

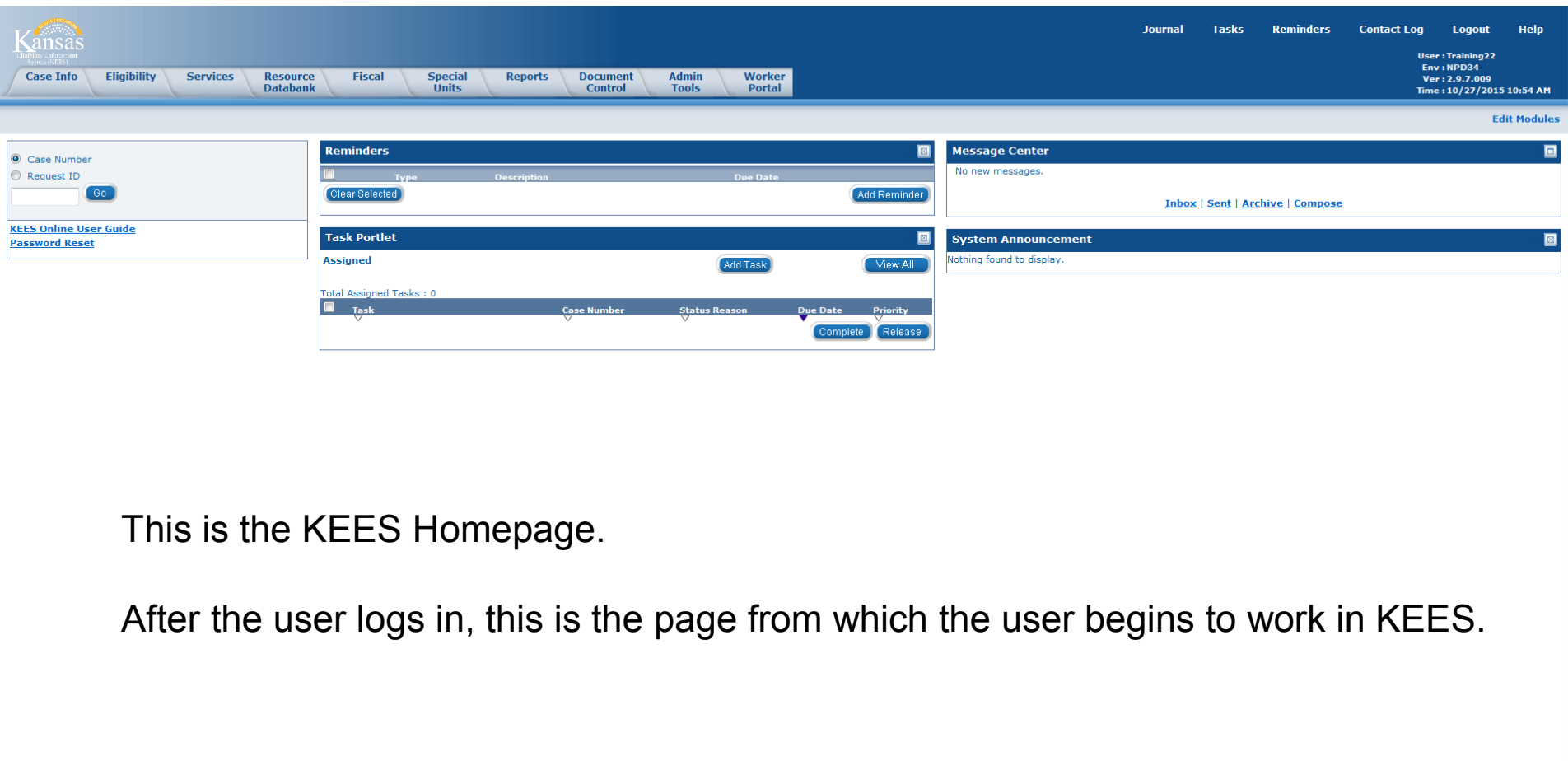


# KEES Overview

KEES

# KEES Overview

## KEES Homepage



The screenshot displays the KEES homepage interface. At the top, there is a navigation bar with the following items: Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this is a secondary navigation bar with tabs for Case Info, Eligibility, Services, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. On the right side of the top bar, user information is displayed: User: Training22, Env: NPD34, Ver: 2.9.7.009, and Time: 10/27/2015 10:54 AM. An 'Edit Modules' link is located at the bottom right of the top bar.

The main content area is divided into several sections:

- Left Sidebar:** Contains search options for Case Number and Request ID, a 'Go' button, and links for 'KEES Online User Guide' and 'Password Reset'.
- Reminders:** A table with columns for Type, Description, and Due Date. It includes a 'Clear Selected' button and an 'Add Reminder' button.
- Task Portlet:** Shows 'Assigned' tasks with an 'Add Task' button and a 'View All' button. Below, it displays 'Total Assigned Tasks : 0' and a table with columns for Task, Case Number, Status Reason, Due Date, and Priority. 'Complete' and 'Release' buttons are also present.
- Message Center:** Displays 'No new messages.' and links for 'Inbox', 'Sent', 'Archive', and 'Compose'.
- System Announcement:** Displays 'Nothing found to display.'

This is the KEES Homepage.

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



# KEES Overview

## KEES Overview > Global Navigation

The screenshot displays the KEES web application interface. At the top, there is a dark blue navigation bar with the following items: Journal, Tasks, Reminders, Contact Log, Logout (User: user user), and Help. Below this is a lighter blue navigation bar containing: Case Info, Eligibility (highlighted with a red box), Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. A secondary navigation bar includes: Workload Inventory, Case Summary, Customer Information, Reporting, Distributed Documents, Customer Schedule, and Courtesy Month.

The main content area is titled "Person Search". A red box highlights the "Global Navigation" text in the top right of this section. Below the title, a note states: "The following fields may be required - Last Name, Social Security Number, CIN Number, Case Number, Phone Number and/or Address. Failure to complete at least one of these fields may prevent the search request from processing." A "Search" button is located to the right of this note.

