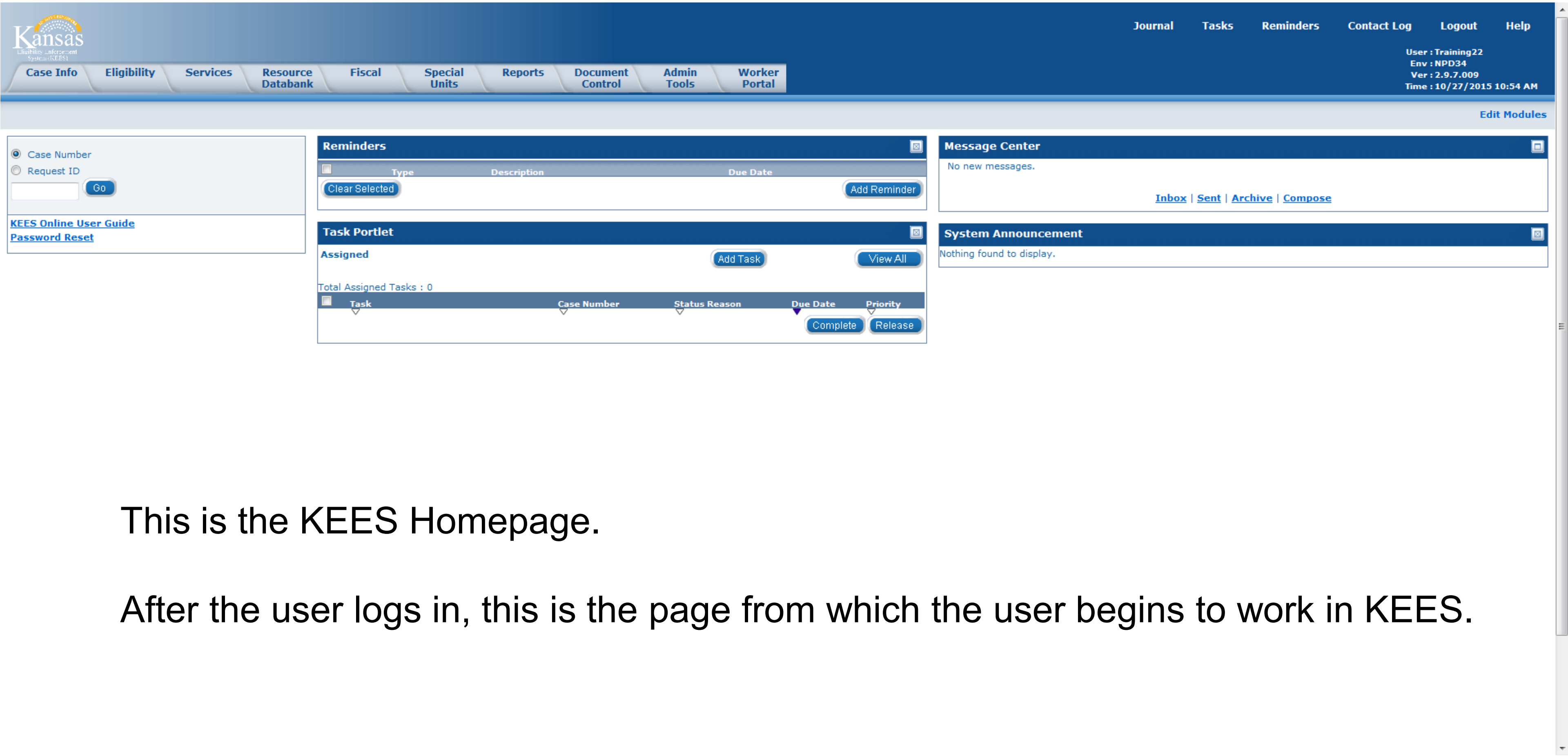
KEES Overview

KEES

KEES Overview

KEES Homepage



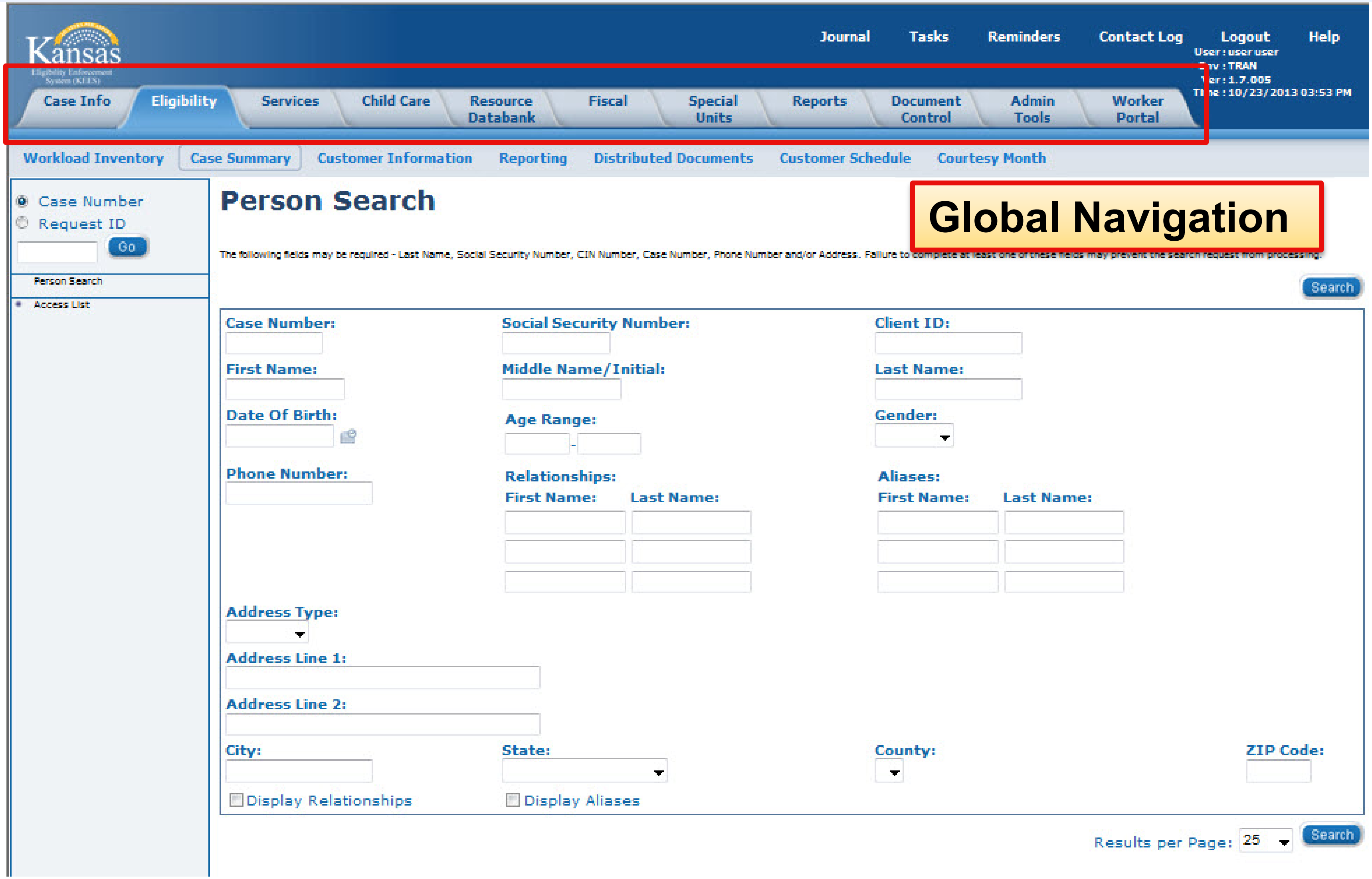
This is the KEES Homepage.

After the user logs in, this is the page from which the user begins to work in KEES.

Kansas
Eligibility Enforcement System (KEES)

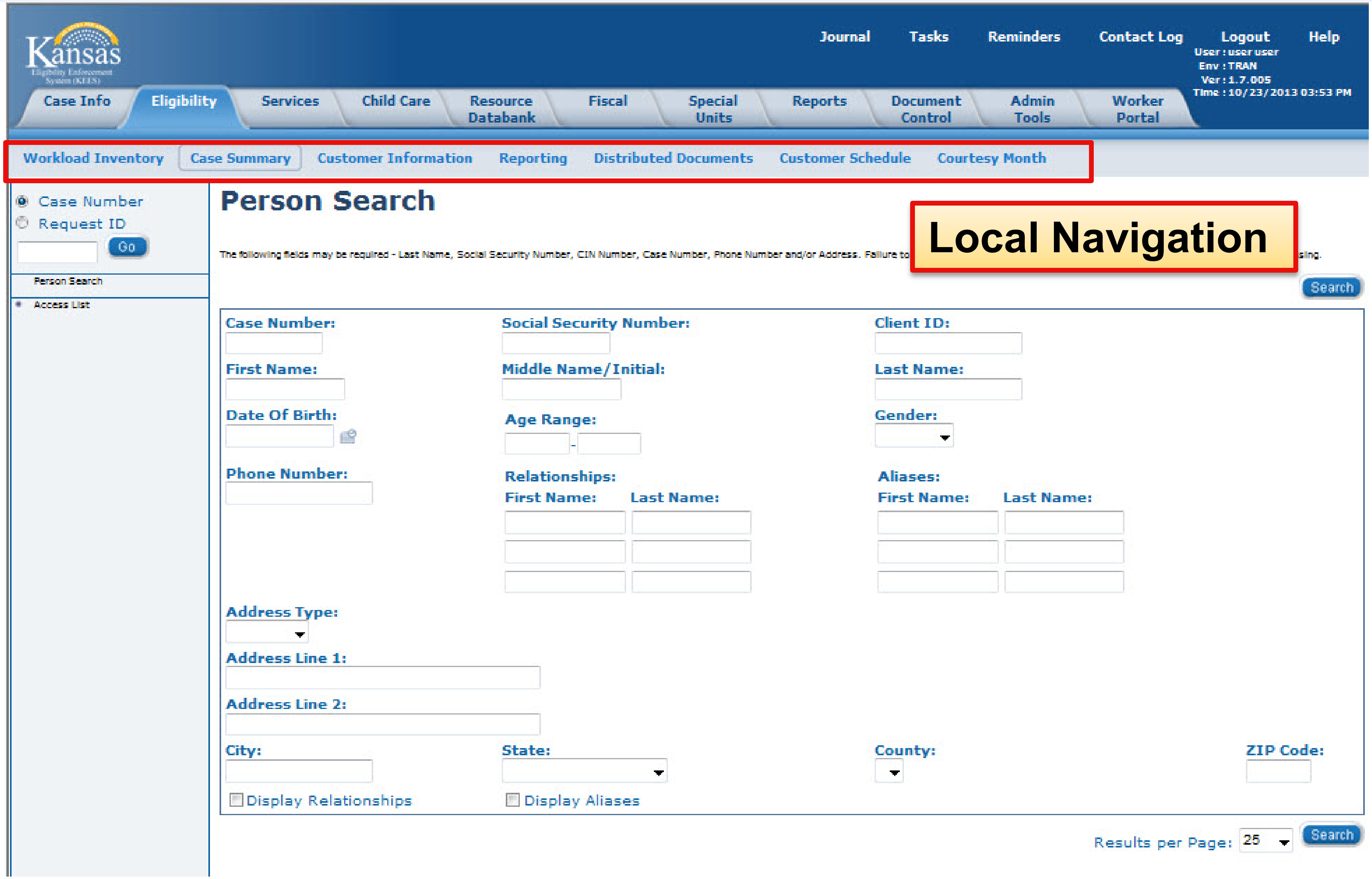
KEES Overview

KEES Overview > Global Navigation



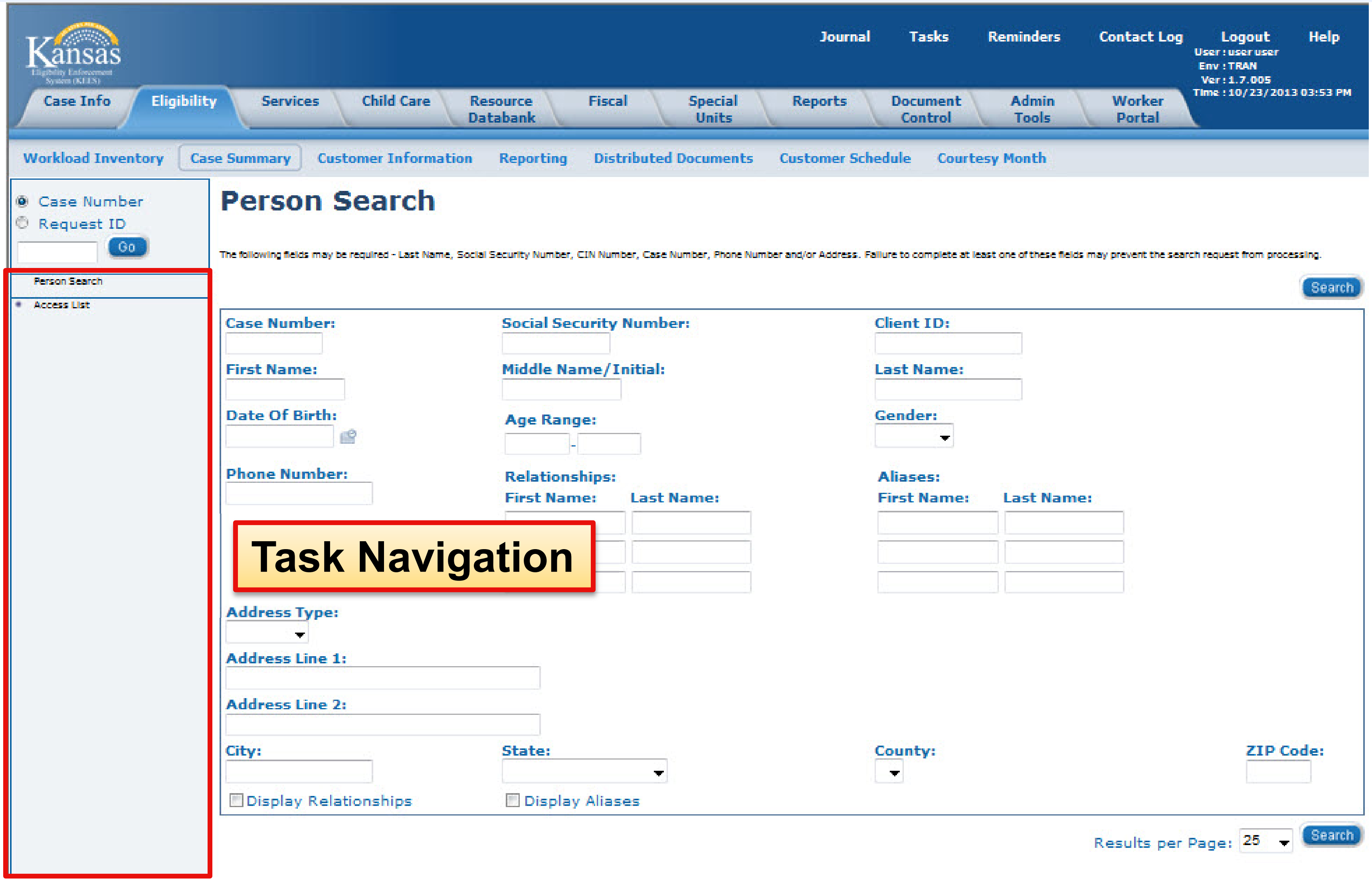
KEES Overview

KEES Overview > Local Navigation



KEES Overview

KEES Overview > Task Navigation



KEES Overview

Introduction

After completing this course, you will be able to complete the following actions in KEES:

