Kansas
Eligibility Enforcement System (KEES)

Medical Eligibility

Utility Navigation

Medical Eligibility: Utility Navigation

Introduction

Utility Navigation within the Kansas Eligibility Enforcement System (KEES) provides users the utilities or tools to:

- Manage their workload
- Track important events
- Log case related information

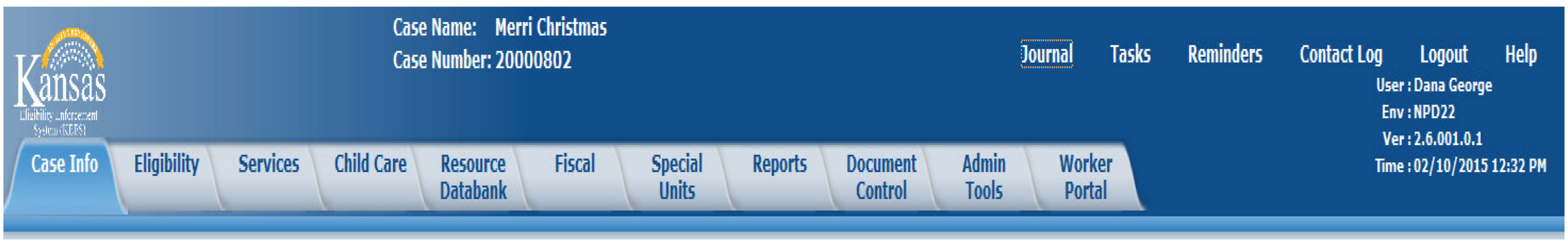
These tools are accessed through the Utility Navigation bar located in the upper right corner of the KEES page.

Medical Eligibility: Utility Navigation

Introduction

This is the Utility Navigation bar. The primary tools include:

- Journal, Tasks, Contact Log, Logout, and Help
- Reminders is not being used by either DCF or KDHE



Upon completion of this course, you will have the knowledge and skills to use these tools.

Medical Eligibility: Utility Navigation

Agenda

Lesson 1: Journal
Lesson 2: Tasks
Lesson 3: Contact Log
Lesson 4: Logout
Lesson 5: Help

After completing this course, you will be able to:

- Define Journal entries
- Add, Edit, Append, Suppress, Copy, Transfer entries
- Export (print) entries

The Journal provides the ability to record information and actions related to a case. It provides:

- A central location to quickly determine the current or historical actions specific to a case
- System generated journal entries
- Manually created journal entries

Lesson 1: Journal > Automatic Logs

Automatic journal entries are triggered by case activity and are generated in one of two ways:

Templates
A template utilizes different pieces of data from the Contact Log and generates a journal entry.

Auto Logs
A pre-scripted system message which is automatically produced when certain actions are taken.

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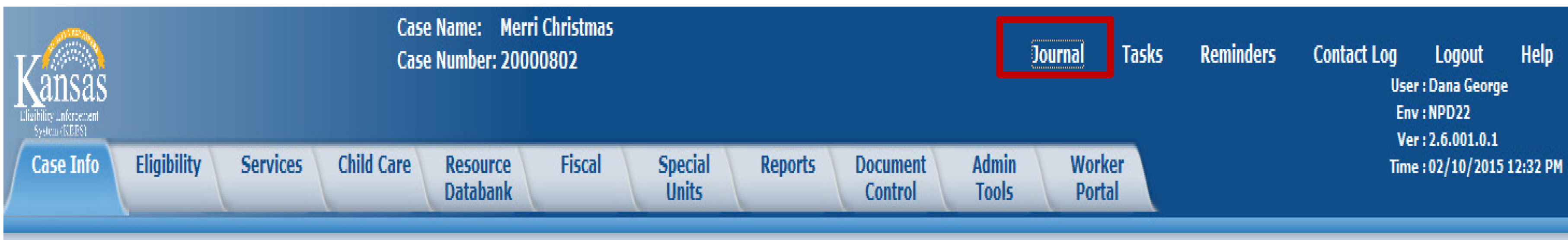
Lesson 1: Journal

In order to access the Journal List:

- Click the **Journal** hyperlink while in the context of a case
- The **Journal List** will appear in a separate window



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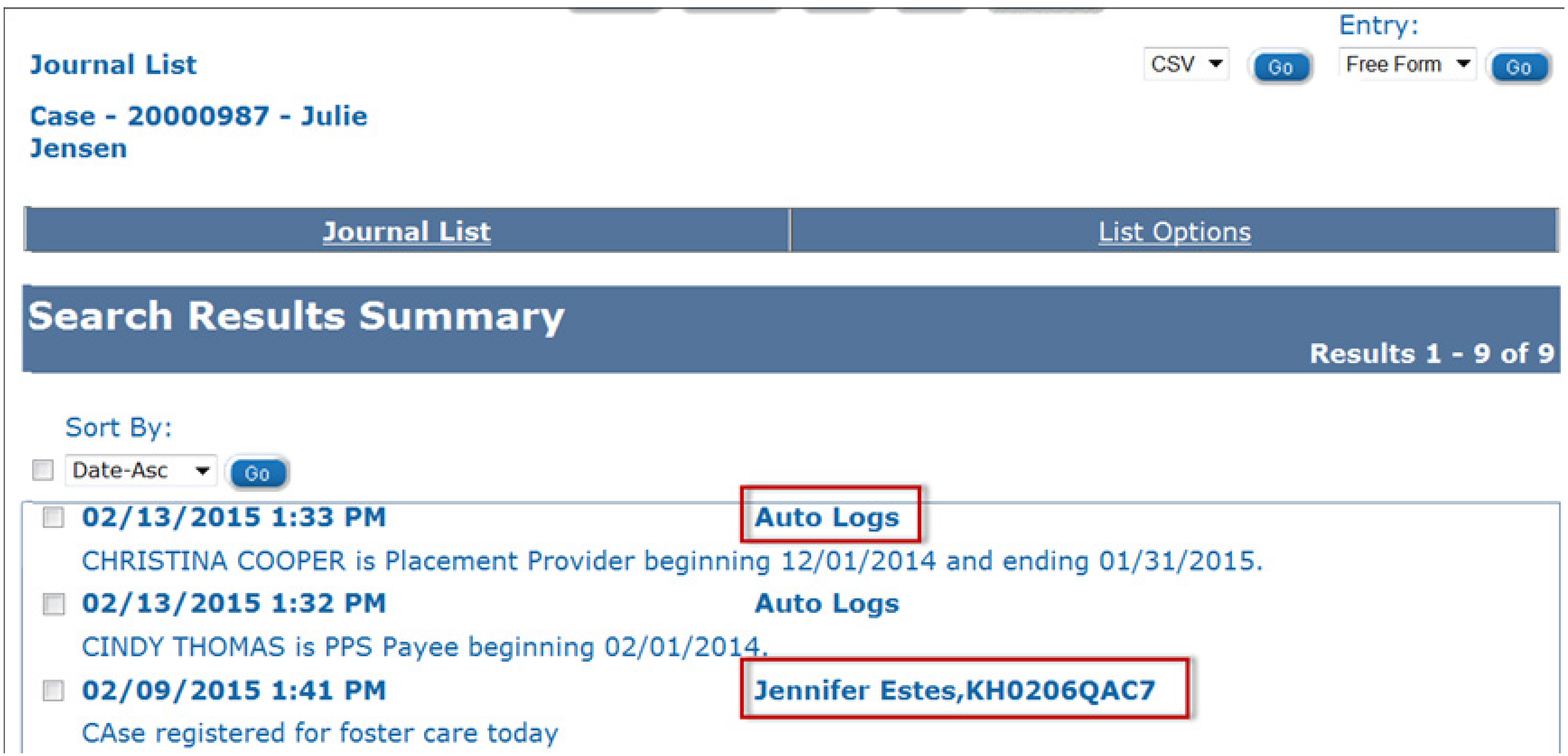
Lesson 1: Journal >Journal List

User entered logs are identified by the Worker's name and ID.



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Lesson 1: Journal > Journal List

The **Journal List** page displays the following fields:

- Journal List – Case Number and Case Name
- Action buttons: Append, Edit, Copy, Transfer
- Export
- Add Entry

In the **Search Results Summary** section, information is sorted by Date. User can sort by ascending or descending dates.

The search results show:

- Date of entry
- Time of entry
- Worker Name and ID/Auto Logs
- Text entry

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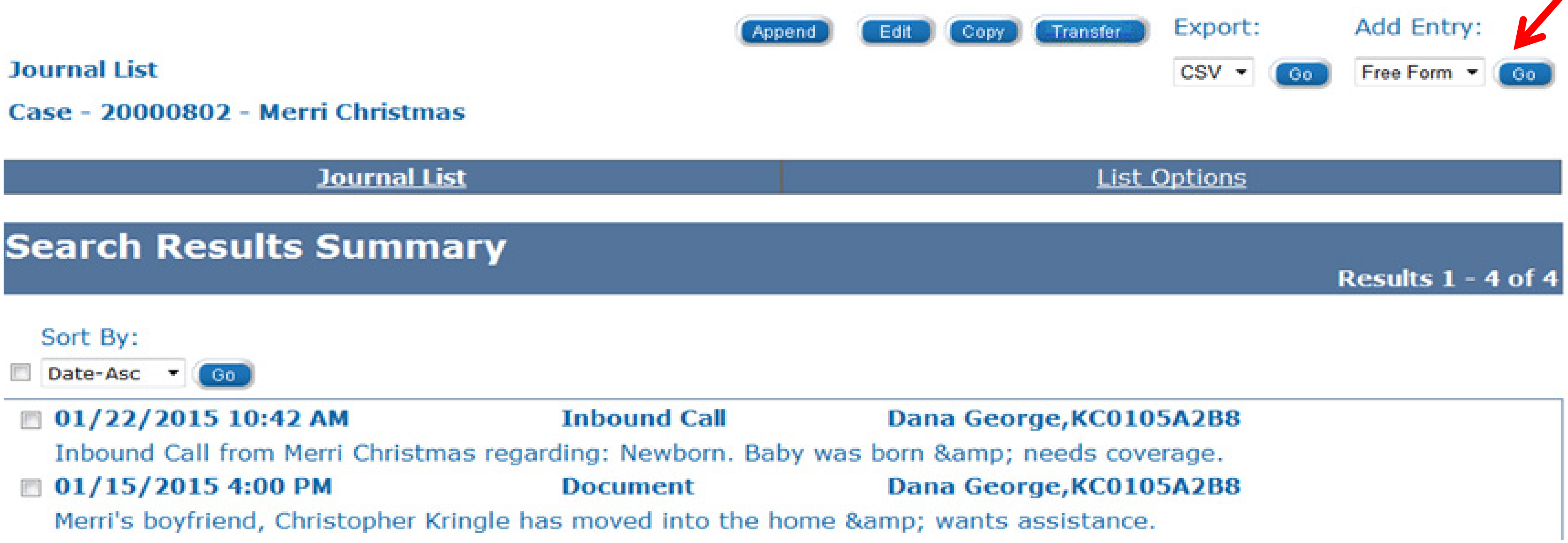
Lesson 1: Journal > Add Entry

To add a new journal entry, click the **Go** button associated to the **Add Entry** field. A new Journal Entry page displays in a new window.



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Lesson 1: Journal > Add Entry

Journal Entry

Check Spelling | Save | Cancel

(Dana George, KC0105A2B8)

Case Number:
20000802

Case Name:
Merri Christmas

Long Description:*

Enter the narrative in the Long Description box. Review the narrative

- Check Spelling
- Click the Save button to save the entry
- Click the Cancel button to return to the Journal List page without saving the entry

Check Spelling | Save | Cancel

*- Indicates required fields

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Lesson 1: Journal > Edit Entry

Editing a journal entry allows the user to create an entry that will replace the existing entry.

Please note:

- Only manual journal entries can be edited.
- A journal entry can only be edited by the creator.
- Editing may only be done on the same business day.

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Lesson 1: Journal > Edit Entry

To edit a journal entry:

- Click the check box to the left of the entry to be edited.
- Click the **Edit** button to open the Journal Entry page.

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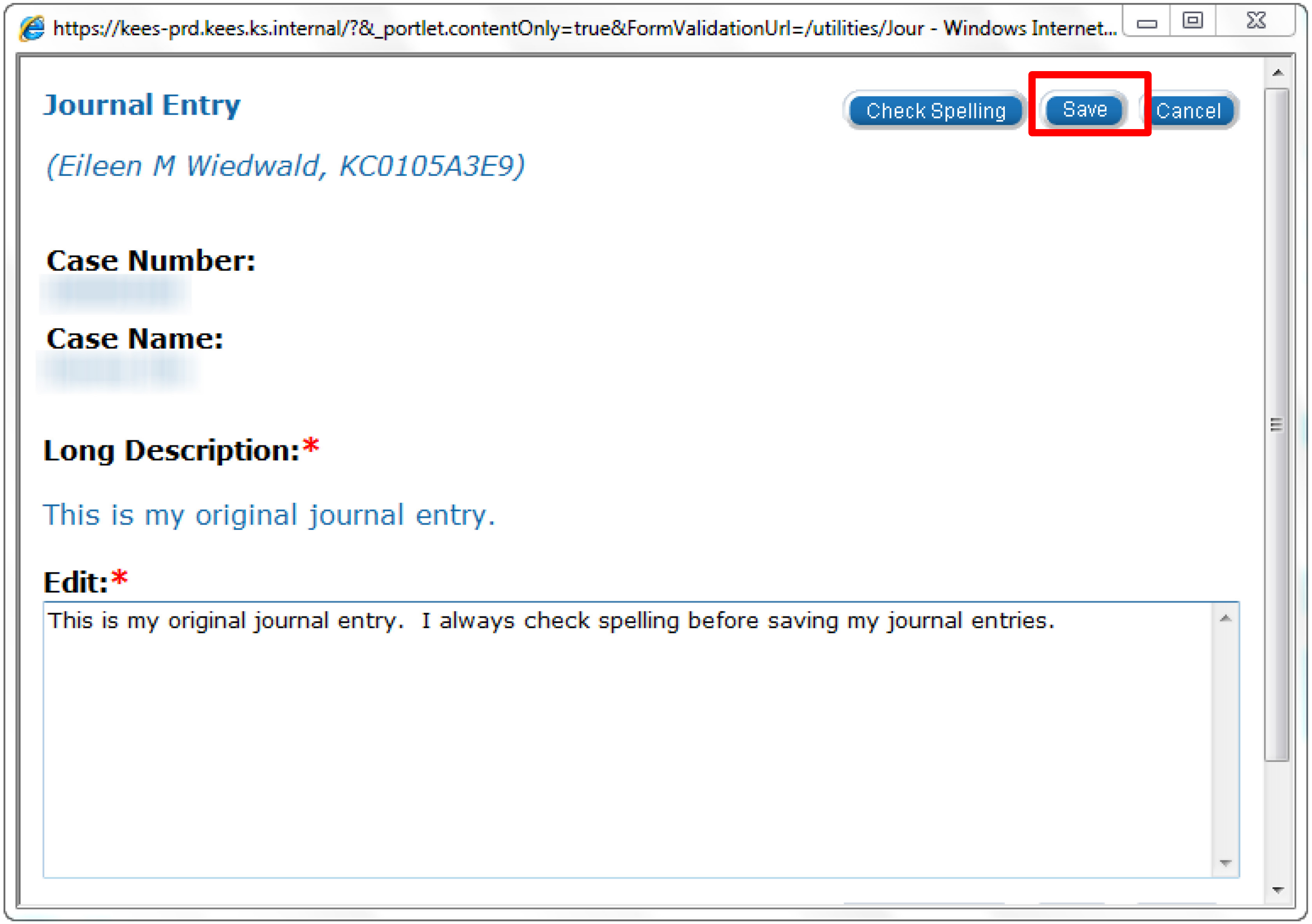
Lesson 1: Journal > Edit Entry



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Lesson 1: Journal > Append Entry

If additions to a journal entry are needed, the user can Append the entry.

Please note:

- All users can Append a Journal entry.
- Only manual journal entries can be appended.
- A journal entry can be appended unlimited times.
- Journal entries cannot be sorted or filtered by the date the entry was appended.
- It is best to avoid appending journal entries, unless the appended text relates directly to the original text.

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Lesson 1: Journal > Append Entry

To append a journal entry:

- Click the check box to the left of the entry to be appended.
- Click the **Append** button to open the Journal Entry page.

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Lesson 1: Journal > Append Entry

Journal Entry

Check Spelling | Save | Cancel

(Eileen M Wiedwald, KC0105A3E9)

Case Number:

Case Name:

Long Description:*
This is my original journal entry. I always check spelling before saving my journal entries.

Append:*
I am adding additional text to my original entry through the append functionality.

Check Spelling | Save | Cancel

*- Indicates required fields

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Lesson 1: Journal > Append Entry

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Lesson 1: Journal > Suppress Entry

Journal entries CANNOT be deleted. Suppressing a journal entry means the entry will only be visible to designated users.

Please note:

- Suppressing a journal entry is a feature that only certain users will be able to utilize.
- The Suppress button will not be visible to people without the proper security profile.
- Suppressed entries appear in the Journal List, but details cannot be accessed.
- When an entry is suppressed, all appended text is also suppressed.
- Suppressed Journal entries cannot be unsuppressed.