The search form contains the following fields:

- Case Number:** [Text Input]
- Request ID:** [Text Input] with a "Go" button
- Person Search:** [Section Header]
- Access List:** [List Item]
- Case Number:** [Text Input]
- First Name:** [Text Input]
- Date Of Birth:** [Text Input]
- Phone Number:** [Text Input]
- Address Type:** [Dropdown Menu]
- Address Line 1:** [Text Input]
- Address Line 2:** [Text Input]
- City:** [Text Input]
- State:** [Dropdown Menu]
- County:** [Dropdown Menu]
- ZIP Code:** [Text Input]
- Social Security Number:** [Text Input]
- Middle Name / Initial:** [Text Input]
- Age Range:** [Text Input]
- Relationships:** [Table with columns for First Name and Last Name]
- Client ID:** [Text Input]
- Last Name:** [Text Input]
- Gender:** [Dropdown Menu]
- Aliases:** [Table with columns for First Name and Last Name]

At the bottom right, there is a "Results per Page:" dropdown set to "25" and a "Search" button.



# KEES Overview

## KEES Overview > Local Navigation

[Journal](#)
[Tasks](#)
[Reminders](#)
[Contact Log](#)
[Logout](#)
[Help](#)

Case Info
Eligibility
Services
Child Care
Resource Databank
Fiscal
Special Units
Reports
Document Control
Admin Tools
Worker Portal

Workload Inventory
Case Summary
Customer Information
Reporting
Distributed Documents
Customer Schedule
Courtesy Month

Case Number  
 Request ID

### Person Search

The following fields may be required - Last Name, Social Security Number, CIN Number, Case Number, Phone Number and/or Address. Failure to

<b>Case Number:</b> <input type="text"/>	<b>Social Security Number:</b> <input type="text"/>	<b>Client ID:</b> <input type="text"/>
<b>First Name:</b> <input type="text"/>	<b>Middle Name / Initial:</b> <input type="text"/>	<b>Last Name:</b> <input type="text"/>
<b>Date Of Birth:</b> <input type="text"/>	<b>Age Range:</b> <input type="text"/> - <input type="text"/>	<b>Gender:</b> <input type="text"/>
<b>Phone Number:</b> <input type="text"/>	<b>Relationships:</b>	
	<b>First Name:</b>	<b>Last Name:</b>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
<b>Address Type:</b> <input type="text"/>	<b>Aliases:</b>	
<b>Address Line 1:</b> <input type="text"/>	<b>First Name:</b>	<b>Last Name:</b>
<b>Address Line 2:</b> <input type="text"/>	<input type="text"/>	<input type="text"/>
<b>City:</b> <input type="text"/>	<b>State:</b> <input type="text"/>	<b>County:</b> <input type="text"/>
<input type="checkbox"/> Display Relationships	<input type="checkbox"/> Display Aliases	<b>ZIP Code:</b> <input type="text"/>

Results per Page: 25

**Local Navigation**



# KEES Overview

## KEES Overview > Task Navigation

**Person Search**

The following fields may be required - Last Name, Social Security Number, CIN Number, Case Number, Phone Number and/or Address. Failure to complete at least one of these fields may prevent the search request from processing.

**Case Number:**

**Social Security Number:**

**Client ID:**

**First Name:**

**Middle Name/Initial:**

**Last Name:**

**Date Of Birth:**

**Age Range:**  -

**Gender:**

**Phone Number:**

**Relationships:**

First Name:	Last Name:
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Aliases:**

First Name:	Last Name:
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Address Type:**

**Address Line 1:**

**Address Line 2:**

**City:**

**State:**

**County:**

**ZIP Code:**

Display Relationships  Display Aliases

**Task Navigation**

Results per Page: 25



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





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





# KEES Overview

## Lesson 1: Performing a Person Search > Introduction

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.

# KEES Overview

## Lesson 1: Performing a Person Search > Person Search Results

The screenshot displays the KEES web application interface. At the top right, there are navigation links: Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below these, user information is shown: User: Training22, Env: NPD34, Ver: 2.9.7.009, Time: 10/27/2015 01:51 PM. A main navigation bar includes tabs for Case Info, Eligibility, Services, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. Below this is a secondary navigation bar with links for Workload Inventory, Case Summary, Customer Information, Reporting, Distributed Documents, Customer Schedule, and Courtesy Month. The main content area is titled 'Person Search' and includes a search form with radio buttons for 'Case Number' and 'Request ID', a text input field, and a 'Go' button. Below the search form, a message states: 'The following fields may be required - Last Name, Social Security Number, Client ID, Case Number and/or Address. Failure to complete at least one of these fields may prevent the search request from processing.' A 'Refine Your Search' link is also present. The search results are displayed in a table with columns for Name/Client ID, DOB, SSN, Address, Relationships, Aliases, KE, CS, FA, and KM. Two results are shown for 'Robertson, James' with different client IDs and addresses. The table is titled 'Search Results Summary' and 'Results 1 - 2 of 2'.

**Person Search**

The following fields may be required - Last Name, Social Security Number, Client ID, Case Number and/or Address. Failure to complete at least one of these fields may prevent the search request from processing.

► [Refine Your Search](#)

**Search Results Summary** Results 1 - 2 of 2

Name/ Client ID	DOB	SSN	Address	Relationships	Aliases	Systems			
						KE	CS	FA	KM
<a href="#">Robertson, James</a> 0010000067	07/19/1984		5436 NW BRICKYARD RD TOPEKA,KS 66618						
<a href="#">Robertson, James</a> 0010000064	06/17/1985	653-29-7512	11200 W 69TH TER SHAWNEE,KS 66203						

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

**Person View**

**Person Detail Summary**

Name: James Robertson      SSN: 653297512      Date of Birth: 06/17/1985      State Employee:

Alias Name(s):      Alias SSN(s):      Gender: Male

Home Address: 11200 W 69TH TER, SHAWNEE, KS 66203      Client ID: 0010000064

**Person Case History**

**Associated Individuals**

Systems:	KE	CS	FA	KM	CN						
TANF Months	ABAWD Months			GA Months							
0	0			0							
Program	Aid Code	LTC Details	Program Status	Case Number	Person Role	Role Start Date	Role End Date	Denial/Discont. Reason	Case Head	Companion Case(s)	Worker
Food Assistance			Active	<a href="#">20000003</a>	MEM	12/01/2015			Yes	None	<a href="#">DK5102G100</a>
Food Assistance			Active	<a href="#">20000003</a>	MEM	11/01/2015	11/30/2015		Yes	None	<a href="#">DK5102G100</a>
Food Assistance			Active	<a href="#">20000003</a>	MEM	10/01/2015	10/31/2015		Yes	None	<a href="#">DK5102G100</a>
Medical	MDN/DS/N/N		Active	<a href="#">20000006</a>	MEM	08/01/2015			Yes	None	<a href="#">KH0206Q100</a>

- 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.



