2' (Regular)
9. TCAS Ex Parte Renewal Frequency indicates "Odd years only" and last renewal was "Ex Parte".	'2' (Regular)
10. TCAS indicates stable income required, and Client has non-stable income.	'2' (Regular)
11. TCAS indicates "no Community Spouse" and Client has "Community Spouse".	'2' (Regular).
12. TCAS indicates resource limits, and client resources within \$500 of limit.	'2' (Regular).
13. Everything else.	'1' (Ex Parte).

Renewal Screens

Renewals By Caseload / Parish (RNEWQ)

Screen 1

```

RNEWQ          *** M.E.D. SYSTEM ***          08/08/07
MECRDTQ        RENEWALS BY CASELOAD / PARISH    13:01:02 1 >
                                                    METEST

Worker :      4   DOE,BETTY

Case Number    Type    19 Type Case
Case           Case    BD Renewal Dt Cd   Client Name    Client SSN    Lvl FS AR
-----
999999999999 004-040 08/29/2007 1 DOE, LARRY    999-99-9999 2 N Y
004-050 08/29/2007 1 DOE, LARRY    999-99-9999 2 N Y
999999999999 001-040 07/27/2007 1 DOE, MARY     999-99-9999 2 N Y
999999999999 001-040 07/27/2007 11 DOE, ALBERT   999-99-9999 2 Y Y
999999999999 017-095 07/27/2007 DOE, MARY X    999-99-9999 2 N Y
999999999999 017-095 07/27/2007 11 DOE, EDWARD X 999-99-9999 2 Y N
999999999999 004-050 07/27/2007 DOE, CHARLIE X 999-99-9999 2 N Y
999999999999 017-095 07/27/2007 DOE, CHARLIE X 999-99-9999 2 N Y
999999999999 003-015 07/27/2007 DOE, BELITA X  999-99-9999 2 N N
999999999999 003-014 07/27/2007 11 DOE, ALINE X  999-99-9999 2 Y N

Caseload *Type/*ID/*Number: P__ 1__ 2__ Renewal Month: 8_ / 2007
*Parish of Residence: _____ *Level: _ Show AR Records: Y (Y/N)
*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main Retn Quit Sort Elig Back Fwrд Csum Left Right ARerr
RNEWQ with no Level specified
    
```

Screen 2

```

RNEWQ          *** M.E.D. SYSTEM ***          08/08/07
< 1 MECRDTQ    RENEWALS BY CASELOAD / PARISH    13:07:48
                                                    METEST

Worker :      4   DOE,BETTY

Case Num       Rule Renewal Level Determination Desc          AR
-----
999999999999 12 Err w/resource std type Resource info not available Y
12 Err w/resource std type Resource info not available Y
999999999999 12 Err w/resource std type Resource info not available Y
999999999999 9 Prior renewal was exparte , can't allow exparte this time Y
999999999999 12 Err w/resource std type Resource info not available Y
999999999999 9 Prior renewal was exparte , can't allow exparte this time N
999999999999 12 Err w/resource std type Resource info not available Y
12 Err w/resource std type Resource info not available Y
999999999999 8 Type case Exparte Frequency is blank N
999999999999 8 Type case Exparte Frequency is blank N

Caseload *Type/*ID/*Number: P__ 1__ 2__ Renewal Month: 8_ / 2007
*Parish of Residence: _____ *Level: _ Show AR Records: Y (Y/N)
*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Main Retn Quit Sort Elig Back Fwrд Csum Left Right ARerr
    
```

This inquiry shows all the renewals (latest renewal dates come first) for a caseload number within a parish starting from the input renewal date. The worker number and name associated with the caseload number is displayed at the top of the screen. The input renewal month will default to the next month after the current month. The analyst will be able to type over the default input renewal month.

Note: If all AU members are suspended within a cert or if some AU members are suspended and others are inactive within the same cert, their corresponding renewals will not be displayed. Only certs which include active AU members will have their corresponding renewals displayed.

Keep the earliest renewal date for a case redundantly on the Case file. This will allow the creation of a super descriptor on the case that includes the renewal date. The records will be read in descending earliest renewal date sequence and the cases requiring renewals soonest are shown last. All of a Case's type cases whose renewal date meets the search criteria will be displayed.

Only show the renewals for the selected caseload, i.e. there will only be one worker.

Field Descriptions

Columns

Case Number (N13)

The number that identifies the case.

Type Case (N6)

The category code (N3) and type case code (N3) of the Certification.

19 BD (A1)

Indicates whether an AU Member on the cert turns 19.

Type Case Renewal DT (N8)

The date the Certification should be re-determined.

Renewal Cd (N2)

The reason the Certification was extended.

Client Name (A18)

The name of the client on the Certification.

Client SSN (N9)

The SSN of the client on the Certification.

Lvl (N1)

Displays the Initial Renewal Level of the Cert. If there is no open Renewal for the Cert, the derived Indicated Level is displayed. Otherwise the Renew Level from the open Renewal is displayed. If there are two certs for the same case with the same renewal date, the same initial renewal level is displayed for both certs. I.e if one cert has a derived level of 1 – Ex Parte and the other cert has a derived level of 2 – Regular and they have the save renewal date, then a level of 2 is displayed for both certs. The Initial Renewal level is not displayed for OCS certs (categories 6, 8 15 and 22)

Open Rnw (A1)

Displays 'Y' if there is an open Renewal for the Cert. Displays blank otherwise.

Rule (N2)

Displays the rule that determined the Initial Renewal Level of the Cert.

Renewal Level Determination Desc

Description of how the Initial Renewal Level was determined.

Input fields at bottom of screen:

Caseload *Type/*ID/*Number (A4, N4, N3)

Required. Location type, ID and Number of the caseload worker on the case.

Renewal Month (N6)

Required. The input renewal month defaults to the next month after the current month. The analyst can type over the default input renewal month. Format MMYYYY

Parish of Residence (N3)

Optional. The parish in which the Case members reside. Enter this field to show only cases within a specific parish of residence.

Level (N1)

Optional. Valid Values: 1 (Ex Parte), 2 (Regular). This is an optional filter criteria for the list of Certs displayed on the screen.

You must specify the Caseload and Renewal Month in combination with Level. You do NOT have to specify a Parish of Residence when using this field, although you can if you wish.

If you specify a value in this field, the system will limit the list of Certs displayed to those whose current Renewal Level is equal to the value you specified and that meet the other specified criteria.

Exclude Open Renewals (A1)

Optional. Valid values: X or blank. This is an optional filter criteria for the list of Certs displayed on the screen.

You must specify the Caseload and Renewal Month in combination with Exclude Open Renewals. You do NOT have to specify a Parish of Residence when using this field, although you can if you wish.

If you specify an 'X' in this field, the system will limit the list of Certs displayed to those who have NO open Renewal Documentation.

Additional PF Keys

PF Key 5 – Sort

The default sort sequence will be Caseload / Earliest Renewal Date / Parish of Residence. PF5 will change the sort sequence to Caseload / Earliest Renewal Date / SSN. Only the last 6 digits will be used in the sort (i.e. An SSN of 123-45-6789, sort using 456789). The input field 'Parish of Residence' will change to 'SSN' and the heading on the screen will change to 'Renewals by Caseload / SSN' (See Renewals by Caseload / SSN (RNEWQ) – page 15). Pressing PF5 again, will change the sort sequence back to the default. In both cases, the latest renewal dates will be shown first.

PF6 – Elig

This key will point to the Eligibility Determination Maintenance screen.

PF9 – Csum

This key points to the Case Summary Inquiry screen.

PF12 – Renew

Place the cursor on a detail line (a Cert) and press this key to invoke the Renewal Maintenance screen for that Cert.

If there is an open Renewal for the selected Cert, the system will automatically display the existing open Renewal on the Renewal Maintenance screen.

If there is no open Renewal for the selected Cert, the system will invoke the Renewal Maintenance screen in Add mode, with the Action populated with 'A' (Add), and the "Case Num 1" field populated with the Case Number of the Case to which the selected Cert belongs. You can then press enter on that screen to begin the process of adding a new Renewal.

Renewals by Caseload / SSN (RNEWQ)

```

RNEWQ                *** M.E.D. SYSTEM ***                02/20/04
MECRDTQ              RENEWALS BY CASELOAD / SSN           15:59:23 1 >

Worker :

Case Number          Type  19 Type Case                      Open
Case Number         Case  BD Renewal Dt Cd      Client Name      Client SSN  Lvl Rnw
-----
***** End of Data *****

Caseload *Type/*ID/*Number: P__ 6__ 8__      Renewal Month: 3_ / 2004
          *SSN: _____ *Level: _   Exclude Open Renewals: _ (X)
*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
      Help Main Retn Quit Sort Elig Back Fwrd Csum Left Right Renew
    
```

This inquiry shows all the renewals (latest renewal dates come first) for a caseload number by SSN starting from the input renewal date and last 6 digits of input SSN. The worker number and name associated with the caseload number is displayed at the top of the screen. The input renewal month will default to the next month after the current month. The worker will be able to type over the default input renewal month.

Field Descriptions

SSN (N9)

The Social Security Number of a client. PF1 help will be available (Case Help by SSN).

Additional PF Keys

PF Key 5 – Sort

See Renewals By Caseload / Parish (RNEWQ) – Page 11.

Note: See Renewals By Caseload / Parish (RNEWQ) (page 11) for additional field descriptions and PF-Keys.

Open Renewal Documentation by Caseload / Parish (RENEWQ)

```

RENEWQ          *** M.E.D. SYSTEM ***          03/22/04
MECRNWQ  OPEN RENEWAL DOCUMENTATION BY CASELOAD / PARISH  08:04:10

Worker :

Case Number      Type      19 Type Case
Case            Case      BD Renewal Dt Cd   Client Name      Client SSN  Lvl
-----
-----

Caseload *Type/*ID/*Number:  ___ ___ ___   Renewal Month: 4_ / 2004
*Parish of Residence:  ___   *Level      :  _
*Tran:  ___   Act:  _   Key:  _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit           Elig Back Fwrd Csum           Renew
    
```

This inquiry shows all the open Renewal Documentation record (latest renewal dates come first) for a caseload number within a parish starting from the input renewal date. The worker number and name associated with the caseload number is displayed at the top of the screen. The input renewal month will default to the next month after the current month. The analyst will be able to type over the default input renewal month. See Renewals By Caseload / Parish (RNEWQ) – page 11 for detail descriptions.