Journal entries may need to be suppressed when protecting confidential information such as in Foster Care cases or Adoption cases.

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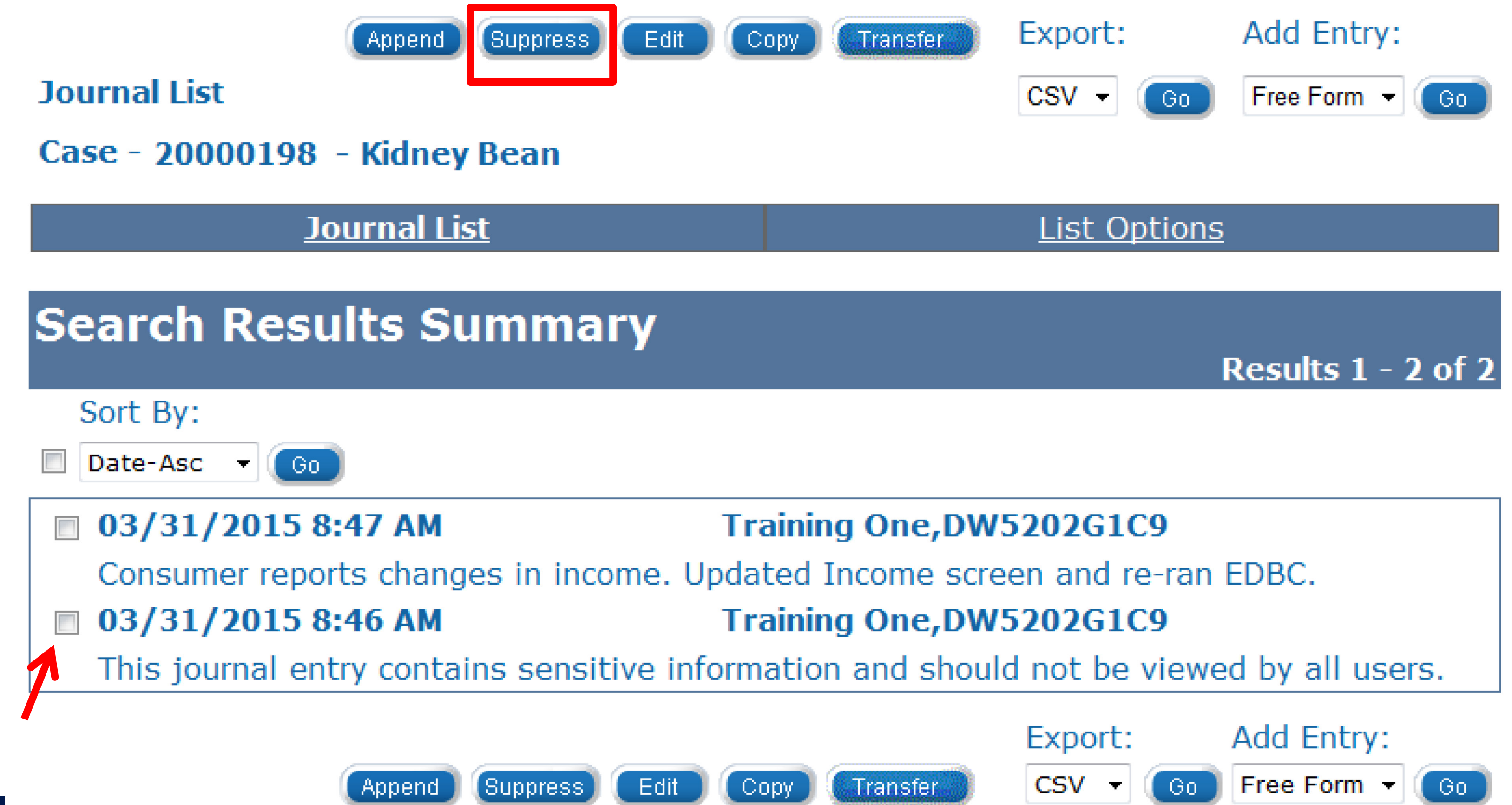
Lesson 1: Journal > Suppress Entry

To suppress a journal entry:

- Click the check box to the left of the entry to be suppressed.
- Click the **Suppress** button to open the **Journal Entry** page.



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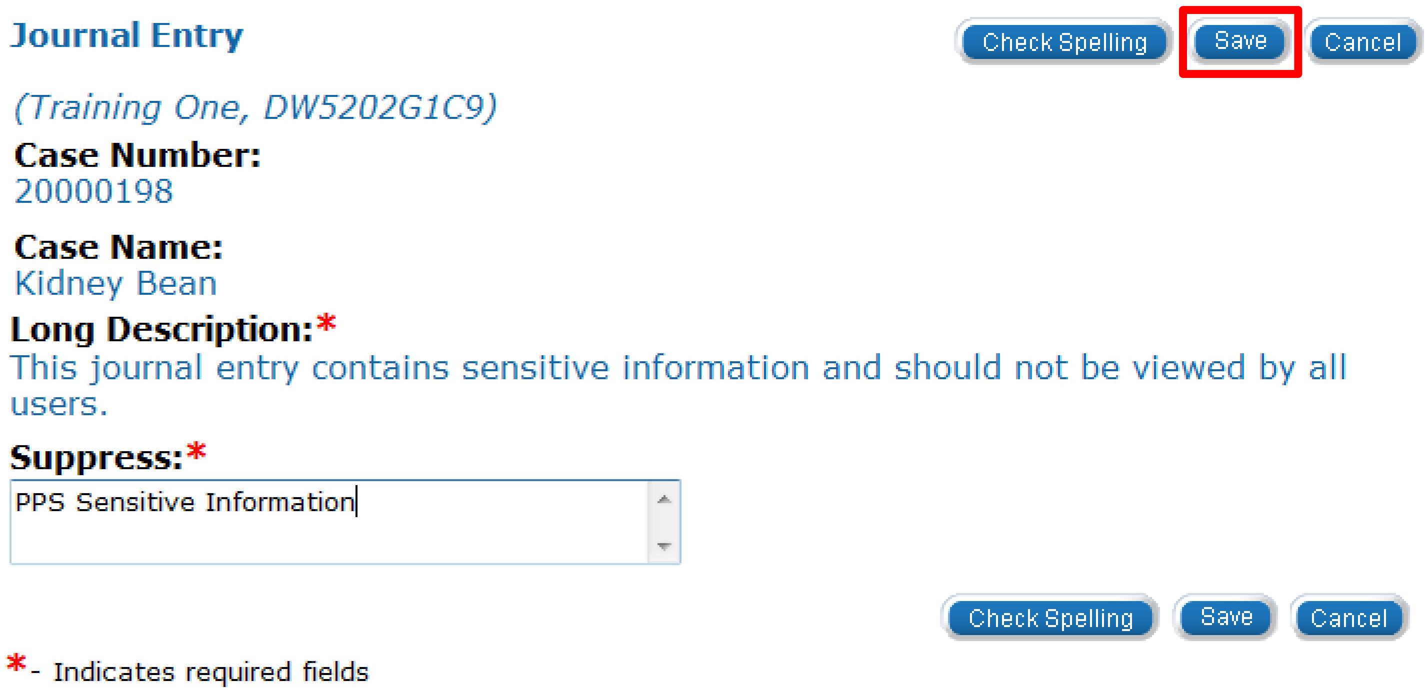
Lesson 1: Journal > Suppress Entry

- Enter the reason why the entry is being suppressed in the **Suppress** text box
- Click **Save**



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Lesson 1: Journal > Suppress Entry

The journal entry will appear on the list page with the long description displaying as **(Suppressed)**.

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Lesson 1: Journal > Copy Entry

The Journal has a Copy feature that will allow you to duplicate an entry on multiple cases.

Please note:

- When you copy a Journal entry, it remains visible on the original case. The same Journal entry will appear on both cases.
- Copying a journal entry is a feature that only certain users will be able to utilize.
- The Copy button will not be visible to people without the proper security profile.
- Ensure the case numbers are accurate when copying Journal entries.
    - The system will error only if the case number is not valid.
- When deciding whether or not to copy an entry, be mindful of HIPPA regulations.

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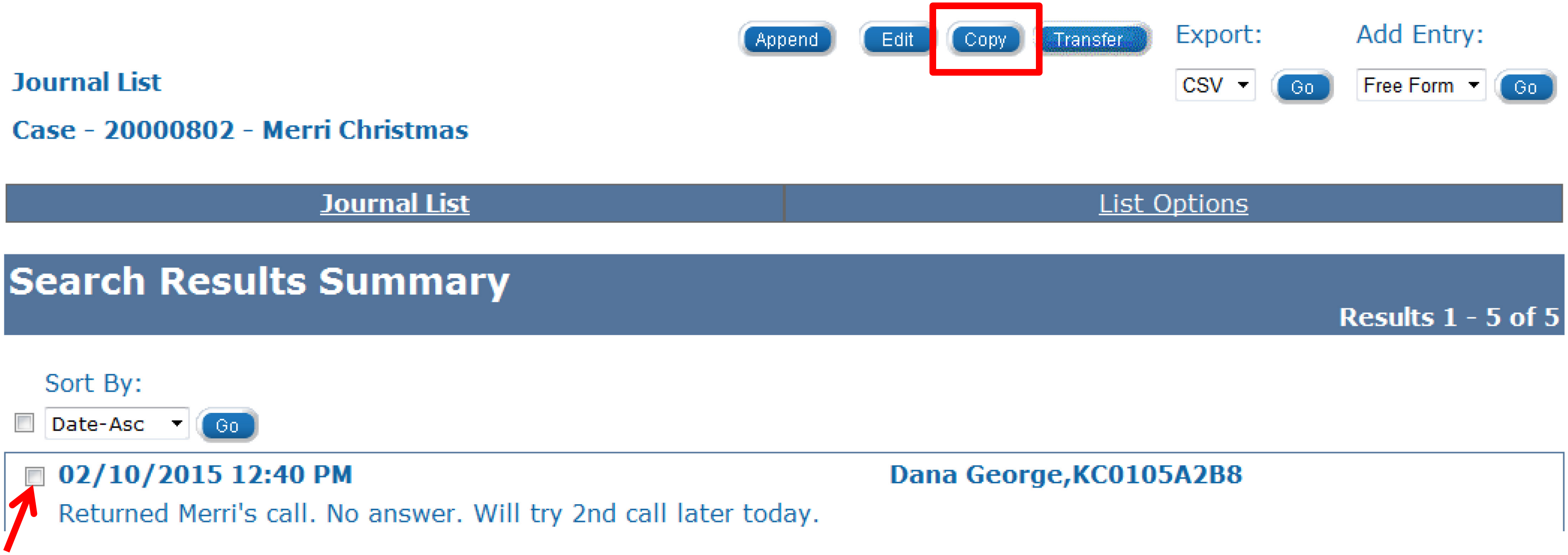
Lesson 1: Journal > Copy Entry

To copy a journal entry:

- Click the check box to the left of the entry to be copied.
- Click the **Copy** button to open the **Journal Entry: Copy** page.



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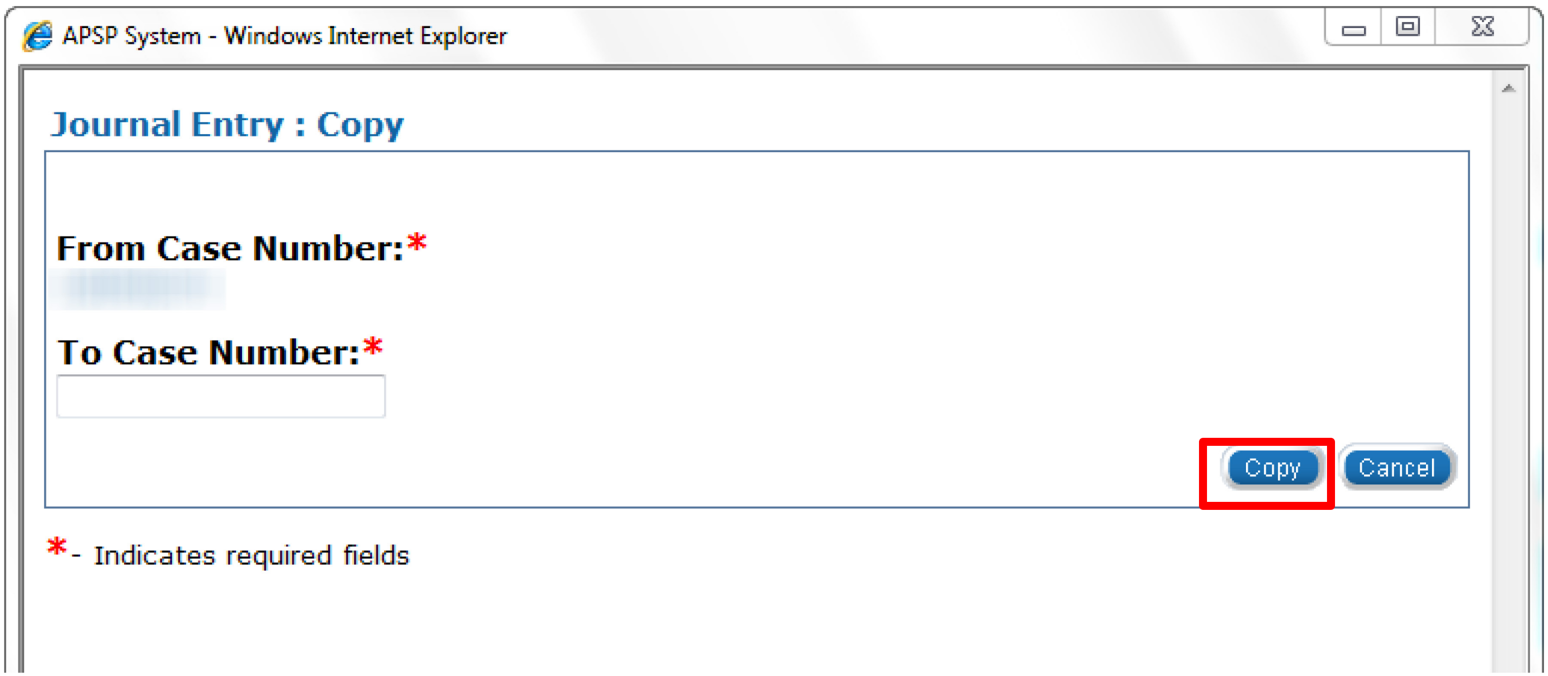
Lesson 1: Journal > Copy Entry

To copy a journal entry:

- Enter the case number
- Click the **Copy** button



The Journal has a Transfer feature that will allow you to remove an entry from one case and move it to another case.

Please note:

- When transferring a Journal entry, it no longer remains visible on the original case.
- Transferring a journal entry is a feature that only certain users will be able to utilize.
- The Transfer button will not be visible to people without the proper security profile.
- Ensure the case numbers are accurate when copying Journal entries.
    - The system will error only if the case number is not valid.

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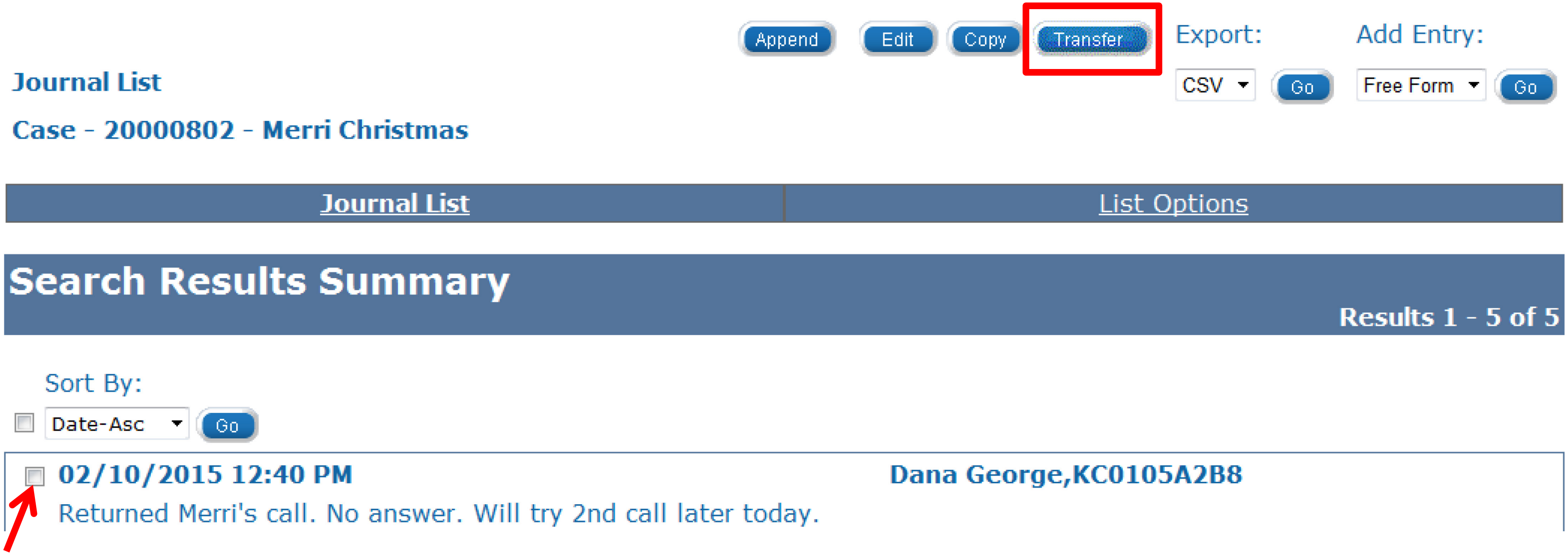
Lesson 1: Journal > Transfer Entry

To transfer a journal entry:

- Click the check box to the left of the entry to be transferred.
- Click the **Transfer** button to open the **Journal Entry: Transfer** page.