# KEES Overview

## Lesson 1: Performing a Person Search > Case Summary

Case Name: Robertson James  
Case Number: 20000003

Journal   Tasks   Reminders   Contact Log   Logout   Help

Case Info
Eligibility
Services
Resource Databank
Fiscal
Special Units
Reports
Document Control
Admin Tools
Worker Portal

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/27/2015 02:02 PM

Workload Inventory
Case Summary
Customer Information
Reporting
Distributed Documents
Customer Schedule
Courtesy Month

Case Number  
 Request ID

Go

---

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- EBT Case List
- Issuance History
- Expungement History
- Time Limit Aid Summary
- Case Flag
- Legacy Case

### Case Summary

Capture
Images

Case Name Robertson James	<b>Mailing Address</b> 11200 W 69TH TER SHAWNEE, KS 66203	County of Residence Kansas
	<b>Home Address</b> 11200 W 69TH TER SHAWNEE, KS 66203	

**Companion Cases**

Case Number	Case Name
<span style="background-color: #004a87; color: white; padding: 2px 5px;">Add</span>	

**Display:**

12/01/2015 View

**Food Assistance - 7747**

<b>Worker:</b>	Unit User	<b>Primary Applicant/Recipient:</b>	James Robertson
<b>Worker ID:</b>	<a href="#">DKS102G100</a>	<b>Language:</b>	English
<b>Program Status:</b>	Active	<b>Phone Number:</b>	
<b>Review Due Month:</b>	09/2016 <span style="background-color: #004a87; color: white; padding: 2px 5px;">Review</span>	<b>Payee:</b>	James Robertson
		<b>Application Date:</b>	10/26/2015

**Aid Code:** FA

Name	Role	Role Reason	Status	Status Reason
James Robertson	MEM		Active	

View Details

**All People Associated with the Case**

Name	DOB	SSN	Client ID	Household Status
<a href="#">James Robertson</a>	06/17/1985	653-29-7512	001000064	

**All SSP Users Linked To This Case**

Name	DOB	SSN	SSP USER NAME	Role
<b>Authorized Representative</b>				
<b>Request ID Details</b>				



# KEES Overview

## Lesson 1: Performing a Person Search > Case Summary

[Capture](#) [Images](#)

Case Number  
Request ID

 [Go](#)

### Case Summary

---

**Case Name**  
Robertson James

**Mailing Address**  
11200 W 69TH TER  
SHAWNEE, KS 66203

**Home Address**  
11200 W 69TH TER  
SHAWNEE, KS 66203

**County of Residence**  
Kansas

---

▼ **Companion Cases**

Case Number	Case Name
	<a href="#">Add</a>

---

**Display:**

12/01/2015 [View](#)

---

▼ **Food Assistance - 7747**

<b>Worker:</b>	Unit User	<b>Primary Applicant/Recipient:</b>	James Robertson
<b>Worker ID:</b>	<a href="#">DK5102G100</a>	<b>Language:</b>	English
<b>Program Status:</b>	Active	<b>Phone Number:</b>	
<b>Review Due Month:</b>	09/2016 <a href="#">Review</a>	<b>Payee:</b>	James Robertson
<b>Aid Code:</b>	FA	<b>Application Date:</b>	10/26/2015

Name	Role	Role Reason	Status	Status Reason
James Robertson	MEM		Active	

[View Details](#)

---

**All People Associated with the Case**

Name	DOB	SSN	Client ID	Household Status
<a href="#">James Robertson</a>	06/17/1985	653-29-7512	0010000064	

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.

**Person View**

**Person Detail Summary**

**Name:** James Robertson  
**SSN:** 653297512  
**Date of Birth:** 06/17/1985  
**State Employee:**

**Alias Name(s):**  
**Alias SSN(s):**  
**Gender:** Male

**Home Address:** 11200 W 69TH TER, SHAWNEE, KS 66203  
**Client ID:** 0010000064

**Person Case History**

**Associated Individuals**

Systems:	KE	CS	FA	KM	CN						
TANF Months	0				0						
ABAWD Months	0				0						
GA Months	0				0						
Program	Aid Code	LTC Details	Program Status	Case Number	Person Role	Role Start Date	Role End Date	Denial/Discont. Reason	Case Head	Companion Case(s)	Worker
Food Assistance			Active	20000003	MEM	12/01/2015			Yes	None	DK5102G100
Food Assistance			Active	20000003	MEM	11/01/2015	11/30/2015		Yes	None	DK5102G100
Food Assistance			Active	20000003	MEM	10/01/2015	10/31/2015		Yes	None	DK5102G100
Medical	MDN/DS/N/N		Active	20000006	MEM	08/01/2015			Yes	None	KH0206Q100



# KEES Overview

## Lesson 1: Performing a Person Search > Program History

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

**Person View** Cancel

**Person Detail Summary**

**Name:** James Robertson      **SSN:** 653297512      **Date of Birth:** 06/17/1985      **State Employee:**

**Alias Name(s):**      **Alias SSN(s):**      **Gender:** Male

**Home Address:** 11200 W 69TH TER, SHAWNEE, KS 66203      **Client ID:** 0010000064

**Person Case History**

**Associated Individuals**

**Systems:** KE      CS      FA      KM      CN

**TANF Months:** 0      **ABAWD Months:** 0      **GA Months:** 0

Program	Aid Code	LTC Details	Program Status	Case Number	Person Role	Role Start Date	Role End Date	Denial/Discont. Reason	Case Head	Companion Case(s)	Worker
Food Assistance			Active	<a href="#">20000003</a>	MEM	12/01/2015			Yes	None	<a href="#">DK5102G100</a>
Food Assistance			Active	<a href="#">20000003</a>	MEM	11/01/2015	11/30/2015		Yes	None	<a href="#">DK5102G100</a>
Food Assistance			Active	<a href="#">20000003</a>	MEM	10/01/2015	10/31/2015		Yes	None	<a href="#">DK5102G100</a>
Medical	MDN/DS/N/N		Active	<a href="#">20000006</a>	MEM	08/01/2015			Yes	None	<a href="#">KH0206Q100</a>