Renewal Documentation Maintenance (RENEW)

```

Message Line -
RENEW                *** M.E.D. SYSTEM ***                03/16/04
MECRENF              RENEWAL DOCUMENTATION MAINTENANCE    07:58:03
                                                            METEST

*Action      : _ (A,B,C,D,M,N,P,L)
RENEWAL NUM: _____ *Status:
*Case Num 1 : _____ +
*   Num 2   : _____ +
*Initial Lvl: _____ Note: _____ +

Cert: _____ Renew Date: _____ +

1 Sources Checked : BENDEX CH CARE LAMI LASES LDET
  Sys Checks Complete: _ MAS MEDS SOLQ TPL TPQY
                                CONTACT (Client/Resp.Prty/Collateral Contact)
2 Call 1 Date: __ __ __ Fr/To: __ Success: _ (Y/N) Note: _____ +
  2   "   "   "   "   "   "   "   "   "   "   "   "   "   "   "   "   "
  No Phone or all Disconnected: _ (Y)
3 Send Elig Revw Notc (2-R): _ (Y) Sent: __ __ __ Due Back: __ __ __
4 Send Request for Info (RI): _ (Y) Sent: __ __ __ Due Back: __ __ __
*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit Dtail RMem RMemD RNEWQ RSrce Elig CERT Close
  
```

Overview

This screen allows you to add and maintain a Renewal for a Case. You add a Renewal to help you manage and keep track of all the steps that policy requires you to take in renewing a Case. This screen allows you to keep track of the progress you have made toward completing the Renewal and either renewing the Cert(s), or determining that the Cert(s) should be closed.

You invoke this screen from the RNEWQ screen when a Case comes up for renewal, which allows you to keep track of all the renewals you currently have "open". Alternatively you can invoke this screen from the Renewals Menu.

This screen is also used to add a Renewal when a call from the client prompts an off-cycle renewal.

The screen has several important groups of fields that are described briefly below:

- **Case Num 1 and 2.** These fields are near the top of the screen and allow you to specify the Case or Cases to be renewed. When you add a Renewal, the system allows you to select, via a pop-up, the Certs to be included.
- **Initial Level.** This is the initial determination by the system of whether the Renewal can be level 1 (Ex Parte) or 2 (Regular).
- **Certs.** The Certs selected by the analyst to be reviewed for eligibility are listed here. If there are more than three, the others can be viewed using the moreable.
- **Steps.** The lower section of the screen lists 4 steps that may be involved in completing a Renewal. Some or all of the steps may be involved in a particular renewal. Briefly the steps are:
 1. Check all appropriate systems for pertinent information on the Case members. The Renewal Members, Renewal Details by Source, and Renewal Details by Member screens (described later) allow you to capture detail information obtained during these checks.
 2. Call the client. You can record up to 10 successful or unsuccessful attempts to call the client, or record the fact that the client called you. The Renewal Members, Renewal Details by Source, and

Renewal Details by Member screens (described later) allow you to capture detail information obtained during this discussion.

3. Send an "Eligibility Review" (2-R) notice.
4. Send an "Information Request" (RI) notice.

Field Descriptions

RENEWAL NUM (N13)

This is a system-generated unique identifier of the Renewal.

Off Cycle

Display Only. Indicates whether this Renewal is an "Off Cycle" renewal for the Case. A Renewal is considered off-cycle if it was added to the system prior to the cut-off date two months before the earliest Renewal Date of any of the Cert on the Renewal. This field displays 'off-cycle' for an off-cycle renewal, and blanks otherwise. The value of this field is determined when the Renewal is first added, and is snapshot onto the Renewal for posterity. Subsequent changes to the Renewal Dates of the various Certs on the Renewal following the creation of the Renewal will not change the value of this field.

Status (A1)

Display Only. Valid Values: 'O' (Open) and 'C' (Completed). This is the status of the Renewal. The status defaults to 'O' when a Renewal is added. The system sets the status to 'C' (Completed) when the Renewal is Closed (PF12). The description of the Status is displayed immediately adjacent to the code.

You cannot modify a Renewal that is in Completed status. All the input data fields on this screen (except the Renewal Number) are protected from modification if the status is 'C' (Completed). Notes will not be protected if the Renewal is in Completed status and will be available for modification,

Technical Note: When the Status on the Renewal is updated to 'C', the RENEWAL-OPEN-Y indicator on each of the ME-RENEWAL-CERT entries must be set to blank. Likewise when the Renewal is re-opened, the RENEWAL-OPEN-Y indicator on each ME-RENEWAL-CERT entry must be set to 'Y'. See details on ReOpn PF-Key.

Completed (N8)

Display Only. Format mm/dd/yyyy. This field displays the date that the status of the Renewal was set to 'C' (Completed).

Case Num 1 (N13)

Required. The Case Number of the first Case to which this renewal applies. The case must be and "active" MEDS case. Once a Renewal has been added, Case Num 1 is protected and cannot be changed.

Client

Display Only. The name, SSN and the telephone number of the Client of Case Num 1 is displayed here.

+

There are two moreables for Case Num 1. The moreable on the left is only displayed when adding a new renewal and displays '>' if a Case is selected through help and the Client on the Case is also the first Client on another Case. This moreable is used to select Case Num 2 when attempting to process Renewals for two Cases that have the same Client. If you invoke this moreable, the system displays the Other Cases for Client Pop-up. This moreable is not displayed at all after a Renewal has been added.

The other moreable for Case Num 1 is displayed on the far right. The system displays '>' if there is a Responsible Party for the Client of Case Num 1, or if there is more than one client for Case Num 1. If you invoke this moreable the system displays the Client Information Pop-up (page 32).

Case Num 2 (N13)

Optional. The Case Number of the second Case to which this renewal applies. Once a Renewal has been added, Case Num 2 is protected and cannot be changed. The case must be and "active" MEDS case.

For example you could include a second Case on a renewal if the Client of Case 1 is the spouse of the Client of Case 2, and you want to renew their cases together. It is expected that this feature will only be used for LTC and Waiver cases; however the system doesn't enforce this restriction. You could also include more than one case if the client has more than one case in their name, for example an SSI-Related case and a C-Related Case.

Client

Display Only. The name, SSN and the telephone number of the Client of Case Num 2 is displayed here.

+

The system displays '>' if there is a Responsible Party for the Client of Case Num 2, or if there are more than one client for Case Num 2. If you invoke this moreable the system displays the Client Information Pop-up (page 32).

Initial Level (N1)

Initial Renewal Level. **Display Only.** This field displays the Renewal Level indicated by an initial assessment that has been made by the system. This assessment takes into account all indicators for a Level 1 Renewal as per the "Medicaid Eligibility Program – Renewal Guide". See Determining the Initial Renewal Level for a Cert (page 9) for a description of the logic for determining the Indicated Renewal Level for a Cert.

If all the Certs that have been selected for the specified Cases meet the criteria for a Level 1 "Ex Parte" renewal, this field will display "1 Ex Parte". Otherwise it will display "2 Regular".

The value of this field is calculated and stored permanently on the Renewal when the Renewal is added to the system. It cannot be modified after the Renewal is added.

Note (A45/5)

Enter miscellaneous Notes about the Renewal. Invoke the moreable to see or edit an expanded note.

Do not use this field to record detailed information regarding income, expenses, etc. Those details should be captured as Renewal Detail entries on either the Renewal Details by Source screen (page 36) or the Renewal Details by Member screen (page 45).

Certs

This section of the screen displays a list of the Certs that the user selected from the "Add" pop-up. Only one open Renewal may exist at one time for a Cert. This validation is applied when a Renewal is added, and when a Renewal is re-opened after being completed. See PF11 – ReOpn under Non-Standard PF-Keys (page 22).

See "Adding a Renewal" (page 23), and "Renewal Add – Cert Selection Pop-up" (page 26) for details on the pop-up.

The "Certs" section of the screen has the following columns:

Case/Cert Num

Display Only. This column displays a value such as "1/0002" where the first 1 refers to the "Case Num 1" field above, and the 0002 refers to the Certification Period Number of that Cert within the Case.

Catg/Type Case

Display Only. This column displays the Category and Type Case of the Certification.

Description

Display Only. This column displays the Description of the Type Case.

Renew Dt

Display Only. This column displays the Renewal Date of the Cert.

+

The system displays '>' if more than three Certs have been selected for Renewal. If you invoke this moreable the system displays the Renewal Certifications Moreable Pop-up (Page 27).

Steps

This section of the screen lists the steps that may be taken in order to complete a Renewal.

Step Number

The step number of each step (1-4) is displayed.

1 Sources Checked

Sources

The system displays a list of all the different sources from which information may be obtained regarding the renewal. The following sources are displayed

Source Code
BENDEX
CH CARE
CONTACT
LAMI
LASES
LDET
MAS
MEDS
SOLO
TPL
TPQY

The system displays 'X' immediately to the left of each Source from which some information has been obtained; that is, if there is at least one Renewal Detail entry from that Source. However if one or more of those Renewal Details has the 'V' (Verification Required) column set to 'Y', the system displays a 'V' here in place of the 'X'.

System Checks Complete (A1)

Place a 'Y' in this field and update the Renewal when all appropriate system checks have been completed. **Valid Values: 'Y', blank.**

2 Call

Record up to ten attempts to telephone the client. A Call entry cannot be populated if any of the prior calls are not yet populated. If any field in a call entry is populated, then Date, Fr/To, and Success are all **required**.

