



Medical Eligibility

Registration



Medical Eligibility: Registration

Introduction

In this course you will learn about the File Clearance and Registration process.

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

- Perform a Person Search
- File Clear Case Persons
- Register Applications





Medical Eligibility: Registration

Agenda

- **Lesson 1: Performing a Person Search**
- Lesson 2: Completing File Clearance
- Lesson 3: Registration
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration





Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Introduction

- The Person Search process is completed prior to File Clearance to help a user determine whether a person currently exists in KEES, and whether they already have a usable case number.
- It is important to complete a thorough search as to avoid creating duplicate persons or additional case numbers during the File Clearance and Registration process.



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person Search results

The screenshot shows the KEES web application interface. At the top, there is a navigation bar with links for Journal, Tasks, Reminders, Contact Log, and Logout Help. Below this is a user profile for Dana George. A secondary navigation bar contains tabs for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. A third navigation bar includes buttons for New Application, Case Summary, Worker Assignment, Customer Schedule, and e-Tools.

The main content area is titled "Person Search". It includes a search form with radio buttons for "Case Number" (selected) and "Request ID", an input field, and a "Go" button. Below the form is a "Person Search" section with an "Access List" link.

A message states: "The following fields may be required - Last Name, Social Security Number, Client ID, Case Number, Phone Number and/or Address. Failure to complete at least one of these fields may prevent the search request from processing." Below this is a "Refine Your Search" link.

The search results are displayed in a table with the following columns: Name/Client ID, DOB, SSN, Address, Relationships, Aliases, and Systems (KE, CS, FA, KM). The table content shows "No Data Found".

Below the table, there is a message: "+- Duplicate Person Record Exists".

No search results display if the consumer is not known to KEES. A user could click on **Refine Your Search** to add additional information for the search criteria such as DOB & SSN.



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > DOB / SSN

KEES will return every person whose Date of Birth matches according to the following:

- Month may be off by +1 or -1
 - Ex: 11/07/01 would return 10/07/01 and 12/07/01
- Day may be off by +1 or -1
 - Ex: 11/07/01 would return 11/06/01 and 11/08/01
- Year may be off by +1 or -1
 - Ex: 11/07/01 would return 11/07/00 and 11/07/02

KEES will return every person whose Social Security Number matches according to the following:

- SSN may be off by +1 or -1 in any one of the sections (first 3 numbers; middle 2 numbers; last 4 numbers)
- SSN 123-45-6789 looking at the first 3 numbers only:
 - Could return 023, 223, 113, 133, 122, or 124



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person Search

- The **Person Search** page utilizes wild card searches.
- 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.

Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person Search

If the user was looking for Lilly Suspend they could enter Lil* Susp*. This would return any persons in KEES whose first three letters of their first name were 'Lil' and the first four letters of their last name were 'Susp'.

Person Search

The following fields may be required - Last Name, Social Security Number, Client ID, 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: <input type="text"/>	Social Security Number: <input type="text"/>	Client ID: <input type="text"/>
First Name: <input type="text" value="Lil*"/>	Middle Name/Initial: <input type="text"/>	Last Name: <input type="text" value="Susp*"/>
Date Of Birth: <input type="text"/>	Age Range: <input type="text"/> - <input type="text"/>	Gender: <input type="text"/>
Phone Number: <input type="text"/>	Relationships:	Aliases:
	First Name: <input type="text"/> Last Name: <input type="text"/>	First Name: <input type="text"/> Last Name: <input type="text"/>
	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person Search results

The screenshot shows the KEES web application interface. At the top, there is a navigation bar with links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this is a secondary navigation bar with tabs for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area is titled 'Person Search' and includes a search filter sidebar on the left with options for Case Number and Request ID. The search results are displayed in a table with columns for Name/Client ID, DOB, SSN, Address, Relationships, Aliases, KE, CS, FA, and KM. A single result is shown for 'Suspend, Lilly' with a note indicating a duplicate record exists.

Person Search

The following fields may be required - Last Name, Social Security Number, Client ID, Case Number, Phone 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 - 1 of 1

Systems									
Name/ Client ID	DOB	SSN	Address	Relationships	Aliases	KE	CS	FA	KM
Phonetic Search Results									
Suspend, Lilly 0010001523	05/03/1982	555-55-1111	12255 W 128TH ST OVERLAND PARK,KS 66213						

+-- Duplicate Person Record Exists

KEES will perform a comprehensive search and return any potential matches for the user to review. If a user is uncertain whether one of the potential matches that was returned is the person they were looking for, additional case specific information can be used to aid in the decision. By clicking the name hyperlink a user will be directed to the **Person View** page.

Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person View

Cancel

Person View

Person Detail Summary

Name:	SSN:	Date of Birth:	State Employee:
James Lemon	159789856	04/01/1955	
Alias Name(s):	Alias SSN(s):	Gender:	
		Male	
Home Address:	Client ID:		
7635 N MAIN STREET TOPEKA, KS 66601	0010011768		

Person Case History

[Associated Individuals](#)

Systems:	KE	CS	FA	KM	CN
-----------------	----	----	----	----	----

TANF Months	GA Months	ABAWD 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
Medical	MDN/DS/N/N		Active	20000101	MEM	07/01/2014			Yes	None	KH0206Q100
Medical	MDN/DS/N/N		Active	20000101	MEM	06/01/2014	06/30/2014		Yes	None	KH0206Q100
Medical			Denied	20000101	FRI	04/01/2014	05/31/2014	Doesn't Meet Program Req.	Yes	None	

Cancel

The **Person View** page displays a holistic view of the individual and case related details. From here the user will be able to see all of the case numbers the person is associated to. The **Person View** page is very helpful when trying to determine whether a person has a usable case number.



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Person View

PPS

Case Name: Michelle Mitchell
Case Number: 20000764

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/11/2014 03:50 PM

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

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Person View Cancel

Person Detail Summary

Name: Michelle L Mitchell SSN: 132645987 Date of Birth: 08/23/2000 State Employee:
Alias Name(s): Alias SSN(s): Gender: Female
Home Address: 416 S Main OTTAWA, KS 66067 Client ID: 0010001895

Person Case History

Associated Individuals

Systems:	KE	CS	FA	KM	CN
TANF Months:	0	GA Months:	0	ABAWD 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
Medical	FCM/DC/N/N		Active	20000764	MEM	11/01/2014			Yes	None	DE4602L1A2

Cancel

The **Person View** page displays a holistic view of the individual and case related details. From here the user will be able to see all of the case numbers the person is associated to. The **Person View** page is very helpful when trying to determine whether a person has a usable case number



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Case Number

PPS

What is a usable case number?

- Usable case is one that has a foster care medical program with a medical aid code of FCM/DC/N/N/, FCM/JC/N/N/, or FCM/TC/N/N/.
DC= DCF; JC=KDOC-JS; TC=Tribal cases.
- Adoption Cases will have a medical aid code of ASM/C/N/N/.



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Case Number

Journal Tasks Reminders Contact Log Logout Help
 User : DANA GEORGE
 Env : PRD-Test
 Ver : 2.5.004.1
 Time : 12/02/2014 05:19 PM

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

Summary Worker Assignment Customer Schedule e-Tools

Person View Cancel

Person Detail Summary

Name: James Lemon	SSN: 159789856	Date of Birth: 04/01/1955	State Employee:
Alias Name(s):	Alias SSN(s):	Gender: Male	
Home Address: 7635 N MAIN STREET TOPEKA, KS 66601	Client ID: 0010011768		

Person Case History

Associated Individuals

Systems:	KE	CS	FA	KM	CN
-----------------	----	----	----	----	----

TANF Months	GA Months	ABAWD 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
Medical	MDN/DS/N/N		Active	20000101	MEM	07/01/2014			Yes	None	KH0206Q100
Medical	MDN/DS/N/N		Active	20000101	MEM	06/01/2014	06/30/2014		Yes	None	KH0206Q100
Medical			Denied	20000101	FRI	04/01/2014	05/31/2014	Doesn't Meet Program Req.	Yes	None	

Cancel

- Under **Program** look for Medical or SSPP. If Medical is listed - look under **Aid Code**. If first 3 letters are FCM or ASM then it should NOT be used by any program other than Foster Care or Adoption Support medical.
- A user may need to look at several case numbers, as well as, the **Case Head** field to determine the best case number to use.