- Perform a Person Search
- View Non-Financial pages
- View Financial pages
- Perform a Distributed Documents Search

KEES Overview

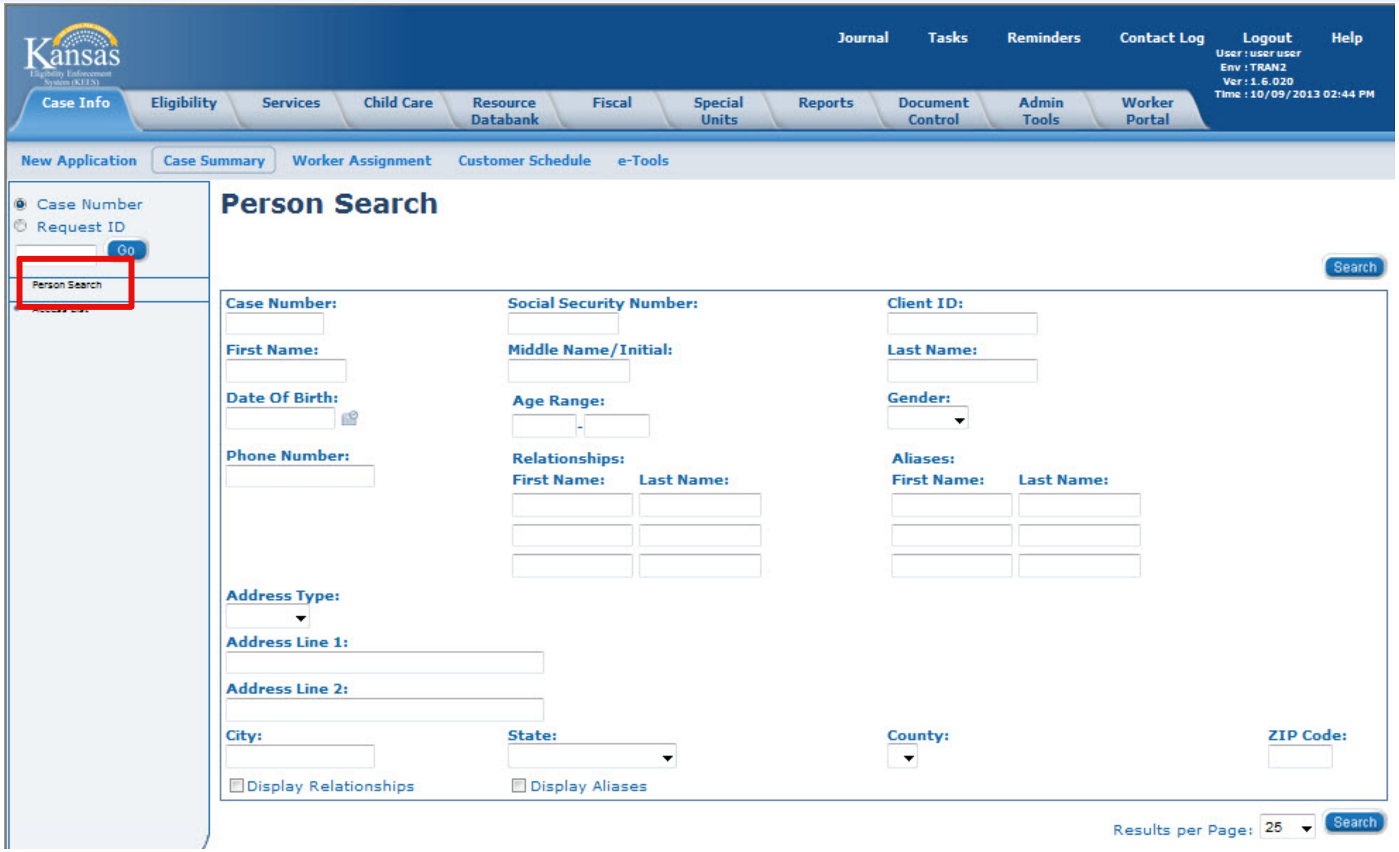
Agenda

- Lesson 1: Performing a Person Search
- Lesson 2: Viewing Non-Financial Data
- Lesson 3: Viewing Financial Data
- Lesson 4: Viewing Distributed Documents

Person Search is used to determine whether a person currently exists in KEES and whether they already have a case number.

KEES Overview

Lesson 1: Performing a Person Search > Person Search



- The Person Search page is similar to completing a CLIN search in KAECSES.
- The Person Search page is located on the Task Navigation portion of the page.
- The user is able to search by Name, SSN, and DOB.

KEES Overview

Lesson 1: Performing a Person Search > Wild Card

- Wild card searches can be performed on both the First Name and Last Name of the consumer.
- This means that the user can enter only partial first and last names followed by an asterisk (*) to get a larger return on their search.
- For example, if the user was looking for James Robertson, they could enter **Jam* Robe***. This would return any persons in KEES whose first three letters of their first name were 'Jam' and the first four letters of their last name were 'Robe'.

NOTE: For Phase 3 the asterisk is not required to do a wild card search. KEES will automatically do a wild card search regardless of how much information is entered. For Phase 3 the user should enter as much information as known when conducting the Person Search.

KEES Overview

Lesson 1: Performing a Person Search > Comprehensive

Beginning Phase 3 a user is able to complete a comprehensive person search. This is recommended. The more information KEES has to use in the person search, the more accurate the returned match will be.

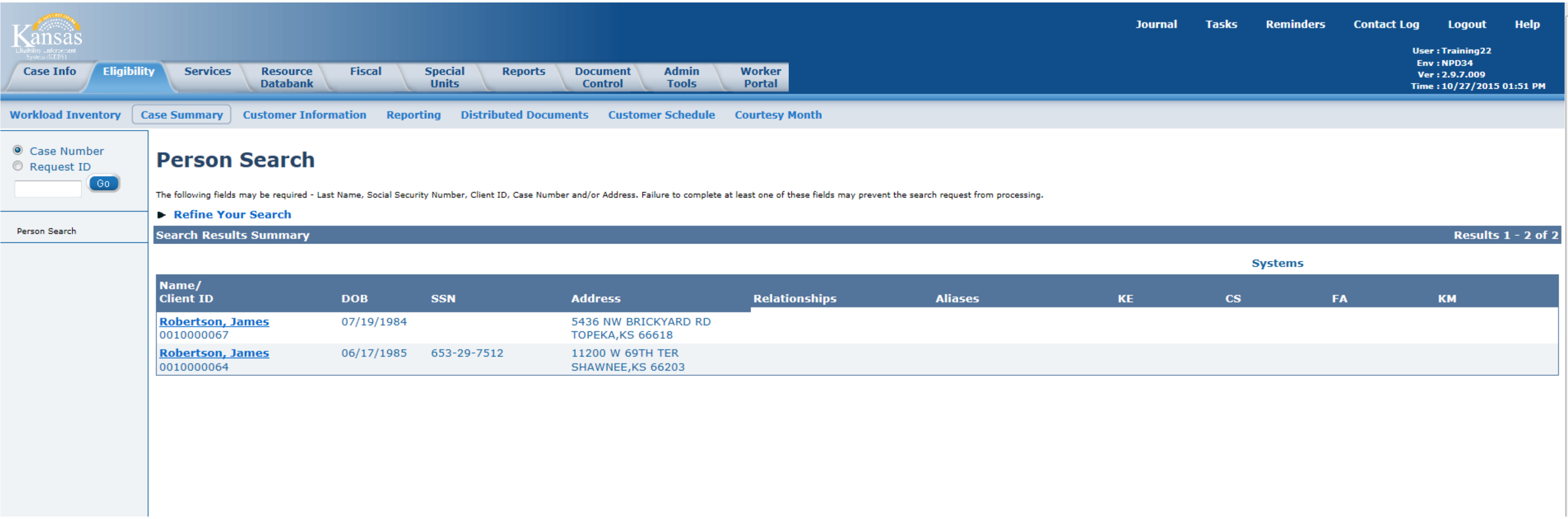
- This means that the user can enter the entire first and last name, SSN, and DOB for the consumer to get a match on as much information as possible.

- For example, if the user was looking for James Robertson, they could enter **James Robertson. SSN, and DOB**. This would return any persons in KEES whose information matches with the information provided.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

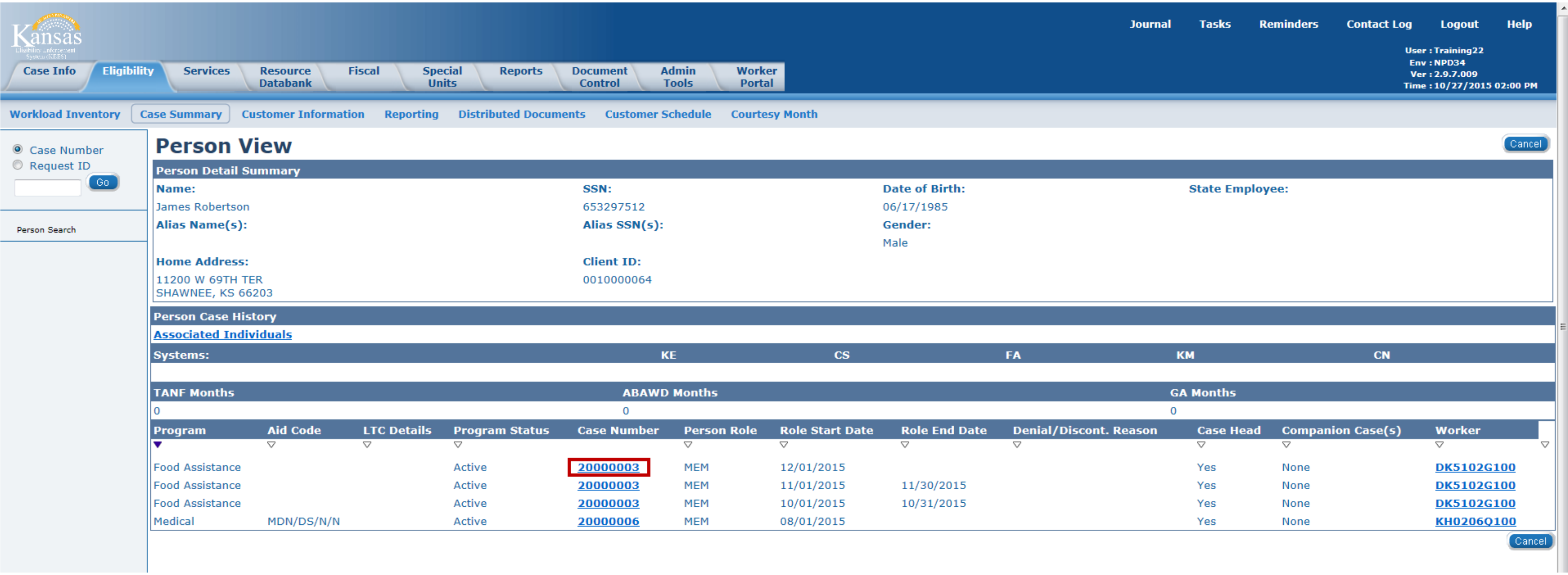
Lesson 1: Performing a Person Search > Person Search Results



KEES performs a comprehensive search and returns any potential matches to the user for review. If a user is uncertain whether one of the potential matches returned is the correct person, clicking the person name hyperlink accesses additional case specific information which can be used to aid in the decision.

KEES Overview

Lesson 1: Performing a Person Search > Person Search results



- Once the person name hyperlink is selected, the Person View page appears. The Person View displays a holistic view of the individual and case related details. All of the programs and case numbers the person has been associated with are listed.
- Clicking the Case Number hyperlink takes the user to the Case Summary page.

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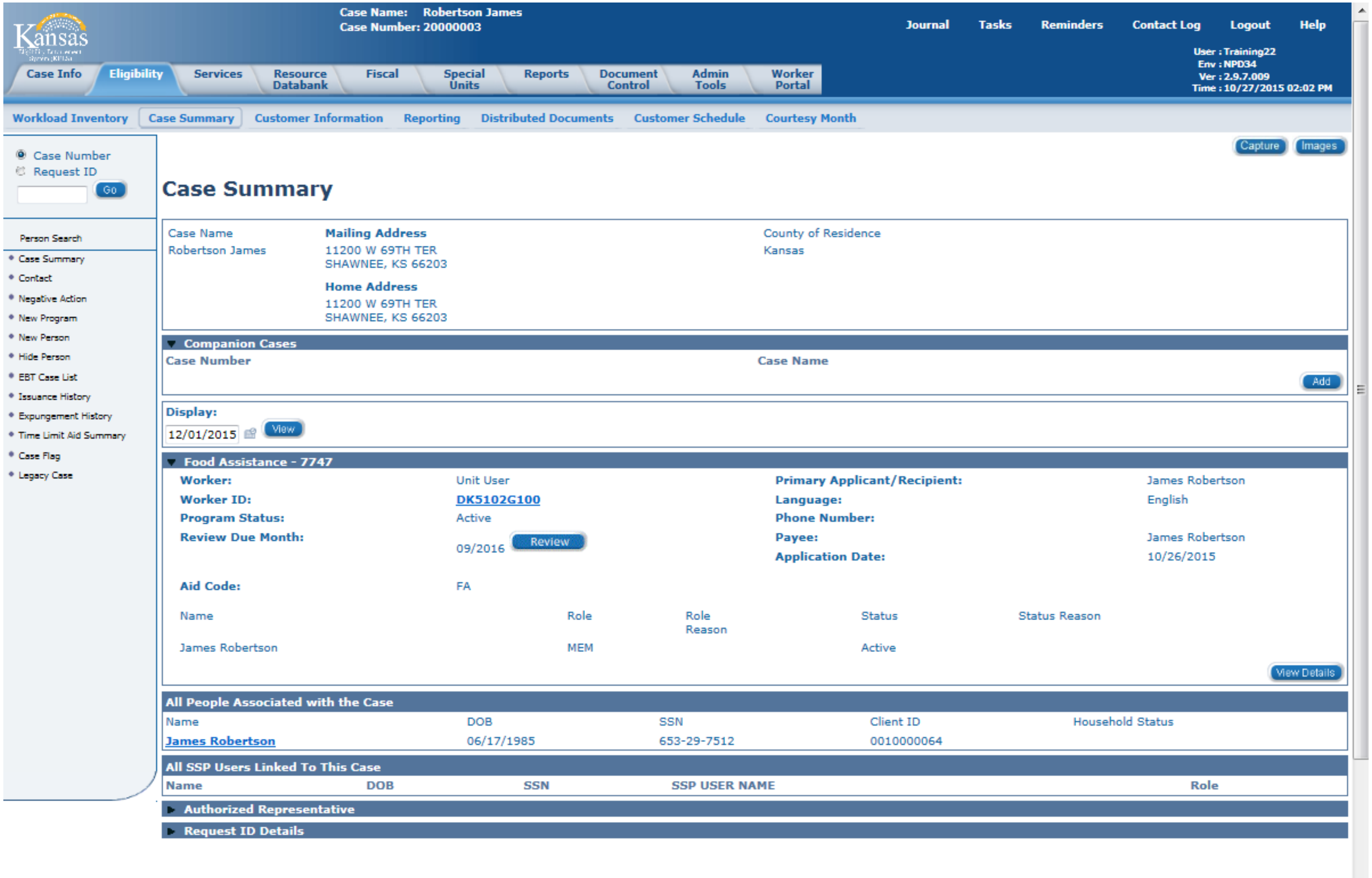
KEES Overview

Lesson 1: Performing a Person Search > Case Summary



KEES Overview

Kansas Eligibility Enforcement System (KEES)