Sequence

Display Only. Indicates the sequence number of the call, 1, 2, 3, etc. If no calls have been recorded, the system always displays Call sequence numbers 1 and 2. If any calls have been recorded, the system always displays the last populated one, and the following one in sequence. For example, if two calls have been recorded, the system will display call numbers 2 and 3. This allows the analyst to see the most recent call, and enter a new call, without having to invoke the moreable. When the 10th call has been populated the system displays calls 9 and 10.

Date (N8)

Enter the date the call attempt was made. Any valid date may be entered. **Format: mm dd yyyy.**

Fr/To (A2)

Indicates whether the call came 'FR'om the Client, or was made 'TO' the Client. **Valid Values: 'FR' (From the client), 'TO' (To the client).**

Success (A1)

Enter 'Y' if you were successfully able to contact the client by phone, otherwise enter a 'N'. This field can be left blank if Fr/To = 'FR'. If a value is entered the **valid values are 'Y' (Yes), 'N' (No).**

Note (A16)

Optional. Enter any notes or comments regarding the call attempt. Specific comments regarding income, Expenses, etc, should not be entered here. This field is **protected** if there is more text in the first 45 character Note field than is displayed on the screen.

Please note that there is no moreable for the Call Note on this screen. In order to invoke the moreable for the Call Note, you must first invoke the moreable for the Call group, and then invoke the appropriate Note moreable from there.

+ (moreable)

This is the moreable for the Call group. When you invoke this moreable the system displays the Renewal Calls Moreable Pop-up (page 28).

No Phone or all Disconnected (A1)

Optional. Enter 'Y' in this field to indicate that there are no known phone numbers for the client, or all the known phone numbers have been disconnected. **Valid Values: 'Y', blank.**

3 Send Elig Revw Notce (2-R) (A1)

Before Auto-Notice 2-R Implementation: Enter 'Y' in this field and update the Renewal when an "Eligibility Review" notice (2-R) needs to be sent. The system will display the

Renewal Information Request Selection Pop-up (page 28). You must use EZ-Notice to generate the 2-R notice requesting only the required information. Press PF3 – Cont to continue the update. The system will set the Sent date to today's date. You can then modify the Sent date if appropriate.

After Auto-Notice 2-R Implementation: Enter 'Y' in this field and update the Renewal. The system will display the

Renewal Information Request Selection Pop-up (page 28). Select the required items from the list and press PF3 – Cont. The system will generate the Auto-Notice "Eligibility Renewal" notice (2-R), including paragraphs requesting the appropriate verifications. The system will set the Sent date to the appropriate date, and calculate the Due Back date.

The 'Y' you enter in this field is not stored. Once the update has been completed (and the Sent date and Due Back dates have been populated, the 'Y' value is cleared so that it can be used again to send another notice if necessary. **Valid Values: 'Y', blank.**

Sent (N8)

The date the notice was sent. **Format: mm dd yyyy.** Prior to Auto-Notice implementation of the 2-R notice, this is an input field. Following Auto-Notice implementation of the 2-R notice, this field is display-only.

Due Back (N8)

The date the 2-R notice is due back from the Client.

Before Auto-Notice 2-R Implementation: The due back date can be entered manually.

After Auto-Notice 2-R Implementation: If the notice was sent by Auto-Notices, the system calculates this date from the Sent date.

4 Send Request for Info (RI) (A1)

The descriptions, business rules, and validations of this group of fields is the same as for the "3 Send Elig Revw Notice (2-R)" group except that the notice is the "Request for Information" notice (RI). **Valid Values: 'Y', blank.**

Non-Standard Actions

'Purge

You cannot purge a "Completed" Renewal. When you purge an "Open" renewal, the system displays a pop-up warning. If you choose to continue with the purge, the system deletes the Renewal including all the Renewal Members, the list of selected Certifications, and all the Renewal Details that you or the system added to that Renewal. That information is lost and cannot be recovered automatically, although provided you know the Renewal Number, you can view the data via the various renewal related Audit browses.

Non-Standard PF-Keys

PF5 – DTail

If you place the cursor on one of the Certs in the upper section of the screen and press this key, the Cert Summary screen is displayed for that Cert. If there is only one Cert, then you don't have to place your cursor on the Cert before pressing this key.

PF6 – RMem

This key takes you to the Renewal Members screen (page 33).

PF7 – RMemD

This key takes you to the Renewal Details by Member screen (page 45).

PF8 – RNEWQ

This key takes you to the Renewals By Caseload / Parish (RNEWQ) screen (page 11). RNEWQ defaults to the caseload of case number 1.

PF9 – RSrce

This key takes you to the Renewal Details by Source screen (page 36).

Optionally, if you place the cursor on one of the Source codes listed in Step 1 of this screen and press this key, the Renewal Details by Source screen will be invoked for that Source.

PF 10 – Elig

This key takes you to the Eligibility Determination Maintenance screen.

PF11 – CERT

This key invokes the Certification Maintenance (CERT) screen. If there is only one Cert on the Renewal, then that Cert is displayed. If there is more than one Cert on the Renewal, then the Cert to be displayed must be selected by placing the cursor on the Cert and then pressing this key.

PF12 – Close/ReOpen

This key either opens or closes the Renewal depending on the status of the Renewal

If the Renewal has a Status 'O' (Open), then this key closes the Renewal. When this key is pressed, the system sets the value of "Eligibility Decision is Complete" to 'Y', sets the Status of the Renewal back to 'C' (Completed), populates the Completed Date with the current date and protects any fields that may not be updated if the Renewal is completed. The renewal can be closed even if the Cases on the Renewal are not "active" anymore.

Technical Note: When the Renewal Status is set to 'C' (Completed), the RENEWAL-OPEN-Y field on each of the ME-RENEWAL-CERT records belonging to this Renewal must be reset.

If the Renewal has a status of 'C' (Completed), then this key re-opens the Renewal after it has been completed. When this key is pressed, the system sets the value of "Eligibility Decision is Complete" to blank, sets the Status of the Renewal back to 'O' (Open), clears the Completed Date, and re-enables any fields that were disabled when the Renewal was completed. Re-opening the Renewal also allows you to make changes to the Renewal Members and Renewal Details belonging to the Renewal. You cannot re-Open a Renewal if another open Renewal exists for any Cert on the Renewal.

Technical Note: When the Renewal Status is set back to 'O' (Open), the RENEWAL-OPEN-Y field on each of the ME-RENEWAL-CERT records belonging to this Renewal must be updated to 'Y'.

Adding a Renewal

When adding a new Renewal, the system will first pop up a window that allows you to select which Certs to include in the Renewal. See "Renewal Add – Cert Selection Pop-up" (page 26). The pop-up includes an "ALL" PF-Key that automatically selects all the Certs. The system then adds the selected Certs to the Renewal.

The system then snapshots onto the Renewal as Renewal Members all appropriate Case Members. If the Type Case requires a budget (TCAS field "Budgets Required" = 'Y') and a budget exists, the appropriate members include the Client, all people who are IU Members on the selected Certs, and all people who are non-budget members with income or expenses. If an IU Member is an invalid person, then the IU member is not added a Renewal member. If the Type Case does not require a budget or it does, but no budget exists, the appropriate members include the Client, and all the active AU Members of the selected Certs. The format of the Name field of the Renewal Members added by the system is always: <FirstName> <MI> <LastName> <Suffix>. For example:

JANE X DOE SR
JACK DOE III
MARY DOE

Once the Add is complete, you can immediately view the Renewal Members screen (page 33) to see the members.

When the Renewal is first added, the system applies business rules equivalent to the "Indicators" shown for Level 1 on the Renewal Guide to determine whether the Case appears to be eligible for Ex Parte (Level 1) renewal. If Ex Parte is indicated, the Renew Level field displays '1' (Ex Parte), and displays '2' (Regular) otherwise.

When a Renewal is added, the system automatically creates a set of Renewal Detail entries for the Renewal Members that were added to the Renewal as described above. Some examples of Renewal Detail entries added automatically at this point are described below. In each case the picture shows how the detail described would appear on the Renewal Details by Member screen (page 45):

- A Renewal Detail is created for each current Employer in the Earned Income section of the PIES (Person Month Income/Expense Summary) screen of each Renewal Member. The "From System" field of that entry is populated with the Employer Name and the monthly earnings. For example "MCDONALDS \$150". The Renewal Type is "EINC" (Earned Income) and the Source is "MEDS". These entries are created for all budget and non-budget members that were selected as Renewal Members. If the "Self-Employed" field on the PIES "Earned Income" popup is "Y", then the text "Self-Employed" is used in place of the Employer Name, however if there is an Employer Name as well it is included in parentheses after the amount.

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_	EINC MEDS	MCDONALDS \$150	+ _____	+ _ +
_	EINC MEDS	Self-Employed \$430 (Apex Su >	_____	+ _ +

- A Renewal Detail is created for every non Budget member that was added as a Renewal Member. The "From System" field of that entry is populated with the Income Contributor description. The Renewal Type is "MISC" (Miscellaneous) and the Source is "MEDS".

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_	MISC MEDS	Comm Spouse	+ _____	+ _ +
_	MISC MEDS	Dependent 1	> _____	+ _ +

- A Renewal Detail is created for each current Unearned Income entry on the PIES of each Renewal Member. The "From System" field is populated with the short description of the Unearned Income Type, and the monthly amount. For example "RSDI \$50". The Renewal Type is "UINC" (Unearned Income) and the Source is "MEDS". These entries are created for all budget and non-budget members that were selected as Renewal Members.

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_	UINC MEDS	RSDI \$50	+ _____	+ _ +

- A Renewal Detail is created for each current Expense entry on the PIES of each Renewal Member. The "From System" field is populated with the short description of the Expense Code, and the monthly amount. For example "ALIMONY \$100". The Renewal Type is "EXPS" (Expense) and the Source is "MEDS". These entries are created for all budget and non-budget members that were selected as Renewal Members.

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_	EXPS MEDS	ALIMONY \$100	+ _____	+ _ +

- A Renewal Detail is created for the Client's phone number if one is listed on the Person Maintenance screen. The "From System" field is populated with "Phone:" followed by the phone number, and the contents of the "Phone Notes" from the PERS screen. For example: "Phone: 225 925 0912". The Renewal Type is "MISC" (Miscellaneous) and the Source is "MEDS". The resulting Detail entry is associated with the Renewal Member that represents the Client.