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Lesson 1: Journal > Transfer Entry

To transfer a journal entry:

- Enter the case number
- Click the **Transfer** button

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Lesson 1: Journal > Export/Print Entry

The Export/Print process is used:

- to produce a printed version of journal entries associated to a specific case
- in cases where Journal are a part of a fair hearing or fraud case.

Please note:

- An entire journal or selected journal entries may be printed.
- Only 50 journals can be exported at one time.
- The Journal can be exported in CSV (Excel) or Text (Notepad) which allows it to be printed in the selected format.

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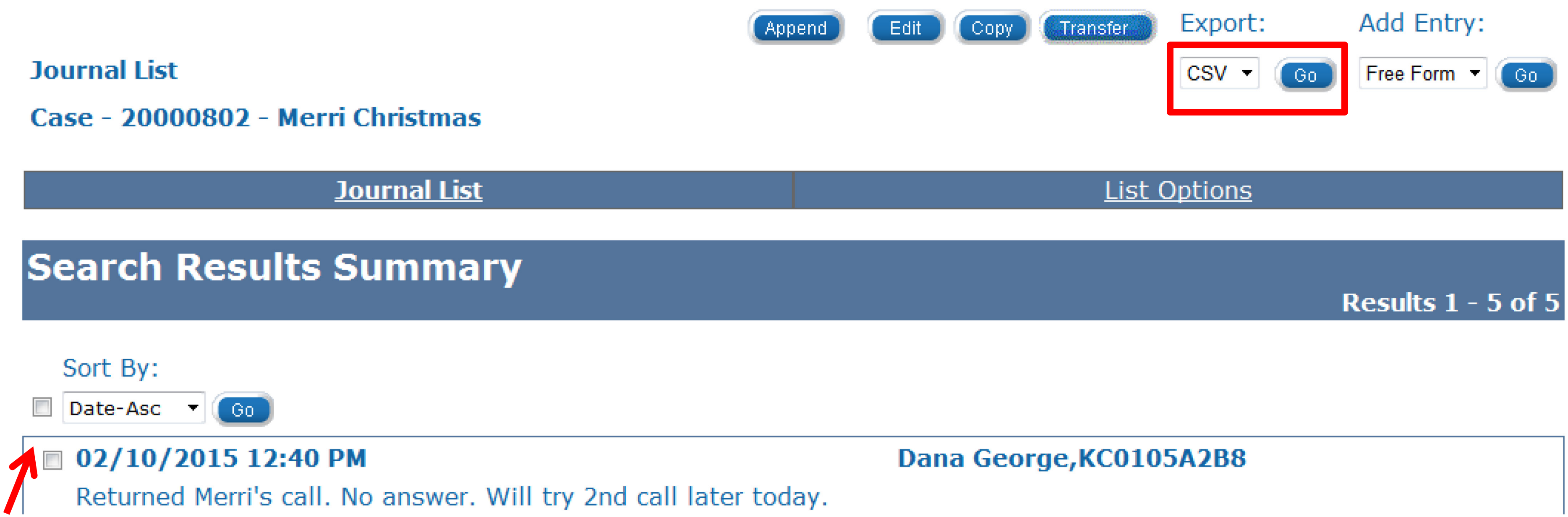
Lesson 1: Journal > Transfer Entry

To export a journal entry:

- Click the check box to the left of the entry to be exported.
    - The user can use the select all check box to the left of the **Sort By:** drop-down.
- From the Export drop-down menu select **CSV** (Excel) or **Text** (Notepad).
- Click **Go.**



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Lesson 1: Journal > Summary

In this lesson we have discussed how to:

- Add Journal entries
- Edit Journal entries
- Append Journal entries
- Suppress Journal entries
- Copy Journal entries
- Transfer Journal entries
- Export (print) Journal entries

Next, we will discuss Lesson 2: Tasks

Medical Eligibility: Utility Navigation

Agenda

- Lesson 1: Journal
- **Lesson 2: Tasks**
- Lesson 3: Contact Log
- Lesson 4: Logout
- Lesson 5: Help

Lesson 2: Tasks > Introduction

Tasks is the second tool accessible from the Utility Navigation bar to help KEES users manage their workload.

A task captures and assigns a need for specific program action to an individual or a work queue

Tasks can be assigned manually by a user or automatically by KEES.

Tasks can be created within the context of a case or created without an associated case number

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Lesson 2: Tasks > Introduction

After completion of this lesson you will be able to :

- Locate Tasks
- Add a Task
    - Create Future Tasks
- Claim a Task
- Release a Task
- Reassign a Task
- Complete a Task
- Void a Task

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Lesson 2: Tasks

Tasks can be viewed from the:

- **Task Portlet:** Contains a list of the tasks assigned to the user.
- **Task Inventory**: Allows a user to search for tasks using specific search criteria.
- **Task Management**: Allows a user to view all tasks related to a specific case.

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Lesson 2: Tasks > View Task

Task Portlet

Displays on the home page and contains a list of tasks assigned to user. Up to ten tasks will display. If more than ten tasks are assigned **Next** and **Previous** hyperlinks display.

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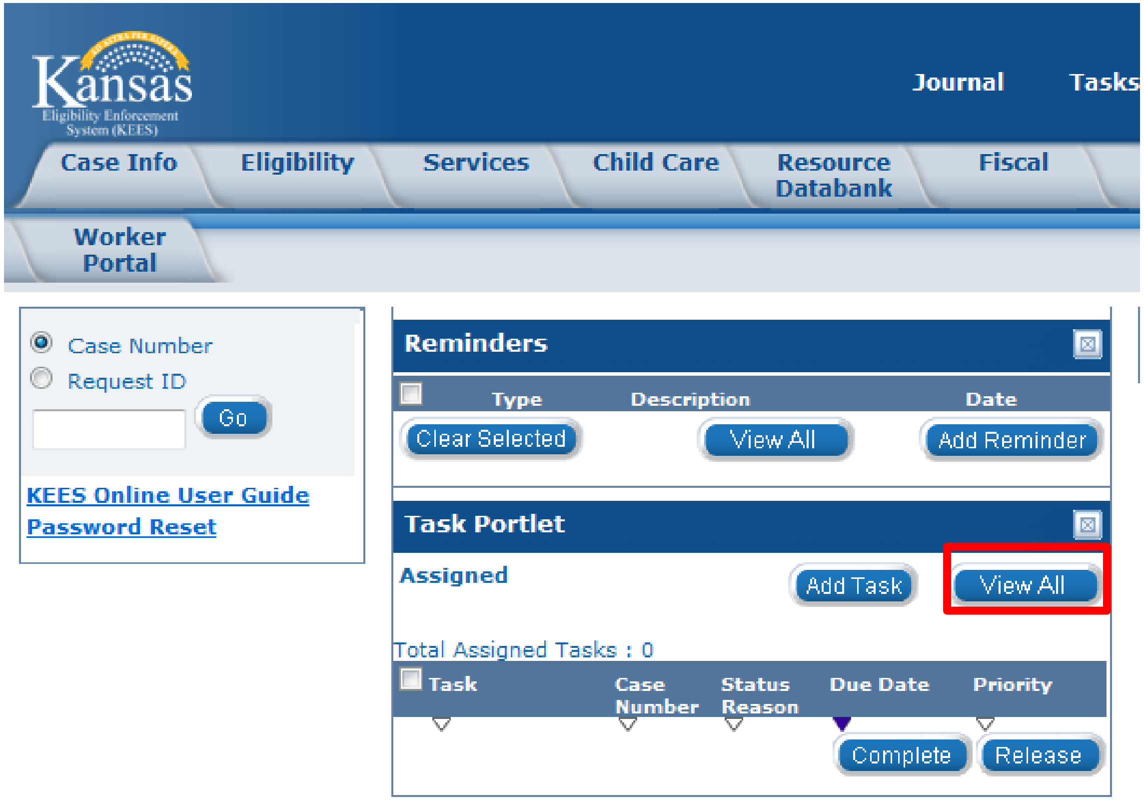
Lesson 2: Tasks > View Task

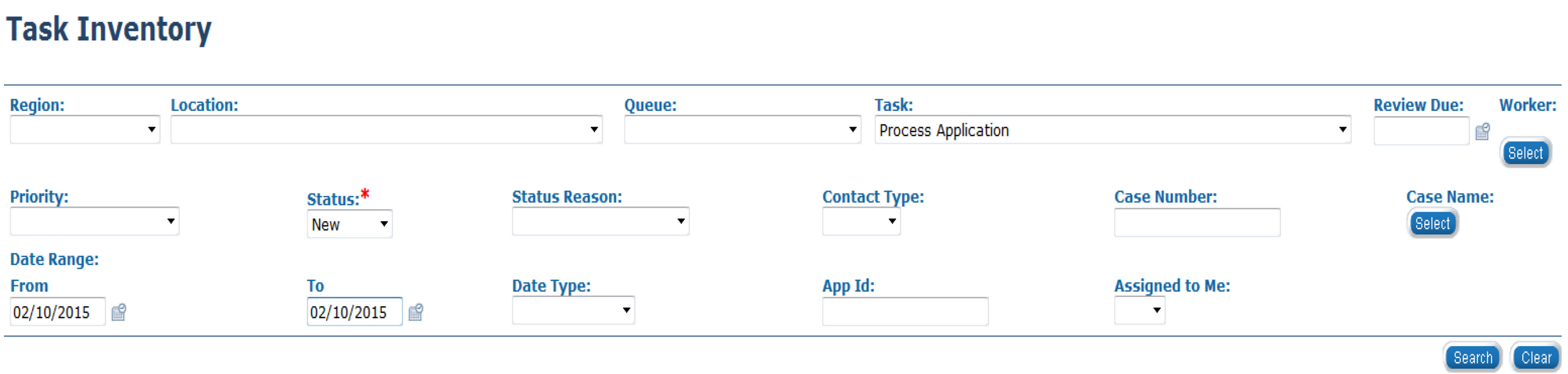
To access **Task Inventory**:

- Click **View All** in the **Task Portlet**.



Task Inventory

Allows the user to search for tasks using criteria entered.



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Lesson 2: Tasks > View Task

The Task Inventory page displays a list of tasks based on the search criteria.

Click on the hyperlink under the Task Name to view the Task Details.

Task Inventory

Results per Page: 25 Search Clear

Search Results Summary — Results 1 - 2 of 2

	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
☐	None		Change - 330082	12/16/2014	New		12/26/2014	Purple	1683:06			Topeka Service Center		20000210	Audrey Mason	
☐	None		Change - 370114	01/20/2015	New		01/28/2015	Purple	839:36			Topeka Service Center		12297409	KIMBERLY A JOHNSON	

Claim Reassign

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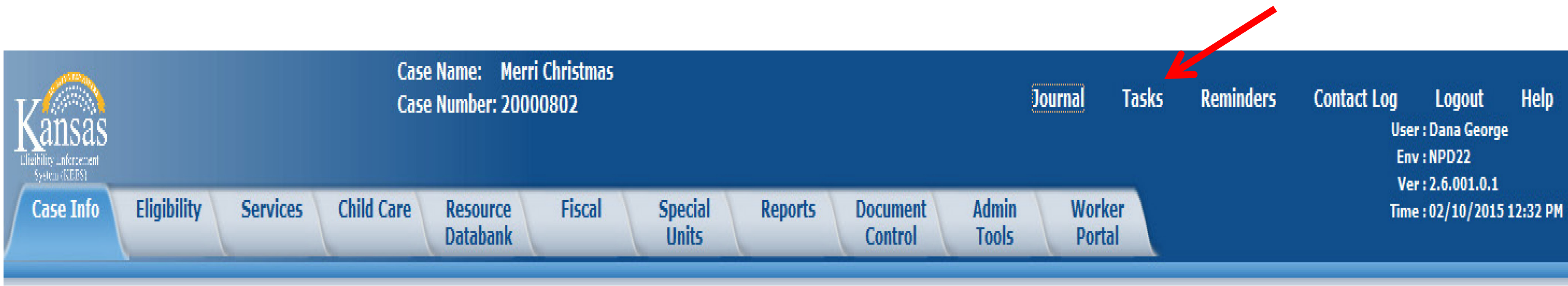
Lesson 2: Tasks > View Task

Task Management
Displays tasks assigned to the specific case and all tasks assigned to the user.

To access Task Management:

- Click on Tasks from the Utility Navigation bar.



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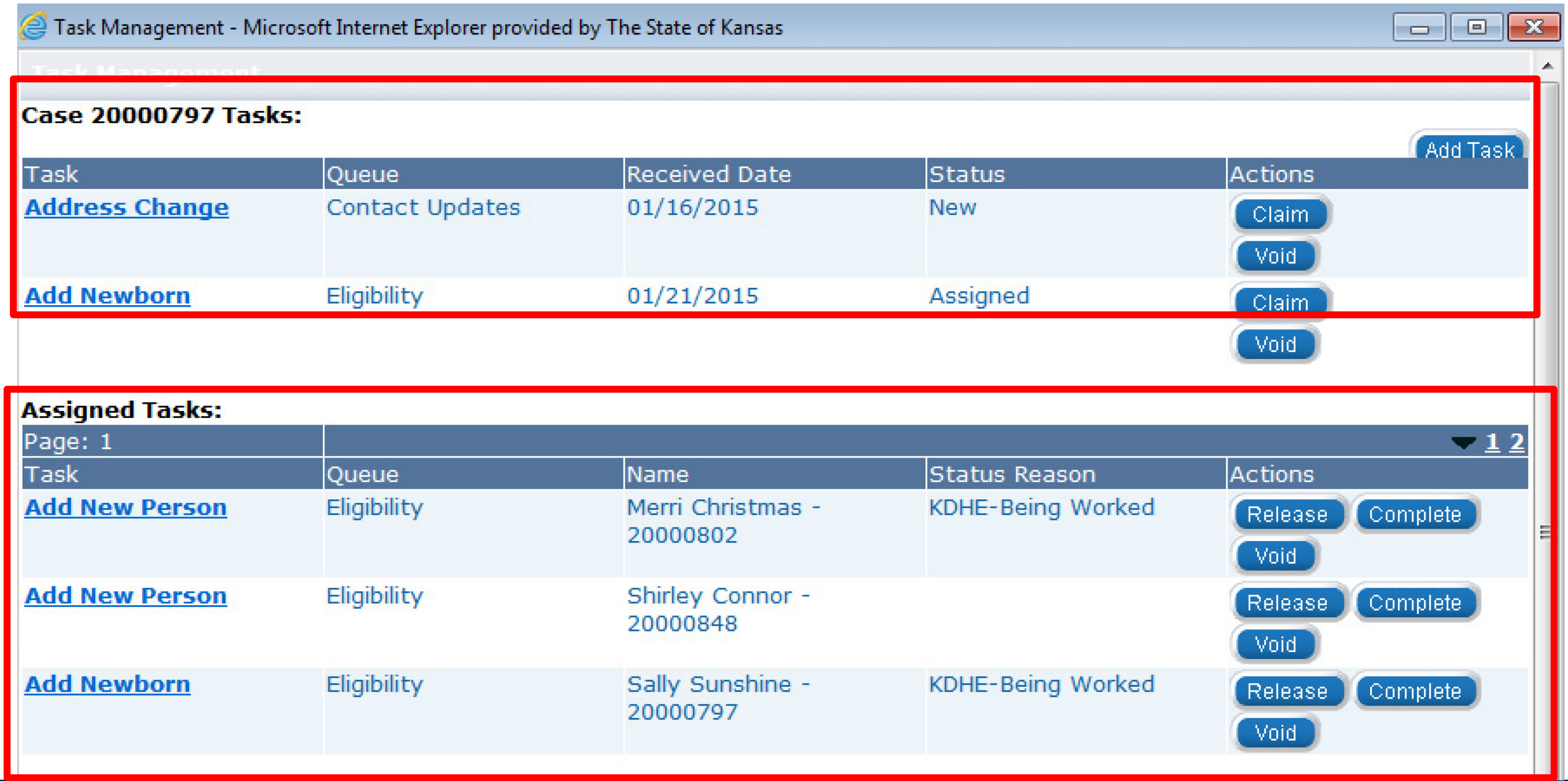
Lesson 2: Tasks > View Task

Task Management Window: Allows user to view all tasks related to a specific case as well as all tasks assigned to them.