KEES Overview

Lesson 1: Performing a Person Search > Case Summary

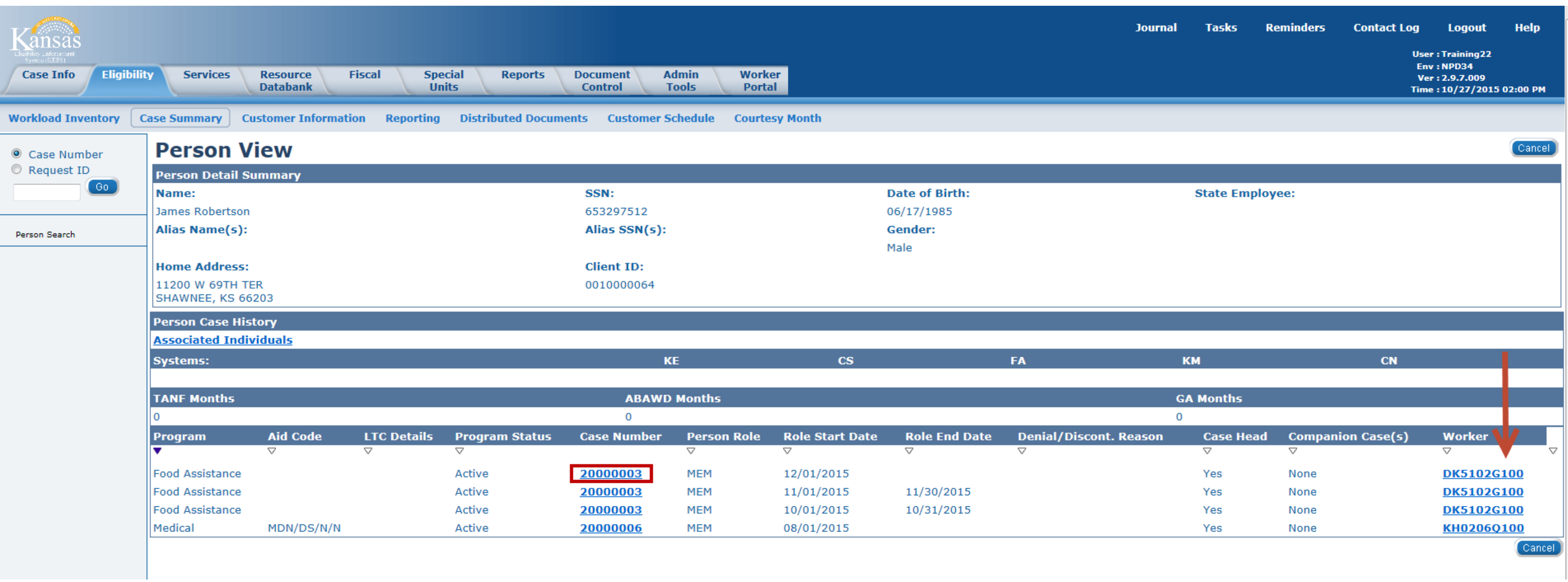
Clicking on the person name hyperlink from the Case Summary page returns the user to the Person View page.

KEES Overview

Lesson 1: Performing a Person Search > Program Assignment

On the Person View page the user can determine which agency owns the case number. This is important since Medical and Non-Medical programs should not be on the same case number.

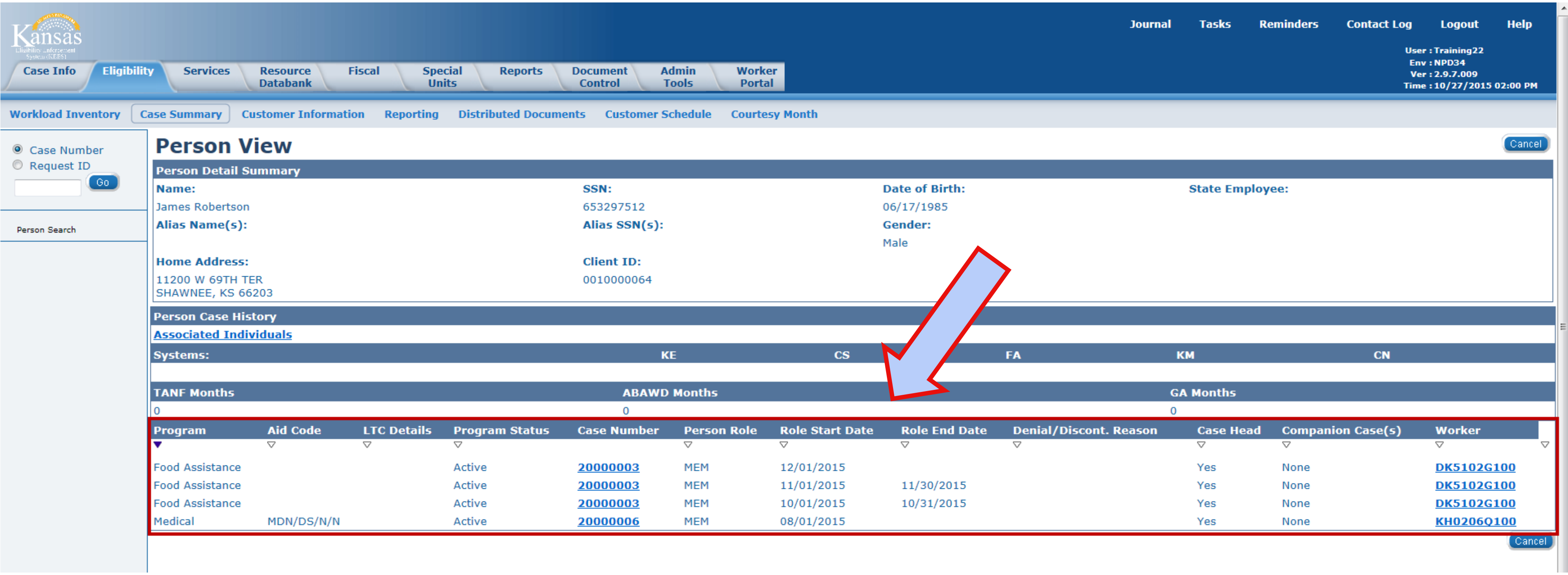
Under the Worker column, the first letter of the worker ID is a "D" for DCF or "K" for KDHE.



KEES Overview

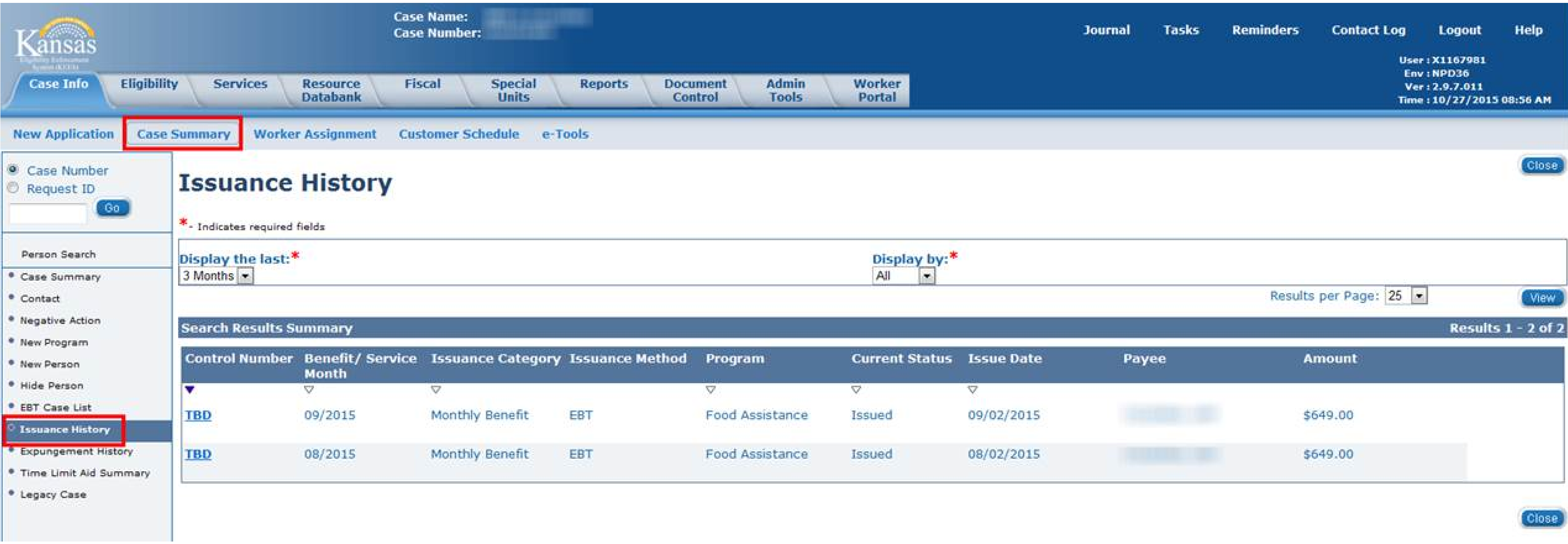
Lesson 1: Performing a Person Search > Program History

The Person View page can also be used to determine the Benefit History.



KEES Overview

Lesson 1: Performing a Person Search > Issuance History



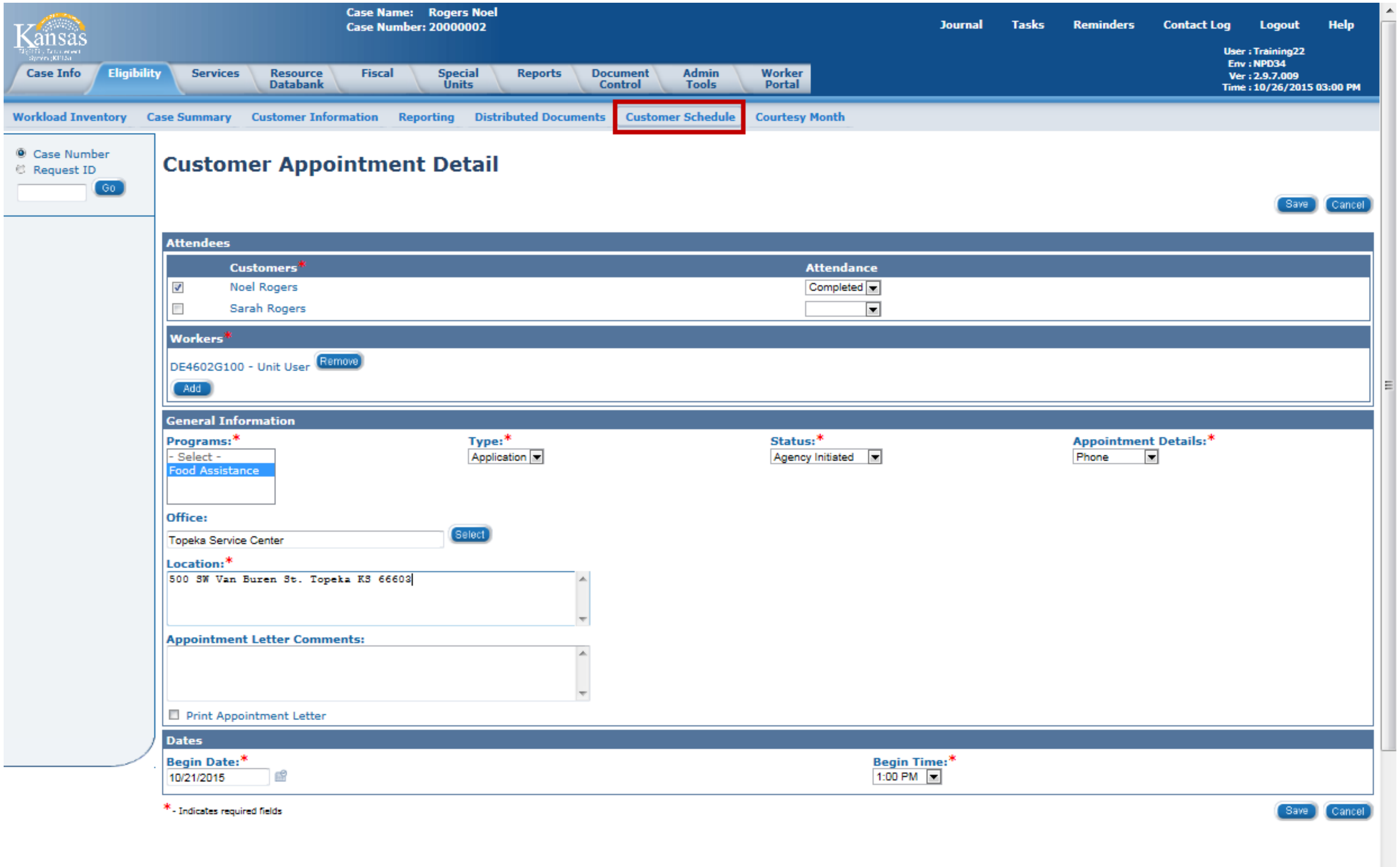
To view the Issuance History the user must be in the context of a case.

Once in the context of a KEES case, the user can navigate from the Case Summary Local Navigation to the Issuance History tab in the Task Navigation.

The Case Summary page can be accessed from either the Case Info or Eligibility Global Navigation tab.

KEES Overview

Lesson 1: Customer Schedule > Recording an Interview



The Customer Schedule page is where the user records a scheduled and/or completed interview record.

This page can be accessed using the Local Navigation from the Case Info or the Eligibility tab in the Global Navigation bar.

KEES Overview

Lesson 1: Performing a Person Search > Summary

The Person Search in KEES is similar to a Client Inquiry (CLIN) in KAECSES. A user can search using SSN, DOB, and First and Last Name.

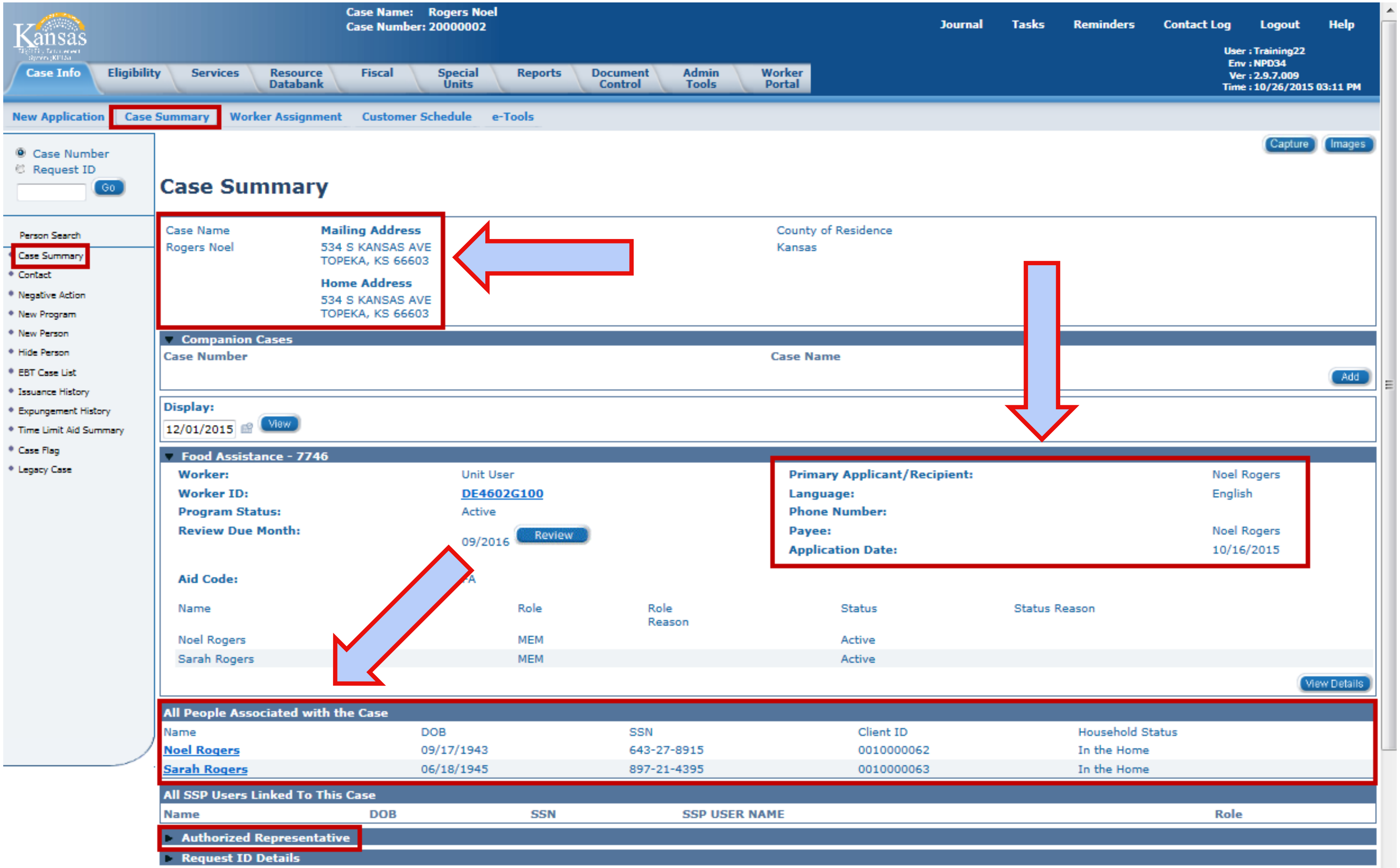
The results show in a Search Results Summary similar to the Client Inquiry Short List (CLIS).