Cancel

# KEES Overview

## Lesson 1: Performing a Person Search > Issuance History

The screenshot shows the KEES web application interface. At the top, there is a navigation bar with tabs for 'Case Info', 'Eligibility', 'Services', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The 'Case Summary' tab is highlighted in red. Below the navigation bar, there is a sidebar with a list of navigation options, including 'Case Number', 'Request ID', 'Person Search', 'Case Summary', 'Contact', 'Negative Action', 'New Program', 'New Person', 'Hide Person', 'EBT Case List', 'Issuance History' (highlighted in red), 'Expungement History', 'Time Limit Aid Summary', and 'Legacy Case'. The main content area is titled 'Issuance History' and contains a search filter section with 'Display the last:' set to '3 Months' and 'Display by:' set to 'All'. Below this is a 'Search Results Summary' section with a table of results. The table has columns for Control Number, Benefit/Service Month, Issuance Category, Issuance Method, Program, Current Status, Issue Date, Payee, and Amount. Two rows of results are shown, both for 'Food Assistance' with an amount of \$649.00.

Control Number	Benefit/ Service Month	Issuance Category	Issuance Method	Program	Current Status	Issue Date	Payee	Amount
<a href="#">TBD</a>	09/2015	Monthly Benefit	EBT	Food Assistance	Issued	09/02/2015		\$649.00
<a href="#">TBD</a>	08/2015	Monthly Benefit	EBT	Food Assistance	Issued	08/02/2015		\$649.00

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

Case Name: Rogers Noel  
Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User: Training22  
Env: NPD34  
Ver: 2.9.7.009  
Time: 10/26/2015 03:00 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents **Customer Schedule** Courtesy Month

Case Number Request ID [ ] Go

### Customer Appointment Detail

Attendees

Customers	Attendance
<input checked="" type="checkbox"/> Noel Rogers	Completed
<input type="checkbox"/> Sarah Rogers	

Workers

DE4602G100 - Unit User [Remove] [Add]

General Information

Programs: \* [Food Assistance] Type: \* [Application] Status: \* [Agency Initiated] Appointment Details: \* [Phone]

Office: [Topeka Service Center] [Select]

Location: \* [500 SW Van Buren St. Topeka KS 66603]

Appointment Letter Comments: [ ]

Print Appointment Letter

Dates

Begin Date: \* [10/21/2015] Begin Time: \* [1:00 PM]

\* Indicates required fields

[Save] [Cancel]

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.





# KEES Overview

## Lesson 2: Non-Financial Data > Case Summary

Case Name: Rogers Noel  
Case Number: 2000002

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:11 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

New Application **Case Summary** Worker Assignment Customer Schedule e-Tools

Case Number  
Request ID  
Go

Person Search  
**Case Summary**  
Contact  
Negative Action  
New Program  
New Person  
Hide Person  
EBT Case List  
Issuance History  
Expungement History  
Time Limit Aid Summary  
Case Flag  
Legacy Case

### Case Summary

Case Name: Rogers Noel  
Mailing Address: 534 S KANSAS AVE TOPEKA, KS 66603  
Home Address: 534 S KANSAS AVE TOPEKA, KS 66603  
County of Residence: Kansas

Companion Cases

Display: 12/01/2015 View

Food Assistance - 7746

Worker: DE4602G100  
Unit User: Active  
Program Status: Active  
Review Due Month: 09/2016 Review

Aid Code: A

Name	Role	Role Reason	Status	Status Reason
Noel Rogers	MEM		Active	
Sarah Rogers	MEM		Active	

Primary Applicant/Recipient: Noel Rogers  
Language: English  
Phone Number:  
Payee: Noel Rogers  
Application Date: 10/16/2015

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Noel Rogers	09/17/1943	643-27-8915	0010000062	In the Home
Sarah Rogers	06/18/1945	897-21-4395	0010000063	In the Home

All SSP Users Linked To This Case

Name	DOB	SSN	SSP USER NAME	Role
<b>Authorized Representative</b>				
<b>Request ID Details</b>				

# KEES Overview

## Lesson 2: Non-Financial Data > Contact Summary

Case Name: Rogers Noel  
Case Number: 20000002

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:19 PM

Journal Tasks Reminders Contact Log Logout Help

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

### Contact Summary

Search Results Summary Results 1 - 4 of 4

Display From:  To:

Person	Type	Address	Begin Date	End Date	Action
<a href="#">Rogers, Noel</a>	Mailing	534 S KANSAS AVE TOPEKA, KS 66603	10/16/2015		<a href="#">Edit</a>
<a href="#">Rogers, Sarah</a>	Mailing	534 S KANSAS AVE TOPEKA, KS 66603	10/16/2015		<a href="#">Edit</a>
<a href="#">Rogers, Sarah</a>	Physical	534 S KANSAS AVE TOPEKA, KS 66603	10/16/2015		<a href="#">Edit</a>
<a href="#">Rogers, Noel</a>	Physical	534 S KANSAS AVE TOPEKA, KS 66603	10/16/2015		<a href="#">Edit</a>

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 KAECSSES.

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



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 KAECSSES.



# KEES Overview

## Lesson 2: Non-Financial Data > Individual Demographics

Case Name: Rogers Noel  
Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User: Training22  
Env: NPDS4  
Ver: 2.9.7.009  
Time: 10/26/2015 03:24 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
GO

Person Search

Non Financial  
Contact  
Root Questions  
**Individual Demographics**  
Citizenship/Residency  
Household Status  
Relationship

Images  
Continue

### Individual Demographics List

Root Questions

Name	SSN	DOB	Role	Action
<a href="#">Rogers, Noel</a>	643-27-8915	09/17/1943	Case Member	<a href="#">Edit</a>
<a href="#">Rogers, Sarah</a>	897-21-4395	06/18/1945	Case Member	<a href="#">Edit</a>

Complete  
[Continue](#)

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

Case Name: Rogers Noel  
 Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User: Training22  
 Env: MPD34  
 Ver: 2.9.7.009  
 Time: 10/26/2015 03:25 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
 Request ID

Individual Demographics Detail

Person Search

Non Financial  
 Contact  
 Root Questions  
 Individual Demographics  
 Citizenship/Identity  
 Household Status  
 Relationship  
 Non-Citizenship  
 Pregnancy  
 Residency  
 Other Prog. Assist.  
 Non-Compliance  
 Customer Options  
 Money Mgmt.  
 Time Limits  
 Purch. and Prep.  
 School Attend.  
 Employment  
 Striker  
 Work Regist.  
 Living Arrgmt.  
 LTC Data  
 Noncustodial Parents  
 Medical Condition