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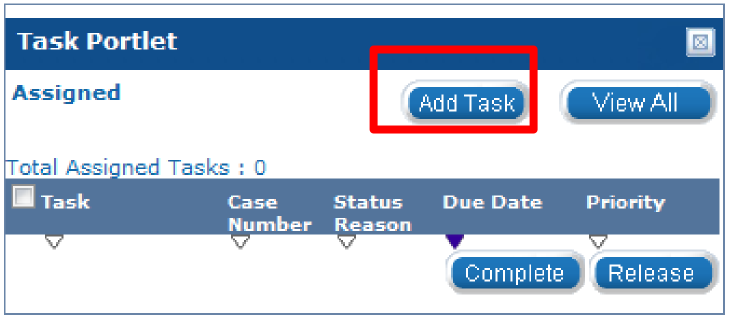
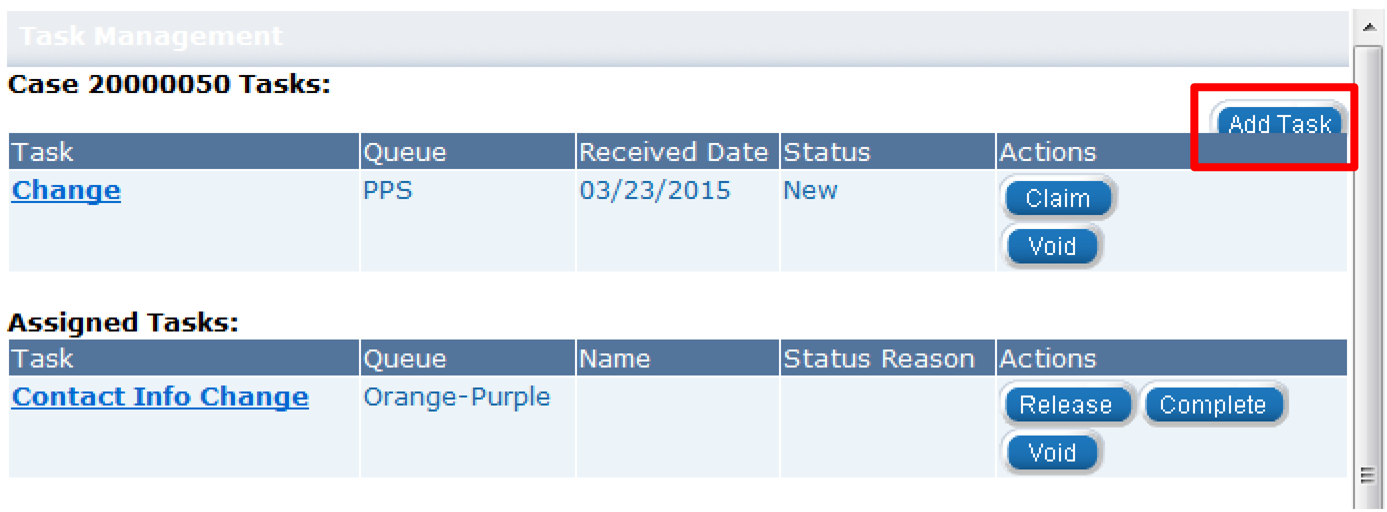
Lesson 2: Tasks > Add Task



Clicking the **Add Task** button in the **Task Portlet** will open a pop-up window for **Manual Task-No Case**.

Clicking the **Add Task** button in the **Task Management** window will open a pop-up window for **Manual Task-In Case**.



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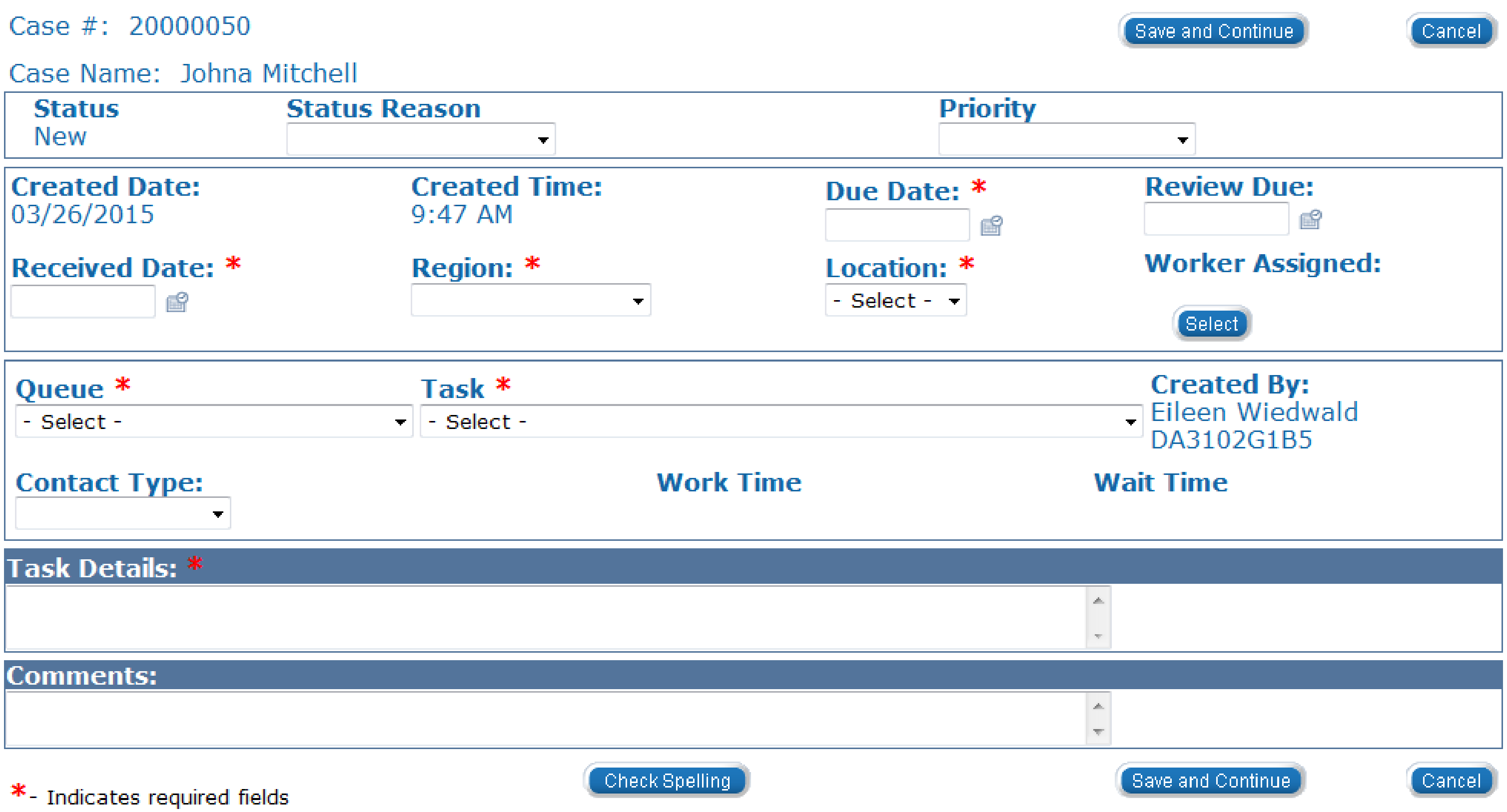
Lesson 2: Tasks > Add Task> Task Details

On the Task Detail page the following information is required when adding a task:

- Due Date, Received Date, Region, Location, Queue, Task, Task Details



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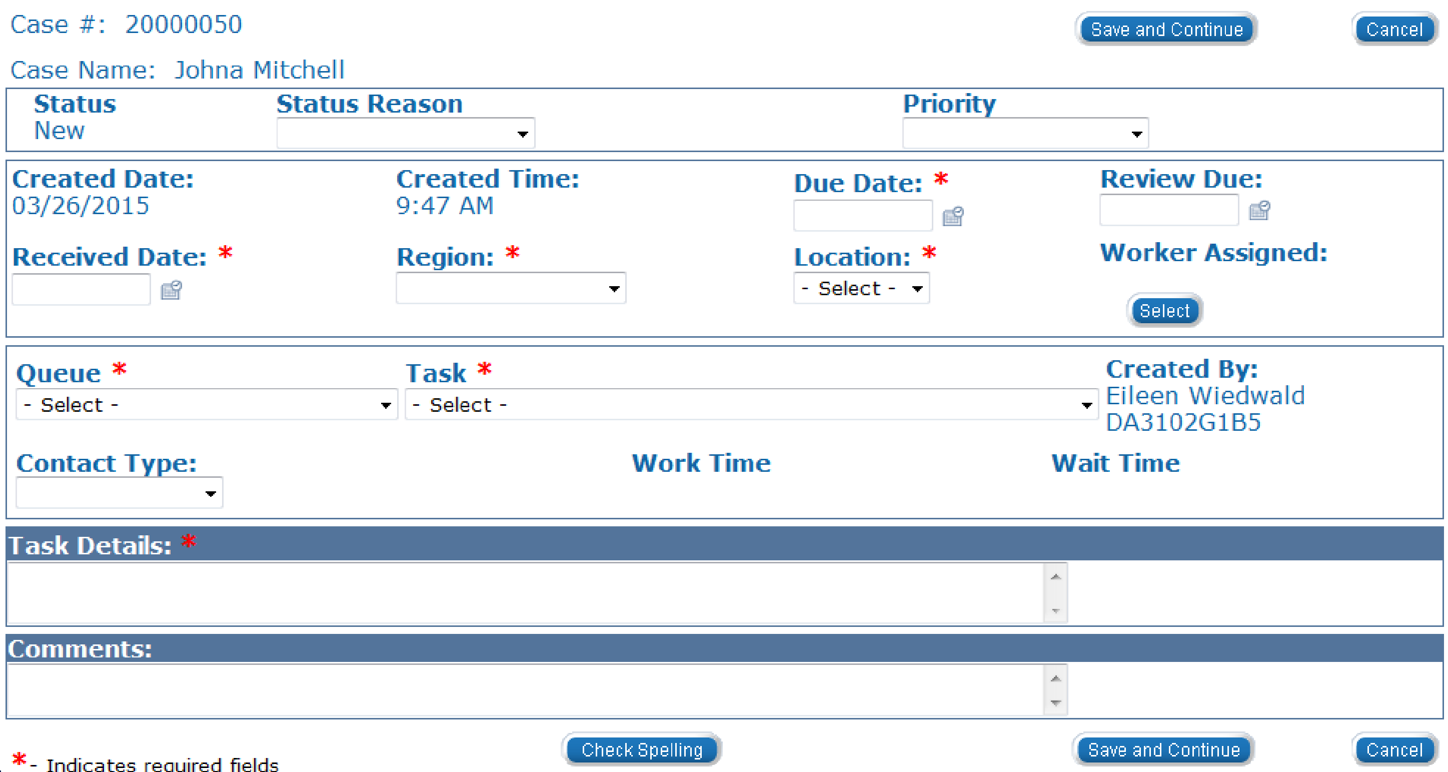
Lesson 2: Tasks > Add Task> Task Details

The following fields will be populated by system on the **Task Detail** window:

- **Status** will always begin as ‘New’
- **Created Date** and **Time** act as a Date and time stamp of when the task was completed
- **Created by** will auto-populate with worker ID and name



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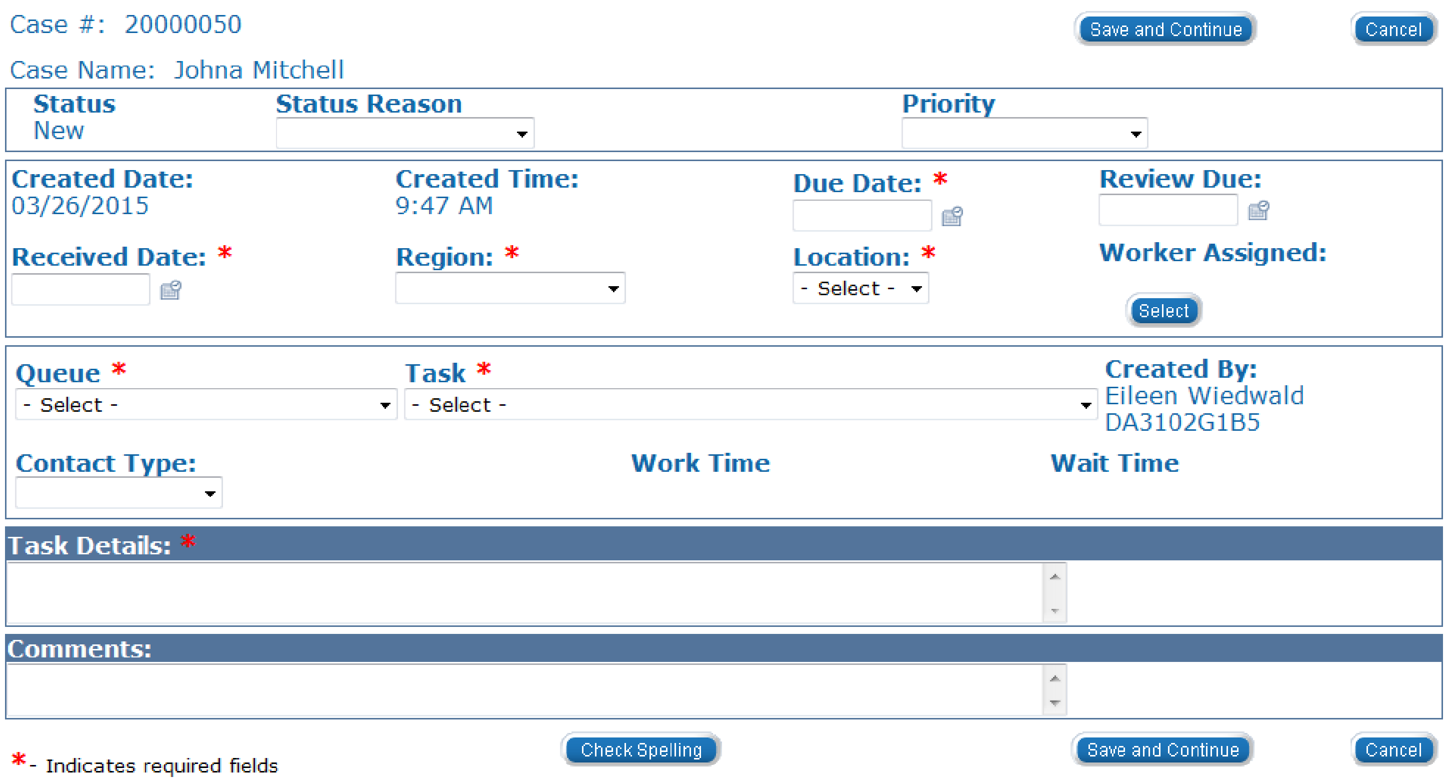
Lesson 2: Tasks > Add Task> Task Details

The following dynamic drop-down fields *MUST* be completed in order:

1. Region
2. Location
3. Queue
4. Task


Case #: 20000050
Save and Continue
Cancel
Case Name: Johna Mitchell
Status
New
Status Reason
Priority
Created Date:
03/26/2015
Created Time:
9:47 AM
Due Date: *
Review Due:
Received Date: *
Region: *
Location: *
- Select -
Worker Assigned:
Select
Queue *
- Select -
Task *
- Select -
Created By:
Eileen Wiedwald
DA3102G1B5
Contact Type:
Work Time
Wait Time
Task Details: *
Comments:
*- Indicates required fields
Check Spelling
Save and Continue
Cancel

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Lesson 2: Tasks > Add Task> Future Task

Future Tasks are a type of Manual Task that are created when future action is required on a case.

Examples of some actions beyond the current come-up month:

- **Medicare Expenses:** A future task would be set to update Medicare Expenses when Buy-In occurs.
- **Absence Without Leave (AWOL) youth**. A future task would be set to check the youth's status so the case could be discontinued per agency policy.
- **Placements in Detention:** Task to review the case for discontinuance of the Medical case per agency policy.
- **Pregnancy:** Task to review the case based on the due date of the child.

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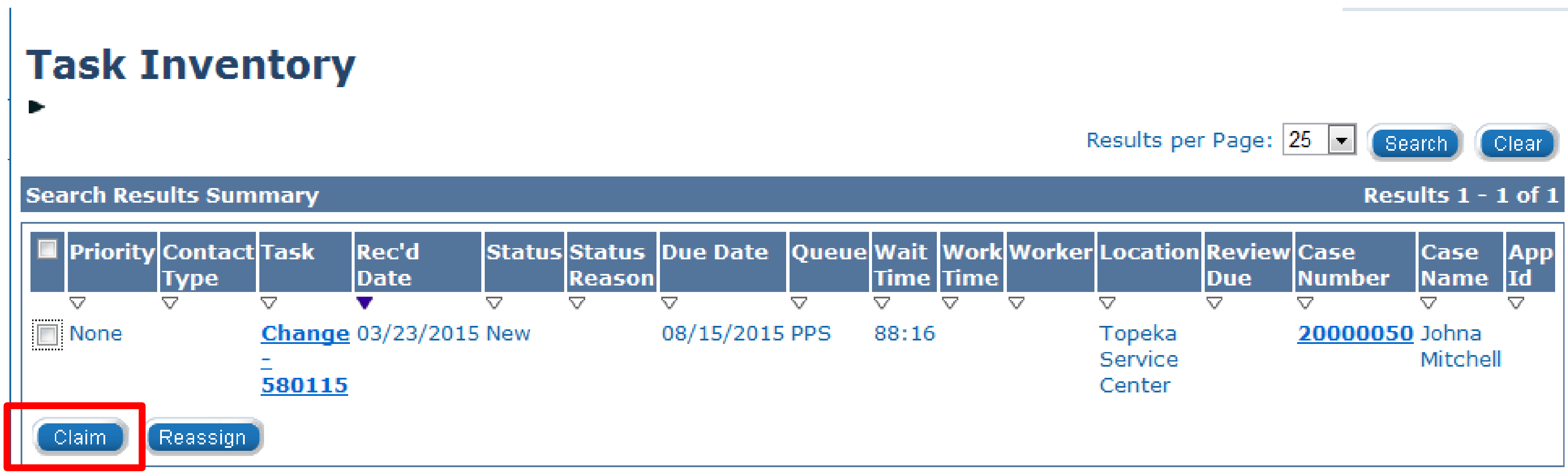
Lesson 2: Tasks > Claim a Task

When a worker claims a task, they assign the action to themselves. There are multiple screens from which to claim a task.