Next, let’s take a look at some KEES pages.

Kansas Eligibility Enforcement System (KEES)

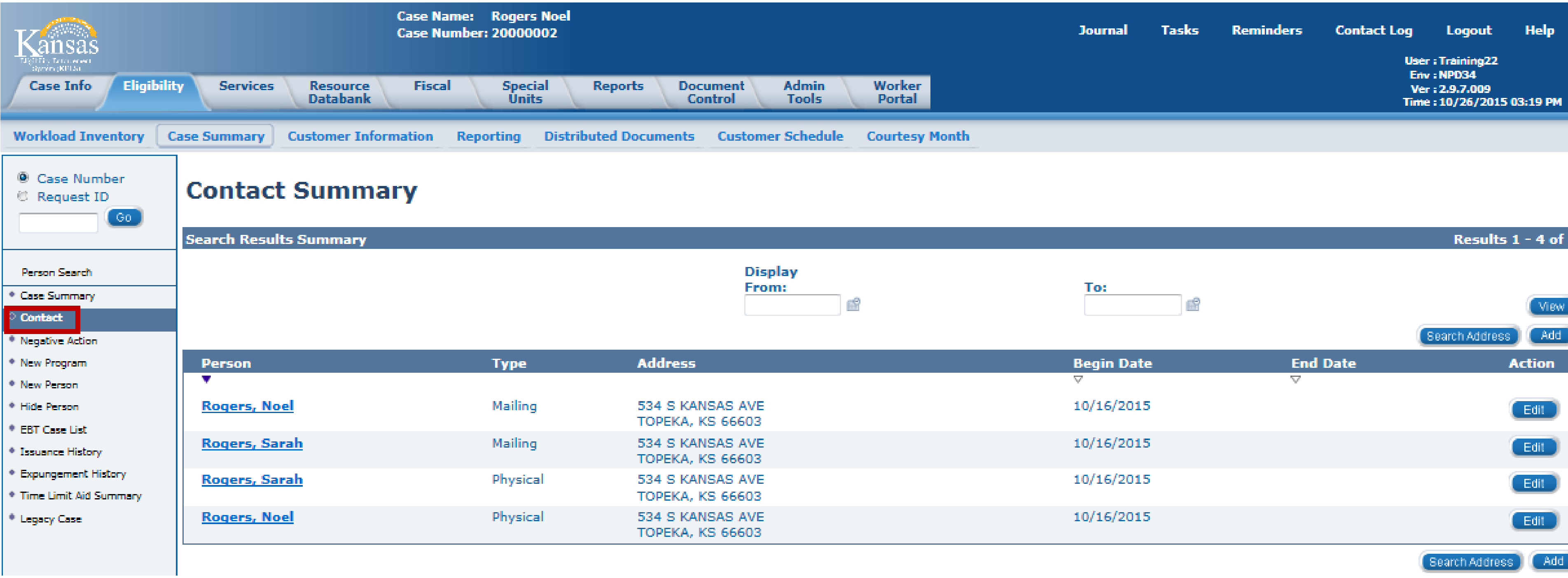
KEES Overview

Lesson 2: Non-Financial Data > Case Summary



KEES Overview

Lesson 2: Non-Financial Data > Contact Summary



The Contact Summary displays the Mailing and Physical address for all Case Persons and the Begin Date for the addresses. This is similar to the ADDR screen in KAECSES.

The Contact Summary page can be accessed from both the Case Summary and the Customer Information in the Local Navigation bar.

KEES Overview

Lesson 2: Non-Financial Data > Individual Demographics

Individual Demographics information is collected on all members.

Information captured on this page includes:

- Name
- SSN
- Marital Status
- Gender
- U.S. Citizenship (Non-Medical programs)
- Date of Birth
- Race/Ethnic Origin
- Language (Spoken, Written, and Correspondence)

This page contains information similar to SSDO in KAECSES.

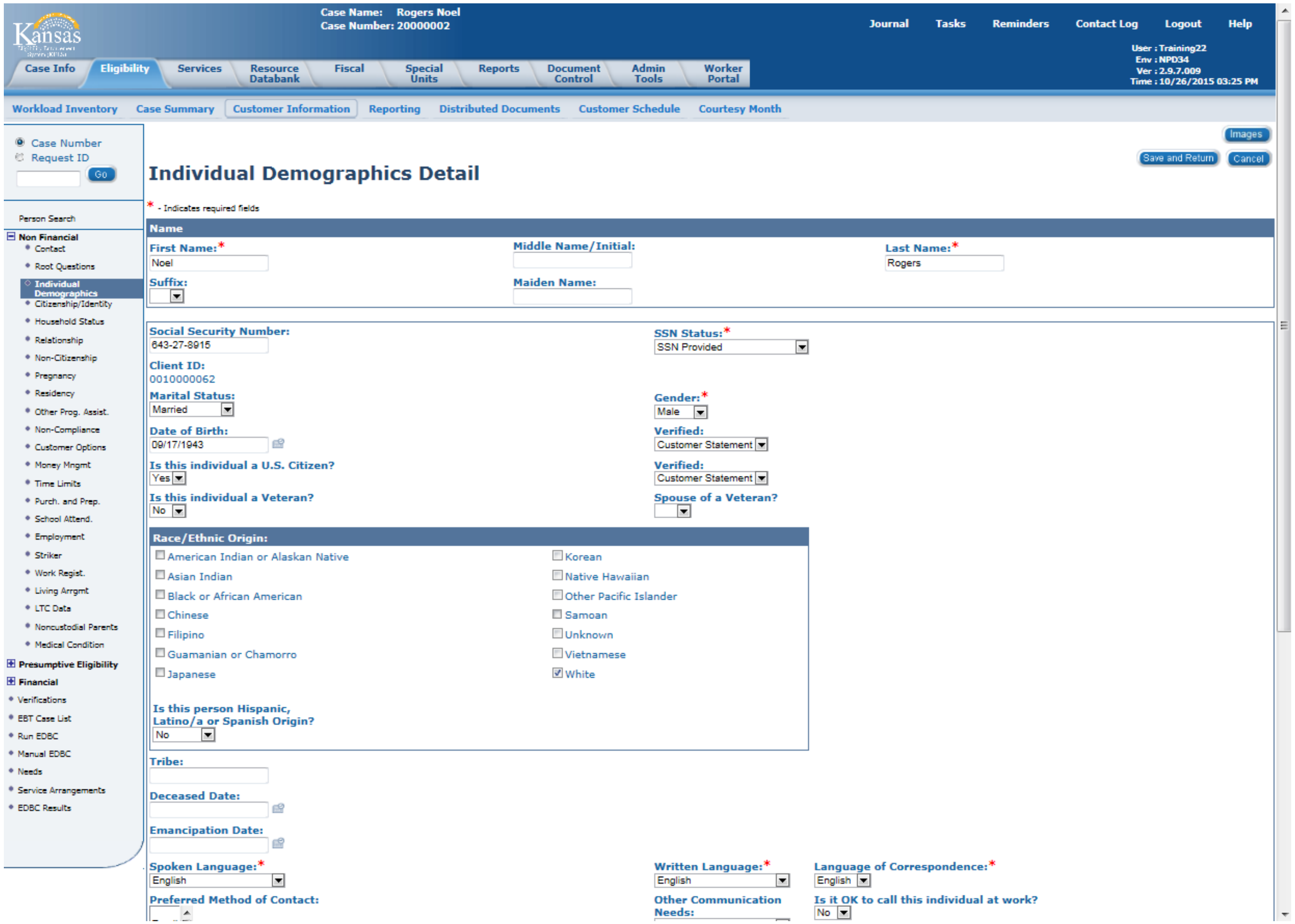
KEES Overview

Lesson 2: Non-Financial Data > Individual Demographics

An Individual Demographic record is automatically created for each member associated with the case during the registration process. Clicking on the Person Name hyperlink or the Edit button takes the user to the Individual Demographic Detail page.

KEES Overview

Lesson 2: Non-Financial Data > Individual Demographics



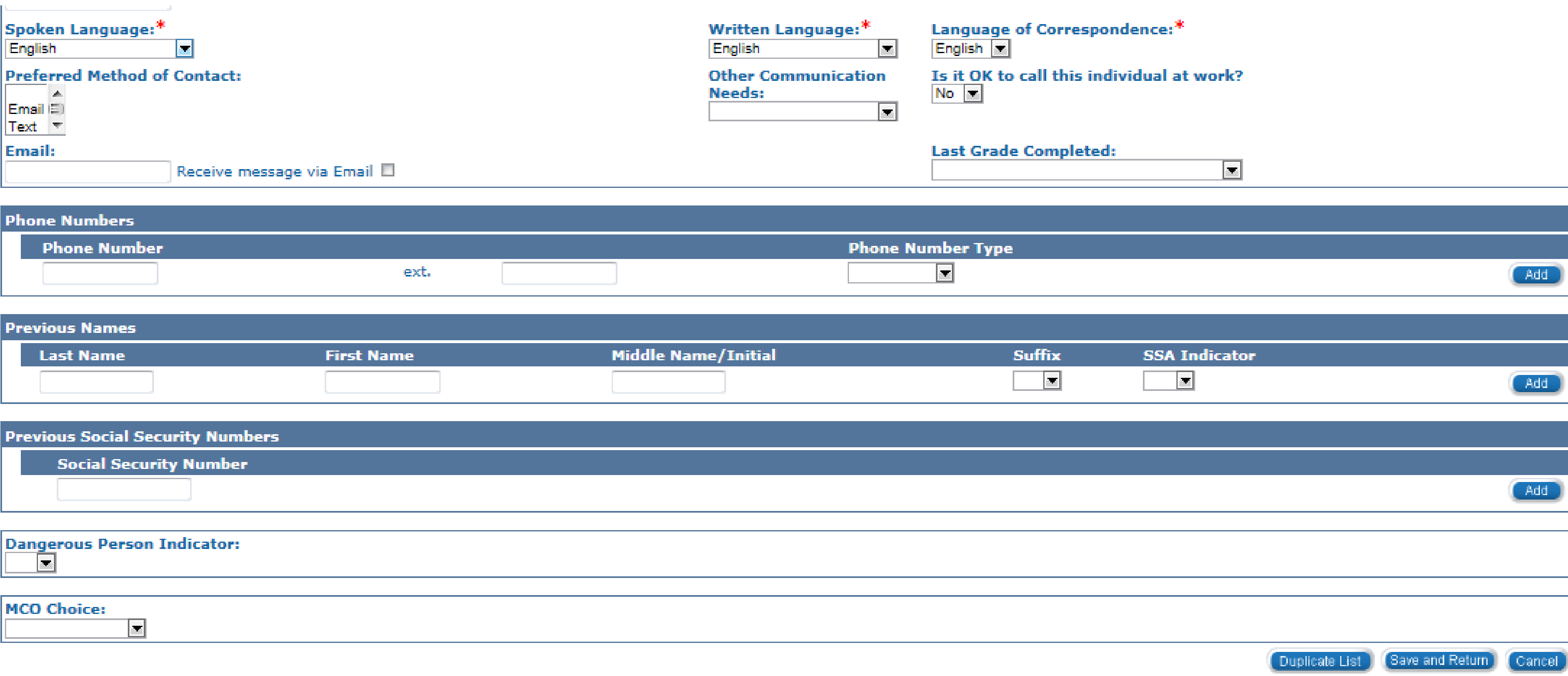
The Individual Demographics Detail page has:

- Consumer’s Name
- SSN
- Client ID #
- Marital Status
- Gender
- Citizenship (for Non-Medical programs)
- DOB
- Race/Ethnic Origin
- Decease Date
- Language Preferences
- Phone Numbers
- Aliases
- Last Grade Completed

Kansas Eligibility Enforcement System (KEES)

KEES Overview

Lesson 2: Non-Financial Data > Individual Demographics



Last Grade Completed for TANF is also captured on the Individual Demographics page. Phone Numbers and Aliases display at the bottom of the page.