Presumptive Eligibility  
 Financial  
 Verifications  
 EBT Case List  
 Run EDBC  
 Manual EDBC  
 Needs  
 Service Arrangements  
 EDBC Results

\* - Indicates required fields

**Name**

First Name: \* Noel  
 Middle Name/Initial:  
 Last Name: \* Rogers  
 Suffix:  
 Maiden Name:

Social Security Number: 643-27-8915  
 Client ID: 001000062  
 Marital Status: Married  
 Date of Birth: 09/17/1943  
 Is this individual a U.S. Citizen? Yes  
 Is this individual a Veteran? No

SSN Status: \*  
 SSN Provided  
 Genders: \*  
 Male  
 Verified: Customer Statement  
 Verified: Customer Statement  
 Spouse of a Veteran?

**Race/Ethnic Origin:**

American Indian or Alaskan Native  
 Asian Indian  
 Black or African American  
 Chinese  
 Filipino  
 Guamanian or Chamorro  
 Japanese  
 Korean  
 Native Hawaiian  
 Other Pacific Islander  
 Samoan  
 Unknown  
 Vietnamese  
 White

Is this person Hispanic, Latino/a or Spanish Origin? No

Tribes:  
 Deceased Date:  
 Emancipation Date:

Spoken Language: \* English  
 Preferred Method of Contact:

Written Language: \* English  
 Other Communication Needs:

Language of Correspondence: \* English  
 Is it OK to call this individual at work? No

Save and Return Cancel Images



# KEES Overview

## Lesson 2: Non-Financial Data > Individual Demographics

**Spoken Language:** \* English

**Preferred Method of Contact:** Email, Text

**Email:**  Receive message via Email

**Written Language:** \* English

**Other Communication Needs:**

**Language of Correspondence:** \* English

**Is it OK to call this individual at work?** No

**Last Grade Completed:**

**Phone Numbers**

Phone Number	ext.	Phone Number Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Previous Names**

Last Name	First Name	Middle Name/Initial	Suffix	SSA Indicator
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Previous Social Security Numbers**

Social Security Number
<input type="text"/>

**Dangerous Person Indicator:**

**MCO Choice:**

[Duplicate List](#) [Save and Return](#) [Cancel](#)

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

Case Name: William Martin  
Case Number: 5007051

[Journal](#) [Tasks](#) [Reminders](#) [Contact Log](#) [Logout](#) [Help](#)

User : user user  
Env : TRAN2  
Ver : 1.6.020  
Time : 10/09/2013 03:46 PM

Case Info
Eligibility
Services
Child Care
Resource Databank
Fiscal
Special Units
Reports
Document Control
Admin Tools
Worker Portal

Workload Inventory
Case Summary
Customer Information
Reporting
Distributed Documents
Customer Schedule
Courtesy Month

Case Number

Request ID

Go

Person Search

Non Financial

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assis.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Pen.

## Household Status List

Continue

▶ Root Questions

Search Results Summary Results 1 - 2 of 2

Display From:

To:

View

Add

Name	Living in the Home Status	Begin Date	End Date	
<a href="#">Martin, Nora</a>	In the Home	08/01/2013		<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Edit</span>
<a href="#">Martin, William</a>	In the Home	08/01/2013		<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Edit</span>

Add

Complete

Continue



# KEES Overview

## Lesson 2: Non-Financial Data > Household Status

### Living in the Home Status:\*

In the Home	▼
Added in Error	
In the Home	
Permanently Out of the Home	
Temporarily Out of the Home	

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”.



# KEES Overview

## Lesson 2: Non-Financial Data > Relationship

Case Name: William Martin  
Case Number: 5007051

Journal Tasks Reminders Contact Log Logout Help  
User : user user  
Env : TRAN2  
Ver : 1.6.020  
Time : 10/09/2013 03:54 PM

Case Info **Eligibility** Services Child Care Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number Request ID  
Person Search

Non Financial  
 • Contact  
 • Root Questions  
 • Individual Demographics  
 • Citizenship/Identity  
 • Household Status  
**• Relationship**  
 • Non-Citizenship  
 • Pregnancy  
 • Residency  
 • Other Prog. Asslat.  
 • Non-Compliance  
 • Customer Options  
 • Money Mngmt  
 • Time Limits

Relationship List

Number of relationships remaining to be created: 0

Search Results Summary Results 1 - 1 of 1

Display by Relationship: All Related From: To: View Add

Person 1	Relationship	Person 2	Parental Control	Begin Date	End Date
Martin, Nora	Spouse	Martin, William	No	08/01/2013	

Edit Add Complete Continue

- 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.

# KEES Overview

## Lesson 4: Non-Financial Data > Purchase and Prepare

Case Name: Rogers Noel  
Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:38 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.**
- School Attend.

**Purchase And Prepare List**

Root Questions

Search Results Summary Results 1 - 1 of 1

Display From: To:

Name	Begin Date	End Date	Action
<a href="#">Rogers, Noel</a>	10/01/2015		<input type="checkbox"/> Remove <input type="checkbox"/> Complete <input type="button" value="Continue"/>

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.



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

Case Name: Robertson James  
Case Number: 20000003

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/27/2015 02:18 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
Root Questions  
Resources  
Special Needs  
Expenses  
Tax  
Medicare Expense  
Medical Subrogation  
Other Health Insurance  
Health Care Ref.  
IEVS Applicant  
Verifications  
EBT Case List  
Run EDBC  
Manual EDBC  
Needs  
Service Arrangements  
EDBC Results

**Income List**

\* - Indicates required fields

Root Questions

Search Results Summary Results 1 - 2 of 2

Display by Program Type: From: To: View

Name	Program Type	Category	Type	Begin Date	End Date
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical	Social Security	Social Security Disability	10/01/2015	
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical	Social Security	Social Security	08/01/2015	