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_ MISC	MEDS	PHONE: 999 999 9999	+ _____	+ _ +

- A Renewal Detail is created if the Renewal Member is a MEDS Person, but a pseudo-SSN is recorded for them, and at the time the Renewal is added the Person is more than 6 months (180 days) old. A Pseudo-SSN is one that starts with '9'. The "From System" field is populated with the pseudo-SSN followed by the text "PSEUDO", for example "SSN: 912345678 PSEUDO". The Renewal Type is "PI" (Personal Information) and the Source is "MEDS". The "Verification Required" indicator is set to 'Y' and the Verification Code is set to Personal Information Type '07' (Social Security Number).

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_ PI	MEDS	SSN: 9999999999 PSEUDO	+ _____	+ Y
>				

- A Renewal Detail is created for each Renewal Member that is an AU Member on one of the Cases of the Renewal. The "From System" field is populated with "TPL:" followed by the TPL Code from the AU Member screen. The text of the field is either "TPL: Y" or "TPL: N". The Renewal Type is "MEIN" (Medical Insurance) and the Source is "TPL".

If there is a TPL policy for the AU Member and it is an active LaHIPP policy the "From System" field is populated with "TPL: Y (LaHIPP)". If the LaHIPP Policy is not active the "From System" field is populated with "TPL: Y".

Note: The LahIPP policy start date and end date in the TPL system is used to determine whether there is an active LaHIPP policy or not.

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_ MEIN	TPL	TPL: Y (LAHIPP)	+ _____	+ _ +

- A Renewal Detail is created for each Renewal Member that is an AU Member on one of the Cases of the Renewal. The "From System" field is populated with the Medicare Code from the AU Member screen. The text of the field is either "Medicare:" followed by the description of the Medicare Code. For example "Medicare: Unknown" or "Medicare: Part A Only", etc. The Renewal Type is "MCAR" (Medicare) and the Source is "MEDS".

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_ MCAR	MEDS	Medicare: Part A Only	+ _____	+ _ +

- A Renewal Detail is created for the Client of the Cert(s) if the current Food Stamp certification information has been received from LAMI for the client. The "From System" field is populated with "Active FS" or "No Active FS" and the date that we received that information from LAMI. The Renewal Type is "MISC" and the Source is "LAMI".

*C*Type	*Srce	From System	Client/Resp.Prty/Coll	Ver
-	-	-	-	-
_ MISC	LAMI	Active FS 02/01/04	+ _____	+ _ +

Renewal Add – Cert Selection Pop-up

```

*** M.E.D. SYSTEM ***                                03/16/04
MECRCSN          RENEWAL ADD - CERT SELECTION        08:00:43

Case 1:
Case 2:

Sel      Case/Cert          Type Case          Renew Dt   Ren
-----
-
-

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF
      Help      Cont      Canc  ALL

```

This pop-up screen is displayed when you press enter on the Renewal Maintenance screen to add a new Renewal. The list of Cases at the top of the pop-up corresponds to the Cases that were entered on the Renewal Maintenance screen. This pop-up displays a list of all the active Certs on the case(s) specified on the Renewal.

Enter 'X' next to each of the Certs that you want included in the Renewal, and press PF3 to continue adding the Renewal. If you press PF5 you will be returned to the Renewal Maintenance screen, which will display the message "Add Canceled".

Field Descriptions

Case 1

Display Only. Displays the Case Number of the first Case entered on the Renewal Maintenance screen, and the name of the Client of that Case.

Case 2

Display Only. Displays the Case Number of the second Case entered on the Renewal Maintenance screen, and the name of the Client of that Case. This field is blank if a second case wasn't specified on Renewal Maintenance.

Cert List

The main part of the pop-up is a list of all the active Certs on the selected Case(s). At least one cert must be selected and you cannot select a cert if it is linked to an open Renewal.

Sel

Type 'X' next to each of the Certs that you want included as part of the Renewal. If you select a Cert that currently has Renewal Code 4 (Adv/Pnd Closure), 5 (Adv./DHH Appeal), or 9 (Adv./SSA Appeal), the system displays the error message:

"Cannot include Certs with Renewal Code 4 (Pnd Closure), 5 or 9 (Appeal)"

Case/Cert

Display Only. Displays one of the two Case Numbers that are shown at the top of the screen, in combination with the Certification Period Number of the Cert within that Case. The two values are separated by a slash character '/'.

Type Case

Display Only. Displays the Category/Type Case code, followed by the description of the Type Case of the Cert.

Renew Dt

Display Only. Displays the Renewal Date of the Cert.

Ren Code

Display Only. Display the Renewal Code that is currently recorded on the Cert.

Non-Standard PF-Keys

PF6 – ALL

If you press this key the system automatically selects all the Certs in the list and adds the Renewal.

Renewal Certifications Moreable Pop-up

MECRCMN	*** M.E.D. SYSTEM ***	01/27/04
	RENEWAL CERTIFICATIONS	12:44:00
Case 1:		
Case 2:		
Cert	Type Case	Renew Date
-----	-----	-----
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10-		
Help	Retn	Dtail CERT

This pop-up is displayed when you invoke the moreable associated with the "Certs" group on the Renewal Maintenance screen.

Non-Standard PF-Keys

PF5 – DTail

If you place the cursor on one of the Certs above and press this key, the Cert Summary screen is displayed for that Cert. If there is only one Cert, then you do not have to place your cursor on the Cert to select it.

PF6 – CERT

This key invokes the Certification Maintenance (CERT) screen. If there is only one Cert on the Renewal, then that Cert is displayed. If there is more than one Cert on the Renewal, then the Cert to be displayed must be selected by placing the cursor on the Cert and then pressing this key.

Renewal Calls Moreable Pop-up

```

*** M.E.D. SYSTEM ***
MECRCLN                                RENEWAL CALLS                                03/16/04
                                           08:06:25
                                           METEST

Seq   Date   Fr   Success   Note
-----
 1   _____  -   -   _____  +
 2   _____  -   -   _____  +
 3   _____  -   -   _____  +
 4   _____  -   -   _____  +
 5   _____  -   -   _____  +
 6   _____  -   -   _____  +
 7   _____  -   -   _____  +
 8   _____  -   -   _____  +
 9   _____  -   -   _____  +
10   _____  -   -   _____  +

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
      Help      Cont      Canc
    
```

This pop-up is displayed when you invoke the moreable associated with the "Calls" group on the Renewal Maintenance screen. This pop-up allows you to see and edit the complete list of calls made regarding the Renewal. You can record at most 10 calls with regard to a Renewal.

The valid values, validations, and other business rules for the Calls recorded on this pop-up are identical to those described for the "Calls" field group on the Renewal Maintenance screen.

If you invoke the moreable on the Note field of an individual call, the system displays Notes Moreable Pop-up (page 31), where you can enter up to 5 lines of text.

All input fields on this popup except the Note field are protected and cannot be modified if the Renewal Status is 'C' (Completed).

Renewal Information Request Selection Pop-up

```

*** M.E.D. SYSTEM ***
MECRIRN                                RENEWAL INFORMATION REQUEST SELECTION          03/16/04
                                           08:07:21
                                           METEST

Select One: X Case 1:
              Case 2:
Select from the list below, those items that still require verification.
S   Name           Type Source   From System   Client/Res.P/Col   Ver
-----
                                           -----

Date EZ-Notice Sent: 03 16 2004
*** End of Data ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
      Help      Cont      Canc      Back  FwrD
    
```

This pop-up is displayed when you enter 'Y' in either the "Send Elig Revw Notc (2-R)" field, or the "Send Request for Info (RI)" field, and then update the renewal. If you select an entry on this screen, the notice that is produced (if Auto-Notice is implemented) includes a paragraph requesting some information for the Renewal Member specified on the selected entry. The "Type" of the entry determines the text of the paragraph. For example, if you select one or more of the Type "EINC" (Earned Income) entries for Jane Doe, the notice will include paragraphs such as:

- We have not been able to obtain the following information we need to decide if you are eligible for Medicaid coverage:
 - Proof of earnings of the last month (such as check stubs/employer's statement, proof of income and expenses from self-employment, etc.) for Jane Doe.

For some types of Detail entries, the analyst needs to be more specific about the exact type of verification required. For example if the Detail has Type "UINC" (Unearned Income) the analyst must specify one or more "Unearned Income" types using the 'Ver' moreable. If the analyst had specified, as shown in the example Renewal Detail Verification Code moreable popup (page 44), Unearned Income codes '03' (Alimony) and '08' (Court-ordered Child Support Payments) then the notice will include paragraphs such as:

- We have not been able to obtain the following information we need to decide if you are eligible for Medicaid coverage:
 - Proof of the amount of money Jill Smith gets from:
 - Alimony
 - Court-ordered Child Support payments.

Although the "From System" and "Client/Resp.Party/Coll" fields are displayed in the pop-up, in most cases the text they contain is not included in the text of the notice. Usually it is only the Type and the Member Name on the Renewal Detail that determines the text of the paragraph. The exception is when the Type is "VERO" (Verification Required (Other)), in which case the text in either the "From System" field or the "Client/Resp.Party/Coll" is included as part of the text of the notice. The value in the "Client/Resp.Party/Coll" will only be used if the "From System" is empty.

Technical Note: VERO was removed from Renewal Detail Type LDA since it will only be used for Auto Notices

Field Descriptions

Select One

Enter 'X' next to one of the Case Numbers listed to send the Notice to the client of that case. By default when this screen is displayed, Case 1 is already selected and the cursor is in the Case 1 selection field. If there is no Case 2 on the renewal, the Case 2 selection field is disabled. One and only one Case may be selected.

Detail List

This screen displays a list of Renewal Details that have the "Ver" (Verification Required) field set to 'Y'.

S

Selection. Enter 'X' to select a detail so that the appropriate request for information paragraph is generated by Auto-Notices.