KEES Overview

Lesson 2: Non-Financial Data > Household Status

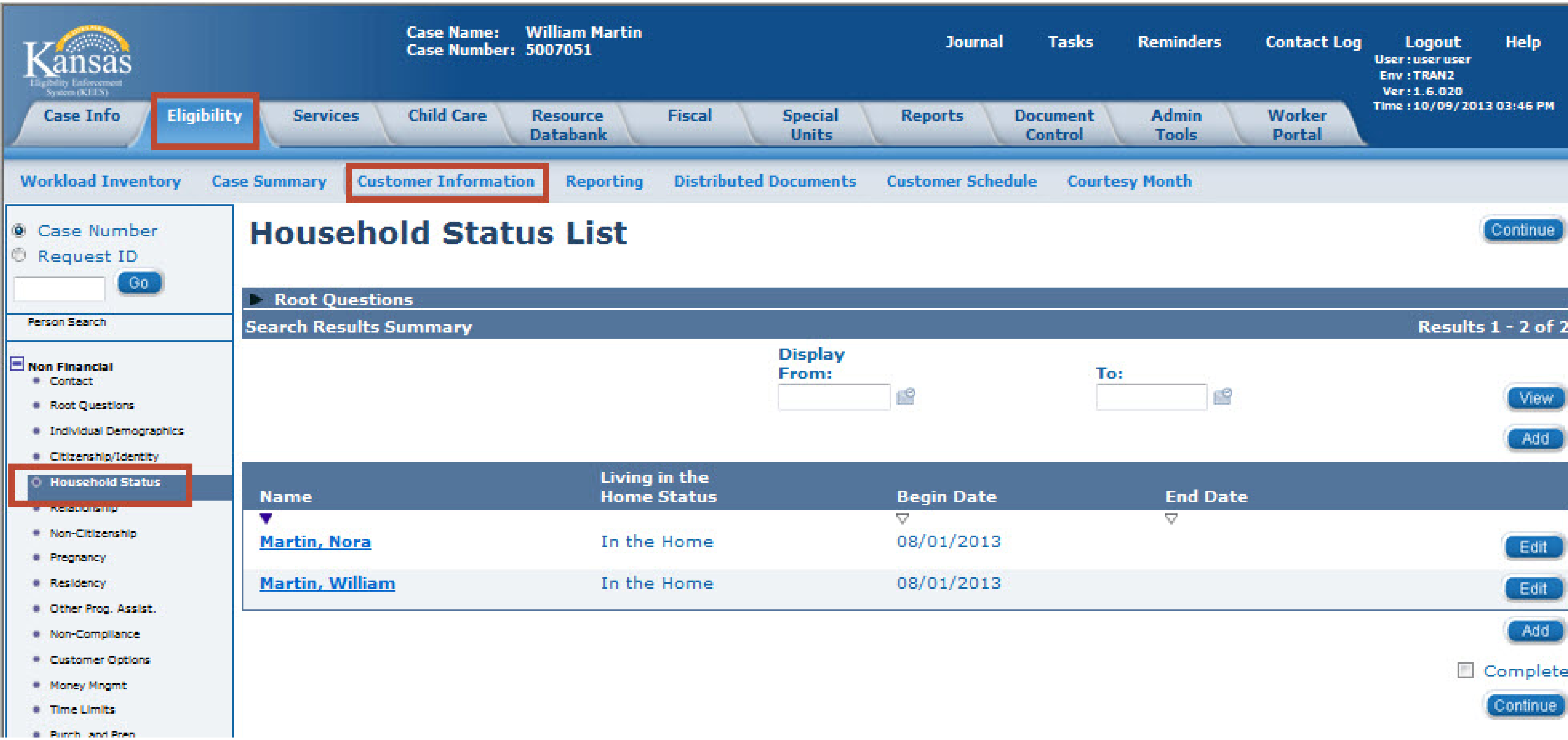
Household Status information in KEES is used by the EDBC Rules to determine who lives in the home and who is permanently or temporarily out of the home. This is comparable to SEPA codes used in KAECSES, but with limited selections.

If no Household Status exists for a consumer, KEES rules assume the consumer is “In the Home”.

Once a Household Status is added for a person, the person will be required to have a household status record. Similar to case address records, household status records are continuous records. This means that, while the status may change, there must always be a status record in KEES.

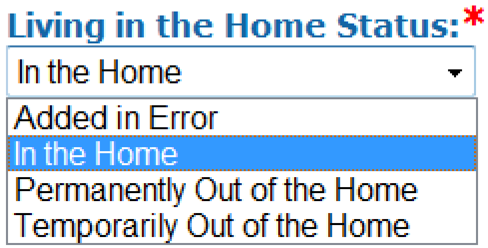
KEES Overview

Lesson 2: Non-Financial Data > Household Status



KEES Overview

Lesson 2: Non-Financial Data > Household Status



Status choices are:

- **In the Home** – A person who lives in the home and may or may not be receiving assistance.

- **Permanently Out of the Home** – A person who was previously in the home but is no longer living there.

- **Temporarily Out of the Home** – A person who is not living in the home at this time, but is expected to return. This could be a person who is placed in the hospital due to an accident or illness or a child that is placed in foster care.

- **Added in Error** – This status is used when the wrong person is added to a case. Since consumers cannot be removed from a case, this person is given the Household Status of Added in Error.

KEES Overview

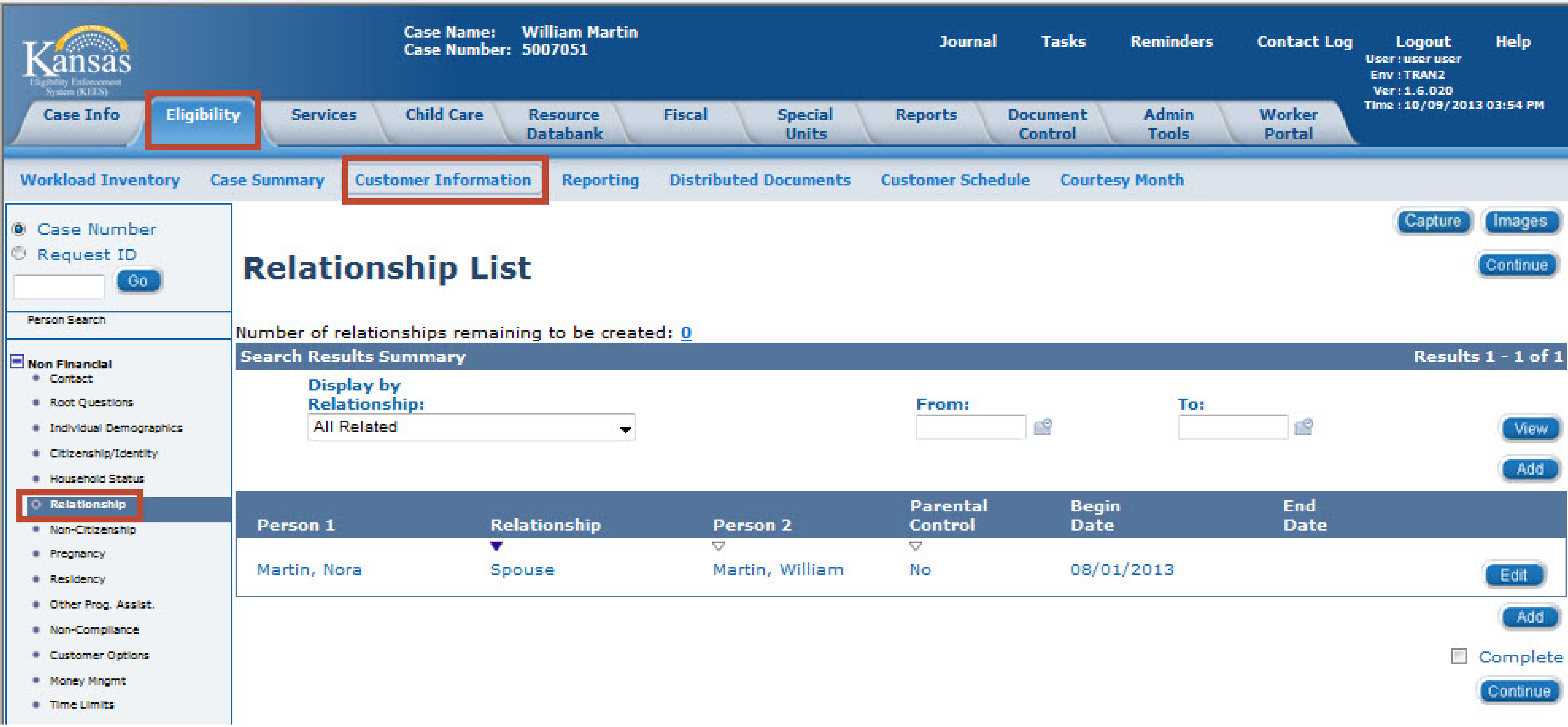
Lesson 2: Non-Financial Data > Household Status

- Household status is used to determine who lives in the home and who is permanently or temporarily out of the home.
- If no Household Status exists, KEES assumes the person is “In the Home”.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

Lesson 2: Non-Financial Data > Relationship

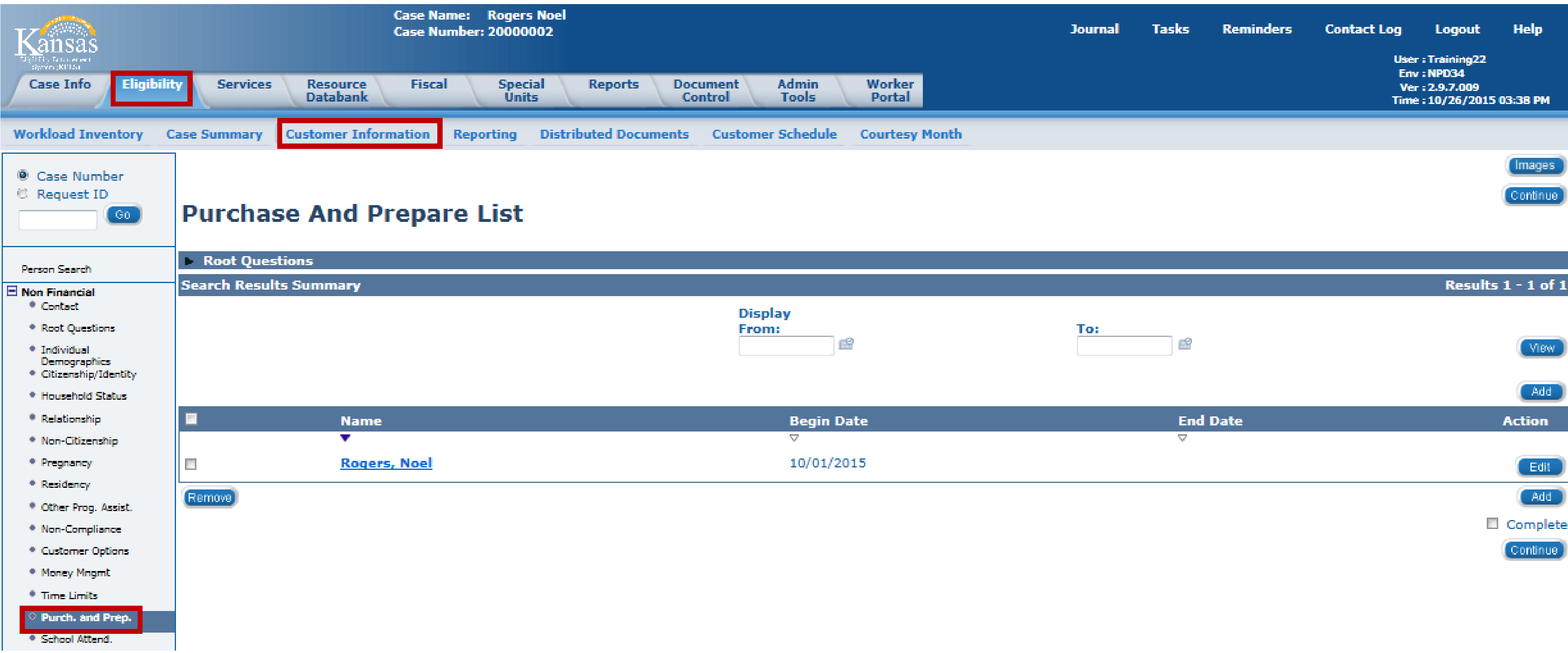


- Relationships are established between two persons in the household.
- Relationship information must exist for all persons associated to the case regardless if the person is requesting or receiving assistance.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

Lesson 4: Non-Financial Data > Purchase and Prepare



A purchase and prepare record is required for the Primary Applicant and any individuals that purchase and prepare with the Primary Applicant that are not already required to be part of the FA household. This includes unrelated individuals and adult siblings or children that are not required to be part of an FA household unless the individuals purchase and prepare meals together.

KEES Overview

Lesson 2: Non-Financial Data > Summary

- **Case Summary:** This page displays Case Name, Address, Responsible Persons, and All People Associated with the Case.
- **Contact Summary:** This page displays the address for all persons associated to the case.
- **Individual Demographics:** This page is used to view the demographic information, such as DOB, SSN, and Marital Status.
- **Household Status:** The user can view the household status for all persons on the case.
- **Relationship:** The user can view the relationships of all persons in the home. All Case Persons need to have relationship whether or not they receive benefits.
- **Purchase and Prepare:** The information on this page relates individuals that purchase and prepare meals together for the FA program.

KEES Overview

Lesson 3: Financial Pages > Introduction

The Financial Data collection pages are designed to capture specific information such as income sources, resources, Medicare, other health insurance information and expenses.

This lesson will cover:

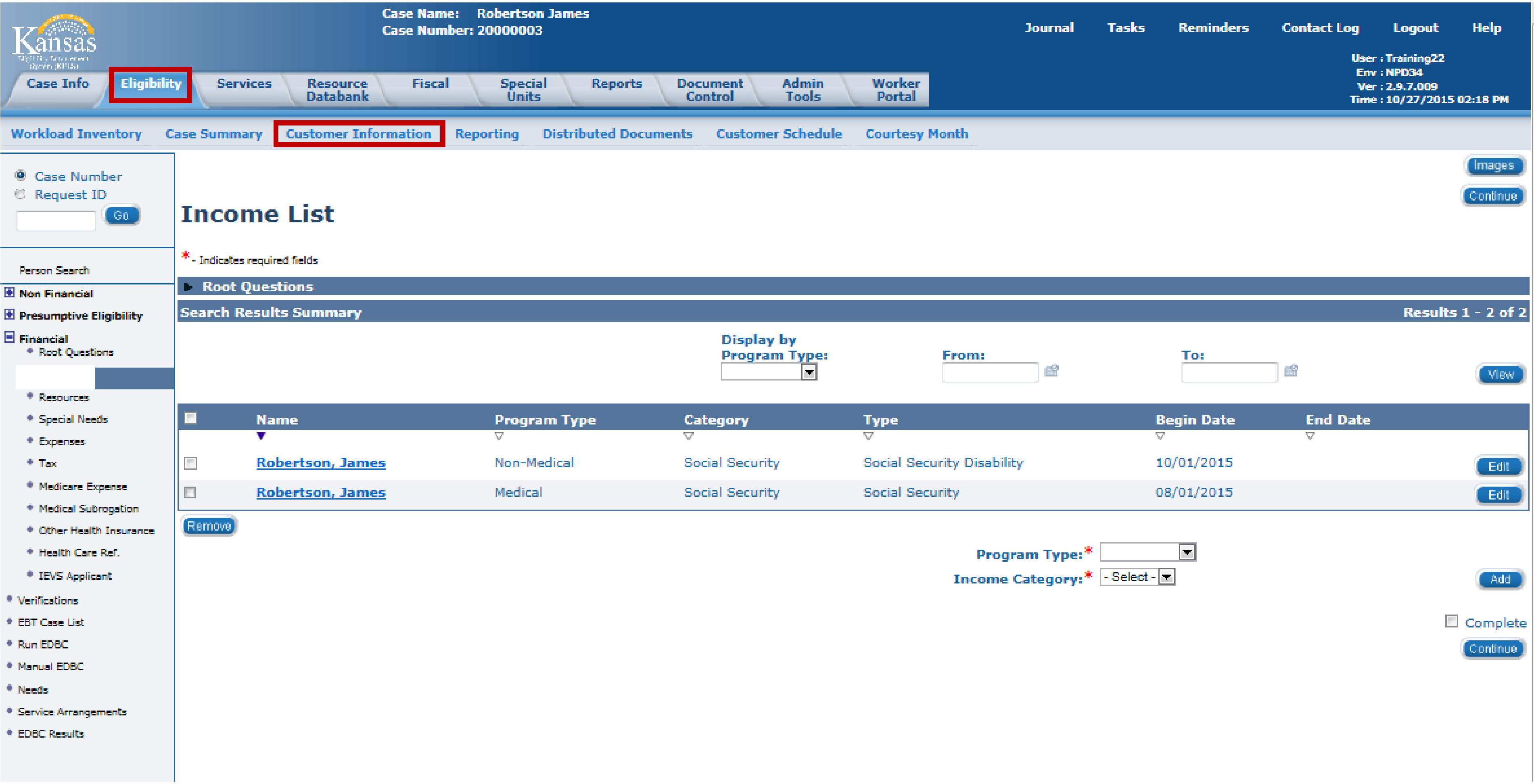
- Viewing Income Information
- Viewing Resource Information
- Viewing Expense Information