From the Task Inventory page:

- Click the check box next to the task(s) you wish to claim.
- Click the **Claim** button.



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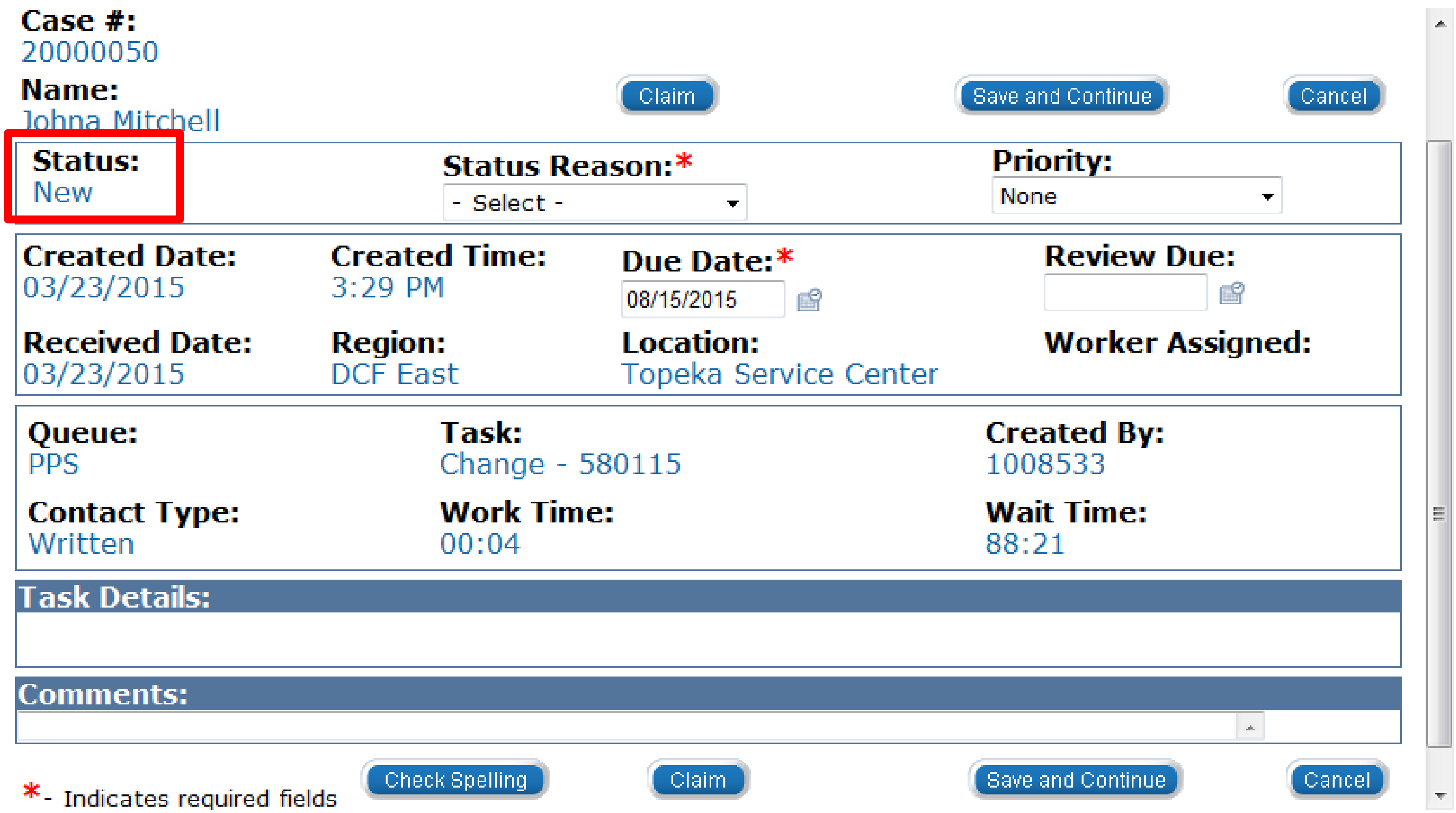
Lesson 2: Tasks > Claim a Task

A task can be claimed on the Task Details page if the Status field displays **New**.

- Click the **Claim** button.



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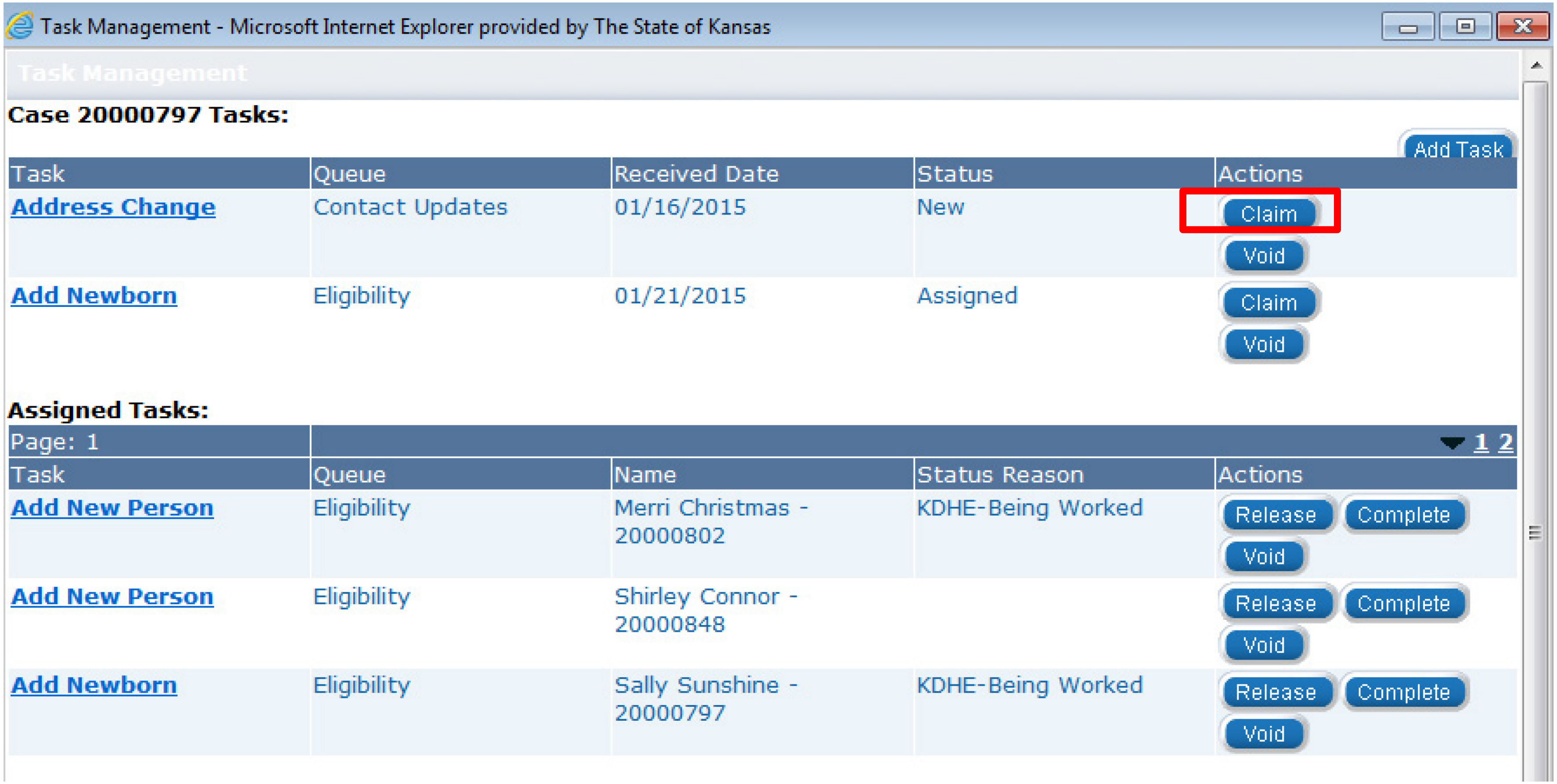
Lesson 2: Tasks > Claim a Task

A task can be claimed on the Task Management window.

- Click the **Claim** button.



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Lesson 2: Tasks > Release Task

Release is used to send the task back to the queue it originally came from and the status will revert to **New**.

Some examples of instances when you would release a task are:

- If a task is assigned to you in error.
- If the task assigned to you is outside of your skill set.

There are multiple screens from which to release a task.

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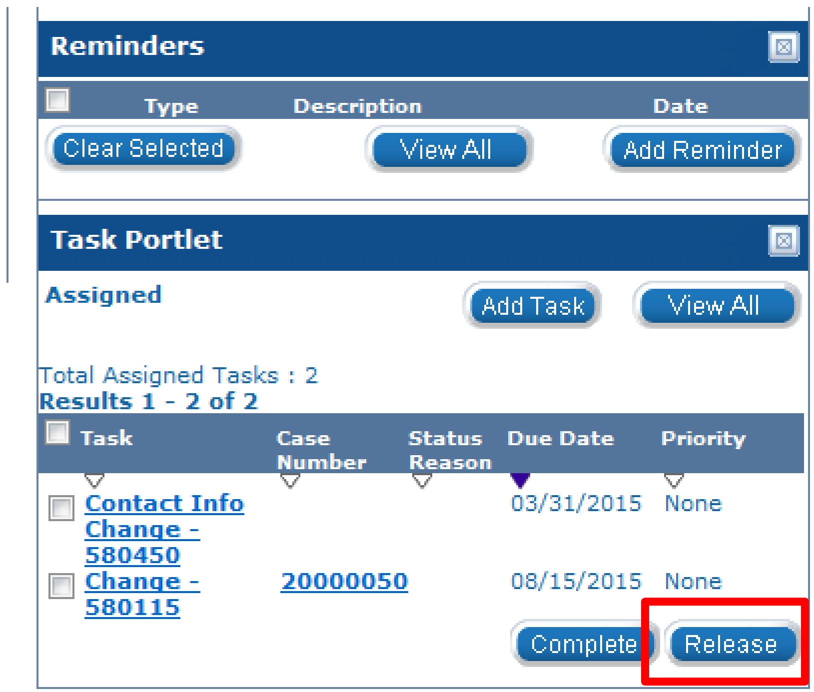
Lesson 2: Tasks > Release Task

From the **Task Portlet**:

- Click the check box next to the task(s) you wish to release.
- Click **Release**.



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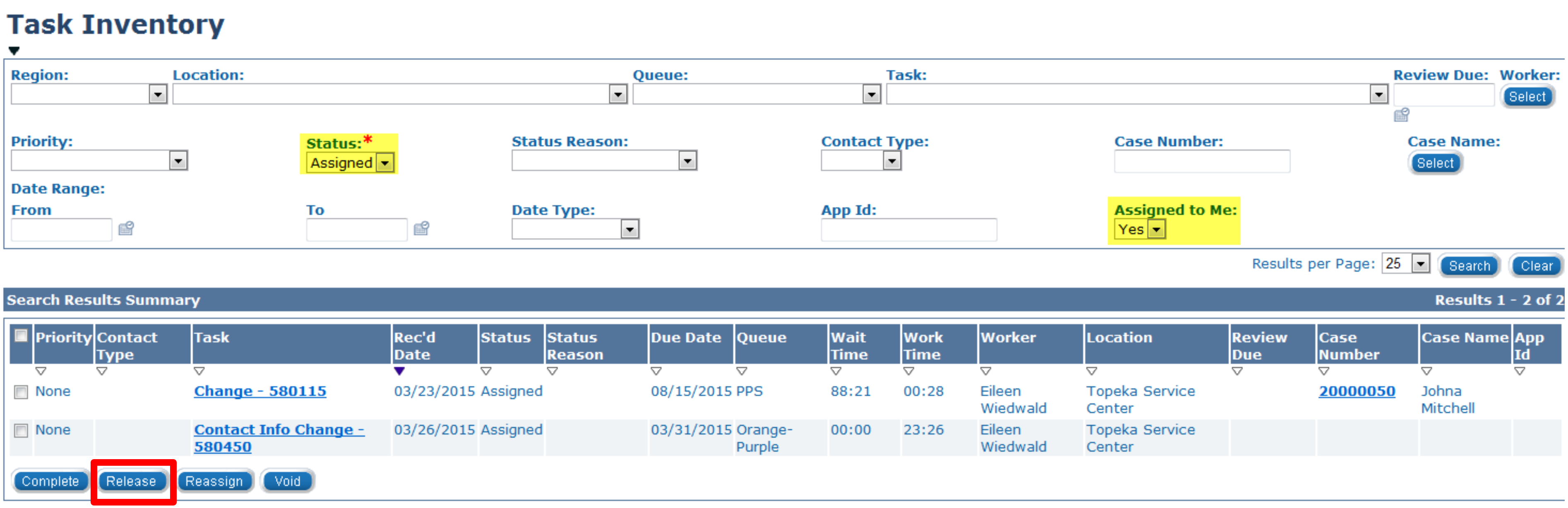
Lesson 2: Tasks > Release Task

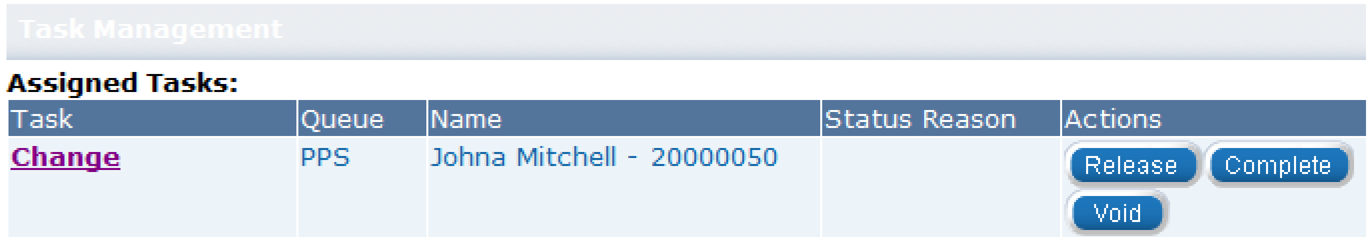
From the **Task Inventory**:

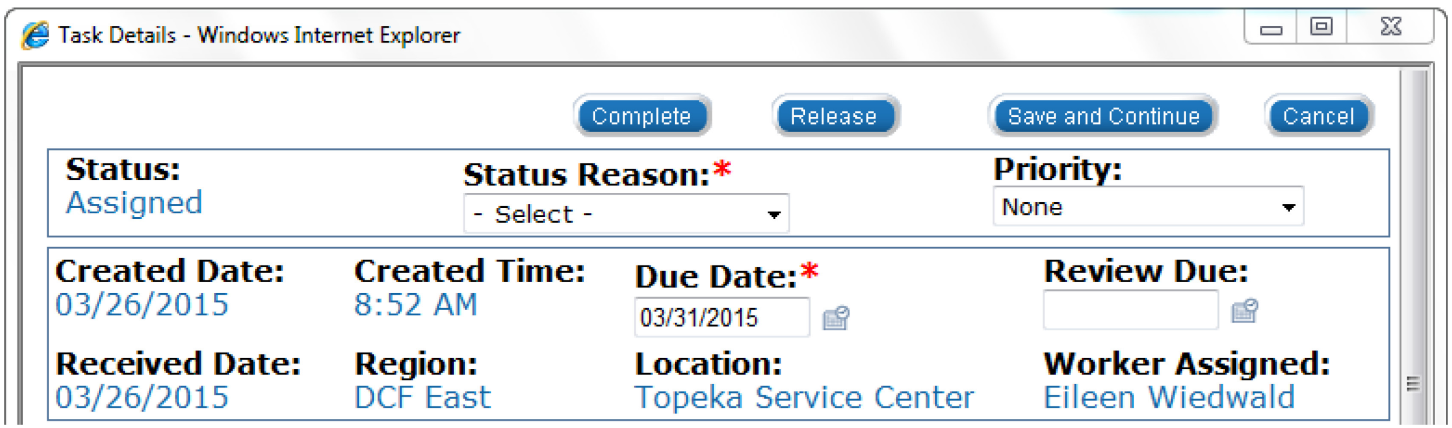
- Select **Assigned** from the **Status** drop-down.
- Select **Yes** from the **Assigned to Me** drop-down.
- Click the check box next to the task(s) you wish to release.
- Click **Release**.