Up until implementation of the Auto-Notice 2-R or RI, this field will be protected.

Name

Display Only. Displays the name of the Renewal Member to whom the Renewal Detail entry applies.

Type

Display Only. Displays the Type of the Renewal Detail. The values in this column are as follows:

Type Code	Description
EINC	Earned Income
EXPS	Expense (Deduction)
MEIN	Medical Insurance
MCAR	Medicare
MISC	Miscellaneous
NONE	None
VERO	Verification Required (other)
PI	Personal Information
RSRC	Resource
UINC	Unearned Income

Source

Display Only. Displays the Source of the Renewal Detail. The values in this column are as follows:

Source Code
BENDEX
CH CARE
CONTACT
LAMI
LASES
LDET
MAS
MEDS
SOLO
TPL
TPQY

From System

Display Only. Displays the information obtained from the specified Source. When you invoke the moreable of this field, the system displays the Renewal Detail – "From System" Moreable Pop-up (page 42).

Client/Resp.Prty/Coll

Display Only. This column contains information obtained from the client, or the responsible party, or from a collateral source such as a neighbor of the household. When you invoke the moreable of this field, the system displays the Renewal Detail – "Client/Resp.Prty/Coll" Moreable Pop-up (page 43).

Ver

Verification required. The field containing the 'Y' is **Display Only**. However you can update the Verification Codes associated with the Renewal Detail by invoking the moreable, which displays the Renewal Detail Verification Code moreable popup (page 44).

Important: Before you press PF3 – Cont, to continue with sending the notice, be sure you have used the popup to select all the appropriate Verification Codes needed for each Renewal Detail that you have selected on this screen. This is only important after Auto-Notices is implemented.

The validations and business rules for this field are identical to the "Ver" field on the Renewal Details by Source screen, with one additional validation, as follows:

- Once Auto-Notices has been implemented, if a Detail is selected on this popup, and the Type of the Detail is "EXPS" (Expenses), "PI" (Personal Information), "RSRC" (Resources), or "UINC" (Unearned Income), then just a 'Y' is not acceptable. You must select one or more Verification Codes using the moreable popup.

Date EZ-Notice Sent (N8)

After using EZ-Notice to send the 2-R or RI notice, enter the date the system should consider was the date the notice was sent. The system uses this to determine the date any response is due from the Client. The system records this date on the Renewal as the Sent date against the appropriate Step on the Renewal Maintenance screen.

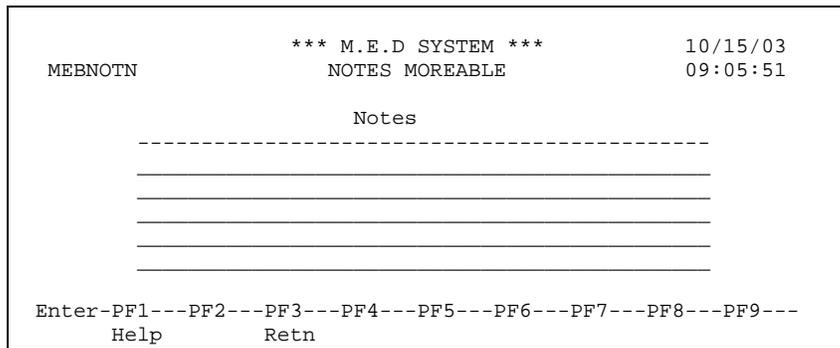
Required if PF3 – Cont is pressed.

This field will be removed from this screen when the Auto-Notice 2-R is implemented, at which time the system will determine this date automatically. *Technical Note: Since the 2-R and the RI notice may be implemented at different time, the calling program must pass a Logical parameter to indicate "Auto Notice". This field should only be displayed if the parameter is FALSE.*

sequence

The detail lines on this pop-up are displayed in sequence of Type, and Source within Member.

Notes Moreable Pop-up



This is the pop-up that is displayed whenever the moreable of a Notes field on any Renewal screen is actioned.

Client Information Pop-up

```

Message Line -
*** M.E.D. SYSTEM ***                                01/27/04
MECRCIN1      CLIENT INFORMATION                       12:52:08

Case Number:

Client:              Resp Prty:
  PH:                +                PH:
  SSN:

Client:              Resp Prty:
  PH:                +                PH:
  SSN:

***** End of Data *****
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
      Help      Retn                Back  Fwr
    
```

This pop-up is displayed when you invoke the moreable associated with the Client for a Case on the Renewal Maintenance screen. This pop-up displays the Client name and telephone number as well as the responsible party name and telephone Number for all the Clients for all the Certs linked to this Renewal.

The moreable next to the phone number invokes the Phone Information pop-up. A '>' is displayed if the Client has any additional phone information, otherwise a '+' is displayed.

Browse Renewals by Case Number

```

Message Line -
*** M.E.D. SYSTEM ***                                03/16/04
MECRENB      RENEWAL BROWSE BY CASE                   08:09:50

Case          Client Name          Date          Renewal          Date
Number        Created          Status        Completed
-----
-----

*Case Number: _____
*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main  Retn  Quit                Back  Fwr
    
```

The browse invoked by the 'B' Action on the Renewal Maintenance screen displays the Renewals in sequence of Case Number and Creation Date, starting at the specified Case Number.

The active help on Case Number invokes the standard Case Help by Name/Parish.

Detail Lines

Cmd

Line Command. Used to 'A'dd, 'M'odify, 'D'elete a Renewal Member. You can't delete a Renewal Member that has Renewal Details associated with it and you can't delete a Renewal Member that was added by the system.

SSN (N9)

Optional. The Social Security Number of the person.

Name (First M Last S) (A20)

Required. This field contains name of the Renewal Member. The label also serves as a reminder of the recommended format of the name when adding new members.

When adding a new Renewal Member, the name should in the **format: <FirstName> <MI> <LastName> <Suffix>**. This is because the Renewal Member name may be used as data to Auto-Notices. The Member names are formatted so that when multiple names are applicable to a certain Auto-Notice action, multiple names can be compressed together into a single string of characters that may be included in a paragraph of a notice. For example: "Jane X Doe Sr, Jack Doe, and John Doe".

It is not possible for the system to ensure that the name is entered in the appropriate format. However if you enter a comma or other special character as part of the name, the system displays an error message that describes the correct format.

The Name field cannot contain commas or other special characters. It may only contain alphabetic characters. If a non-alphabet character is entered, the system will display the error message: "Name Format should be: <First> <M> <Last> <Suffix>. Enter letters only."

Birth Date (N8)

Optional. This field contains the date of birth of the Renewal Member. **Format: mm dd yyyy.**

Rel'ship (A10)

Optional. The relationship the person has with the Client of the case.

For Renewal Members populated automatically by the system, this field is only populated for AU Members. It is populated with the description of the code in the "Relationship to Client" field from the AU Member screen.

AU (A1)

An 'X' in this field indicates that this person is, or is expected to be, an AU Member on the Case.

Valid Values: 'X', blank.

IU (A1)

An 'X' in this field indicates that this person is, or is expected to be, an IU Member on the Case.

Valid Values: 'X', blank.

Non Bdgt (A1)

An 'X' in this field indicates that this person is, or is expected to be, a non-budget member with income on the Case. **Valid Values: 'X', blank.**

Not in HH (A1)

Enter 'Y' to indicate that the person is no longer in the household. **Valid Values: 'Y', blank.**

Note

Invoke the moreable to enter miscellaneous Notes and Comments about this person. Do not use this field to record detailed information on income, resources, etc. Instead use the Renewal Details by Member screen to record detailed information about the person.

Sequence

The Renewal Members appear on this screen in the sequence they were added to the Renewal, not in name sequence.

For any Renewal Member that was added automatically by the system when the Renewal was created (from MEDS or another system via an electronic interface), the SSN, Name, DOB, Rel'ship, AU, IU, and Non Bdgt fields are protected and cannot be modified. Any new information related to these fields can be captured as part of the Note, or on a Renewal Detail of Type 'MISC' (Miscellaneous).

Non-Standard PF-Keys

PF5 – Renew

This key invokes the Renewal Documentation Maintenance (RENEW) screen (page 17).

PF9 – RSrce

Press this key to invoke the Renewal Details by Source screen (page 36).

PF10 – RMemD

Place the cursor on one of the Members displayed on this screen and press this key to invoke the Renewal Details by Member screen (page 45) for that Member.

PF11 – Pers

Place the cursor on one of the Members displayed on this screen and press this key to invoke the Person Maintenance screen for that Member. An error message will be displayed if the selected member is not registered as a Person in MEDS. If no person is selected, a blank Person screen is displayed and a new MEDS Person can be added.

PF12 – AUMem

Place the cursor on a Member on this screen and press this key to invoke the AU Member Maintenance screen for that person. If that person is an active AU Member on both a regular cert and a "plus" cert, the AU Member entry for the regular Cert is displayed on the AU Member screen. An error message will be displayed if the selected Member is not an AU member on one of the Renewal's Cases.

Adding a Renewal Member

When a Renewal is first added, the system automatically includes all relevant case members on the Renewal as Renewal Members. However during subsequent investigation of other systems or during discussions with the client it may be necessary to document new household members as part of the renewal.

In order to add a new Renewal Member entry you must add it on an empty line below the existing entries. If the screen is full, you may have to scroll down to the end of the list to reveal an empty line.

The format of the name should be <FirstName> <MiddleInitial> <LastName> <Suffix>. For example:

"JANE X DOE SR"
"JACK DOE"
"JOHN DOE"

This is because the Renewal Member name may be used as data when generating Auto-Notices. The Member names should be formatted so that when multiple names are applicable to a certain Auto-Notice action, the names can be compressed together into a single string of characters that may be included in a paragraph of a notice. For example: "Jane X Doe Sr, Jack Doe, and John Doe".