Medical Eligibility: Registration

Lesson 1: Performing a Person Search > Summary

In this lesson we have discussed the Person Search process using the wild card searches and how to identify a usable case number.

Now let's take a look at the File Clearance process.





Medical Eligibility: Registration

Agenda

- Lesson 1: Performing a Person Search
- **Lesson 2: Completing File Clearance**
- Lesson 3: Registration
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration



Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Definition

What is File Clearance?

- File Clearance is the process of searching for a person to determine if they are currently known to KEES and whether they are associated to any existing case numbers.
- It also includes adding new persons to KEES and assigning a Client ID to them.





Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Registration Person Search

Databank Units Control Tools Portal

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Case Number
 Request ID

Person Search
 Access List

Registration Person Search

* - Indicates required fields

First Name:* <input type="text"/>	Middle Name/Initial: <input type="text"/>	Last Name:* <input type="text"/>	Suffix: <input type="text"/>																
Social Security Number: <input type="text"/>	Date of Birth: <input type="text"/>	Age Range: <input type="text"/> - <input type="text"/>	Gender: <input type="text"/>																
Relationships: <table border="1"> <tr> <td>First Name:</td> <td>Last Name:</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	First Name:	Last Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Aliases: <table border="1"> <tr> <td>First Name:</td> <td>Last Name:</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	First Name:	Last Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Client ID: <input type="text"/>	
First Name:	Last Name:																		
<input type="text"/>	<input type="text"/>																		
<input type="text"/>	<input type="text"/>																		
<input type="text"/>	<input type="text"/>																		
First Name:	Last Name:																		
<input type="text"/>	<input type="text"/>																		
<input type="text"/>	<input type="text"/>																		
<input type="text"/>	<input type="text"/>																		
Address Line 1: <input type="text"/>																			
Address Line 2: <input type="text"/>																			
City: <input type="text"/>	State: <input type="text" value="Kansas"/>	ZIP Code: <input type="text"/>																	
<input type="checkbox"/> Display Relationships		<input type="checkbox"/> Display Aliases																	

Results per Page: 25

Since a Person Search has already been completed and the person was not found, the user should enter the person's full name, SSN, and DOB (or as much is known). Whoever is file cleared first will be the Case Head for this medical case.



Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Search Criteria

If available, search for an EXACT match on SSN, DOB, and First Name.

- If this matches then this is considered an exact match for the person.

If available, search for an EXACT match on SSN (not considering any other search criteria) AND search for:

- First Name (with assumed 2 character wild card)
 - Ex: If name is James, the system will search for Ja*
- Last Name (with assumed 3 character wild card)
 - Ex: If name is Lemon, the system will search for Lem*

Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Search Results

The screenshot shows the KEES web application interface. At the top, there is a navigation bar with links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this is a secondary navigation bar with tabs for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. A user information box in the top right corner displays: User: DANA GEORGE, Env: PRD-Test, Ver: 2.5.004.1, Time: 12/03/2014 02:22 PM.

The main content area is titled "Registration Person Search Results". It includes a search filter on the left with radio buttons for "Case Number" (selected) and "Request ID", and a "Go" button. Below the filter is a "Person Search" section with an "Access List" link.

The search results section displays a warning: "This person may already exist in the system. To avoid creating duplicate records, make sure the person you are searching for is not in the list below." It lists potential matches for James Lemon with the following details:

- Name: James Lemon
- Date of Birth: 04/01/1955
- SSN: 159-78-9856
- Gender:

Below the match details is a "Search Results Summary" table with the following data:

Name/ Client ID	DOB	SSN	Address	Relationships	Aliases	KE	CS	FA	KM
<input checked="" type="radio"/> Lemon, James 0010011768	04/01/1955	159-78-9856	7635 N MAIN STREET TOPEKA,KS 66601						

Below the table, a message states: "+ Duplicate Person Record Exists". At the bottom right of the results area, there are buttons for "Select", "Add New Person", and "Cancel".

- If the person already exists in KEES, use the radio button to identify the correct consumer and then click the **Select** button.
- If the person is not known to KEES, the user will click **Add New Person**.



Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Registration Person Detail

Registration Person Detail Continue Edit

* - Indicates required fields

Name: James Lemon	Date of Birth: 04/01/1955	Gender: Male
Social Security Number: 159-78-9856	Client ID: 0010011768	Alternative Client ID:
Addresses:		
Physical 7635 N MAIN STREET TOPEKA, KS 66601		
Mailing 7635 N MAIN STREET TOPEKA, KS 66601		
Phone Number:	Phone Number Type: Cell	Email Address:
International Phone Number: - (xxx)		

Continue Edit

If the person is known to KEES, then information (address, phone number & e-mail address) known to KEES will populate on the **Registration Person Detail** page. If a consumer is not known to KEES, the user will enter the information on the data collection pages after registration has been completed.



Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Registration Person Detail

Registration Person Detail Continue

* - Indicates required fields

Name: James Lemon	Date of Birth: 04/01/1955	Gender: Male
Social Security Number: 159-78-9856	Client ID: 0010011768	Alternative Client ID:
Addresses:		
Physical 7635 N MAIN STREET TOPEKA, KS 66601		
Mailing 7635 N MAIN STREET TOPEKA, KS 66601		
Phone Number:	Phone Number Type: Cell	Email Address:
International Phone Number: - (xxx)		

Continue

The **Alternative Client ID** is the consumer's client ID from KAECSES. It is only used if the consumer is not known to KEES .



Medical Eligibility: Registration

PPS

The business process for PPS medical applications is two steps:

- The Social Worker (DCF), Community Service Officer (Kansas Department of Corrections – Juvenile Services; KDOC-JS), or Social Worker – Tribal Agency submit an application – PPS 5410A Initial IV-E Eligibility Determination, notification of placement, and supporting eligibility documents.
- The eligibility specialist completes the PPS 5410B – Initial IV-E eligibility determination to determine whether the child is funding eligible for Foster Care. Similar forms are used for Adoption Assistance. This determination is not completed in KAECSES or KEES at this time.
- ES will register the case in KAECSES first and then register in KEES.
- The KAECSES Client ID will be entered as an alternative ID on the **Registration Person Detail** page during the KEES registration process.



Medical Eligibility: Registration

Lesson 2: Completing File Clearance > Summary

In this lesson we learned about the file clearance process.

We have seen the differences in a person known to KEES and someone not known to KEES.

We have also discussed when to add the Alternate Client ID.

Now let's move on to Registration.



Medical Eligibility: Registration

Agenda

- Lesson 1: Performing a Person Search
- Lesson 2: Completing File Clearance
- **Lesson 3: Registration**
- Lesson 4: e-Summary Registration (CH only)
- Lesson 5: Existing Case Registration





Medical Eligibility: Registration

Lesson 3: Registration > Introduction

Registration is the process of adding persons from an application to the appropriate case. Case registration for KEES includes the following:

- Creating a case
- Adding case persons
- Creating a program
- Adding program persons
- Assigning a worker to the program





Medical Eligibility: Registration

Lesson 3: Registration > Case Member List

The screenshot shows the 'Case Member List' page in the KEES system. The page header includes navigation options like 'Journal', 'Tasks', 'Reminders', 'Contact Log', and 'Logout'. The user is identified as 'DANA GEORGE' in a 'PRD-Test' environment. The main navigation bar includes 'Eligibility', 'Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The sub-navigation bar includes 'Application', 'Case Summary', 'Worker Assignment', 'Customer Schedule', and 'e-Tools'. The main content area displays 'Case Member List' for 'James Lemon'. A table lists the case members with columns for Name, SSN, and DOB. The table contains one entry: James Lemon, SSN 159-78-9856, DOB 04/01/1955. There are buttons for 'Add Person', 'Save and Continue', and 'Remove'.