The Income pages capture the following information which is used for determining eligibility and benefits:

- Earned Income amounts
- Unearned Income amounts
- Self-Employment Income amounts

KEES Overview

Lesson 3: Financial Pages > Income List Page



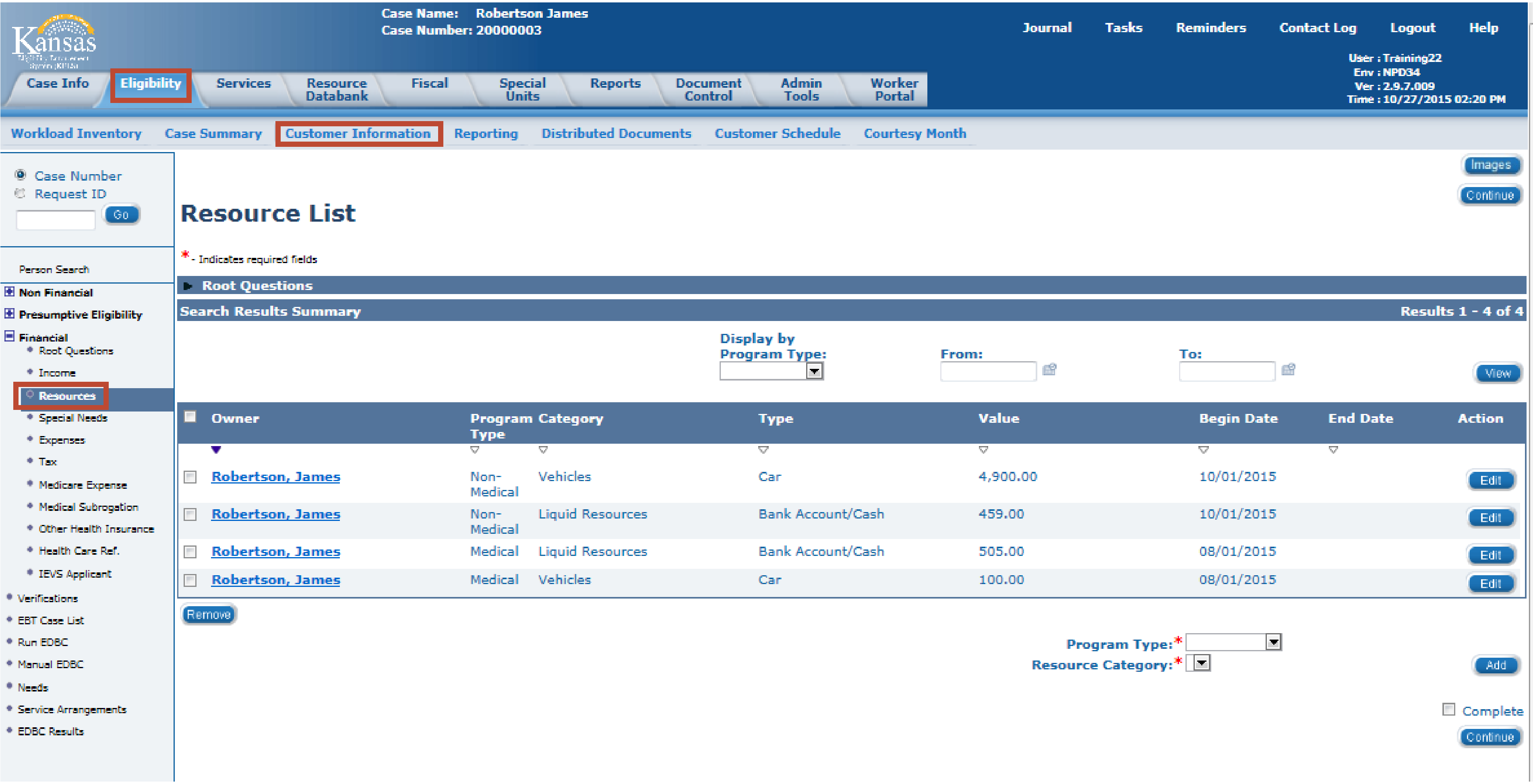
Once **Income** is selected on the Task Navigation, the Income List page appears.

The Resource List page allows the worker to view the type of resources each consumer owns. The types of resources are captured on the detail pages:

- **Liquid Resources Detail** – includes: checking, savings, stocks, etc.
- **Motor Vehicle Detail** – includes: cars, motorcycles, RVs, etc.
- **Real Property Detail** – includes: houses, land, buildings, etc.

KEES Overview

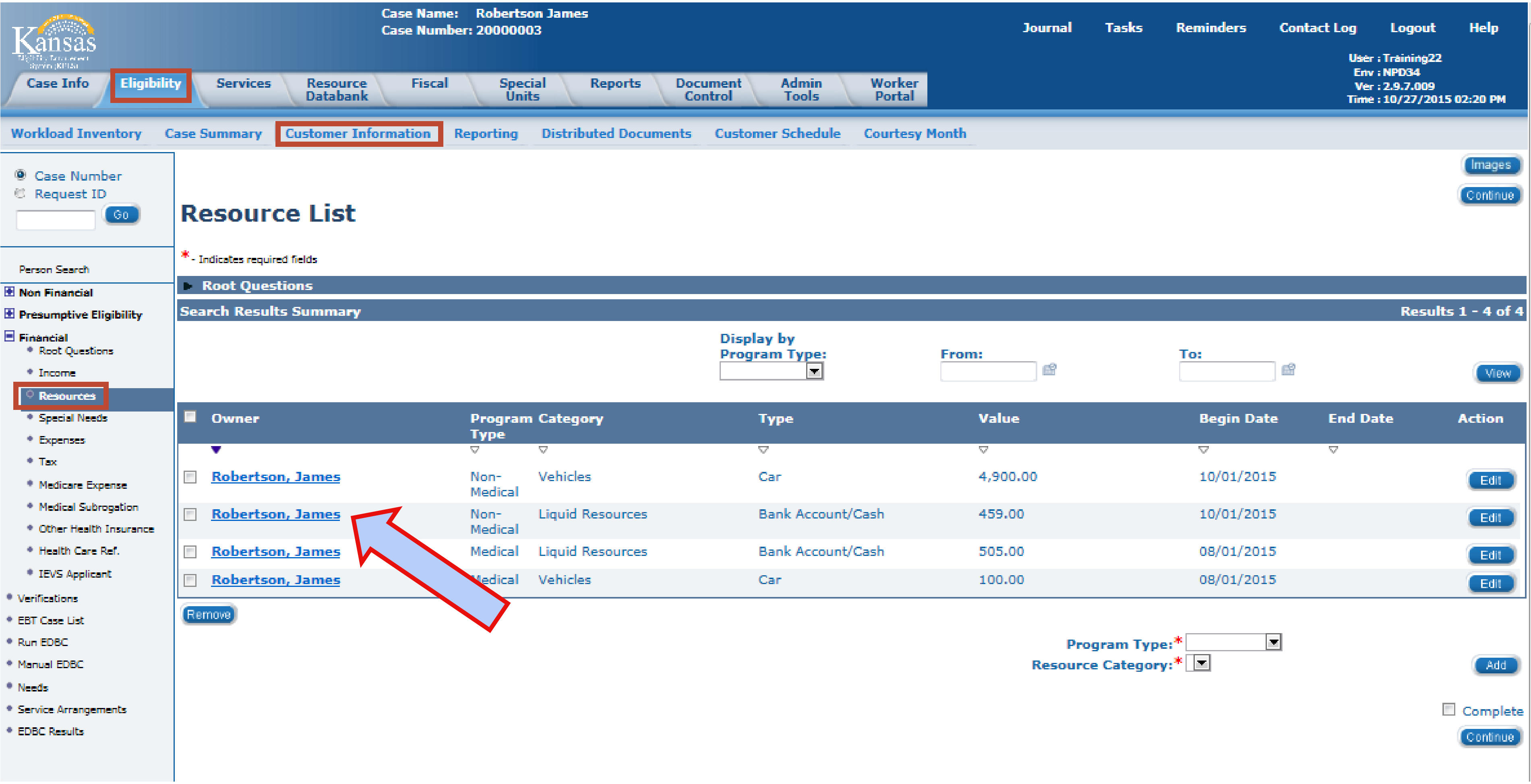
Lesson 3: Financial Pages > Resource List Page



The Resource List displays resource records and allows selective viewing and addition of resources by Program Type (Medical and Non-Medical).

KEES Overview

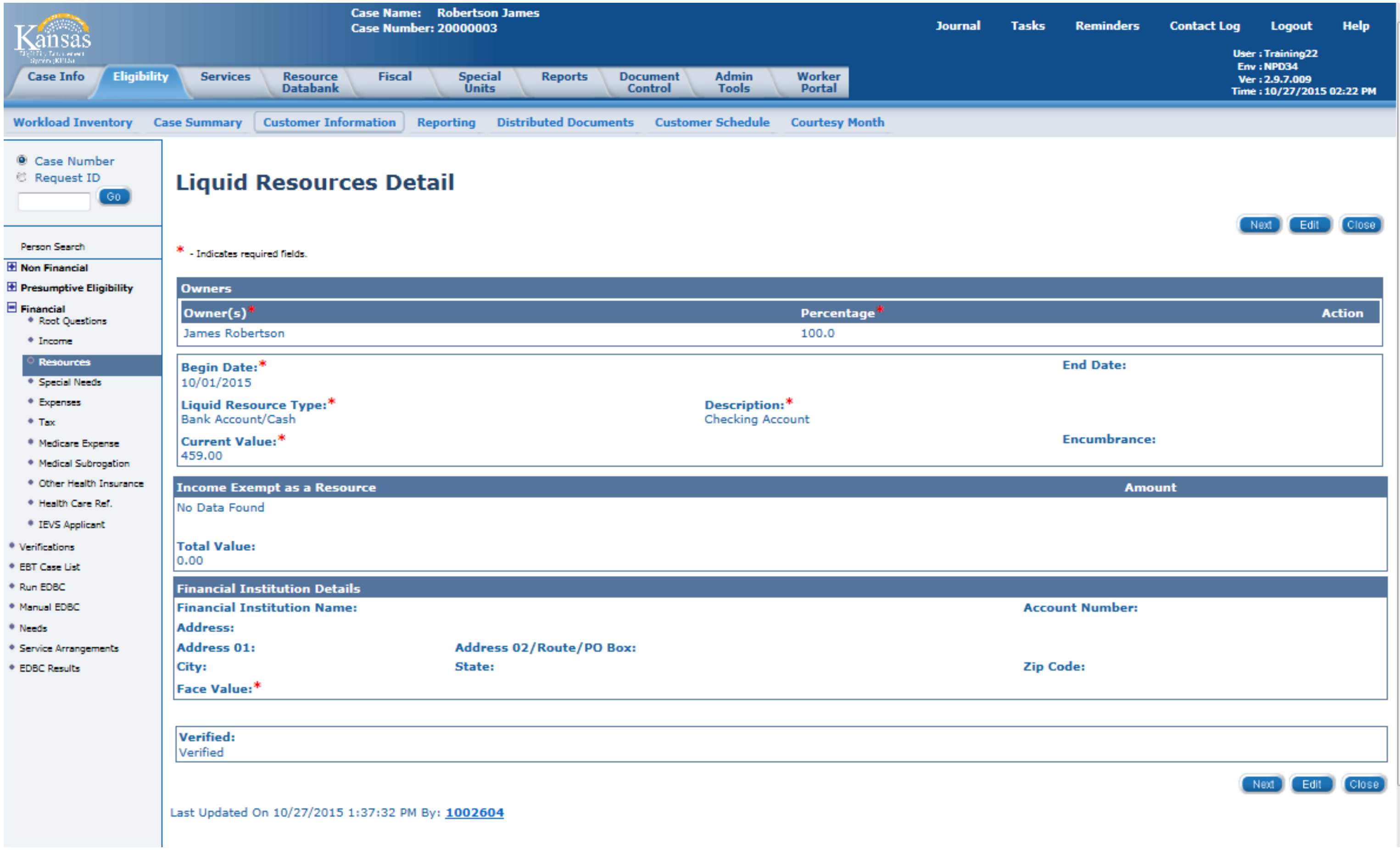
Lesson 3: Financial Pages > Resource List Page



Clicking the Person Name hyperlink on the Resource List page allows the user to view the Resource Detail information.

KEES Overview

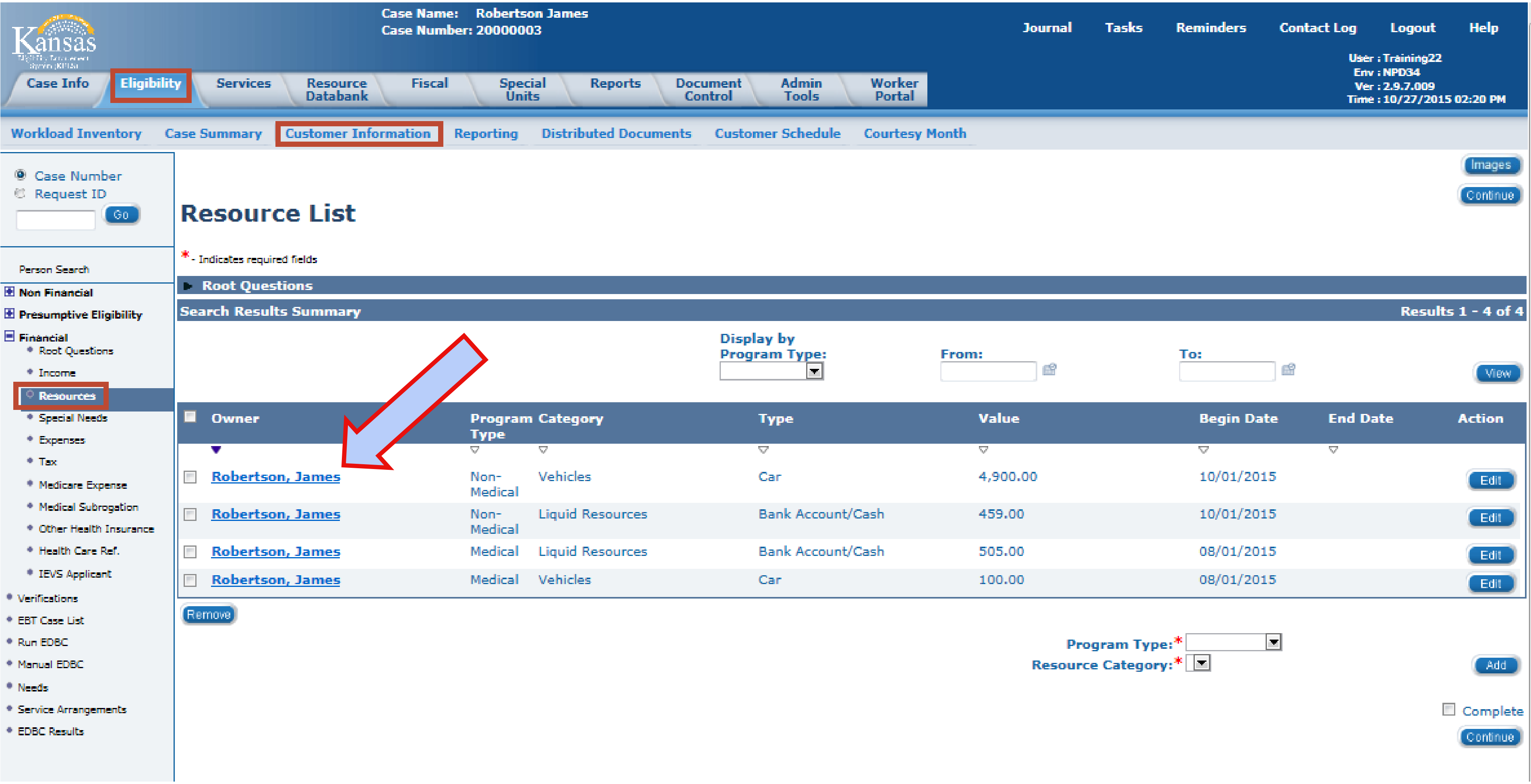
Lesson 3: Financial Pages > Liquid Resources Detail Page



Clicking the James’ name for the Bank Account/Cash record on the Resource List page allows the user to view the Liquid Resource information.