Remove

Program Type: \* - Select -  
Income Category: \* - Select - Add

Complete  
Continue

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

Case Name: Robertson James  
Case Number: 20000003

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/27/2015 02:20 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
Root Questions  
Income  
**Resources**  
Special Needs  
Expenses  
Tax  
Medicare Expense  
Medical Subrogation  
Other Health Insurance  
Health Care Ref.  
IEVS Applicant  
Verifications  
EBT Case List  
Run EDBC  
Manual EDBC  
Needs  
Service Arrangements  
EDBC Results

**Resource List**

\* - Indicates required fields

Root Questions

Search Results Summary Results 1 - 4 of 4

Display by Program Type: From: To: View

Owner	Program Category Type	Type	Value	Begin Date	End Date	Action
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Vehicles	Car	4,900.00	10/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Liquid Resources	Bank Account/Cash	459.00	10/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Liquid Resources	Bank Account/Cash	505.00	08/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Vehicles	Car	100.00	08/01/2015		<a href="#">Edit</a>

[Remove](#)

Program Type: \* [ ]  
Resource Category: \* [ ] [Add](#)

Complete [Continue](#)

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

Case Name: Robertson James  
Case Number: 20000003

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/27/2015 02:20 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
Root Questions  
Income  
Resources  
Special Needs  
Expenses  
Tax  
Medicare Expense  
Medical Subrogation  
Other Health Insurance  
Health Care Ref.  
IEVS Applicant  
Verifications  
EBT Case List  
Run EDBC  
Manual EDBC  
Needs  
Service Arrangements  
EDBC Results

**Resource List**

\* - Indicates required fields

Root Questions

Search Results Summary Results 1 - 4 of 4

Display by Program Type: From: To: View

Owner	Program Category Type	Type	Value	Begin Date	End Date	Action
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Vehicles	Car	4,900.00	10/01/2015		<input type="button" value="Edit"/>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Liquid Resources	Bank Account/Cash	459.00	10/01/2015		<input type="button" value="Edit"/>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Liquid Resources	Bank Account/Cash	505.00	08/01/2015		<input type="button" value="Edit"/>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Vehicles	Car	100.00	08/01/2015		<input type="button" value="Edit"/>

Remove

Program Type: \* Resource Category: \*

Complete

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

Case Name: Robertson James  
Case Number: 20000003

Journal    Tasks    Reminders    Contact Log    Logout    Help

User : Training22  
Env : N9034  
Ver : 2.9.7.009  
Time : 10/27/2015 02:22 PM

Case Info    Eligibility    Services    Resource Databank    Fiscal    Special Units    Reports    Document Control    Admin Tools    Worker Portal

Workload Inventory    Case Summary    Customer Information    Reporting    Distributed Documents    Customer Schedule    Courtesy Month

Case Number  
Request ID

Person Search

- Non Financial
- Presumptive Eligibility
- Financial
  - Root Questions
  - Income
  - Resources
    - Special Needs
    - Expenses
    - Tax
    - Medicare Expense
    - Medical Subrogation
    - Other Health Insurance
    - Health Care Ref.
    - IEVS Applicant
  - Verifications
  - EBT Case List
  - Run EDIBC
  - Manual EDIBC
  - Needs
  - Service Arrangements
  - EDIBC Results

\* - Indicates required fields.

### Liquid Resources Detail

Owners	
Owner(s) *	Percentage *
James Robertson	100.0

Begin Date: \* 10/01/2015      End Date:

Liquid Resource Type: \* Bank Account/Cash      Description: \* Checking Account

Current Value: \* 459.00      Encumbrance:

Income Exempt as a Resource	Amount
No Data Found	
Total Value:	0.00

Financial Institution Details

Financial Institution Name:      Account Number:

Address:

Address 01:      Address 02/Route/PO Box:      City:      State:      Zip Code:

Face Value: \*

Verified:  
Verified

Last Updated On 10/27/2015 1:37:32 PM By: [1002604](#)

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

Case Name: Robertson James  
Case Number: 20000003

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/27/2015 02:20 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
Root Questions  
Income  
**Resources**  
Special Needs  
Expenses  
Tax  
Medicare Expense  
Medical Subrogation  
Other Health Insurance  
Health Care Ref.  
IEVS Applicant  
Verifications  
EBT Case List  
Run EDBC  
Manual EDBC  
Needs  
Service Arrangements  
EDBC Results

**Resource List**

\* - Indicates required fields

Root Questions

Search Results Summary Results 1 - 4 of 4

Display by Program Type: From: To: View

Owner	Program Category Type	Type	Value	Begin Date	End Date	Action
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Vehicles	Car	4,900.00	10/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Non-Medical Liquid Resources	Bank Account/Cash	459.00	10/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Liquid Resources	Bank Account/Cash	505.00	08/01/2015		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Robertson, James</a>	Medical Vehicles	Car	100.00	08/01/2015		<a href="#">Edit</a>

Remove

Program Type: \* [ ]  
Resource Category: \* [ ]

Complete [Continue](#)

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

Case Name: Robertson James  
 Case Number: 20000003

Journal Tasks Reminders Contact Log Logout Help

User: Training22  
 Env: NP034  
 Ver: 2.9.7.009  
 Time: 10/27/2015 02:31 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
 Request ID  
  
 Go

Person Search

- Non Financial
- Presumptive Eligibility
- Financial
  - Root Questions
  - Income
  - Resources
    - Special Needs
    - Expenses
    - Tax
    - Medicare Expense
    - Medical Subrogation
    - Other Health Insurance
    - Health Care Ref.
    - IEVS Applicant
  - Verifications
  - EBT Case List
  - Run EDBC
  - Manual EDBC
  - Needs
  - Service Arrangements
  - EDBC Results

### Motor Vehicle Detail

\* - Indicates required fields

Owner(s)*	Percentage*	Action
James Robertson	100.0	

Year\*: 2009  
 Model: Avenger  
 Begin Date\*: 10/01/2015  
 Fair Market Value Source: Blue Book  
 Registered In Kansas\*: Yes  
 Encumbrance:  
 Status/Usage Code\*: Primary Vehicle  
 Count as Most Valuable Vehicle (Medicaid only): No  
 Verified: Verified

Make: Dodge  
 Motor Vehicle Type\*: Car  
 End Date:  
 Fair Market Value\*: 4,900.00

Last Updated On 10/27/2015 1:40:57 PM By: [1002604](#)