From the **Task Management** window:

- Click **Release**.





From the **Task Details** window:

- Click **Release**.

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Lesson 2: Tasks > Reassign Task

Reassign is a feature that allows the user to move the task within one of the four sections:

- Queue
- Worker
- Location
- Case

Possible scenarios when **Reassign** would be used:

- Case with conflict of interest.
- When a task is created and assigned to a wrong queue.

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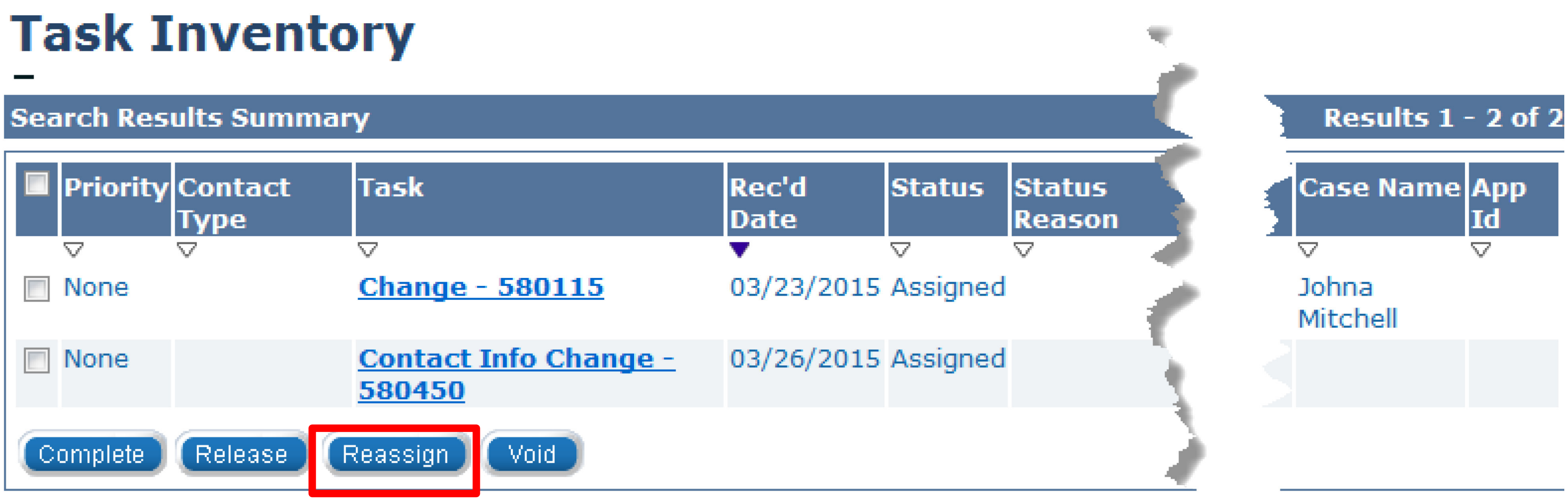
Lesson 2: Tasks > Reassign Task

From the **Task Inventory** window:

- Click the check box to the left of the task.
- Click **Reassign**.



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Lesson 2: Tasks > Reassign Task

From the **Task Inventory** window:

- Highlight the task you wish to reassign.
- Update the appropriate section(s).
- Click **Save and Continue**.

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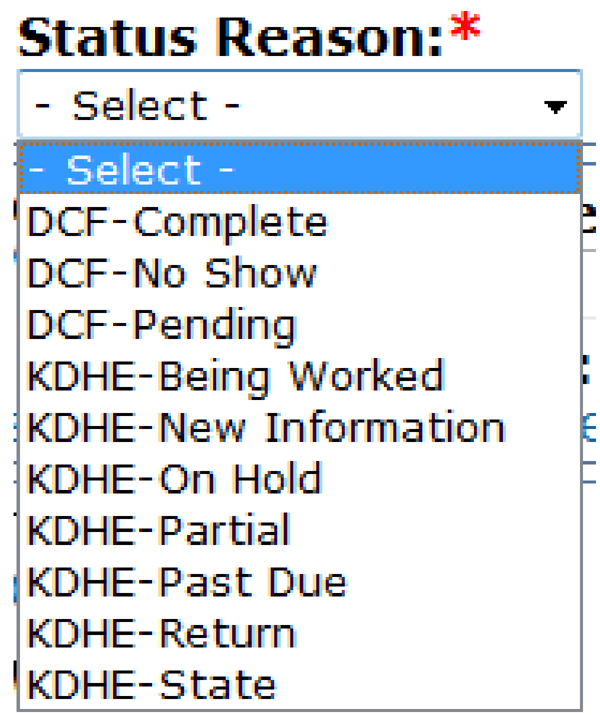
Lesson 2: Tasks > Complete Task

After claiming and working a task, you must consider whether or not the task is finished.

Anytime action is taken related to a task, the status reason should be updated to reflect the appropriate task status.

In order to **Complete** a task, a status must be selected from the **Status Reason** drop-down.



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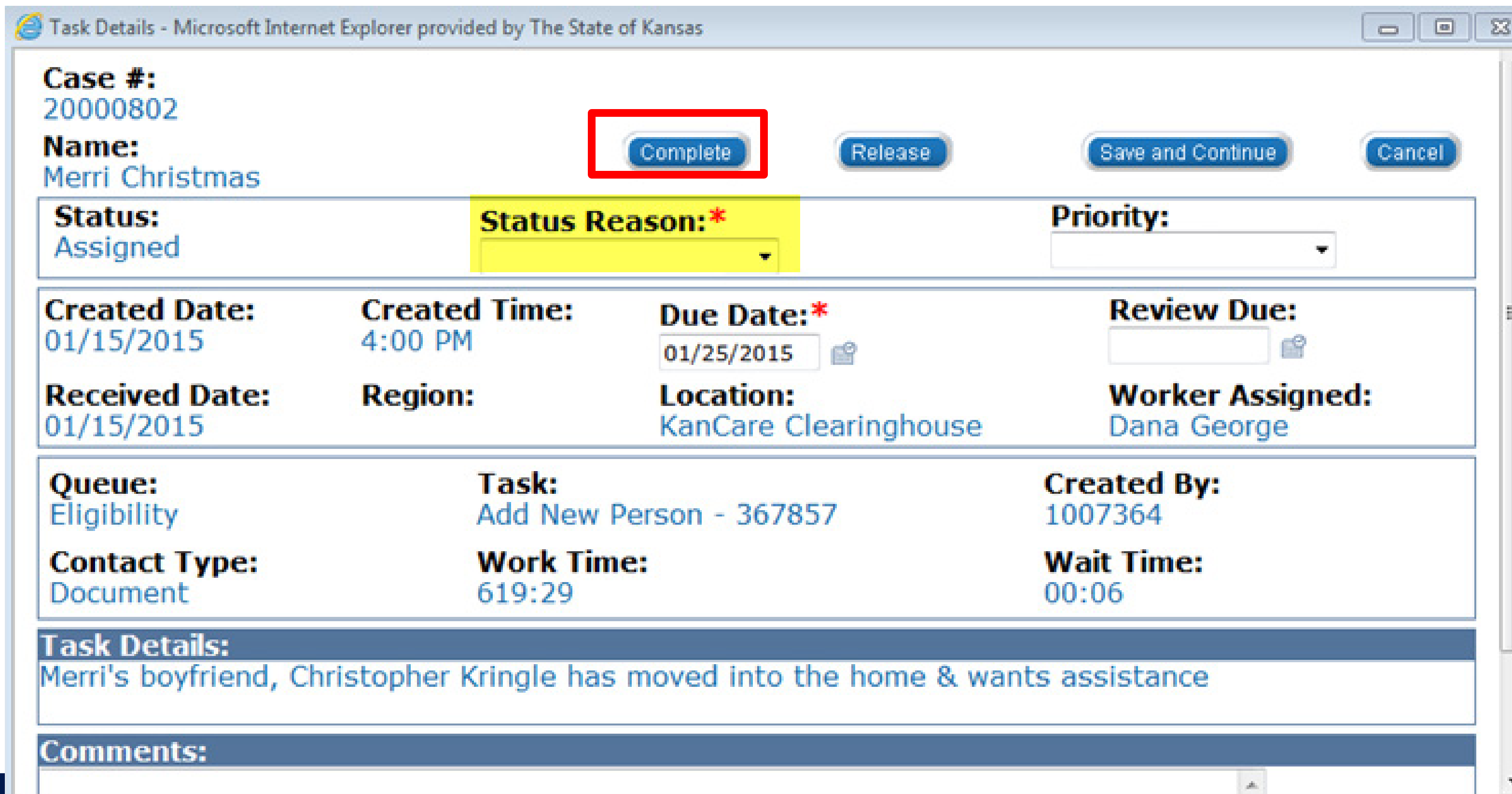
Lesson 2: Tasks > Complete Task

From the **Task Details** window:

- Update **Status Reason**
- Click **Complete**



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Lesson 2: Tasks > Void Task

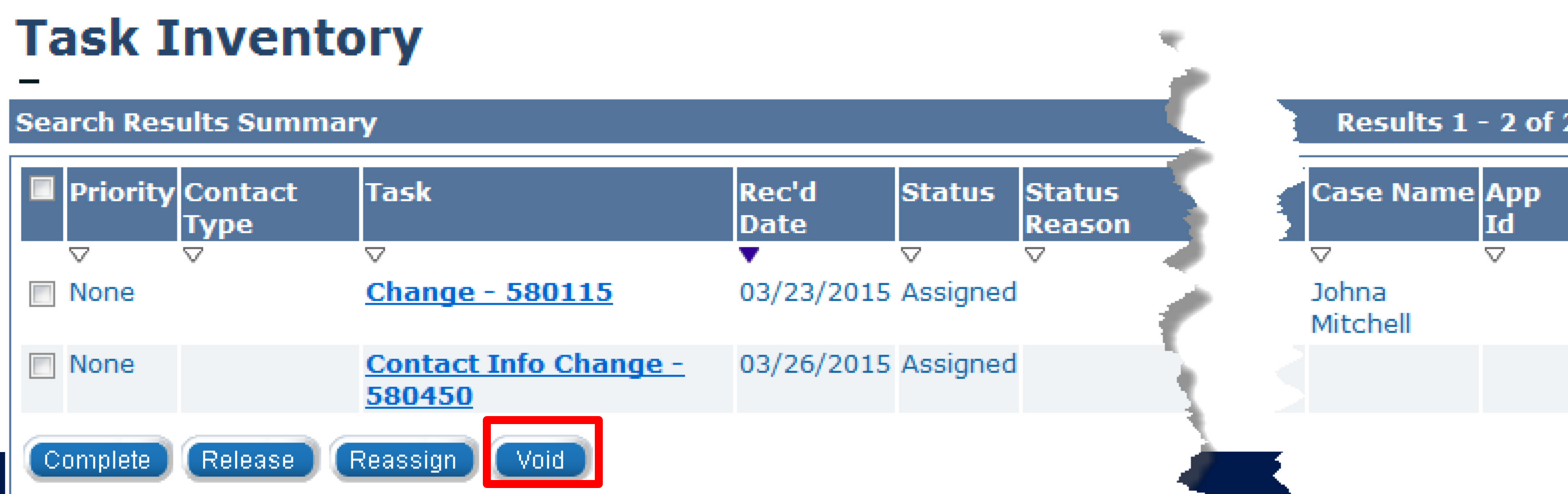
Void is a feature that will allow the user to remove a task from the system permanently.

One example of when this function could be utilized is if duplicate tasks are created in error.

DO NOT void tasks unless you are certain it should be voided.

From the **Task Inventory** or **Task Management** window:

- Click the check box to the left of the task.
- Click **Void**.



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Lesson 2: Tasks > Summary

This completes our lesson.

In this lesson, we discussed Tasks and how they will help users manage their work and communicate with each other.

We discussed:

- Locate Tasks
- Add a Task
- Create Future Tasks
- Claim a Task
- Release a Task
- Reassign a Task
- Complete a Task
- Void a Task

Medical Eligibility: Utility Navigation

Agenda

- Lesson 1: Journal
- Lesson 2: Tasks
- **Lesson 3: Contact Log**
- Lesson 4: Logout
- Lesson 5: Help

After completing this lesson you will be able to:

- Define the purpose and use of the Contact Log
- Create a Contact Log entry
- Use General Inquiry - No established case
- Search the Contact Log

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Introduction

The **Contact Log** is the screen that captures interactions with consumers and provides users with the ability to view historical interactions associated with a case or individual.

Many of the Contact Logs will be generated by the receptionist and lobby staff.

Contact Log entries may also be generated after contact with other providers, co-workers and agencies.

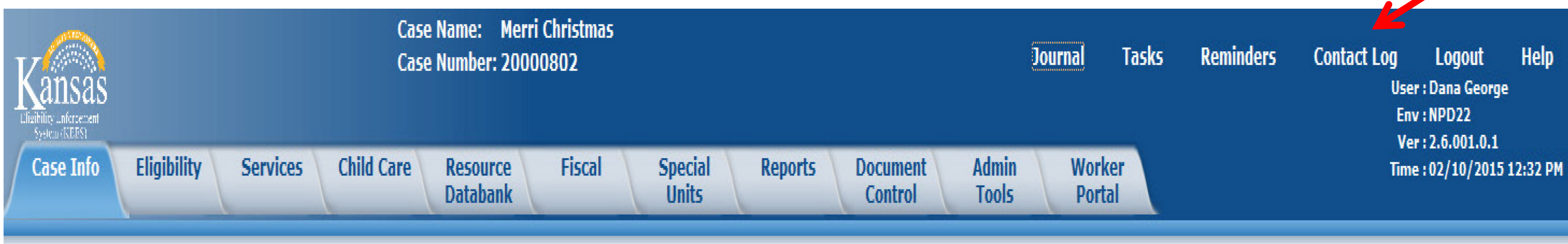
The Contact Log can create tasks based on the reason the contact was made.

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log

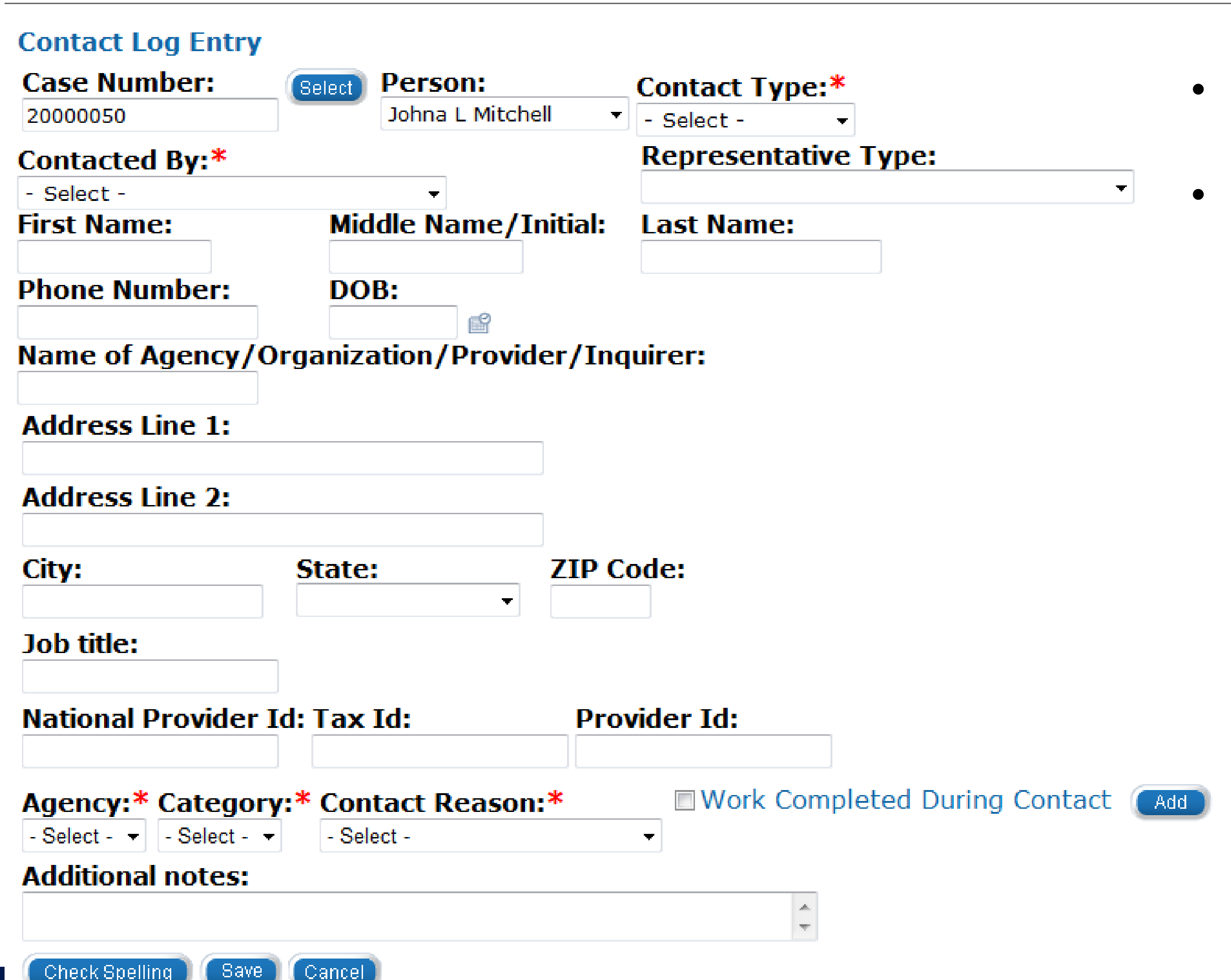
To access the Contact Log:

- Click **Contact Log**



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

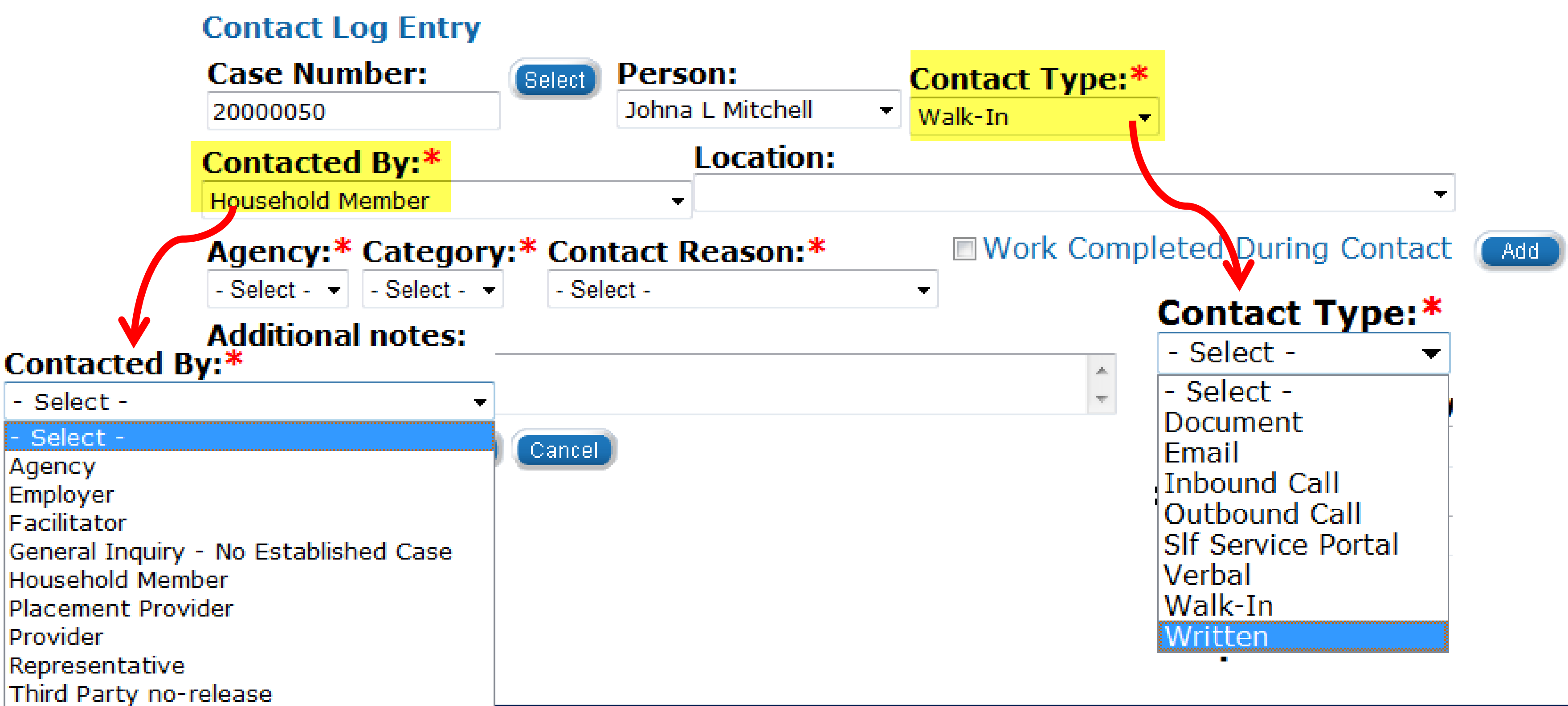


- Enter the **Case Number**
- Select the **Person** from the drop-down menu

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

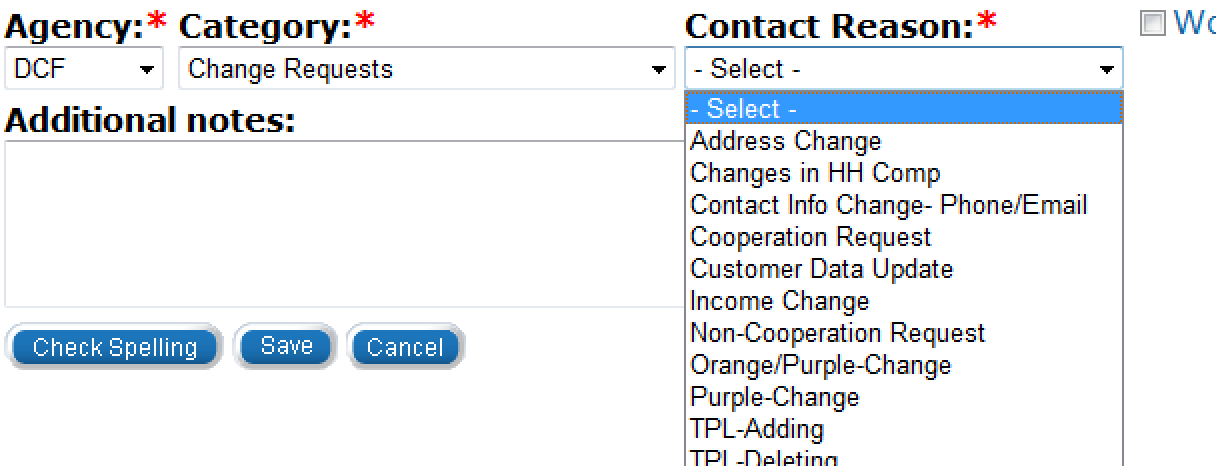
- Select **Contact Type** from the drop-down menu
- Select **Contacted By** from the drop-down menu
  - The contact log fields will vary based on this selection



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

- Select **Agency, Category, Contact Reason** from the drop-down menus
  - The drop-down values will vary based on these selections

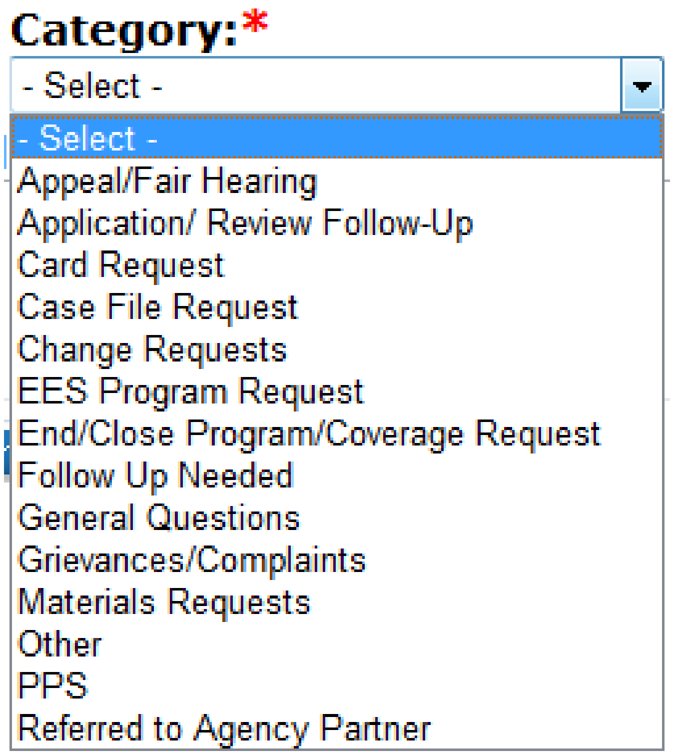


Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

The **Category** drop-down menu will vary based upon the **Agency** selected.

- When selecting KDHE from **Agency**, the drop-down will include **Family Medical Coverage Request**
- **PPS** and **EES Program Request** are DCF specific **Category** values

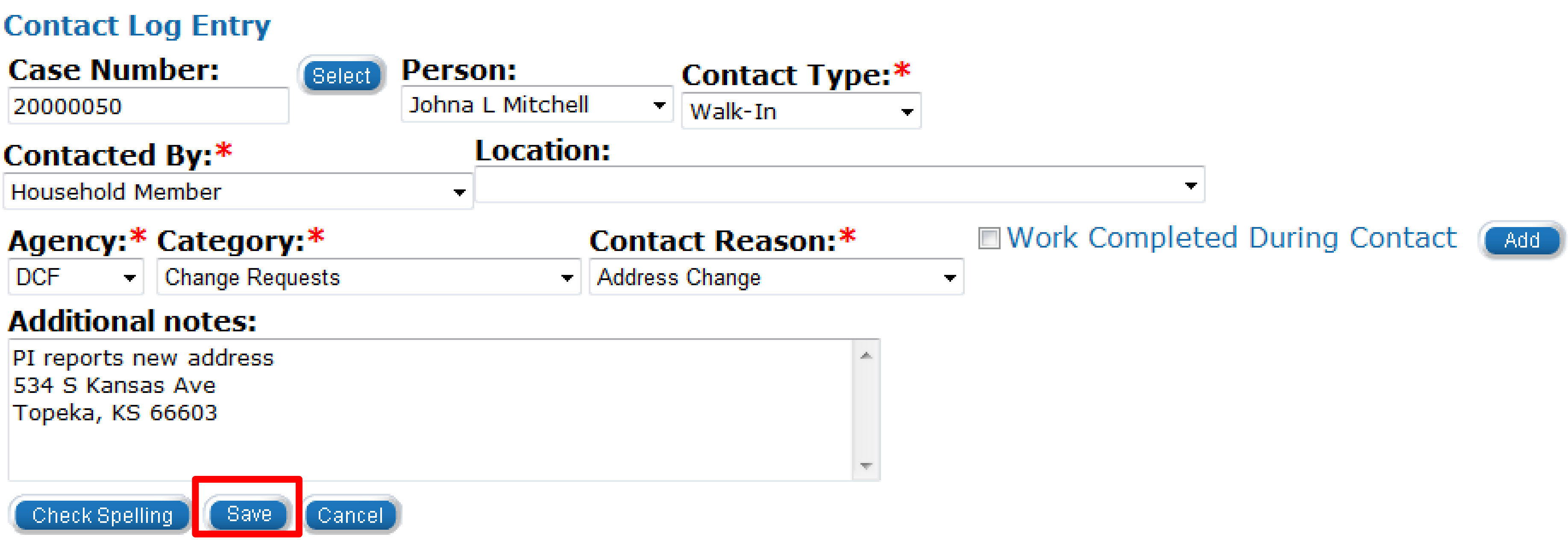


Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

Kansas Eligibility Enforcement System (KEES)

- Enter any applicable information in the **Additional notes** field
- **Check Spelling**
- Click **Save**



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Imaged Documents

We have looked at the fields of the **Contact Log** and how a user enters a contact record. Imaging a document can create a contact log.

Imaged Documents:

- Imaged into the ImageNow system
- Indexed and associated to a case
- Automatically create a Contact Log entry
  - This includes Case Number, App ID, Receive Date of the document, Scan Date, Document Type and the Image ID
  - The Contact Type is set to Document

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > General Inquiry

Users may receive inquiries from individuals who are not known to KEES. This type of inquiry can be recorded by using the **Contacted By: General Inquiry – No Established Case.**

It is important to capture the full name, address, phone number and date of contact for whom the call is regarding. This will provide the capability for the logs to later be linked if a new case is created.

For all **Contact Log** entries that are not linked to a case, a monthly batch will run to compare the name and date of birth with new cases that have been created that month.

If the criteria match, the Contact Log will be linked to the newly created case and copied to the journal.

If a **Contact Log** entry is not linked to a case, searching the contact log by **Worker ID** or **Non-Case Related** allows the user to link an entry to a specific case. Once linked to the case, the entry will be copied into the case journal.

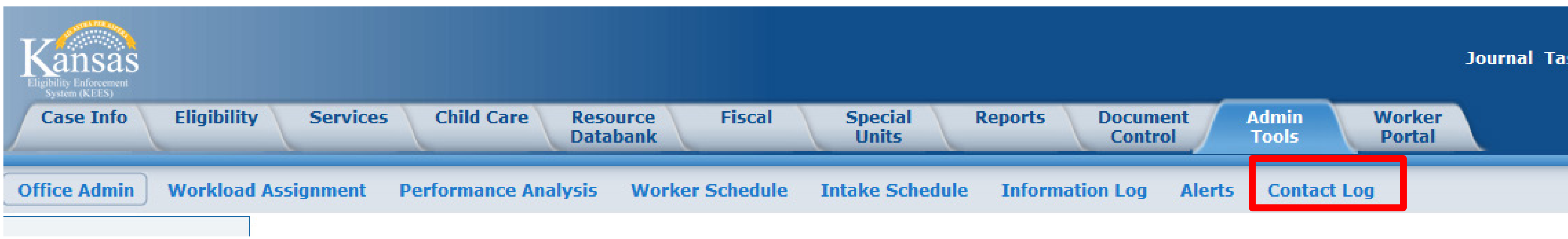
The **Case Number** column will be blank if not associated with a case.

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

To access the **Contact Log Search**:

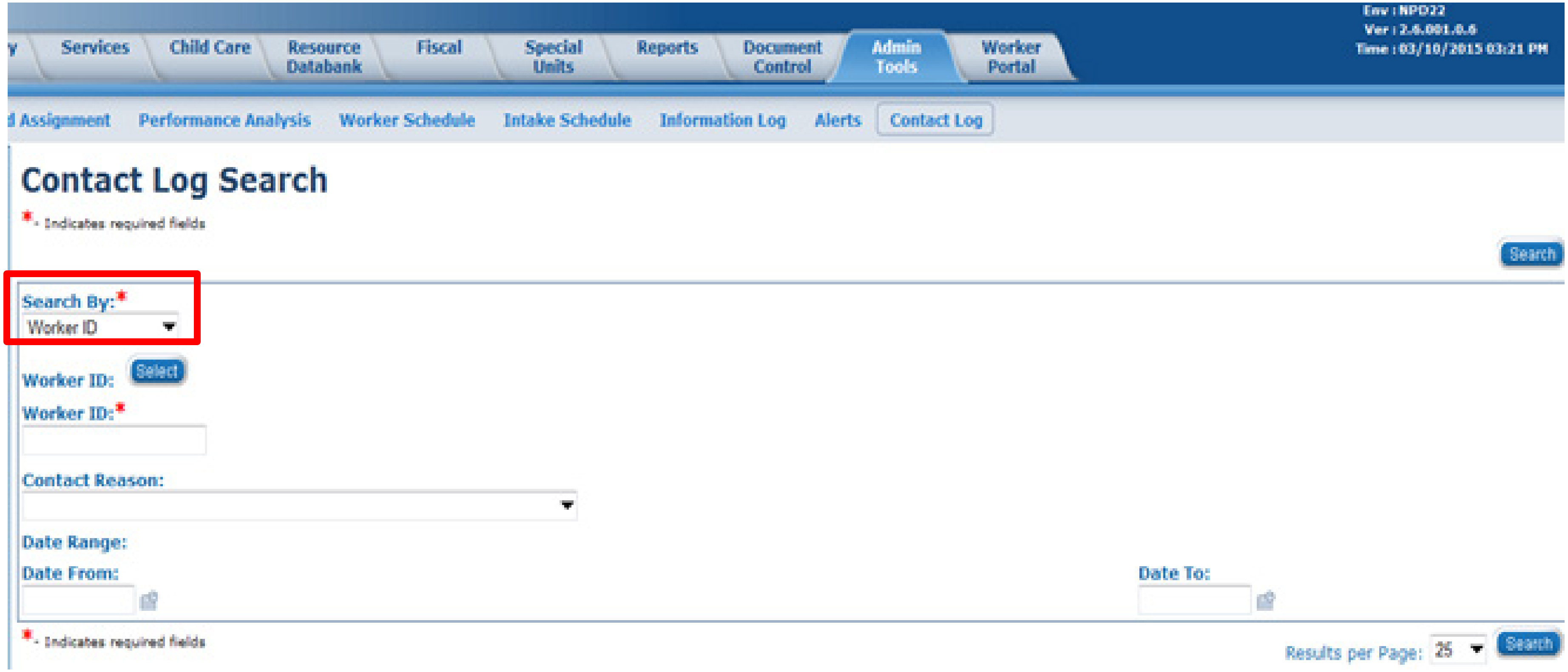
- Click **Admin Tools**
- Click **Contact Log**



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log >Searching the Contact Log