Name	SSN	DOB
James Lemon	159-78-9856	04/01/1955

After a person has been searched for and chosen, the **Case Member List** page is displayed so that the user can create a new case. At this point, it is a 'shell' and the user will continue to add additional household members to the case until all have been added.

Medical Eligibility: Registration

Lesson 3: Registration > New Programs Detail

Case Name: James Lemon
Case Number: 20002897

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

User : DANA GEORGE
Env : PRD-Test
Ver : 2.5.004.1
Time : 12/03/2014 05:09 PM

Case Info | Eligibility | Services | Child Care | 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
- Person Search
- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

New Programs Detail

[Save and Continue](#) [Cancel](#)

* - Indicates required fields

Administrative Roles

Primary:*

- Select -

Date of Application:*

Language:*

English

Program Information

Name	DOB	Programs	Add/Remove Programs
James Lemon	04/01/1955		Add
Jennifer Lemon	03/25/1956		Add

[Save and Continue](#) [Cancel](#)

Once all members have been added, the **New Programs Detail** page displays prompting the user to select a person to be the Primary Applicant for the program and what program the consumer(s) is requesting. For PPS only- the child will always be chosen as the Primary Applicant.



Medical Eligibility: Registration

Lesson 3: Registration > New Programs Detail

Case Name: James Lemon
Case Number: 20002921

Journal Tasks Reminders Contact Log Logout Help
User : DANA GEORGE
Env : PRD-Test
Ver : 2.5.004.1
Time : 12/04/2014 11:29 AM

Case Info Eligibility Services Child Care 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
- Legacy Case
- Access List

New Programs Detail

* - Indicates required fields

Administrative Roles

Primary: * James Lemon Date of Application: * 12/04/2014 Language: * English

Program Information

Name	DOB	Programs	Add/Remove Programs
James Lemon	04/01/1955	Medical	Edit
Jennifer Lemon	03/25/1956		Add

Save and Continue Cancel

Save and Continue Cancel

The Add Program process repeats for each applicant requesting coverage. Each person that is added to the Medical program at this step, will share the same Medical program block. Therefore, if any applicant requires their own program block, do not add it here – it will need to be added in a later step.



Medical Eligibility: Registration

Lesson 3: Registration > Select Programs

The screenshot shows the KEES web application interface. At the top, the case information is displayed: Case Name: James Lemon and Case Number: 20002917. A navigation menu includes options like Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this, a secondary menu lists various system functions such as Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area is titled 'Select Programs' and shows the name 'James Lemon'. There are two checkboxes: 'ADAP' (unchecked) and 'Medical' (checked). A 'SSPP' checkbox is also present but unchecked. At the bottom right of the program selection area, there are 'Select' and 'Cancel' buttons. On the left side, there is a sidebar with a search field and a list of menu items including Case Summary, Contact, Negative Action, New Program, New Person, Hide Person, Legacy Case, and Access List.

Here the program (usually Medical) will need to be selected for the individual. Medical encompasses all of the different program types except for ADAP and SSPP. Once the program has been checked, the user will click the **Select** button.



Medical Eligibility: Registration

Lesson 3: Registration > Case Summary

e-Applications					
e-App Number	Applicant Name	Expedited Services	Recertification/Renewal	Application Date	e-App Status
1007504	Sunshine, Matthew	No	No	05/04/2015	In Progress

Display:

06/01/2015



[View](#)

Quarterly Reporting

Submit Months	Begin Month	End Month
January, April, July, October	05/2015	

▼ Presumptive Eligibility Adult - 6994

Worker:	Office Num 02 Unit Num Q1 User	Primary Applicant/Recipient:	Matthew Sunshine
Worker ID:	KH0206Q100	Language:	English
Program Status:	Pending	Phone Number:	(785)555-5555
		Application Date:	05/04/2015

Name	Role	Role Reason	Status	Status Reason	End Date
Mary Sunshine	MEM		Pending		
Matthew Sunshine	MEM		Pending		

[View Details](#)

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Matthew Sunshine	01/03/1985	758-85-9494	0010005646	
Mary Sunshine	08/08/1985	123-45-7575	0010005647	
Annie Sunshine	05/05/2009	158-85-8585	0010005655	

After adding the consumers and programs the user is taken to the **Case Summary** Page where the user will see all the entered information.

At the bottom of the **Case Summary** page you will see a block called 'All People Associated with the Case'. This is where all of the Case Persons will be listed.



Medical Eligibility: Registration

Lesson 3: Registration > Case Person

- A Case Person is a person who is part of the case, but may or may not be requesting aid for themselves.
- A Case Person can NEVER be removed from the case. They can have a Household Status of “Permanently Out of the Home” and can even be “hidden” so as not to appear on other pages throughout the system.



Medical Eligibility: Registration

Lesson 3: Registration > Program Blocks

Journal Tasks Reminders Contact Log Logout Help
User : DANA GEORGE
Env : PRD-Test
Ver : 2.5.004.1
Time : 12/04/2014 10:37 AM

Case Name: James Lemon
Case Number: 20000101

Case Info Eligibility Services Child Care 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

Case Summary

Case Name	James Lemon	Mailing Address	7635 N MAIN STREET TOPEKA, KS 66601	Phone Number	(785)335-1234	County of Residence	Kansas
		Home Address	7635 N MAIN STREET TOPEKA, KS 66601				

▼ Companion Cases

Case Number	Case Name
Add	

Display: 01/01/2015 [View](#)

▼ Medical Programs

Worker:	Office Num 02 Unit Num Q1 User	Primary Applicant/Recipient:	James Lemon
Worker ID:	KH0206Q100	Language:	English
Program Status:	Active	Phone Number:	(785)335-1234
		Application Date:	06/15/2014
Review Due Month:	05/2015 Review		

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
▶ James Lemon	Medical	05/2015	Primary Applicant	MEM		Active	
▶ Jennifer Lemon	Medical	05/2015	Spouse	MEM		Active	

This is an example of the **Case Summary** page showing one medical program block.

32



Medical Eligibility: Registration

Lesson 3: Manual Case Registration > Program Blocks

What is a Program Block?

A program block shows the program details for each program on the case. Some of the details that will display in the program block are:

- The program persons (applicants and the case persons financially responsible for them).
- The type of medical coverage being requested.
- The status of the medical request.
- The worker or work team assigned to the program block.



Medical Eligibility: Registration

Lesson 3: Registration > Program Blocks

KDHE managed medical programs and DCF managed medical programs can live together on the same case number, but are never combined on the same program block.

Once a KDHE medical program block or DCF medical program block becomes active, it remains a program block for that agency. This means that if it should become inactive at some point, it should not be used as a program block for the other agency.

PPS will have only one program block for FC/AS medical and will be on their own case number.



Medical Eligibility: Registration

Lesson 3: Registration > Program Blocks

How to tell which agency “owns” the program block:

On the **Person View** page - under Worker - the first letter will be a “D” for DCF or “K” for KDHE. This same information can be located on the program block itself.