Next Edit Close

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

# KEES Overview

## Lesson 3: Financial Pages > Expenses

Case Name: Rogers Noel  
Case Number: 2000002

Journal    Tasks    Reminders    Contact Log    Logout    Help

User : Training22  
Env : NP034  
Ver : 2.9.7.009  
Time : 10/26/2015 03:52 PM

Case Info    **Eligibility**    Services    Resource Databank    Fiscal    Special Units    Reports    Document Control    Admin Tools    Worker Portal

Workload Inventory    Case Summary    **Customer Information**    Reporting    Distributed Documents    Customer Schedule    Courtesy Month

Case Number  
Request ID

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
  • Root Questions  
  • Income  
  • Resources  
  • Special Needs  
  • **Expenses**  
  • Tax  
  • Medicare Expense  
  • Medical Subrogation  
  • Other Health Insurance  
  • Health Care Ref.  
  • IEVS Applicant  
  • Verifications

**Expense List**

\* - Indicates required fields

▶ Root Questions

Search Results Summary Results 1 - 2 of 2

Display From:  To:

<input type="checkbox"/>	Category	Type	Amount	Begin Date	End Date	Action
<input type="checkbox"/>	<a href="#">Shelter</a>	Mortgage	850.00	10/01/2015		<input type="button" value="Edit"/>
<input type="checkbox"/>	<a href="#">Utility Allowance</a>	Utility Allowance		10/01/2015		<input type="button" value="Edit"/>

Expense Category: \*

Complete

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

# KEES Overview

## Lesson 3: Financial Pages > Expenses

Case Name: Rogers Noel  
Case Number: 2000002

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:52 PM

Case Info **Eligibility** Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary **Customer Information** Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
Root Questions  
Income  
Resources  
Special Needs  
**Expenses**  
Tax  
Medicare Expense  
Medical Subrogation  
Other Health Insurance  
Health Care Ref.  
IEVS Applicant  
Verifications

**Expense List**

\* - Indicates required fields

Root Questions

Search Results Summary Results 1 - 2 of 2

Display From: To: View

Category	Type	Amount	Begin Date	End Date	Action
<a href="#">Shelter</a>	Mortgage	850.00	10/01/2015		Edit
<a href="#">Utility Allowance</a>	Utility Allowance		10/01/2015		Edit

Remove Expense Category: \* Add

Complete Continue

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

# KEES Overview

## Lesson 3: Financial Pages > Expenses

[Journal](#) [Tasks](#) [Reminders](#) [Contact Log](#) [Logout](#) [Help](#)

Case Name: Rogers Noel  
Case Number: 20000002
User: Training22  
Env: NPD34  
Ver: 2.9.7.009  
Time: 10/26/2015 03:53 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
 [Go](#)

Person Search

- Non Financial
- Presumptive Eligibility
- Financial
  - Root Questions
  - Income
  - Resources
  - Special Needs
  - Expenses
    - Tax
    - Medicare Expense
    - Medical Subrogation
    - Other Health Insurance
    - Health Care Ref.
    - IEVS Applicant
  - Verifications
  - EBT Case List
  - Run EDBC
  - Manual EDBC
  - Needs

### Expense Detail

\* - Indicates required fields

<b>Expense Category:</b> Shelter	<b>Description:</b>
<b>Expense Type:</b> Mortgage	<b>Subsidized Housing:</b> No Subsidy
<b>Frequency:</b> Monthly	

**Display From:**

**To:**

[View](#)

Contributors*			
Persons	Begin Date	End Date	Action
<a href="#">Noel Rogers</a>	10/01/2015		

Amounts			
Amount	Amount Paid by Others	Begin Date	End Date
<a href="#">850.00</a>	0.00	10/01/2015	

[Next](#) [Edit](#) [Close](#)

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

# KEES Overview

## Lesson 3: Financial Pages > Medicare Expenses

Case Name: Rogers Noel  
Case Number: 20000002

Journal    Tasks    Reminders    Contact Log    Logout    Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:56 PM

Case Info    **Eligibility**    Services    Resource Databank    Fiscal    Special Units    Reports    Document Control    Admin Tools    Worker Portal

Workload Inventory    Case Summary    **Customer Information**    Reporting    Distributed Documents    Customer Schedule    Courtesy Month

Case Number  
Request ID  
Go

Person Search

Non Financial  
Presumptive Eligibility  
Financial  
  Root Questions  
  Income  
  Resources  
  Special Needs  
  Expenses  
  Tax  
**Medicare Expense**  
  Medical Subrogation  
  Other Health Insurance  
  Health Care Ref.  
  IEVS Applicant  
Verifications  
EBT Case List  
Run EDBC

Images  
Continue

### Medicare Expense List

Root Questions

Search Results Summary Results 1 - 2 of 2

Display From:  To:

Name	Method of Payment	Begin Date	End Date
<a href="#">Rogers, Noel</a>	Part B: Self:\$104.90 Part D: Self:\$25.08	10/01/2015	
<a href="#">Rogers, Sarah</a>	Part B: Self:\$104.90 Part D: Self:\$46.00	10/01/2015	

Remove    Add    Complete    Continue

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

Case Name: Rogers Noel  
Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 03:57 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number Request ID  Go

Person Search

- Non Financial
- Presumptive Eligibility
- Financial
  - Root Questions
  - Income
  - Resources
  - Special Needs
  - Expenses
  - Tax
  - Medicare Expense**
    - Medical Subrogation
    - Other Health Insurance
    - Health Care Ref.
    - IEVS Applicant
- Verifications
- EBT Case List
- Run EDBC
- Manual EDBC
- Needs
- Service Arrangements
- EDBC Results

### Medicare Expense Detail

\* - Indicates required fields.