KEES Overview

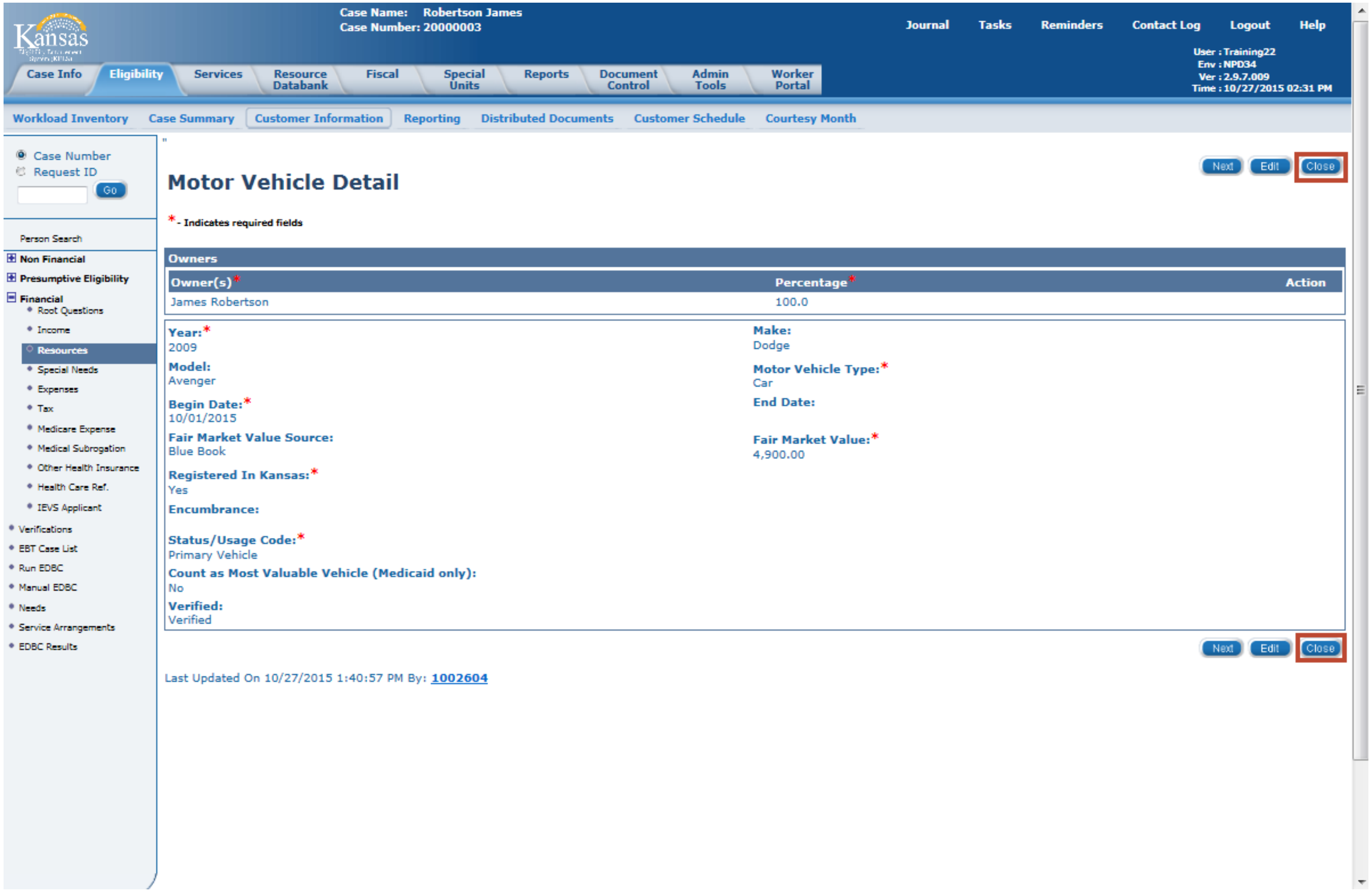
Lesson 3: Financial Pages > Resource List Page



Clicking the James' name next to the Vehicle allows the user to view the Motor Vehicle Detail information.

KEES Overview

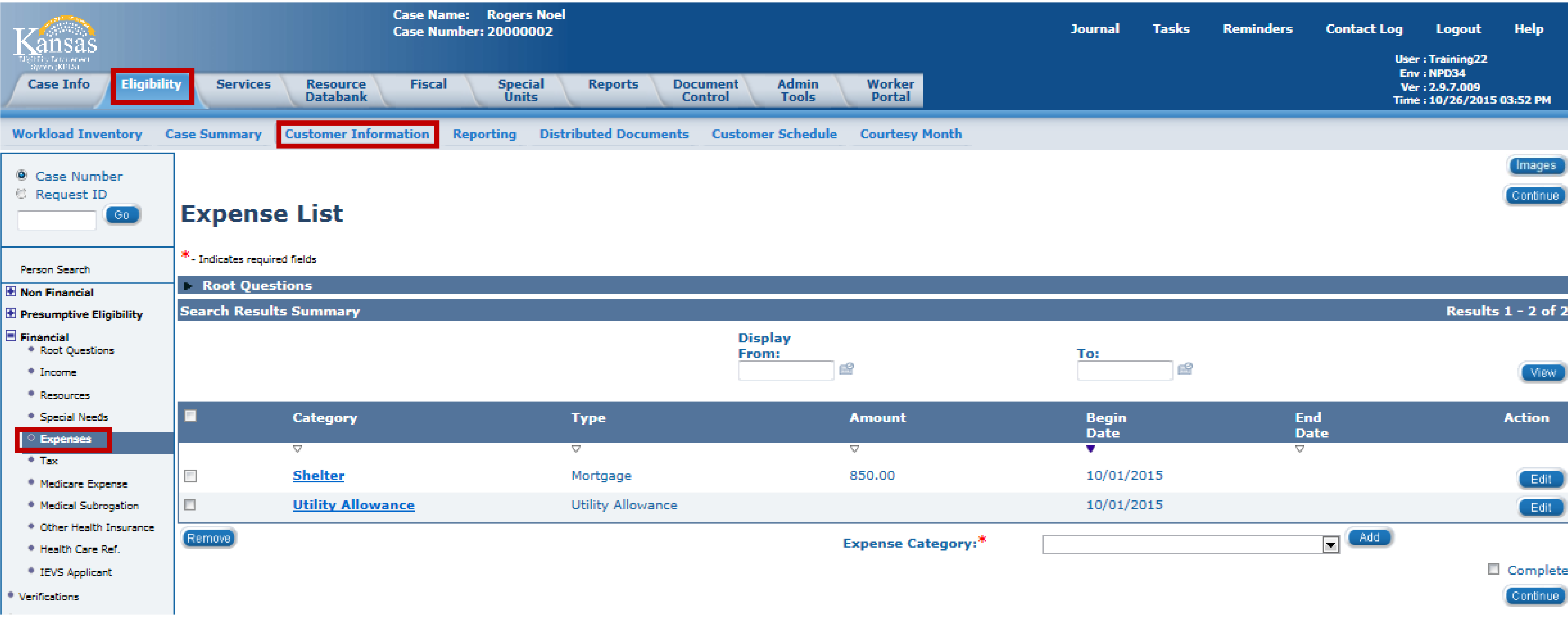
Lesson 3: Financial Pages > Motor Vehicle Detail



Click the Close button to return to the Resource List page.

KEES Overview

Lesson 3: Financial Pages > Expenses

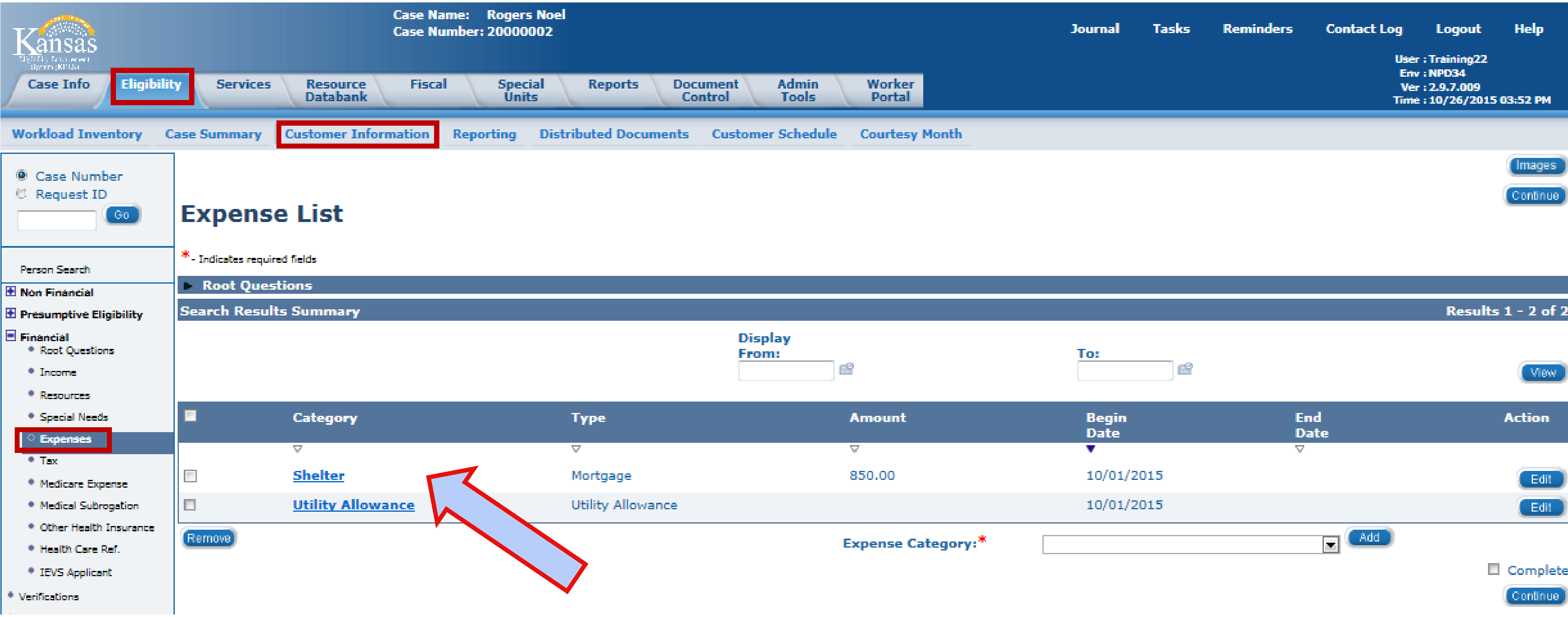


The Expense List page lists the expenses associated to case members.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

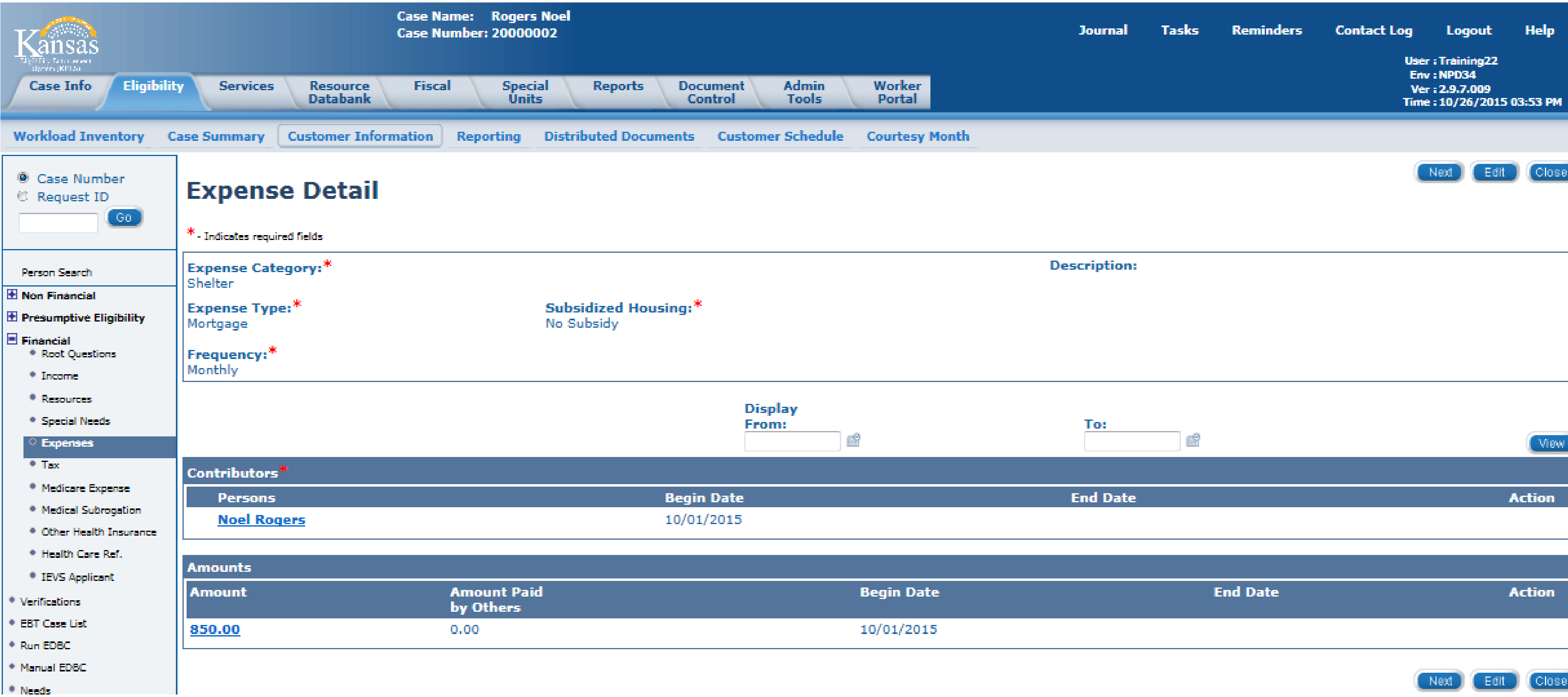
Lesson 3: Financial Pages > Expenses



Clicking the Expense hyperlink takes the user to the Expense Detail page to view additional information.