The screenshot shows the 'Person View' page in the KEES system. The page is divided into several sections:

- Person Detail Summary:** Displays personal information for James Lemon, including SSN (159789856), Date of Birth (04/01/1955), Alias SSN(s), Gender (Male), Home Address (7635 N MAIN STREET, TOPEKA, KS 66601), and Client ID (0010011768).
- Person Case History:** Includes a link for 'Associated Individuals'.
- Systems:** A row of buttons for different systems: KE, CS, FA, KM, and CN.
- TANF Months:** Shows 0 months.
- GA Months:** Shows 0 months.
- ABAWD Months:** Shows 0 months.
- Program Block Table:** A table with columns: 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), and Worker. The 'Worker' column contains links to worker IDs: KH0206Q100 and KH0206Q100.

A red box highlights the 'Worker' column in the table, showing the worker ID 'KH0206Q100' for the first two rows.



Medical Eligibility: Registration

Lesson 3: Registration > Program Blocks

Long Term Care (LTC) and Home and Community Based Services (HCBS) recipients each get their own Medical program block, however they can share a case number with any other medical program other than PPS.

PPS will use the same program block for PPS, LTC and HCBS. They will just update the RMT as needed.



Medical Eligibility: Registration

Lesson 3: Registration > Program Blocks

Husband and Wife both requesting a Medicare Savings Program

- Add both applicants at the same time to a Medical program block.

Husband requesting LTC and wife requesting a Medicare Savings Program

- Each applicant will get their own Medical program block.
- Only one program can be added during the initial Registration process.

The key is in understanding which program types can share a program block, and which cannot.



Medical Eligibility: Registration

Family of four all requesting Family Medical

- Add all applicants at the same time to a Medical program block.

Same family of four but one child is requesting HCBS

- Family Medical applicants are added to the same Medical program block at the same time. Other child will need a separate Medical program block.
- Only one program can be added during the initial Registration process.



Medical Eligibility: Registration

Lesson 3: Registration > Administrative Roles

PPS- Administrative Role

- Child will always display as the Primary Applicant/Recipient.
- Begin Date for Medical will always default to the first day of the month. If the child is eligible one day in the month they are eligible for the entire month.
This date should never be changed.
- A “Placement Provider” will always be assigned from the Resource Data Bank for Foster Care Medical cases. Exception is if child is in detention or PRTF.
- A “PPS Payee will always be assigned from the RDB for Adoption Medical cases.
- Begin Date for Placement Provider or PPS Payee is the actual date of placement with that provider.



Medical Eligibility: Registration

Lesson 3: Registration > Administrative Roles

PPS

Case Name: Michelle Mitchell
Case Number: 20000764
Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env: NDD22

Case Info Eligibility Services Child Care 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

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

Medical Program Detail

* - Indicates required fields

Date: *

Program Information

Status: *	Status Reason:	Household Premium Amount:
Active		0.00

Application Date: *	Review Begin Month:	Review Due Month: *	Delinquent Premiums:	Date:
11/05/2014 <input type="button" value="Edit"/>	11/2014	<input type="text" value="10/2015"/>		

Automatically Reassign When Activated:	Assign To Medical Only:	Delinquent Premium Amount:
<input type="text" value="No"/>	<input type="text" value="No"/>	<input type="text"/>

Administrative Roles

Name	Administrative Role	Begin Date	End Date
Michelle L Mitchell	Primary Applicant/Recipient	11/01/2014	
CINDY THOMAS	Placement Provider	11/05/2014	

Program Persons

Name	CE	Requested Medicaid Type	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Michelle L Mitchell		PPS	Primary Applicant	MEM		Active	



Medical Eligibility: Registration

Lesson 3: Registration > Pending Assignment List

Case Name: James Lemon
Case Number: 20002921

Journal Tasks Reminders Contact Log Logout Help
User : DANA GEORGE
Env : PRD-Test
Ver : 2.5.004.1
Time : 12/04/2014 11:33 AM

Case Info Eligibility Services Child Care 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
Legacy Case
Access List

Pending Assignment List

Assign Close

Program	Previous Worker	Worker Id	Disc./ Denied
Medical			

Program Information

Assignment Options

Automatic Assignment
 Manual Assignment

Appointment Option

Appointment with Case Manager

Show Dates Starting On: Appointment Type: Both

Reassignment Option

Automatically Reassign When Activated:*
Yes

Assign Close

The **Pending Assignment List** page is used to assign a worker or work team to the newly created Medical program. The user can choose to either assign the program manually, or allow KEES to assign it automatically using behind-the-scenes logic.



Medical Eligibility: Registration

Lesson 3: Registration > Pending Assignment List

Case Name: James Lemon
Case Number: 20002921

Journal Tasks Reminders Contact Log Logout Help
User: DANA GEORGE
Env: PRD-Test
Ver: 2.5.004.1
Time: 12/04/2014 11:33 AM

Case Info Eligibility Services Child Care 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
- Legacy Case
- Access List

Pending Assignment List

Assign Close

<input checked="" type="checkbox"/>	Program	Previous Worker	Worker Id	Disc./ Denied
<input checked="" type="checkbox"/>	Medical			

Program Information

Assignment Options

Automatic Assignment

Manual Assignment

Select

Appointment Option

Appointment with Case Manager

Show Dates Starting On: Appointment Type: Both

Reassignment Option

Automatically Reassign When Activated:*
 Yes

Assign Close

To manually assign a program, the user will select the program they wish to assign, and then select the radio button to the left of Manual Assignment. Clicking on the **Select** button will take the user to the **Select Worker** page.

Medical Eligibility: Registration

Lesson 3: Registration > Select Worker

Case Name: Sally Sunshine
Case Number: 20000797

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/29/2014 01:33 PM

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

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Select Worker

▶ Refine Your Search

Search Results Summary Results 1 - 1 of 1

Name	Worker ID	Classification Title
<input checked="" type="radio"/> User, Office Num 35 Unit Num G1	DE3502G100	Other

- The user will enter the Worker ID from the Worker ID list or, for PPS cases, the user will enter their own Worker ID or their name to assign the case to themselves.



Medical Eligibility: Registration

Lesson 3: Registration > Pending Assignment List

- If automatic assignment is chosen, KEES applies behind-the-scenes logic to assign the program to the appropriate worker.
- If the auto assignment logic is unable to find a worker or work team that meets all of the auto assignment criteria, the user will need to manually assign the program.
- If this happens, no error message will display, the user simply stays on this page.



Medical Eligibility: Registration

Lesson 3: Registration > Pending Assignment List

PPS

- PPS Staff have individual caseloads.
- Cases will be manually assigned to individual workers.
- Always check “no” for automatically reassign when activated

Medical Eligibility: Registration

Lesson 3: Registration > Case Summary

Navigation: [New Application](#) | [Case Summary](#) | [Worker Assignment](#) | [Customer Schedule](#) | [e-Tools](#)

Case Number: Request ID: [Go](#) [Capture](#) [Images](#)

Case Summary

Person Search: [Go](#)

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Case Flag
- Legacy Case
- Access List

Case Name James Lemon	Mailing Address 7635 N MAIN STREET TOPEKA, KS 66601	Phone Number (785)335-1234	County of Residence Kansas
Home Address 7635 N MAIN STREET TOPEKA, KS 66601			

Companion Cases

Case Number	Case Name
Add	

Display: [View](#)

Medical Programs

Worker: Office Num 02 Unit Num Q1 User
 Worker ID: **KH02060100**
 Program Status: Active

Primary Applicant/Recipient: James Lemon
 Language: English
 Phone Number: (785)335-1234
 Application Date: 06/15/2014

Review Due Month: 05/2015 [Review](#)

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
▶ James Lemon	Medical	05/2015	Primary Applicant	MEM		Active	
▶ Jennifer Lemon	Medical	05/2015	Spouse	MEM		Active	

[View Details](#)

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
James Lemon	04/01/1955	159-78-9856	0010011768	
Jennifer Lemon	03/25/1956	358-66-4581	0010011769	

The **Case Summary** page allows the user to view all of the information that was just entered when creating the case. At this point, the case creation process is complete but there are a few final steps that need taken to finish the registration process.