<b>Name:</b> *	Sarah Rogers	<b>Medicare Claim Number:</b> *	897214395A
<b>Part A Payment Method:</b>		<b>Part A Payment Amount:</b>	
<b>Part A Start Date:</b>		<b>Part A End Date:</b>	
<b>Part B Payment Method:</b>	Self	<b>Part B Payment Amount:</b>	104.90
<b>Part B Start Date:</b>		<b>Part B End Date:</b>	
<b>Part D Payment Method:</b>	Self	<b>Part D Payment Amount:</b>	46.00
<b>Part D Start Date:</b>		<b>Part D End Date:</b>	
<b>Begin Date:</b> *	10/01/2015	<b>End Date:</b>	
<b>Verified:</b> *	Verified		

10/26/2015 3:57 PM

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

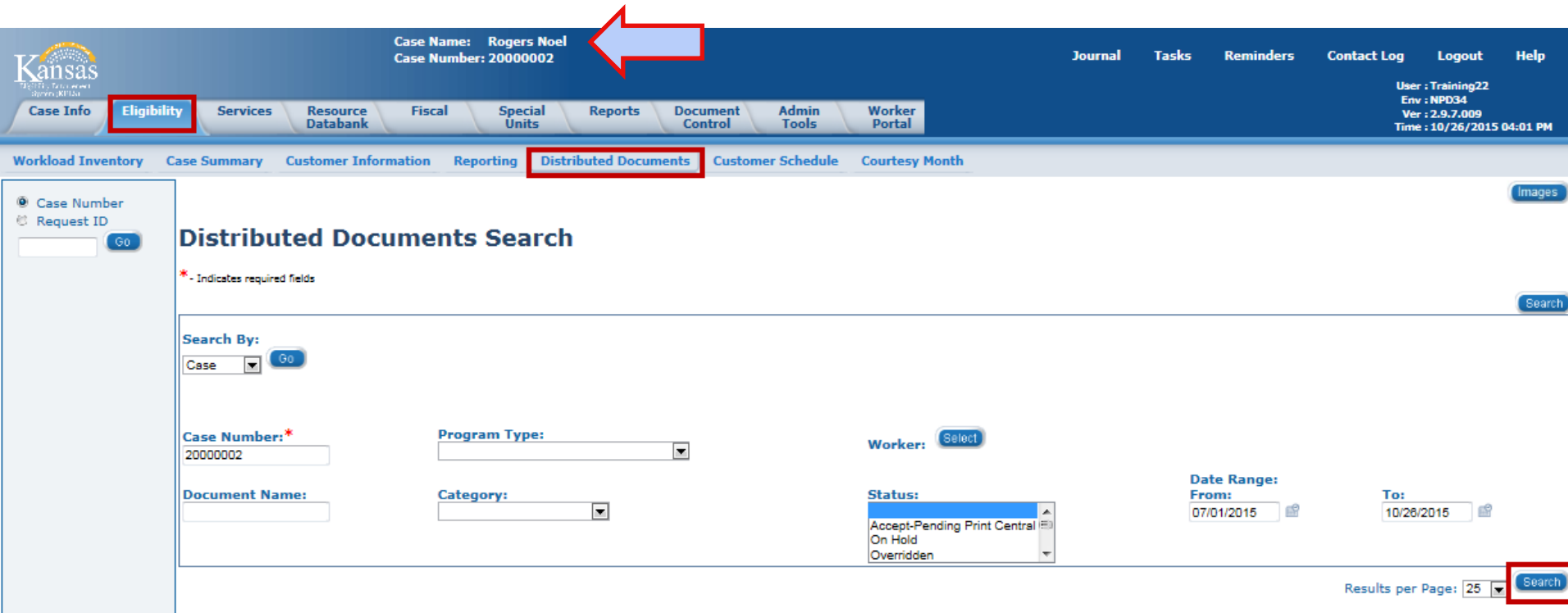
- KEES contains a record of all NOAs and Forms that have been generated within the context of a case
- History is in the **Distributed Documents** page under the **Eligibility** Global Tab

**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



Case Name: Rogers Noel  
Case Number: 20000002

Journal Tasks Reminders Contact Log Logout Help

User : Training22  
Env : NPD34  
Ver : 2.9.7.009  
Time : 10/26/2015 04:01 PM

Case Info Eligibility Services Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number  
Request ID  
Go

### Distributed Documents Search

\* - Indicates required fields

Search By:  
Case Go

Case Number: \*  
20000002

Program Type:

Worker: Select

Document Name:

Category:

Status:  
Accept-Pending Print Central  
On Hold  
Overridden

Date Range:  
From: 07/01/2015  
To: 10/26/2015

Results per Page: 25 Search

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.

Case Number  
Request ID



## Distributed Documents Search

\* - Indicates required fields

▶ Refine Your Search

### Search Results Summary

Results 1 - 2 of 2

Date	Document	Prog	Ben. Mo.	Received Date	Return by PO?	Category	Status	Worker
10/26/2015	<a href="#">NOA - Food Assistance - Benefit Change</a>	Food Assistance - 7746	11/2015		Food Assistance - 7746	NOA	Accept-Pending Print Central	Training Twentytwo
10/26/2015	<a href="#">NOA - Food Assistance - Approval</a>	Food Assistance - 7746	10/2015		Food Assistance - 7746	NOA	Accept-Pending Print Central	Training Twentytwo

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

To view the notice, click the Document name hyperlink.

# KEES Overview

## Lesson 4: Viewing Distributed Documents > Process Steps

The screenshot shows a web browser window titled 'Noa Detail - Windows Internet Explorer provided by The State of Kansas'. The main page displays a document viewer for a 'Notice of TANF Months Used'. The document content includes:

<OFFICE\_NAME>  
 <OFFICE\_ADDRLINE1>  
 <OFFICE\_ADDRLINE2>  
 <OFFICE\_ADDRLINE3>

**Kansas**  
 Department for Children and Families  
 Strong Families Make a Strong Kansas

Notice Date: <CURRENT\_DATE>  
 Case Name: <CASE\_NAME>  
 Case Number: <CASE\_NUMBER>  
 Program: <Program>

<CUSTOMER\_NAME>  
 <CUSTOMER\_ML\_ADDRESS\_1>  
 <CUSTOMER\_ML\_ADDRESS\_2>  
 <CUSTOMER\_ML\_ADDRESS\_3>

**Notice of TANF Months Used**

IMPORTANT! IMPORTANT! IMPORTANT!

There is a 36 month lifetime limit to receive Temporary Assistance for Needy Families (TANF). However, if you have received a Diversion payment, there is a 30 month lifetime limit to receive TANF. We show that

user **Approval** Robertson

The background page shows a navigation menu with options like Journal, Tasks, Reminders, Contact Log, Logout, Help, Reports, Document Control, Admin Tools, and Worker Portal. A table at the bottom shows search results for 'Results 1 - 1 of 1' with columns for Type, Program, Benefit Month, Status, Receive Date, and Undelivered. The table contains one row: Medical, 10/01/2013, Accept-Pending Print Central. Action buttons like Undelivered, Regenerate, Delete, and Images are visible at the bottom right.

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.





# 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.



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