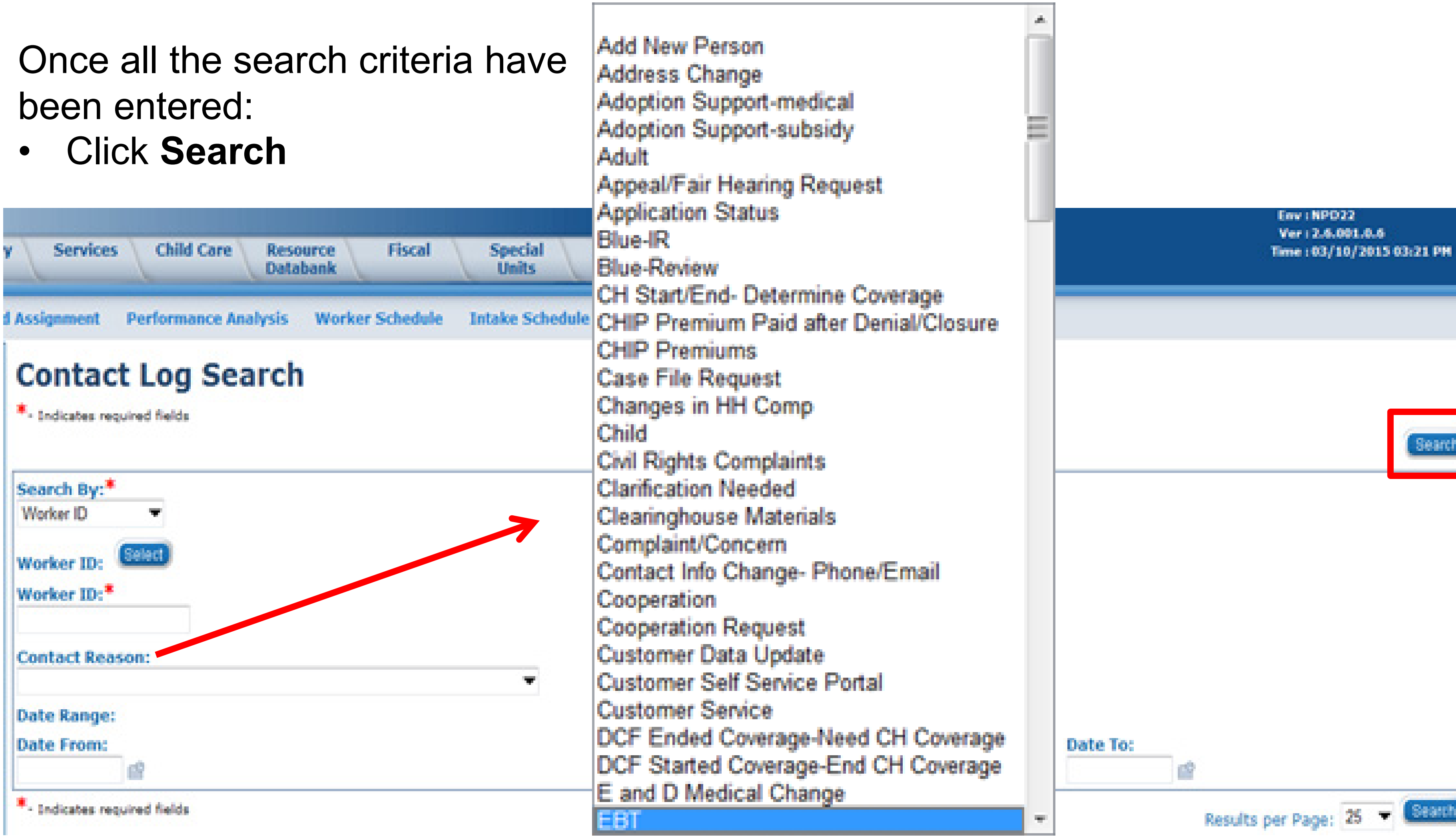
- Select **Search By** from the drop-down field
  - The user can select Worker ID, Case or Non-Case Related
- The required fields vary based on **Search By** selection



Medical Eligibility: Utility Navigation

Once all the search criteria have been entered:

- Click **Search**



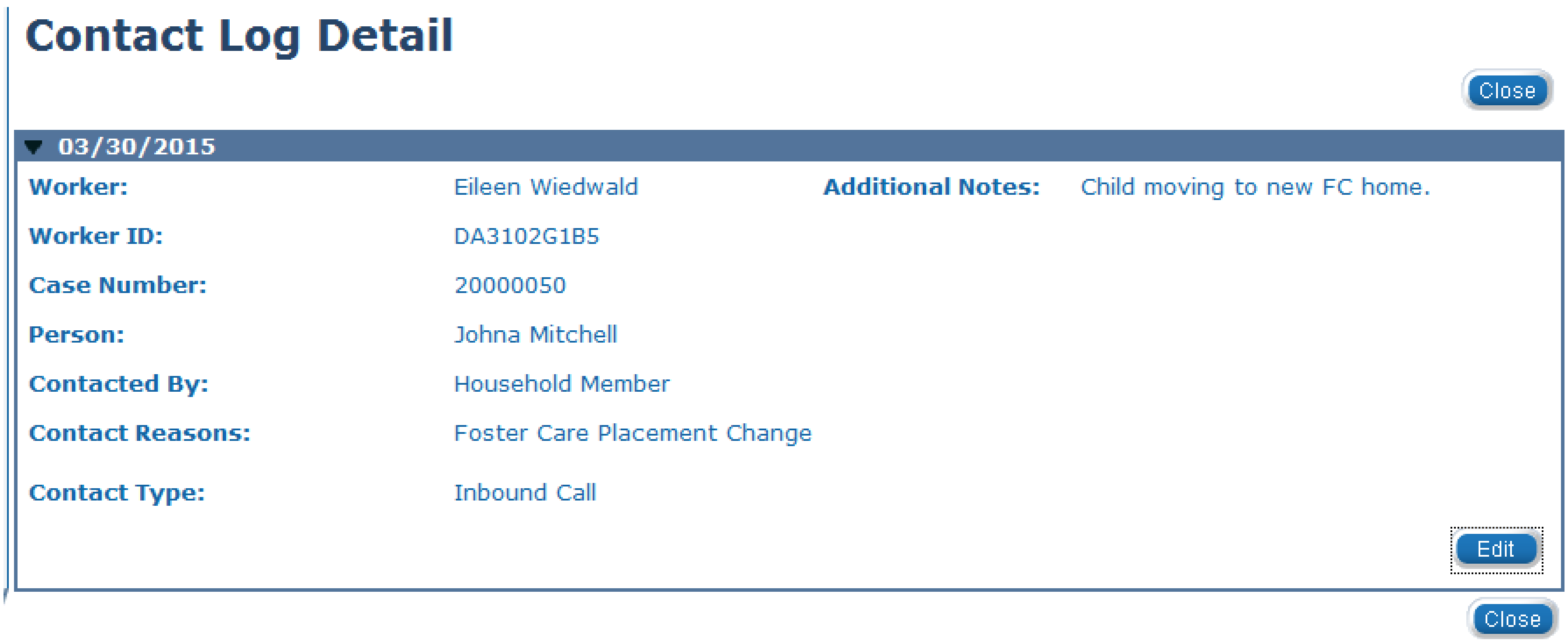
By clicking on the **Date hyperlink**, the details of the selected log displays on the **Contact Detail** page.

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

On the **Contact Log Detail**:

- The user can click **Edit** to update the log



Contact Log Detail

Close

03/30/2015

Worker:	Eileen Wiedwald	**Additional Notes:**	Child moving to new FC home.
Worker ID:	DA3102G1B5		
Case Number:	20000050		
Person:	Johna Mitchell		
Contacted By:	Household Member		
Contact Reasons:	Foster Care Placement Change		
Contact Type:	Inbound Call		

Edit

Close

Lesson 3: Contact Log > Summary

In this lesson you learned:

- How to create a Contact Log
- Entries can be created from imaged documents
- Entries can be created when there is no known case
- Entries can be searched and linked to a case
- Entries can create tasks and initiate work flow

Medical Eligibility: Utility Navigation

Agenda

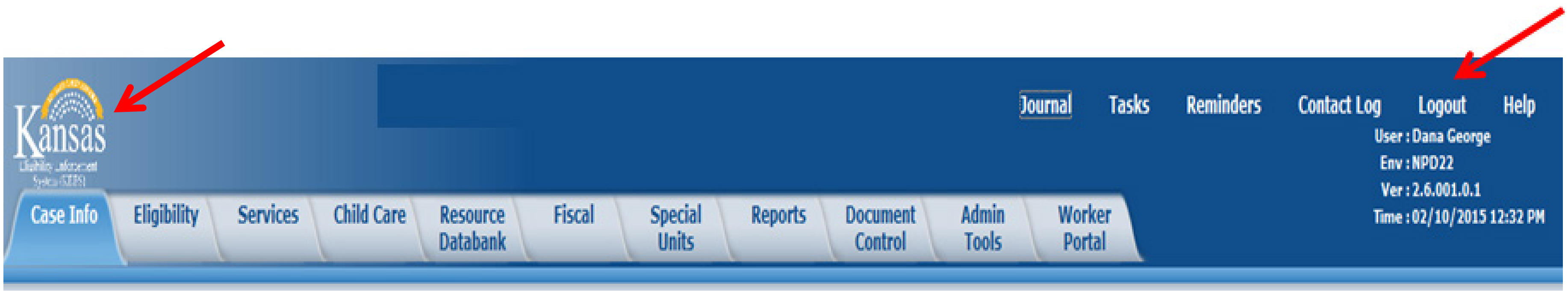
- Lesson 1: Journal
- Lesson 2: Tasks
- Lesson 3: Contact Log
- **Lesson 4: Logout**
- Lesson 5: Help

Medical Eligibility: Utility Navigation

Lesson 4: Logout > Introduction

When a user is going to be away from their desk for extended period of time, they should Logout of KEES.

- If the user is in the context of a case, they MUST click the KEES logo located in the left corner.
- Click **Logout**.

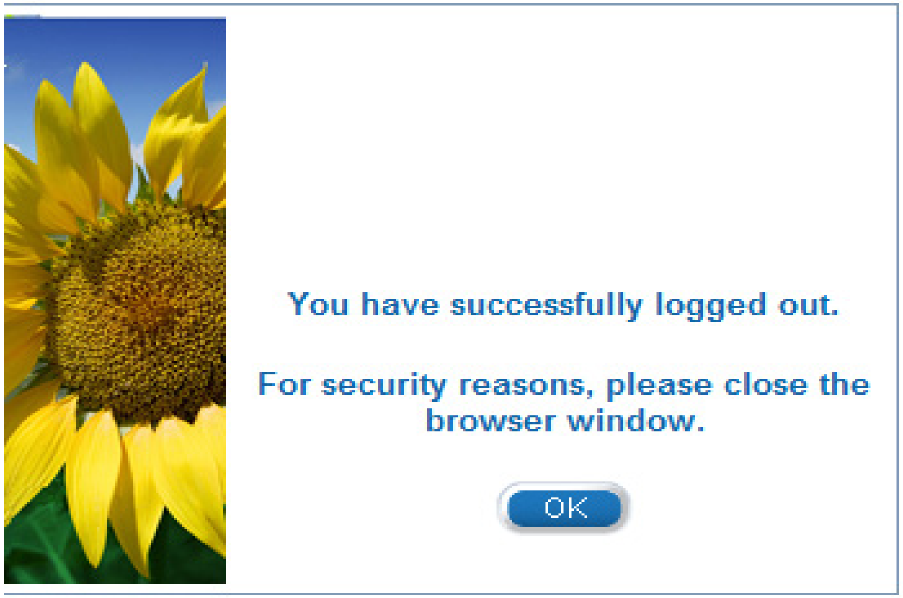


Medical Eligibility: Utility Navigation

Lesson 4: Logout

To complete the Logout process:

- Click the **OK** button
- The browser window closes



Medical Eligibility: Utility Navigation

Lesson 4: Logout > Summary

This completes our lesson.

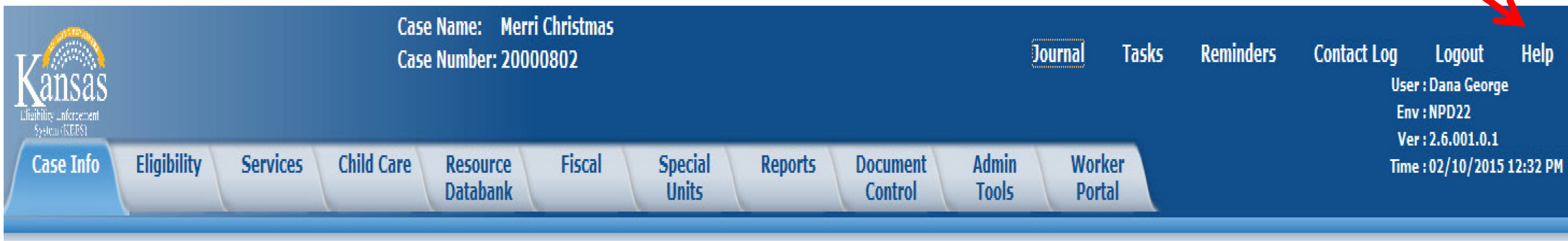
Medical Eligibility: Utility Navigation

Agenda

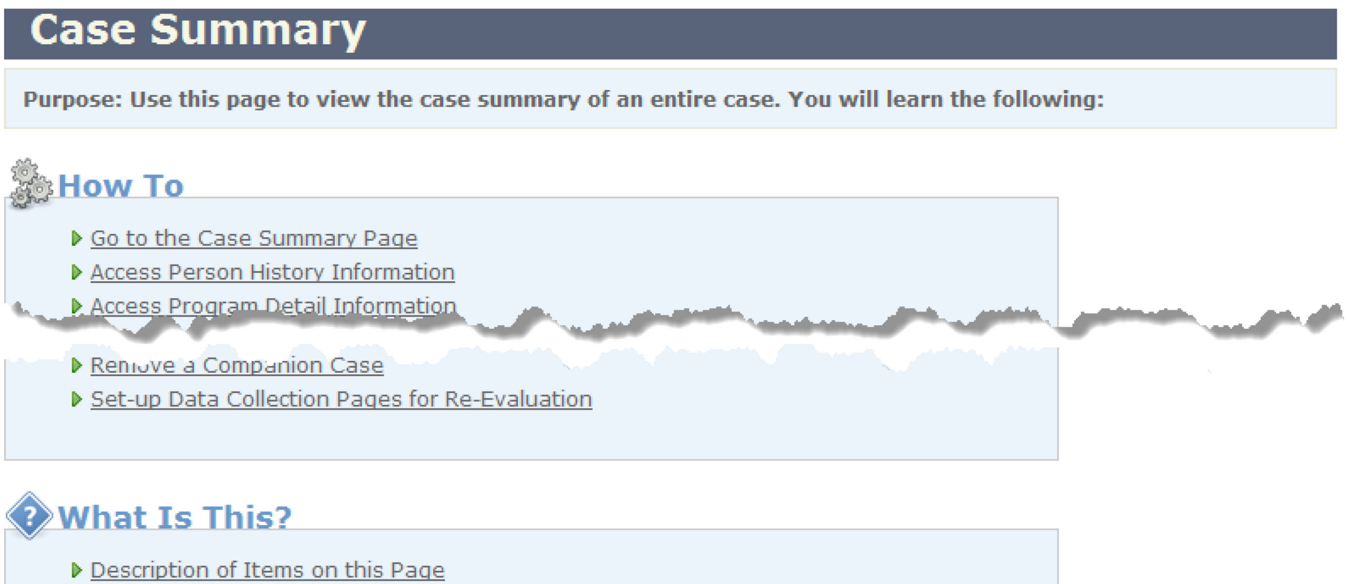
- Lesson 1: Journal
- Lesson 2: Tasks
- Lesson 3: Contact Log
- Lesson 4: Logout
- **Lesson 5: Help**

Medical Eligibility: Utility Navigation

Lesson 5: Help



Help allows the user to view instructions on how to complete the page and describes all functions that may be performed. The Help window displays information based on the current screen selection.



Medical Eligibility: Utility Navigation

Lesson 5: Help

This Online Help page describes all items and functions that may be performed on the corresponding KEES page. Some items and functions described may not be available, depending on the user's security rights and whether the page is being created, viewed, or edited.

How To

Go to the Case Summary Page

Note: The steps listed below are followed AFTER the user is in the context of a case.

1. Click **Case Info**, **Eligibility**, or **Services** in the Global navigation bar.

Access the Person Search Page to Add Companion Case

1. Go to the **Case Summary** page.

What Is This?

Description of Items on this Page

Buttons	The purpose of the Buttons Sample Button
Add	This button accesses the Person Search page to add a companion case.
Remove	This button removes companion cases.
Case Number	This check box is clicked to select the corresponding companion case to remove the relationship.
Check All	This check box is clicked to check all the companion cases.

Columns	The purpose of the Columns

Medical Eligibility: Utility Navigation

Lesson 5: Help > Summary

This completes our lesson.

Medical Eligibility: Utility Navigation

Course Summary

In this course we discussed how to use the tools on the Utility Navigation bar.

We discussed:

- Journal
- Tasks
- Contact Log
- Logout
- Help