Medical Eligibility: Registration

Lesson 3: Registration > Additional steps

- Update RMT as needed
- Add additional program blocks as needed
- Update the primary applicant as needed
- Update the contact information as needed
- Update the household status (per your agency's policy)
- Verify the task priority set correctly (Clearinghouse only)



Medical Eligibility: Registration

Lesson 3: Registration > Update RMT

The Requested Medical Type (RMT) is a data element associated to a person's application which will restrict the rules' medical hierarchy.

This is used to apply for only a specific type of medical benefit (such as: MAGI, LTC, MSP, PPS, etc.)

It is important that the RMT be set correctly for each applicant.

Case Name: Michelle Mitchell
Case Number: 20000764

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/17/2014 11:53 AM

Case Info Eligibility Services Child Care 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
Person Search
Case Summary Contact Negative Action New Program New Person Hide Person Legacy Case Access List

Requested Medicaid Type Detail

Requested Medicaid Type Information

Requested Medicaid Type:* PPS
Begin Month:* 11/2014
End Month:

Save and Return Cancel

Inmate
LTC
MAGI
MSP
Medical
PPS
Qualified Disabled Working Individual
Resource Assessment Only
Working Healthy

Save and Return Cancel



Medical Eligibility: Registration

Lesson 3: Registration > Update RMT

- **REQUESTED MEDICAL TYPES:**

- **Inmate**- Used when Inmate medical is requested
- **LTC**- Used when an applicant requests LTC/HCBS only
- **MAGI**- Used for all other Clearinghouse requests
- **MSP**- Used when an applicant requests a Medicare Savings Program only
- **Medical**- Used for all other DCF requests
- **PPS**- Used for FC/AA medical requests
- **Qualified Disabled Working Individual**- Used for QWD requests
- **Resource Assessment Only**- Used for Resource Assessment Only requests
- **Working Healthy**- Used for Working Healthy requests



Medical Eligibility: Registration

Lesson 3: Registration > Contact Info

Once we have updated any necessary Requested Medical Types we will look at updating contact information.

- If any of the Case Persons were previously known to KEES, they may have had a change in contact information.
- It is easiest to update this information from within the context of the case (rather than during the Registration flow).
- Contact information (specifically address) is updated through the Contact Summary page.



Medical Eligibility: Registration

Lesson 3: Registration > Contact Summary

Case Name: James Lemon
Case Number: 20000101

Journal Tasks Reminders Contact Log Logout Help
User: DANA GEORGE
Env: PRD-Test
Ver: 2.5.004.1
Time: 12/04/2014 11:54 AM

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

Contact Summary

Search Results Summary Results 1 - 4 of 4

Display From: To:

Person	Type	Address	Begin Date	End Date	Action
Lemon, James	Mailing	7635 N MAIN STREET TOPEKA, KS 66601	01/01/2014		Edit
Lemon, Jennifer	Mailing	7635 N MAIN STREET TOPEKA, KS 66601	01/01/2014		Edit
Lemon, Jennifer	Physical	7635 N MAIN STREET TOPEKA, KS 66601	01/01/2014		Edit
Lemon, James	Physical	7635 N MAIN STREET TOPEKA, KS 66601	01/01/2014		Edit

Search Address Add

Phone Numbers

Person	Phone Number	Type
Lemon,James	(785)335-1234	Cell

Search Address Add

The user can add a new address for any or all Case Persons from the **Contact Summary** page.



Medical Eligibility: Registration

Lesson 3: Registration > Contact Summary

Case Name: Michelle Mitchell
Case Number: 20000764

Journal Tasks Reminders Contact Log Logout Help

User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/11/2014 04:19 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

- Case Summary
- Contact**
 - Negative Action
 - New Program
 - New Person
 - Hide Person
 - Legacy Case
 - Access List

Contact Summary

Search Results Summary Results 1 - 2 of 2

Display From: To:

Person	Type	Address	Begin Date	End Date	Action
Mitchell, Michelle	Mailing	KVC - FC 416 S Main OTTAWA, KS 66067	11/05/2014		<input type="button" value="Edit"/>
Mitchell, Michelle	Physical	KVC - FC 416 S Main OTTAWA, KS 66067	11/05/2014		<input type="button" value="Edit"/>

PPS- Enter the Contract Manager's office as the mailing and physical address for the child, not the actual placement address. This is to ensure confidentiality of the foster home placement.



Medical Eligibility: Registration

Lesson 3: Registration > Additional Programs

If two separate Medical program blocks were needed now would be the time to go back and add that other program block.





Medical Eligibility: Registration

Lesson 3: Registration > Additional Programs

The process to add an additional program block is very similar to the process used to create the initial one.

- Add the program
- Select the Primary Applicant
- Add the RMT
- Assign a worker

.





Medical Eligibility: Registration

Lesson 3: Registration > Update Task

If you are at the KanCare Clearinghouse, you will need this one last step.

Because we want to ensure that the downstream workflow maintains the appropriate priority (ex: Expedited), it is important to double check it before completing your task.





Medical Eligibility: Registration

Lesson 3: Registration > Summary

In this lesson we covered:

- How to create a new case in KEES
- How to add a program
- What a program block is
- Who can share a program block
- How to assign a worker
- Updating Requested Medical Types
- Updating Contact Information
- Adding additional program blocks
- Updating task status (CH only)





Medical Eligibility: Registration

Agenda

- Lesson 1: Performing a Person Search
- Lesson 2: Completing File Clearance
- Lesson 3: Registration
- **Lesson 4: e-Summary Registration (CH only)**
- Lesson 5: Existing Case Registration





Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Introduction

The e-Summary Registration process is very similar to the Manual Registration process, with the biggest difference being that many of the steps can be skipped by the user as KEES will perform them automatically.





Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Introduction

e-Application Search

* - Indicates required fields

e-App Status: *
All

Expedited Services:
All

Type: *
 e-Application e-Change Recertification

Search By: *
All

Application Date Range
Begin Date: 12/10/2014 **End Date:** 12/10/2014

[Advanced Search](#)

Results per Page: 25 [Search](#)

Search Results Summary Results 1 - 25 of 66

Expedited Services	Recertification/Renewal	e-App Number	Applicant Name	Application Date	e-App Status	Case Number	Assigned Worker Id
No	No	1003910	ALLEN, CALVIN	12/10/2014	Pending		
No	No	1003840	ANDERSON, ROBERT	12/10/2014	Pending		
No	No	1003908	ANSPAUGH, PAULENE	12/10/2014	Pending		
No	No	1003845	BAMMES, YVONNE	12/10/2014	Pending		
No	No	1003835	BENITEZ ALVAREZ, MANUEL	12/10/2014	Pending		
No	No	1003924	BEURMAN, DALE	12/10/2014	Pending		
No	No	1003939	BONEBRAKE, BRENT	12/10/2014	Pending		
No	No	1003907	BOOR, TERRY	12/10/2014	Pending		
No	No	1003844	BROWN, BETTY	12/10/2014	Pending		
No	No	1003945	BROWN, EMMA	12/10/2014	Pending		
No	No	1003942	BROWN, JAMES	12/10/2014	Pending		

A user will select the **e-App Status** and **Type**. To make the search easier, the user may also want to choose a date range. Any e-Application falling within those criteria will be displayed. The user would then click the **e-Application Number** of the chosen case.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > e-Application Summary

e-Application Summary



Edit

Close

e-App Number: 1003951	e-App Status: Pending	Case Number:	e-App Source: SSP Medical
Application Date: 12/10/2014	Submit Date: 12/10/2014 14:27:02	Authorized Representative:	
Office: Topeka Service Center 500 S.W. Van Buren Topeka, KS 66603			