KEES Overview

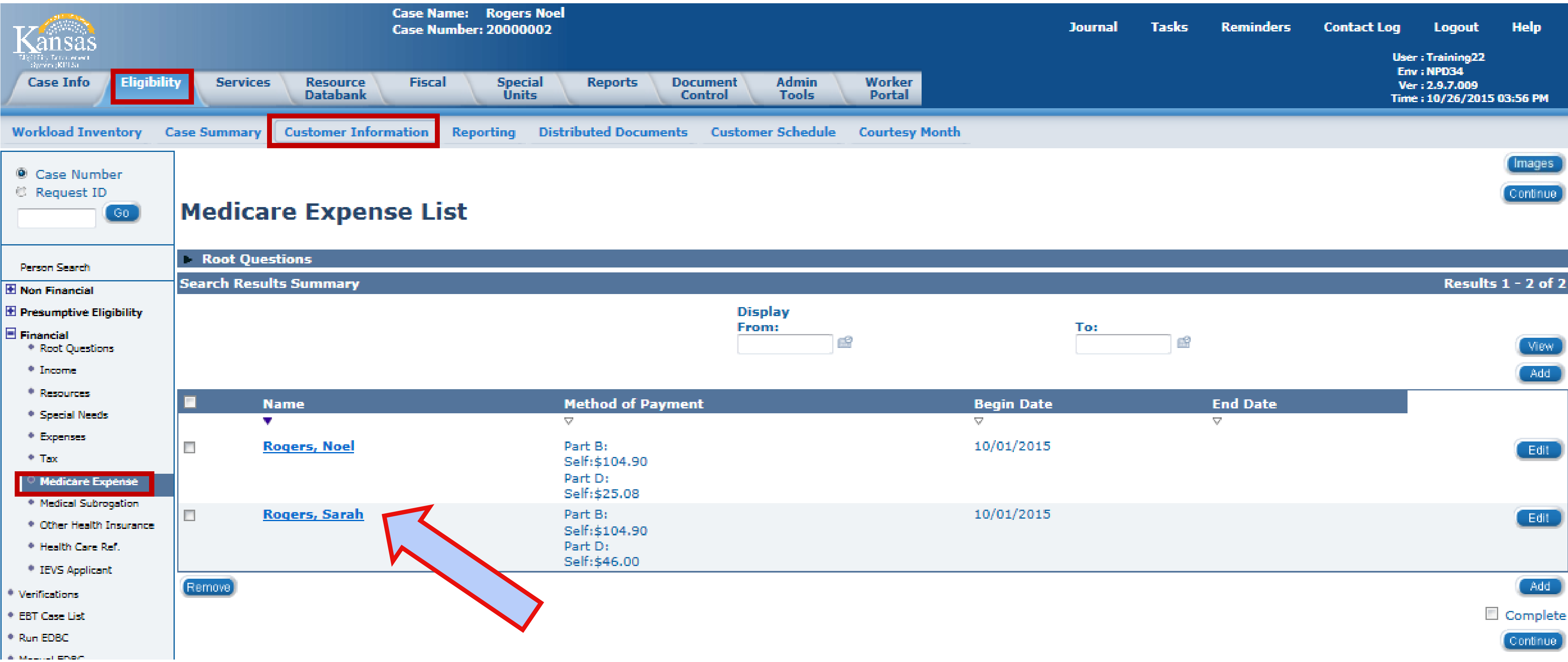
Lesson 3: Financial Pages > Expenses



Clicking the Expense hyperlink takes the user to the Expense Detail page to view additional information.

KEES Overview

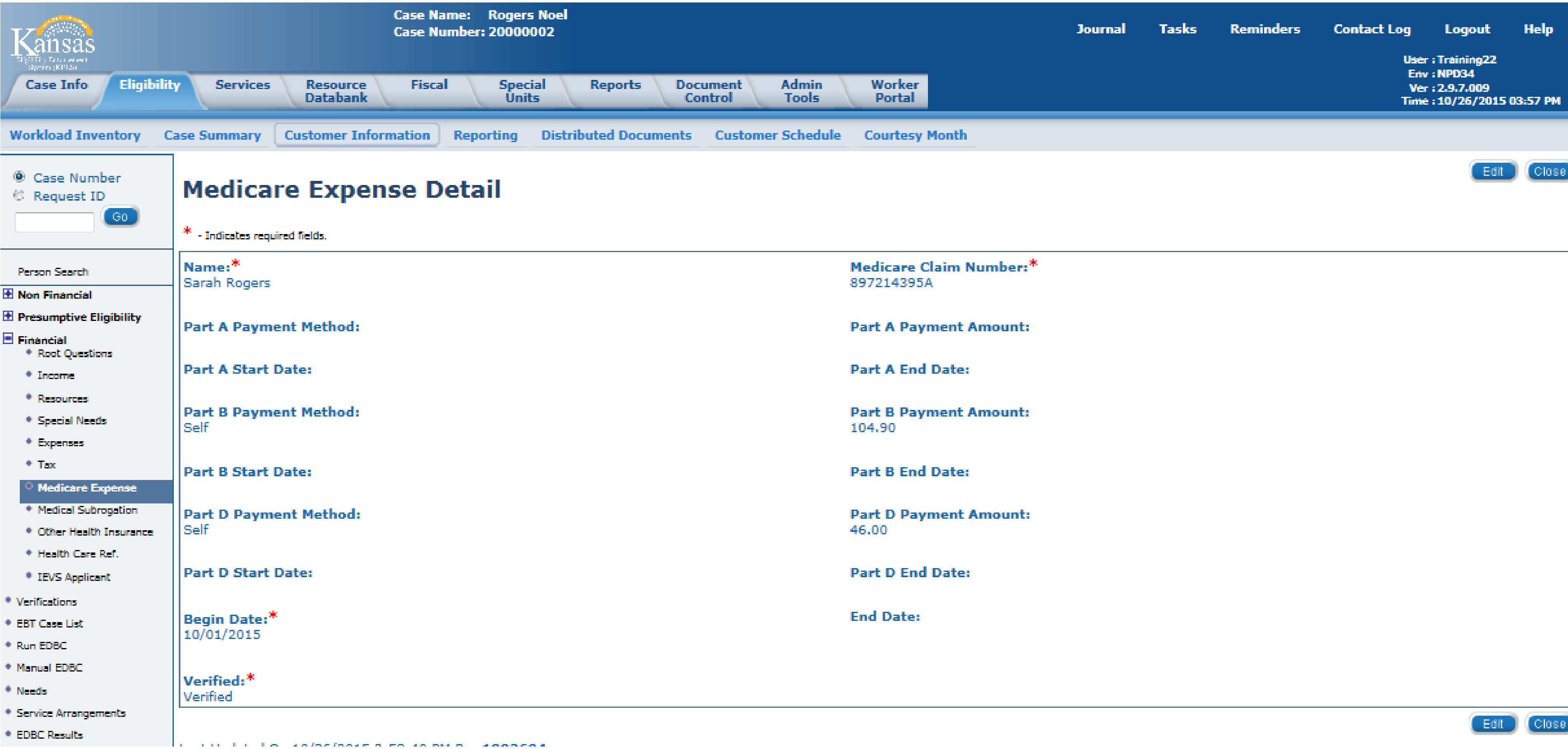
Lesson 3: Financial Pages > Medicare Expenses



Clicking the Medicare Expense hyperlink takes the user to the Medicare Expense Detail page to view additional information.

KEES Overview

Lesson 3: Financial Pages > Medicare Expenses



Clicking the Medicare Expense hyperlink takes the user to the Medicare Expense Detail page to view additional information.

- **Income:** This page displays the income for all case persons.
- **Resources:** This page displays the resources for all persons associated to the case.
- **Expenses:** This page is used to view the expense information for the individuals on the case.
- **Medicare Expense:** The user can view Medicare Expenses for persons on the case.

Next we'll talk about viewing Distributed Documents (or Notices).

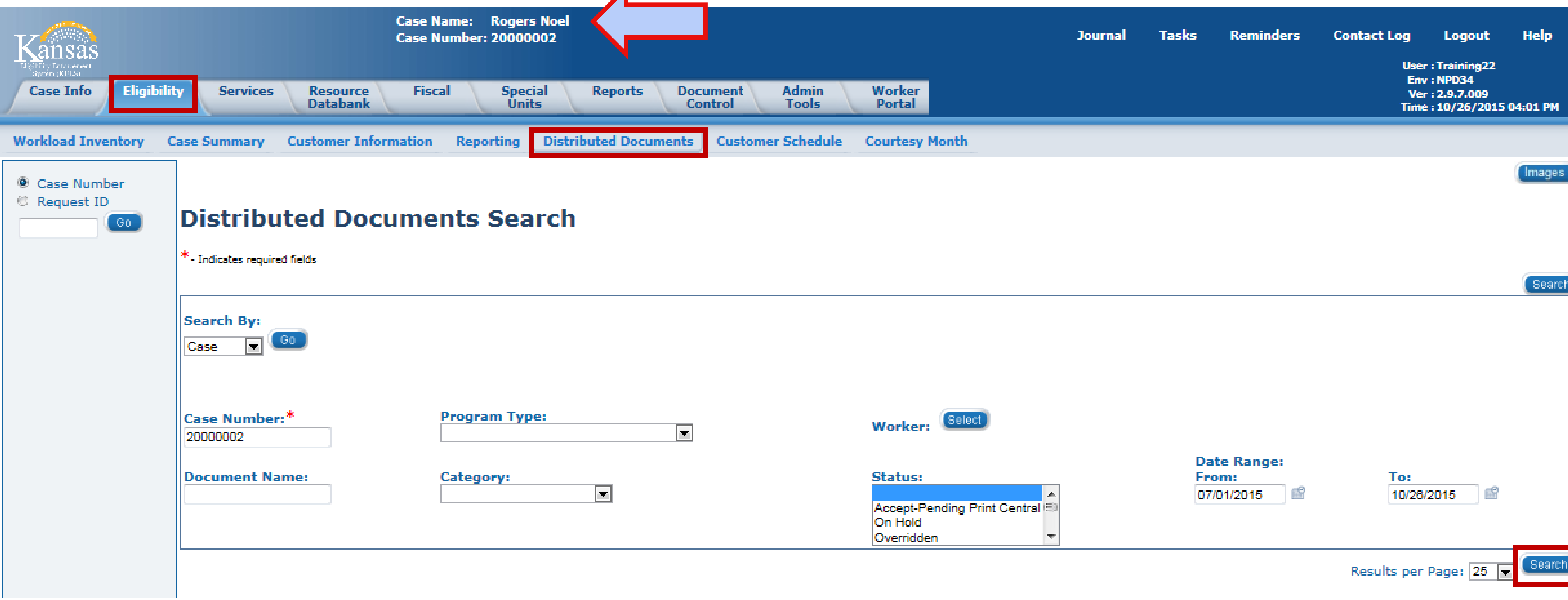
Viewing Forms and NOAs

- KEES contains a record of all NOAs and Forms that have been generated within the context of a case
- History is in the **Distributed Documents** page under the **Eligibility** Global Tab

Note: Blank Template Forms without case or office information and printed locally are not kept on record. When a Form is generated outside the context of a case, it has no specific consumer or case to be associated with in KEES.

KEES Overview

Lesson 4: Viewing Distributed Documents > Process Steps



Once in the context of a case, click the Eligibility Global Tab, then the Distributed Documents Local tab. The Search By: field defaults to Case and the Case Number is already populated. Click the **Search** button to view the notice history.

To restrict the amount of information returned in the search, the user can select a date range.

Kansas Eligibility Enforcement System (KEES)

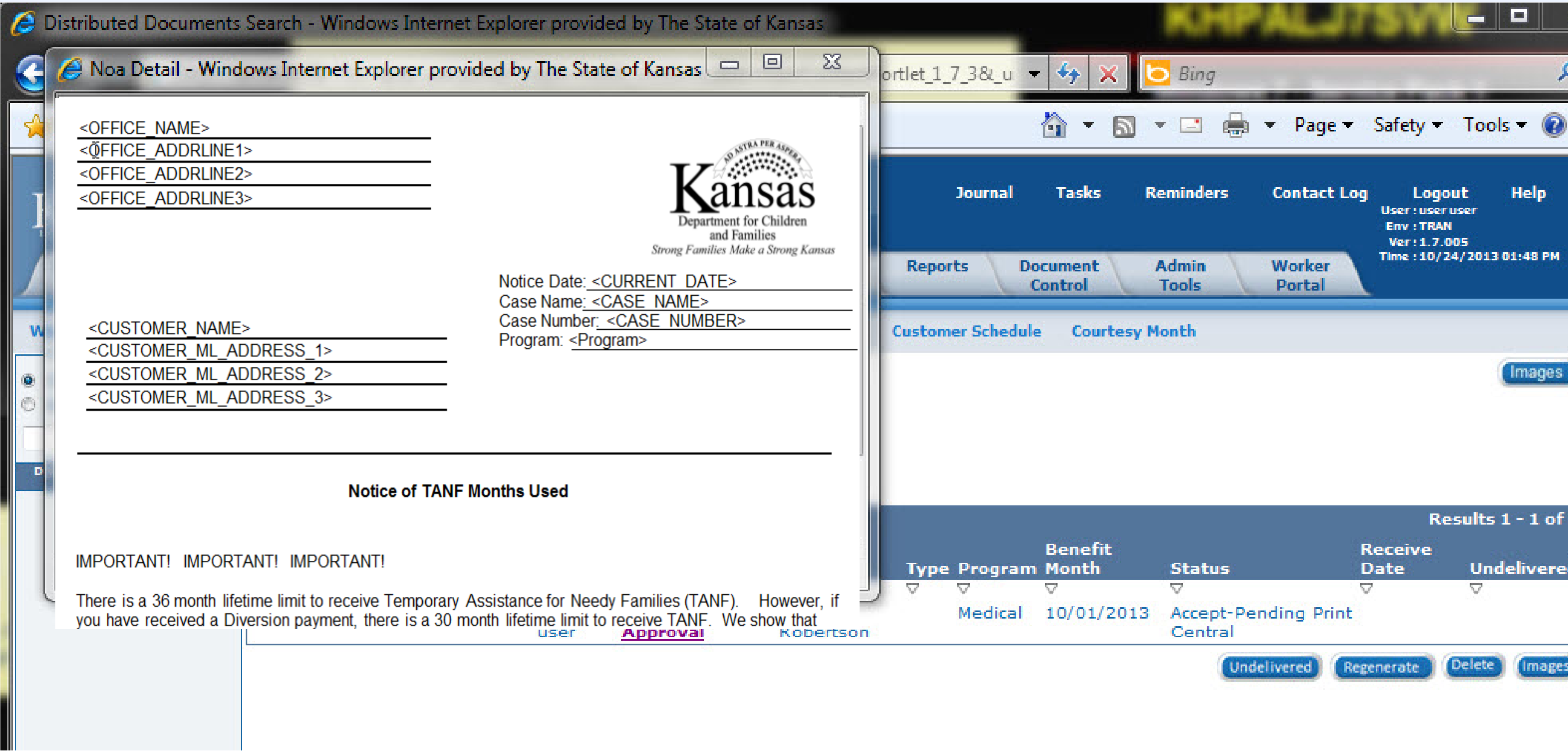
The Distributed Documents Search results replaces the NOHS screen in KAECSES.

To view the notice, click the Document name hyperlink.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

Lesson 4: Viewing Distributed Documents > Process Steps



Once the user has selected the Document name hyperlink a pop-up window displays the notice. The notice is viewable as a PDF document.

In Summary:

- Sent Forms and NOAs are stored in KEES.
- Stored Forms and NOAs can be accessed on the Distributed Documents tab.
- Users can sort the history by Program Type, Document Name, Category, Status, and by a Date Range. Users may also limit the number of results on the page.

Kansas Eligibility Enforcement System (KEES)

KEES Overview

KEES

In Summary:

- Sent Forms and NOAs are stored in KEES.
- Stored Forms and NOAs can be accessed on the Distributed Documents tab.
- Users can sort the history by Program Type, Document Name, Category, Status, and by a Date Range. Users may also limit the number of results on the page.

KEES Overview

KEES Overview > Wrap Up

In this course you learned about KEES.

Today we have talked about how to:

- Perform a Person Search
- View the Case Summary page
- View the Person View page
- View the Customer Appointment record
- View the Contact Summary
- View Individual Demographics
- View Relationships
- View Purchase and Prepare
- View Resource, Income, Expense, and Medicare Expense screens
- Perform a Distributed Documents Search