Renewal Details by Source

```

Message Line -
  RSRCE          *** M.E.D. SYSTEM ***          03/16/04
  MECRDSF        RENEWAL DETAILS BY SOURCE      08:14:08
                                                    METEST

*Action      : _ (C,D,M,N,L)
RENEWAL NUM: _____ Status:
Case Num 1  : _____ Client:
  Num 2    : _____ Client:
*Source     : _____ Information           Information From
*C  *Name   *Type   From System           Client/Resp.PrtY/Coll  Ver
-----
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +
- _____ + _____ + - +

*Tran: _____ Act: _ Key: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit Renew RMem Back FwrD PIES RMemD Pers AUMem
  
```

This screen allows you to view and maintain all the Renewal Detail entries for a particular Source, such as "MEDS", "Person", "FS", "BENDEX", etc. The picture above illustrates the screen where the user has specified "LDET" as the source.

Additions and modifications may be made from this screen only if the status of the Renewal is 'O' (Open).

Other Source Examples

The following examples show only the Detail part of the screen for various different sources.

```

*Source      : MAS_____
*C  *Name   *Type   From System           Client/Resp.PrtY/Coll  Ver
-----
_ JANE X DOE SR      RSRC SAVINGS ACCT $5000.00 + _____ + Y +
- _____ + _____ + - +
  
```

The following example shows information obtained automatically from MEDS at the time the Renewal was added. This includes an Earned Income entry, and a phone number entry. The analyst has learned from the Client that they are now working part-time, and that their current income from the McDonalds job is \$75 per month. The analyst has also obtained an updated home phone number from the Client, and has entered it into the "Client/Resp.PrtY/Coll" column of the "Phone" entry.

```

*Source      : MEDS_____
*C  *Name   *Type   From System           Client/Resp.PrtY/Coll  Ver
-----
_ JANE X DOE SR      EINC MCDONALDS $100.00 + PART TIME $75, FS_____ + Y +
_ JANE X DOE SR      MISC Phone: 999 999 9999 + Phone: 999 999 9999__ + - +
- _____ + _____ + - +
  
```

In the following example, the analyst performed a check against the TPQY system, but no information was found on any of the Renewal Members. The analyst added a Detail Line with the Type code "None" to indicate that no information was found. If this entry were not added, the system would not be able to

display 'X' against the TPQY system on the Renewal Maintenance screen. This serves to remind the analyst that they have already checked this System.

*Source	: TPQY__					
*C	*Name	*Type	From System	Client/Resp.Party/Coll	Ver	
-	-----	-----	-----	-----	---	---
-	_____	NONE	_____	+	_____	+ _ +
-	_____	_____	_____	+	_____	+ _ +

The following example shows how the system displays the fact that an active Food Stamp certification exists for the Client. The gathering of this information may eventually be done by the system if an automatic interface to FS is implemented. As of 8/17/04, additional Renewal Detail lines will be shown for adult IU Members as they are now also being sent to Food Stamps. The name of the case member who has active FS certification will be added to the end of each FS detail line. If there is no active FS certification, no name will be added.

*Source	: FS_____					
*C	*Name	*Type	From System	Client/Resp.Party/Coll	Ver	
-	-----	-----	-----	-----	---	---
-	JANE X DOE SR	MISC	Active FS 02/01/04-JA	+	_____	+ _ +
-	_____	_____	_____	+	_____	+ _ +

The following example shows a Renewal Detail that was created while talking to the client on the phone about a new job that they have at Burger King. Note that the "From System" column is empty. All data is captured into the "Client/Resp.Party/Coll" field. Note that the Source of this details is "Person".

*Source	: Person__					
*C	*Name	*Type	From System	Client/Resp.Party/Coll	Ver	
-	-----	-----	-----	-----	---	---
-	JANE X DOE SR	EINC		+	Burger King \$150 _____	+ _ +
-	_____	_____	_____	+	_____	+ _ +

Field Descriptions

RENEWAL NUM

The unique identifier of the Renewal.

Status (A1)

Display Only. This is the status of the Renewal. **Values: 'O' (Open), 'C' (Completed).**

Case Num 1

Display Only. The Case number of the first Case associated with the Renewal.

Client

Display Only. This field displays the name of the client of the case. **Format: <LastName>, <FirstName> <MI> <Suffix>.**

Case Num 2

Display Only. The Case number of the second Case associated with the Renewal, if any.

Client

Display Only. This field displays the name of the client of the case. **Format: <LastName>, <FirstName> <MI> <Suffix>.**

Source (A7)

Enter a code that specifies the primary source of the Renewal Detail items to be displayed in the details section of the screen. If this field is left blank, all sources will be displayed. However you **cannot add** a new Renewal Detail via this screen if Source is not specified, since the system would have no way of knowing which Source applied to the Detail you are adding.

The Source defaults to "MEDS" when this screen is first invoked after logging in to MEDS. Thereafter the system remembers the last value you used in this screen each time you return, until you log off or your session terminates.

The valid values in this field are as follows:

Source Code
BENDEX
CH CARE
CONTACT
LAMI
LASES
LDET
MAS
MEDS
SOLO
TPL
TPQY

Renewal Detail Lines

This group of columns allows you to view and maintain the detailed renewal related information for the current Renewal Member.

C

Line Command. Used to 'A'dd, 'M'odify, 'D'elete a Detail line.

Name (A20)

Required. This field contains the name of the Renewal Member to whom the Detail entry applies.

For empty detail lines this field appears to be an input field. However this is merely for the convenience of being able to tab into the field. When adding a new Detail entry, you must select the name from the help pop-up. You cannot type a name into this field.

When adding a Renewal Detail if you don't select a Renewal Member from help, the system will display the message:

"Renewal Member is required. Select one from Help".

For existing Renewal Details that were created automatically by the system you cannot modify the Renewal Member.

Type (A4)

Required. This column indicates the type of information the Detail line contains.

IMPORTANT: If you specify Type "VERO" (Verification required (other)), the information you enter in the From System field or "Client/Resp.Party/Coll" field will actually appear as part of the text of an Auto-Notice 2-R or RI notice produced for the entry. The value in the "Client/Resp.Party/Coll" will only be used if the "From System" is empty. The "VERO" Type is the

equivalent of the "Other Information" checkbox at the bottom of the EZ-Notice "RI – Request for Information" screen.

Technical Note: VERO was removed from Renewal Detail Type LDA since it will only be used for Auto Notices

For existing Renewal Details that were created automatically by the system you cannot modify the Type.

The valid values of this field are as follows:

Type Code	Description
EINC	Earned Income
EXPS	Expense (Deduction)
MEIN	Medical Insurance
MCAR	Medicare
MISC	Miscellaneous
NONE	None
VERO	Verification Required (other)
PI	Personal Information
RSRC	Resource
UINC	Unearned Income

Information From System

This column contains information obtained from the specified Source. This field allows the use of mixed-case characters.

For Renewal Detail entries that were created and populated automatically by the system (either from MEDS or from another system via an automatic interface), this column is protected and cannot be modified. This field is also protected and cannot be modified for existing Renewal Details with Source "Person".

You should use this column to manually capture information from some other system such as LASES, LDET, SOLQ, etc.

This field is protected on the main screen if there is more text in the field than is displayed here. In other words, if the moreable indicator shows '>', then the field should be protected. When the field is protected for this reason alone, you can invoke the moreable to edit the contents.

When you invoke the moreable of this field, the system displays the Renewal Detail – "From System" Moreable Pop-up (page 42).

The "From System" column must be blank for any detail entry with Source "Person". This ensures that information obtained from the client, the responsible party, or from a collateral source is always entered into the "Client/Resp.Party/Coll" column. If you try to enter information into the "From System" column for Source "Person", the system displays the error message:

"Info from Source 'Person' must go in 'Client/Resp.Party/Coll' field".

Information From Client/Resp.Party/Coll

This column contains information obtained from the Client, the Responsible Party, or from a "collateral" source. This field allows the use of mixed-case characters.

This field is protected on the main screen if there is more text in the field than is displayed here. In other words, if the moreable indicator shows '>', then the field should be protected. When the field is protected, you can invoke the moreable to edit the contents.

When you invoke the moreable of this field, the system displays the Renewal Detail – "Client/Resp.Prty/Coll" Moreable Pop-up (page 43).

Ver

Verification Required. **Optional.** You can enter a 'Y' in this field to indicate that verification is required for this Renewal Detail.

For some Renewal Detail Type values you can additionally, via the moreable, specify a code or set of codes that indicate more precisely the type of verifications required. For example if the Type of the Detail entry is "UINC" (Unearned Income), you can invoke the moreable to select one or more from a list of Income Type codes. The moreable invokes the Renewal Detail Verification Code moreable popup (page 44).

The Verification Required indicator can be 'Y' only for the following Renewal Detail Types:

Type Code	Description
EINC	Earned Income
EXPS	Expense (Deduction)
MEIN	Medical Insurance
MCAR	Medicare
VERO	Verification Required (other)
PI	Personal Information
RSRC	Resource
UINC	Unearned Income

The Verification Required indicator must be 'Y' if any Verification Code values are selected on the pop-up. However the indicator can be 'Y' without any values being selected.

Sequence

On the Renewal Details by Source screen, the Renewal Details are displayed in sequence of Type within Member. This ensures that the Details of a particular Type for a particular Member are displayed consecutively. The entries aren't necessarily displayed in Member name order, but the entries for a Member are kept together.

Non-Standard Actions

'N'ext and 'L'ast

The 'N' (Next) and 'L' (Last) actions on this screen are slightly non-standard. Both actions cycle through the list of possible Renewal Source codes. The Next action cycles through in the sequence that the Source codes appear in the Source help popup. If the screen is already displaying the last Source in the list, the Next action wraps around to the beginning of the list to display the first Source.

The 'L' (Last) action operates the same as the Next action except that it cycles through the list of Sources in reverse order.

Line Commands

This screen has the standard line commands for a multi-line maintenance screen. This section documents any special or noteworthy behavior when using the line commands.

'A' (Add)

When you add a line on this screen, the new line is associated with the Source that is currently specified (in the field located just above the detail lines).

Non-Standard PF-Keys

PF5 – Renew

Press this key to navigate to the Renewal Documentation Maintenance (RENEW) screen (Page 17)

PF6 – RMem

Press this key to navigate to the Renewal Members screen (page 33).