Primary Applicant Information

First Name: Tammy	Middle Name:	Last Name: Brown
SSN: 515-55-5555	Date of Birth: 06/06/1983	Gender: Female
Language: English	Hispanic Indicator: No	
Marital Status: Divorced	Tribe:	

- ▶ Program Applications
- ▶ Race/Ethnic Origin
- ▶ Additional Information

Other Applicants

<input checked="" type="checkbox"/>	Name	SSN	Date of Birth	Gender	Transfer Status
<input checked="" type="checkbox"/>	Brown, Betty	112-22-2222	03/23/2003	Female	Pending

- ▶ Relationship
- ▶ Citizenship
- ▶ Pregnancy
- ▶ Other Program Assistance
- ▶ Non-Compliance
- ▶ Purchase and Prepare
- ▶ School Attendance
- ▶ Employment
- ▶ Striker

To begin the e-Application Registration process, the user will click the **Link e-App to Case** button in the upper-right corner.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Registration Person Search Results

The screenshot displays the 'Registration Person Search Results' page in the KEES system. The page header includes navigation tabs like 'Case Info', 'Eligibility', and 'Services'. A sidebar on the left contains 'Case Number', 'Request ID', 'Person Search', and 'Access List'. The main content area features a search form with the following fields and values:

- Last Name*: Brown
- First Name*: Tammy
- Middle Name/Initial: [Empty]
- Suffix: [Dropdown]
- Social Security Number: 515555555
- Date of Birth: 08/08/1983
- Alien Number: [Empty]
- Gender*: Female
- Client ID: [Empty]

A message above the form reads: "This person may already exist in the system. To avoid creating duplicate records, make sure the person you are searching for is not in the list below." Below the form, a legend indicates that an asterisk (*) denotes required fields. At the bottom right, there are buttons for 'Search', 'Add New Person', and 'Cancel', along with a 'Results per Page' dropdown set to 25 and a 'Search Results Summary' section showing 'Results 1 - 1 of 1'.

The user is brought directly to the **Registration Person Search Results** page. The information has been pulled in from the e-App Summary automatically. Since the person was not known to **KEES**, the user will click the **Add New Person** button. Had the person been known to **KEES**, the user would click the radio button to the left of the person's name and click **Select**.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Registration Person Detail

Registration Person Detail Save and Continue

* - Indicates required fields

Name: Tammy Brown	Date of Birth: 06/06/1983	Gender: Female
Social Security Number: 515-55-5555	Client ID: 0010001901	Alternative Client ID: <input type="text"/>

Addresses:

<input type="checkbox"/> Mailing 2121 SW 3RD AVE Topeka, KS 66603	Edit
<input type="checkbox"/> Physical 2121 SW 3RD AVE Topeka, KS 66603	Edit

Remove Add Address

Phone Number: <input type="text"/>	Phone Number Type: Cell	Email Address: <input type="text"/>
--	-----------------------------------	---

International Phone Number:
 -
(xxx)

xxx - Indicates International Calling Code Save and Continue

This brings the user to the **Registration Person Detail** page, and just like in the Manual Registration Process, the user would enter the person's Alternative Client ID if they were only known to KAECSES. Then the user will click the **Save and Continue** button.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Case Member List

Case Member List

* - Indicates required fields

Case Name:
 Tammy Brown

Name	SSN	DOB
Tammy Brown	515-55-5555	06/06/1983

KEES will continue to give the **Add Person** option until all Case Persons have been file cleared.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Case Member List

Case Member List

* Indicates required fields

Case Name:
Tammy Brown

Name	SSN	DOB
Tammy Brown	515-55-5555	06/06/1983
Betty Brown	112-22-2222	03/23/2003

Remove

Once all Case Persons have been file cleared, the **Save and Continue** button will display.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Pending Assignment List

Case Name: Tammy Brown
 Case Number: 20000770

Journal Tasks Reminders Contact Log Logout Help
 User: Dana George
 Env: NPD22
 Ver: 2.6.000.0.1
 Time: 12/10/2014 04:29 PM

Case Info Eligibility Services Child Care 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

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

Pending Assignment List

<input checked="" type="checkbox"/>	Program	Previous Worker	Worker Id	Disc./ Denied
<input checked="" type="checkbox"/>	Medical			
<input checked="" type="checkbox"/>	Medical			

Assignment Options

- Automatic Assignment
- Manual Assignment

Appointment Option

Appointment with Case Manager

Show Dates Starting On:

Appointment Type:

Reassignment Option

Automatically Reassign When Activated: *

The **Pending Assignment List** page works the same as in the Manual Registration Process – the user can either choose **Automatic Assignment** or **Manual Assignment**.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Worker Assignment Logic

Basic automatic worker assignment logic:

- If Outstationed Worker assistance was indicated, assign to the Outstationed Worker ID.
- If ALL persons on the program block requested Long Term Care (LTC), assign to DCF.
- If ALL persons on the program block requested Medicare Savings Program (MSP), or are age 65 or older and not pregnant, or are a Medicare recipient and not pregnant, assign to DCF.
- All other requests are assigned to the Clearinghouse.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > e-Application Summary

The screenshot shows the 'e-Application Summary' page in the KEES system. The page includes a navigation menu at the top with options like 'Journal', 'Tasks', 'Reminders', 'Contact Log', 'Logout', and 'Help'. Below the navigation is a secondary menu with 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The main content area displays the following information:

e-App Number: 1003951	e-App Status: In Progress	Case Number: 20000770	e-App Source: SSP Medical
Application Date: 12/10/2014	Submit Date: 12/10/2014 14:27:02	Authorized Representative:	
Office: Topeka Service Center 500 S.W. Van Buren Topeka, KS 66603			
Primary Applicant Information			
First Name: Tammy	Middle Name:	Last Name: Brown	
SSN: 515-55-5555	Date of Birth: 06/06/1983	Gender: Female	
Language: English	Hispanic Indicator: No		
Marital Status: Divorced	Tribe:		

Once worker assignment is complete, the user is returned to the **e-Application Summary** page. The information has now been linked to a case number. Clicking on the case number hyperlink will take the user to the **Case Summary** page.



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Additional Steps

Now that the e-Summary Registration process is complete, we need to verify that everything was set up correctly.





Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Verify Case Persons

The screenshot displays the 'e-Application Summary' page in the KEES system. The interface includes a top navigation bar with options like 'Journal', 'Tasks', 'Reminders', 'Contact Log', 'Logout', and 'Help'. Below this is a secondary navigation bar with tabs for 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The 'Worker Portal' tab is active. The main content area shows the 'e-Application Summary' for Case Number 20000770. The 'e-App Source' field is highlighted with a red box and contains the value 'SSP Medical'. Other fields include 'e-App Number: 1003951', 'e-App Status: In Progress', 'Application Date: 12/10/2014', 'Submit Date: 12/10/2014 14:27:02', and 'Office: Topeka Service Center, 500 S.W. Van Buren, Topeka, KS 66603'. The 'Primary Applicant Information' section lists: First Name: Tammy, Middle Name: (blank), Last Name: Brown, SSN: 515-55-5555, Date of Birth: 06/06/1983, Gender: Female, Language: English, Hispanic Indicator: No, Marital Status: Divorced, and Tribe: (blank). A 'Program Applications' section is partially visible at the bottom.

The Worker Portal only allows for the data entry of up to eight persons. If more than eight persons were listed on the application, the worker will need to manually file clear them and register them to the newly created case number.

Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Check Program Block

You may have also noticed that one of the biggest differences between the manual registration process and the e-Application Summary process is that **KEES** automatically selected the:

- Program
- Program Persons
- Requested Medical Type
- The worker (Clearinghouse/DCF)



Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Check Program Block

Medical Programs

Worker: Office Num 46 Unit Num G1 User
Worker ID: [DE4602G100](#)
Program Status: Pending

Primary Applicant/Recipient: Tammy Brown
Language: English
Phone Number: (785)555-5555
Application Date: 12/10/2014

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Betty Brown	LTC		Child	MEM		Pending	

[View Details](#)

Medical Programs

Worker: Office Num 02 Unit Num Q1 User
Worker ID: [KH0206Q100](#)
Program Status: Pending

Primary Applicant/Recipient: Tammy Brown
Language: English
Phone Number: (785)555-5555
Application Date: 12/10/2014

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Tammy Brown	MAGI		Primary Applicant	MEM		Pending	

[View Details](#)

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Betty Brown	03/23/2003	112-22-2222	0010001902	In the Home
Tammy Brown(pq)	06/06/1983	515-55-5555	0010001901	

All SSP Users Linked To This Case

Check the **Case Summary** page to verify if any of the Program Persons need to be added or removed from the program block due to their RMT.

Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Check Program Block

Remember

- KDHE managed medical programs and DCF managed medical programs can never be combined on the same program block.
- LTC/HCBS applicants must always get their own Medical Program block.





Medical Eligibility: Registration

Lesson 4: e-Summary Registration > Check Program Block

If there is more than one consumer on the application, the user will need to consider how many program blocks are needed.

- MAGI, MAGI = 1 program block
- MAGI, MEDICAL = 2 program blocks
- MAGI, LTC = 2 program blocks
- MAGI, MSP = 2 program blocks
- MAGI, LTC, MSP = 3 program blocks
- LTC, LTC = 2 program blocks
- LTC, MSP = 2 program blocks
- MSP, MSP = 1 program block

Medical Eligibility: Registration

Agenda

- Lesson 1: Performing a Person Search
- Lesson 2: Completing File Clearance
- Lesson 3: Registration
- Lesson 4: e-Summary Registration (CH only)
- **Lesson 5: Existing Case Registration**



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Introduction

In this lesson we will look at what steps are needed for existing case registration.



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

The most important thing to remember about existing case registration is that a user must find a usable case number.

Are all persons listed on the application also listed under the “All People Associated with the Case” block?

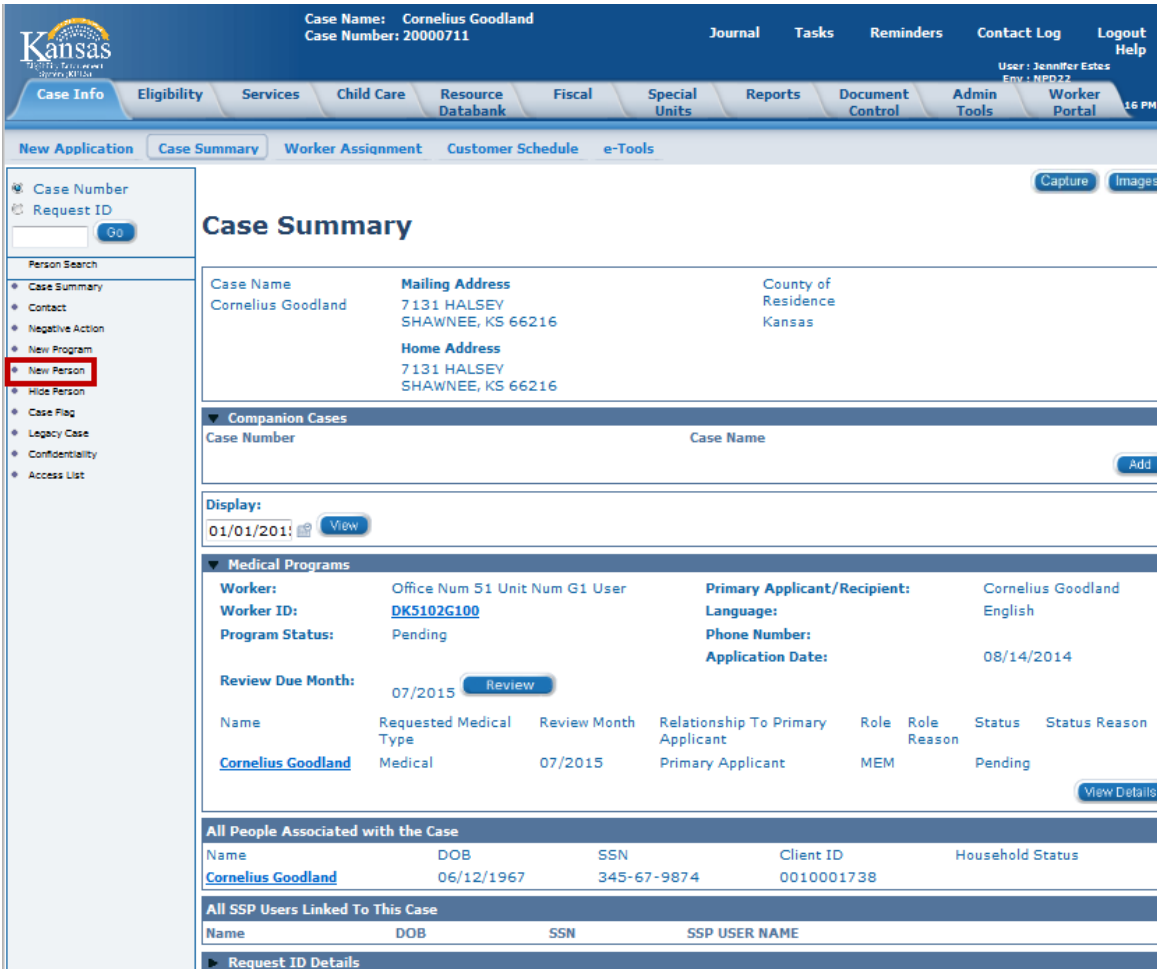
- If any persons need to be added to the case, complete the Add A Case Person Process.



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

On the **Case Summary** page select **New Person** in the Task Navigation to access the **Registration Person Search** page.



Case Name: Cornelius Goodland
Case Number: 20000711

Journal Tasks Reminders Contact Log Logout Help
User: Jennifer Estes Env: NPD22 16 PM

Case Info Eligibility Services Child Care 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
- Case Flag
- Legacy Case
- Confidentiality
- Access List

Case Summary

Capture Images

Case Name	Mailing Address	County of Residence
Cornelius Goodland	7131 HALSEY SHAWNEE, KS 66216	Kansas
	Home Address	
	7131 HALSEY SHAWNEE, KS 66216	

Companion Cases

Case Number	Case Name

Add

Display: 01/01/2011 View

Medical Programs

Worker:	Office Num 51 Unit Num G1 User	Primary Applicant/Recipient:	Cornelius Goodland
Worker ID:	DK5102G100	Language:	English
Program Status:	Pending	Phone Number:	
Review Due Month:	07/2015 Review	Application Date:	08/14/2014

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Cornelius Goodland	Medical	07/2015	Primary Applicant	MEM		Pending	

View Details

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Cornelius Goodland	06/12/1967	345-67-9874	0010001738	

All SSP Users Linked To This Case

Name	DOB	SSN	SSP USER NAME

Request ID Details



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

Case Name: Cornelius Goodland
Case Number: 20000711
Journal Tasks Reminders Contact Log Logout Help
User: Jennifer Estes
Env: NPD22

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

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

Case Number
Request ID

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- **New Person**
- Hide Person
- Legacy Case
- Confidentiality
- Access List