PF9 – Pies

Place the cursor on a particular Renewal Detail on this screen and press this PF-Key to navigate to the PIES screen for the Renewal Member on the selected detail entry. The system displays the latest PIES data for the person. This key will only function if the Renewal Member on the entry was added by the system from the MEDS case at the time the Renewal was created.

PF10 – RMemD

Place the cursor on a particular Renewal Detail on this screen and press this PF-Key to navigate to the Renewal Details by Member screen (page 45) for the Renewal Member on the selected detail entry.

PF11 – Pers

Place the cursor on a particular Renewal Detail on this screen and press this PF-Key to navigate to the PERS screen for the Renewal Member on the selected detail entry. This key will only function if the Renewal Member on the entry was added by the system from the MEDS case at the time the Renewal was created.

PF12 – AUMem

Place the cursor on a particular Renewal Detail on this screen and press this key to invoke the AU Member Maintenance screen for that person. If that person is an active AU Member on both a regular cert and a "plus" cert, the AU Member entry for the regular Cert is displayed on the AU Member screen. An error message will be displayed if the selected Member is not an AU member on one of the Renewal's Cases. This key will only function if the Renewal Member on the entry was added by the system from the MEDS case at the time the Renewal was created.

Adding a new Renewal Detail

When you add a new Renewal Detail entry on the Renewal Details by Source screen, the entry is always associated with the Source that is currently specified.

In order to add a new Renewal Detail entry you must add it on an empty line below the existing entries. If the screen is full, you may have to scroll down to the end of the list to reveal an empty line.

Although the Name column appears to be an input field, you cannot type a name into it when adding a new line. You must instead place the cursor in the field and press PF1 – Help, to select a Renewal Member.

After the new Renewal Detail is added, the system re-sorts the details into sequence. The new entry may appear to have disappeared. It hasn't. You just need to scroll up again until you see the newly added line. It will be redisplayed wherever it falls within the sort sequence of the detail lines.

You can add several Renewal Details at a time provided there are enough empty lines on the screen. If you need more lines you can scroll down past the last existing line, and then add up to 10 new details entries at a time for the same Source.

Renewal Detail – "From System" Moreable Pop-up

```

*** M.E.D SYSTEM ***           03/16/04
MECRDFN1          FROM SYSTEM MOREABLE 08:15:50

Name:              Type:         Source:

      Information from System
-----
_____
_____
_____
_____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF1
      Help          Cont          Canc
  
```

This pop-up is displayed whenever you invoke the moreable of the "From System" field on either the Renewal Details by Source, or the Renewal Details by Member screen. It displays the full text of the "From System" field of a particular Renewal Detail.

Field Descriptions

Name

Display Only. Displays the Name of the Renewal Member to which the Renewal Detail applies.

Type

Display Only. Displays the Type of the Renewal Detail.

Source

Display Only. Displays the Source of the Renewal Detail.

Information from System (A50/5)

Optional. Enter up to 5 lines each of up to 50 characters of information obtained from the System shown above in the Source field. This field allows the use of mixed-case characters.

The Information From System fields are protected and cannot be modified when any of the following conditions is true:

- The Renewal Detail was created by the system and hence contains system-gathered information from MEDS, or from some other system via an electronic interface.
- The Source of the Renewal Detail is "Person".
- The Status of the Renewal is 'C' (Completed).

Renewal Detail – "Client/Resp.Prty/Coll" Moreable Pop-up

```

*** M.E.D SYSTEM ***           03/16/04
MECRDFN2      CLIENT/RESP.PRTY/COLL MOREABLE  08:19:18

Name:                Type:                Source:

Information from Client/Resp.Prty/Collatoral
-----
____
____
____
____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF1
Help      Cont      Canc

```

This pop-up is displayed whenever you invoke the moreable of the "From Client/Resp.Prty/Coll" field on either the Renewal Details by Source, or the Renewal Details by Member screen. It displays the full text of the "From Client/Resp.Prty/Coll" field of a particular Renewal Detail.

Field Descriptions

Name

Display Only. Displays the Name of the Renewal Member to which the Renewal Detail applies.

Type

Display Only. Displays the Type of the Renewal Detail.

Source

Display Only. Displays the Source of the Renewal Detail.

Information from System (A50/5)

Optional. Enter up to 5 lines each of up to 50 characters of information obtained from the client, the responsible party, or a collateral source such as a neighbor. This field allows the use of mixed-case characters.

The Information From Client/Resp.Prty/Collatoral fields are protected and cannot be modified if the Status of the Renewal is 'C' (Completed).

Renewal Detail Verification Code moreable popup

```

*** M.E.D. SYSTEM ***                03/16/04
MECRDVNX      RENEWAL DETAIL VERIFICATION CODE  08:22:00
Name      :                               Type:      Source:
Fr System:                               +
Fr Client:                               +
Sel Code  -----  Type Code
-----
-   03  COURT-ORDER ALIMONY PYMT OUTSIDE HOME
-   02  COURT-ORDER CHILD SUPPORT OUTSIDE HOME
-   01  Dependent Care Deduction
X   06  HEALTH INSURANCE PREMIUM
-   05  MEDICARE PREMIUM
-   07  PAYMENTS TO TAX DEPENDENTS OUTSIDE HOME
-   04  RENT INC ALLOW EXP(MEM I-1524.38/1534.56

***** End of Data *****
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10-
      Help      Cont      Canc      Back  FwrD

```

This popup is invoked by the moreable of the "Ver" (Verification) column on the Renewal Details by Source, Renewal Details by Member, and the

Renewal Information Request Selection Pop-up. This popup allows you to specify one or more Verification Codes for a particular Renewal Detail.

The top portion of the popup displays details of the Renewal Detail, including the first full line of the "From System" and "From Client/Resp.Prty/Coll" fields.

This popup is only available if the Type of the Renewal Detail is "EXPS" (Expenses), "PI" (Personal Information), "RSRC" (Resources), or "UINC" (Unearned Income). The set of Verification Codes displayed is different for each of these Types.

You can select one or more of these codes by typing 'X' in the "Sel" column next to the desired code. Scroll down to see the remaining codes and select more. When you have selected all the desired codes press PF3 – Cont to update the Renewal Detail.

Field Descriptions

Name

Display Only. Displays the Name of the Renewal Member to whom the Renewal Detail applies.

Type

Display Only. Displays the Type of the Renewal Detail.

Source

Display Only. Displays the Source of the Renewal Detail.

Fr System (A50)

Display Only. Displays the full 50 characters of the first line of the "From System" field of the Renewal Detail. The moreable invokes the Renewal Detail – "From System" Moreable Pop-up (page 42) display-only.

More Example Renewal Details

SSN	Name	DOB	Rel'shp	AU	IU	Non Bdgt	Note
999999999	JANE X DOE SR	99/99/9999	CLIENT	X	X		>
"Does Jane have Health Insurance?, Income?, Resources?"							
*C*Type	*Srce	From System		Client/Resp.Prty/Coll			Ver
- UINC	MEDS	RSDI \$50		+			+ - +
- UINC	LASES__	COURT ORD CH SUPP \$150		+			+ - +

The above picture shows a few more example detail lines as they might be displayed on the Renewal Details by Member screen.

Field Descriptions

RENEWAL NUM

The unique identifier of the Renewal.

Status (A1)

Display Only. This is the status of the Renewal. **Values: 'O' (Open), 'C' (Completed).**

Case Num 1

Display Only. The Case number of the first Case associated with the Renewal.

Client

Display Only. This field displays the name of the client of the case. **Format: <LastName>, <FirstName> <MI> <Suffix>.**

Case Num 2

Display Only. The Case number of the second Case associated with the Renewal, if any.

Client

Display Only. This field displays the name of the client of the case. **Format: <LastName>, <FirstName> <MI> <Suffix>.**

Renewal Member Information

Display Only. This group of fields displays information about the current Renewal Member. This information is not modifiable on this screen. To modify the Renewal Member information, go to the Renewal Members screen.

SSN (N9)

Display Only. Displays the Social Security Number of the Renewal Member.

Name (A20)

Display Only. Displays the name of the Renewal Member.

DOB (N8)

Display Only. Displays the Renewal Member's Date of Birth.

Rel'ship (A10)

Display Only. Displays the relationship of the Renewal Member to the Client of the Case.

AU (A1)

Display Only. An 'X' in this field indicates that the Renewal Member is, or is expected to be, an AU Member on the Case.

IU (A1)

Display Only. An 'X' in this field indicates that the Renewal Member is, or is expected to be, an IU Member on the Case.

Non Bdgt (A1)

Display Only. An 'X' in this field indicates that the Renewal Member is, or is expected to be, an non-budget member on the Case who has income significant to the case.

Note (moreable)

Display Only. A moreable that allow you to view any miscellaneous notes or comments that exist with respect to this Renewal Member. When the moreable is invoked from this screen the Notes are **display only**.

"Does Jane have Health Insurance?, Income?, Resources?"

This is a prompt to the analyst as to the question they should ask the client when using this screen.

Renewal Detail Lines

The detail lines on this screen are similar to the detail lines on the Renewal Details by Source screen, except for the presence of a Srce (Source) field in place of the name.

The **validations** and other business rules (such as when fields are protected or non-modifiable) that the system applies to the Detail entries on this screen are identical to those described for the Renewal Details by Source screen, and hence those common validations and other business rules are not repeated here.

Srce (A7)

Required. This column contains the Source from which the information on the Detail line was obtained. Valid Values include "Person", "MEDS", "BENDEX", etc.

For Renewal Detail entries that were created and populated automatically by the system (either from MEDS or from another system via an automatic interface) this column is protected and cannot be modified

The valid values of this field are as follows:

Source Code
BENDEX
CH CARE
CONTACT
LAMI
LASES
LDET
MAS
MEDS
SOLQ
TPL
TPQY

Order by Source (A1)

If you leave this field blank the Renewal Details on this screen are displayed in sequence of Source within Type, so that all the details of a certain Type are displayed consecutively. This is the default.

If you type 'X' in this field, the Renewal Details on this screen are displayed in sequence of Type within Source, so that all the details from a certain Source are displayed consecutively.

Non-Standard Actions

'N'ext and 'L'ast

The 'N' (Next) and 'L' (Last) actions on this screen are slightly non-standard. Both actions cycle through the list of Renewal Members for the current renewal. The Next action cycles through in the sequence that the Renewal Members are displayed on the Renewal Members screen. If the screen is already displaying the last Renewal Member of the Renewal, the Next action wraps around to the beginning of the list to display the first Member of the current renewal.

The 'L' (Last) action operates the same as the Next action except that it cycles through the list of Renewal Members in the reverse order.

Line Commands

This screen has the standard line commands for a multi-line maintenance screen. This section documents any special or noteworthy behavior when using the line commands.

'A' (Add)

When you add a line on this screen, the new line is associated with the Renewal Member that is currently displayed above the detail columns.

Non-Standard PF-Keys

PF5 – Renew

Press this key to navigate to the Renewal Documentation Maintenance (RENEW) screen (page 17).

PF6 – RMem

Press this key to navigate to the Renewal Members screen (page 33).

PF9 – RSrce

Place the cursor on a particular Renewal Detail on this screen and press this PF-Key to navigate to the Renewal Details by Source screen (page 36) for the Source on the selected detail entry.

You can also press this key without cursor-selecting a detail entry to go to the Renewal Detail by Source screen. The Source will default as described for that screen.

PF11 – TPL

Press this key to navigate to the TPL system for the current Renewal Member. Save navigational globals prior to exiting MEDS.

PF12 – Pies

Place the cursor on a particular Renewal Detail on this screen and press this PF-Key to navigate to the PIES screen for the Renewal Member on the selected detail entry. This key will only function if the Renewal Member on the entry was added by the system from the MEDS case at the time the Renewal was created.

Adding a new Renewal Detail

When you add a new Renewal Detail entry on this screen, the entry is always associated with the Member that is currently displayed in the top portion of the screen.

In order to add a new Renewal Detail entry you must add it on an empty line below the existing entries. If the screen is full, you may have to scroll down to the end of the list to reveal an empty line.

After the new Renewal Detail is added, the system re-sorts the details into sequence. The new entry may appear to have disappeared. It hasn't. You just need to scroll up again until you see the newly added line. It will be redisplayed wherever it falls within the current sort sequence of the detail lines.

You can add several Renewal Details at a time provided there are enough empty lines on the screen. If you need more lines you can scroll down past the last existing line, and then add up to 7 new details entries at a time for the same Member.

Summary of Hot-Keys

The following table summarizes the PF-keys that are available to migrate between the various Renewal screens. The assignment of the PF-Keys is consistent across all the Renewal screens, except of course that a screen does not have a hot-key to itself.

PK-Key	Acronym	Go to Screen
PF5	Renew	RENEW Renewal Maintenance
PF6	RMem	RMEM Renewal Members
PF9	RSrce	RSRCE Renewal Details by Source
PF10	RMemD	RMEMD Renewal Details by Member

Renewal Use Cases

This set of use cases (or business scenarios) describes how the analyst interacts with the system in order to perform a renewal, guided by the Online Renewal Guide (Renewal Maintenance screen).

1. Check Sources

Analyst uses Renewal Maintenance screen to add new Renewal, after specifying Cases and Selecting appropriate Certs.

System adds all appropriate Renewal Members to Renewal.

System adds Renewal Detail for each PIES Earned Income, Unearned Income, and Expense entry of all Renewal Members who are IU members. If no Budget exists, all AU Members are added as Renewal Members. System adds other Renewal Details as appropriate.

Analyst checks all other appropriate systems and sources for updated information on all Renewal Members. Analyst creates or updates a Renewal Detail entry for each relevant piece of new or updated information discovered. When a piece of information requires verification, analyst sets the 'Ver' (Verification Required) column on the Renewal Detail to 'Y' (Yes).

Analyst then determines the appropriate level of the Renewal, based on the information currently available. If the initial Level is '1', and nothing learned by the analyst contradicts this assessment, then the analyst may opt to perform an Ex Parte renewal. Otherwise at this point opt to attempt a telephone renewal, or to send an Eligibility Review (2-R) notice.

The analyst sets the Step 1 – "Systems Checked" Completed" field to 'Y' and updates the Renewal.

If the analyst determines that Level '1' (Ex Parte) is appropriate, they proceed to Step 5 – "Close Renewal Documentation".

If the analyst determines that Level '2' (Regular) is appropriate, they proceed to Step 3 – "Send Elig Revw Notc (2-R)".

2. Make Calls

Analyst attempts to telephone the Client.

If analyst determines phone contact not possible (no phone number known or listed numbers disconnected):

Analyst sets "No Phone or all Disconnected" to 'Y', and updates the Renewal.

Analyst proceeds to Step 3 "Send Eligibility Review Notice (2-R)".

If one of the calls succeeds, or the Client calls the analyst:

Analyst discusses Case with Client. Analyst creates or updates a Renewal Detail entry for each relevant piece of new or updated information discovered. When a piece of information requires verification, analyst sets the 'Ver' (Verification Required) column on the Renewal Detail to 'Y' (Yes). For some types of detailed information the analyst can, and if possible should, be more specific about the exact nature of the verification required by specifying one or more Verification Codes on the Renewal Detail.

Analyst sets "Success" field of Call to 'Y' and updates Renewal.

If any Verification needed, i.e. any Renewal Detail has 'Ver' (Verification Required) column set to 'Y' (Yes):

Analyst proceeds to Step 4 "Send Request for Information (RI)". Alternatively the analyst can proceed to Step 5 "Close Renewal Documentation" if she knows that all requested information has been received.

Else (no verifications needed):

Analyst proceeds to Step 5 "Close Renewal Documentation".

If all required attempts to call the client have been made over the required period of time, and all have failed:

Analyst records failure of final call.

Analyst proceeds to Step 3 "Eligibility Review Notice".

3. Send Eligibility Review Notice (2-R)

If Auto-Notice not yet implemented for "Eligibility Review Notice" (2-R):

Analyst enters 'Y' in "Send Elig Revw Notc (2-R)" field, and updates the Renewal.

System pops up

Renewal Information Request Selection Pop-up (page 28) to display a list of all Renewal Details that have the 'Ver' (Verification Required) field set to 'Y' and allows analyst to see what verifications are needed.

Leaving the Verification Selection pop-up open on the Renewal Maintenance screen, analyst uses EZ-Notice to create "Eligibility Review Notice" (2-R), requesting only the necessary verifications.

Analyst returns to MEDS, enters the Date Sent on the Verification Selection Pop-up, and presses Continue key the on pop-up.

System records Date Sent on Renewal, and completes update of Renewal. Analyst can later modify the Sent date if needed. Due back date remains empty. The system clears the "Send Elig Revw Notc (2-R)" field, so that the notice can be requested again if necessary.

Analyst waits for return of Renewal Form.

Else (Auto-Notice 2-R is implemented)

Analyst enters 'Y' in "Send Elig Revw Notc (2-R)" field, and updates the Renewal.

System pops up

Renewal Information Request Selection Pop-up (page 28) to display a list of all Renewal Details that have the 'Ver' (Verification Required) field set to 'Y' and allows analyst to select only those still needed. For those Detail Types that require Verification code(s) to define exactly what is required, if the analyst didn't specify them earlier during step 1 or 2, they may do so now by invoking the 'Ver' moreable.

System generates Auto-Notice 2-R, including Request for Information section if any verifications required. The system determines Sent date and Due Back date and records them on the Renewal. (The Date Sent and Due Back fields are display-only fields). The system clears the "Send Elig Revw Notc (2-R)" field, so that the notice can be requested again if necessary.

Analyst waits for return of Renewal Form.

4. Send Request for Information (RI)

The analyst can utilize this step when needed.

If Auto-Notice not yet implemented for "Request for Information" (RI):

Analyst enters 'Y' in "Send Request for Info (RI)" field, and updates the Renewal.

System pops up

Renewal Information Request Selection Pop-up (page 28) to display a list of all Renewal Details that have the 'Ver' (Verification Required) field set to 'Y' and allows analyst to see what verifications are needed.

Leaving the Verification Selection pop-up open on the Renewal Maintenance screen, analyst uses EZ-Notice to create "Request for Information (RI)", requesting only the needed verifications.

Analyst returns to MEDS and presses Continue button on pop-up.

System records current date as Sent date, and completes update of Renewal. Analyst can later modify the Sent date if needed. The Due Back date remains blank. The system clears the "Send Request for Info (RI)" field, so that the notice can be requested again if necessary.

Analyst waits for return of Renewal Form.

Else (Auto-Notice RI is implemented)

Analyst enters 'Y' in "Send Request for Info (RI)" field, and updates the Renewal.

System pops up

Renewal Information Request Selection Pop-up (page 28) to display a list of all Renewal Details that have the 'Ver' (Verification Required) field set to 'Y' and allows analyst to select only those still needed. For those Detail Types that require Verification code(s) to define exactly what is required, if the analyst didn't specify them earlier during step 1 or 2, they may do so now by invoking the 'Ver' moreable.

System generates Auto-Notice "Request for Information" (RI) to request selected verifications. The system determines Sent date and Due Back date and records them on the Renewal. (The Date Sent and Due Back fields are display-only fields). The system clears the "Send Request for Info (RI)" field, so that the notice can be requested again if necessary.

Analyst waits for return of Renewal Form.

5. Close Renewal Documentation

Analyst waits until any requested information or verifications have been returned, or the due dates are passed. Any other notes regarding the decision can be recorded in the Notes field. For example "RI not recvd by due dt".

Analyst creates an Eligibility Determination. Captures all new and updated information on PERS, PIES, and other screens. Analyst "Completes" the determination to renew or close the certifications as appropriate.

Analyst then closes the Renewal Documentation by pressing PF12 and the System sets the Status of the Renewal to 'C' (Completed).