Registration Person Search Search

* - Indicates required fields

First Name: *	Middle Name/Initial:	Last Name: *	Suffix:
<input type="text" value="Lawrence"/>	<input type="text"/>	<input type="text" value="Goodland"/>	<input type="text"/>
Social Security Number:	Date of Birth:	Age Range:	Gender:
<input type="text" value="555669878"/>	<input type="text" value="03/03/2002"/>	<input type="text"/> - <input type="text"/>	<input type="text"/>
Relationships:		Aliases:	
First Name:	Last Name:	First Name:	Last Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address Line 1:		Client ID:	
<input type="text"/>		<input type="text"/>	
Address Line 2:			
<input type="text"/>			
City:	State:	ZIP Code:	
<input type="text"/>	<input type="text" value="Kansas"/>	<input type="text"/>	
<input type="checkbox"/> Display Relationships		<input type="checkbox"/> Display Aliases	

Results per Page: Search



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

Case Name: Cornelius Goodland
Case Number: 20000711
Journal Tasks Reminders Contact Log Logout Help

User: Jennifer Estes
Emp: NPD22

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

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

Case Number
Request ID

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Confidentiality
- Access List

Registration Person Detail

* - Indicates required fields

Name: Lawrence Goodland	Date of Birth: 03/03/2002	Gender:
Social Security Number: 555-66-9878	Client ID: 0010001812	Alternative Client ID: <input type="text"/>
Addresses: <input type="text"/>		
Phone Number:	Phone Number Type: <input type="text"/>	Email Address: <input type="text"/>
International Phone Number: <input type="text"/> - <input type="text"/> (xxx)		

xxx - Indicates International Calling Code

Addresses:

Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

Case Name: Cornelius Goodland
Case Number: 20000711

Journal Tasks Reminders Contact Log Logout Help
User: Jennifer Estes Env: NPD22

Case Info Eligibility Services Child Care Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal 17 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
- Legacy Case
- Confidentiality
- Access List

Case Member List

* - Indicates required fields

Name	SSN	DOB
<input type="checkbox"/> Lawrence Goodland	555-66-9878	03/03/2002

Remove

Add Person Save and Continue

Add Person Save and Continue

or

The **Case Member List** page displays. To repeat the File Clearance process for another new Case Person, click **Add Person**. If no other Case Persons are needed, click the **Save and Continue** button.

Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Case Persons

Capture Images

Case Number

Request ID

 Go

Case Summary

Case Name
Cornelius Goodland

Mailing Address
7131 HALSEY
SHAWNEE, KS 66216

County of Residence
Kansas

Home Address
7131 HALSEY
SHAWNEE, KS 66216

Companion Cases

Case Number	Case Name
Add	

Display:

01/01/2011 View

Medical Programs

Worker:	Office Num 51 Unit Num G1 User	Primary Applicant/Recipient:	Cornelius Goodland
Worker ID:	DK5102G100	Language:	English
Program Status:	Pending	Phone Number:	
		Application Date:	08/14/2014
Review Due Month:	07/2015 Review		

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Cornelius Goodland	Medical	07/2015	Primary Applicant	MEM		Pending	

View Details

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Cornelius Goodland	06/12/1967	345-67-9874	0010001738	
Lawrence Goodland	03/03/2002	555-66-9878	0010001812	

All SSP Users Linked To This Case

Name	DOB	SSN	SSP USER NAME
No users found.			

Request ID Details

After the **Save and Continue** button is selected the **Case** page displays with the new person added to the case.



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Program Person

Can any of the applicants be added to any of the program blocks? If yes, complete one of the following:

- Rescind Program Person
- Reapply Program Person
- Add Program Person

If no, the user would add a new program block



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Program Person

The **Medical Program Detail** page is where to find the reapply and rescind buttons.

Case Name: Merri Christmas
Case Number: 20000802

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/29/2014 03:36 PM

Case Info Eligibility Services Child Care 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
Legacy Case
Access List

Medical Program Detail

* - Indicates required fields

Date: 12/29/2014 View

View History TMC Save and Return Cancel

Program Information

Status: *	Status Reason:	Household Premium Amount:
Denied	No Eligible Mem	0.00
Application Date: *	Delinquent Premiums:	Date:
05/05/2011		
Automatically Reassign When Activated:	Assign To Medical Only:	Delinquent Premium Amount:
Yes	No	

Administrative Roles

Name	Administrative Role	Begin Date	End Date
Merri Christmas	Primary Applicant/Recipient	05/01/2011	

Edit Add

Program Persons

Name	CE	Requested Medicaid Type	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
<u>Merri Christmas</u>		Medical	Primary Applicant	MEM		Denied	Voluntary withdrawal

Rescind Reapply

Secondary Assignment

Worker
Select

View History TMC Save and Return Cancel



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Program Person

Case Name: Merri Christmas
Case Number: 20000802

Journal Tasks Reminders Contact Log Logout Help

Case Info
Eligibility
Services
Child Care
Resource Databank
Fiscal
Special Units
Reports
Document Control

User: Dana George
Admin Tools Worker Portal

New Application
Case Summary
Worker Assignment
Customer Schedule
e-Tools

Case Number
 Request ID

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Legacy Case
- Access List

New / Reapplication Detail

View Date: 12/29/2014 **Program Type:** Medical

Application Date:* 12/16/2014 **Beginning Date Of Aid:*** 12/01/2014

Requested Medicaid Type:*
MAGI

Inter-County Transfer:*
No

Assign To Medicaid Only:

<input type="checkbox"/>	Name*	DOB	Role	Role Reason	Status	Status Reason
<input checked="" type="checkbox"/>	Merri Christmas	05/08/1985	MEM		Denied	Voluntary Withdrawal

* - Indicates required fields

Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Add Program Person

Case Name: Merri Christmas
Case Number: 20000802

Journal | Tasks | Reminders | Contact Log | Logout | Help
User : Dana George
Env : NPD22
Ver : 2.6.000.0.1
Time : 12/29/2014 03:41 PM

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

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

Case Number (selected) | Request ID | Go

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Case Flag
- Legacy Case
- Access List

Case Summary

Case Name: Merri Christmas | County of Residence: Kansas

Companion Cases

Case Number	Case Name
Add	

Display: 12/29/2014 [View](#)

Medical Programs

Worker: Office Num 02 Unit Num Q1 User
 Worker ID: [KH02060100](#)
 Program Status: Pending

Primary Applicant/Recipient: Merri Christmas
 Language: English
 Phone Number:
 Application Date: 12/16/2014

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Merri Christmas	MAGI		Primary Applicant	MEM		Pending	

[View Details](#)

All People Associated with the Case

Name	DOB	SSN	Client ID	Household Status
Merri Christmas	05/08/1985	115-51-1515	0010002030	

The **Case Summary** page displays showing the applicant is in pending status with the new application date.



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Reapply/Add Program

Are there any applicants left that have not been addressed? If yes, complete one of the following:

- Reapply Program (if there is a usable inactive program block available)
- Add New Program (if there is no usable inactive program block)



Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Update Contact Info

If needed, a worker would then complete the steps below:

- Update or add RMT
- Update or add administrative role
- Update the worker
- Update contact information
- Complete the e-linking process
- Update the priority of the task





Medical Eligibility: Registration

Lesson 5: Existing Case Registration > Summary

This lesson has covered many different processes:

1. Add Case Person
2. Rescind/Reapply
3. Add Program Person
4. Add New Program
5. Update Contact Information (DCF only)
6. Update RMT
7. Add/Update Admin. Roles
8. Update Household Status
9. Reassign Work



That concludes the training. In this course, we reviewed the steps needed to complete the following processes in KEES:

- Person Search
- File Clearance
- Case Registration

