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# PELICAN CCW:

# Child Care Client Self Service Training

# PELICAN CCW Child Care Client Self Service Training Agenda

**The following topics will be covered in this training:**

1. Goals of Child Care Client Self Service
2. Training Overview
3. What is COMPASS
4. The Main COMPASS Page
5. COMPASS Key Screening Pages
6. COMPASS Key Application Processing Pages
7. Help with COMPASS
8. Processing New COMPASS Applications in PELICAN CCW:
   - 8.1
     - COMPASS Application Tracking in PELICAN CCW
     - Changes to PELICAN CCW Inboxes
     - The Inbox Home Page
     - The Application Inbox
     - New COMPASS Application Alerts
     - 6 Steps to Create a Case from a COMPASS Application
     - Processed with Failures and Failed Applications
     - Processing Different COMPASS Application Scenarios
     - COMPASS Application Notice Reason Codes
9. COMPASS Redeterminations:
   - 9.1
     - The Main COMPASS Page
     - COMPASS Benefit Renewal Pages
     - COMPASS Redetermination Tracking in PELICAN CCW
     - The Redetermination Inbox
     - Processing a COMPASS Redetermination
     - Processed with Failures and Failed Redeterminations
10. Public Provider Searches from COMPASS

## PELICAN CCW Child Care Client Self Service
## Goals of Child Care Client Self Service

The Child Care Client Self Service initiative focuses on 2 key user groups:

1. General Public
2. CCIS staff

The goal of Client Self Service is to provide access to services and information for the general public and subsequently transfer online client data to PELICAN Child Care Works.

**1. <u>The General Public:</u>**

Provide access to child care services via the Commonwealth of Pennsylvania Access to Social Services (COMPASS) website.

- Complete a potential eligibility screening
- Apply for child care assistance and check the status of their submitted application
- Complete Redeterminations online
- Access Early Learning information and search for child care providers online

**2. <u>CCISs</u>:**

Process applications for a wider group of parents in need of child care assistance.

## PELICAN CCW Child Care Client Self Service
## Training Overview

- Training for this initiative is geared toward Intake and Eligibility Specialists to become familiar with the processes the general public will use to apply for and renew child care services. We also want you to understand the steps required to process a COMPASS application and redetermination in PELICAN CCW

- Once training is complete, you will have a full understanding of the goals of PELICAN CCW Child Care Client Self Service and your role in successfully processing the information received from COMPASS

# What is COMPASS?

## PELICAN CCW Child Care Client Self Service
## What is COMPASS

- COMPASS is a website designed for the general public to obtain information and apply for assistance programs offered by the Department of Public Welfare (DPW) including:
  - Cash Assistance
  - Food Stamps
  - Energy Assistance
  - Medical Assistance, etc.
  - Child Care

- The general public is able to complete a screening for potential eligibility, complete an application for child care assistance and search for child care providers online

- COMPASS is accessed via the following web address: www.compass.state.pa.us

- Users of COMPASS are required to create a login and password for secure access to their benefits information

- To give CCISs an understanding of COMPASS and steps the general public take to complete various tasks in COMPASS, we will review some key COMPASS pages related to Child Care Client Self Service

# PELICAN CCW Child Care Client Self Service
# The Main COMPASS Page

- To access Child Care Client Self Service, applicants click either the Screen for benefits, Apply for benefits, or Apply Now

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PA STATE AGENCIES
PA ONLINE SERVICES
COMPASS
CLICK. APPLY. BENEFIT.
Contact Us
FAQ
Help
Site Map
Language Selection: En Español | по-русска | 用汉语 | Bằng Tiếng Việt | ᨣᨾᨴᨿᨾᨶᩣᨷᩣᨿᨾᨶᩣᨷᩣᨿᨾᨶᩣᨷᩣ

# COMPASS Key Screening Pages

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

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- The Welcome to the Self-Screening Questionnaire page opens

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COMPASS
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Back | Continue

## Welcome to the Self-Screening Questionnaire

Here's how it works: COMPASS asks questions about members of the household in order to evaluate possible eligibility for benefits offered by the Commonwealth of Pennsylvania. You need to enter correct information about the members of the household for COMPASS to accurately screen.

At the end of the screening questionnaire, you can apply for health care coverage, food stamps, cash assistance, long term care, some home and community based waiver services, and energy assistance (during the energy assistance season). If you choose to apply, the information you give in the screening questionnaire will be automatically transferred to the application.

The information you enter is confidential. If you do not want to apply, the information will be erased at the end of the questionnaire. You can always apply for any benefit provided by the Commonwealth of Pennsylvania. The screening questionnaire can only tell the household what it might be able to receive. An application for benefits must be submitted to determine actual eligibility.

Please Note: If someone in the household wants to apply for Food Stamp benefits and is in an emergency situation (has very little food and money), that individual may have the right to food stamps now.

**Please select the benefits for which you would like to screen:**

- [ ] Screen for all benefits in COMPASS
- [ ] Health Care Coverage: Medical Assistance (including MAWD), Children's Health Insurance Program (CHIP), adultBasic

  *CHIP is expanding to cover families who make too much money to qualify currently for either CHIP or Medical Assistance. You can screen and apply through COMPASS, or you can find out more by going to* http://www.chipcoverspakids.com.

- [ ] Cash Assistance
- [x] Child Care Works Program. *Child care financial assistance for eligible families.*

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

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- On the Self-Screening Questionnaire page, applicants can screen for all services, select multiple services or one particular service

**Please select the benefits for which you would like to screen:**

- [ ] Screen for all benefits in COMPASS
- [ ] Health Care Coverage: Medical Assistance (including MAWD), Children's Health Insurance Program (CHIP), adultBasic

*CHIP is expanding to cover families who make too much money to qualify currently for either CHIP or Medical Assistan*
*you can find out more by going to http://www.chipcoverspakids.com.*

- [ ] Cash Assistance
- [x] Child Care Works Program. *Child care financial assistance for eligible families.*
- [ ] Food Stamp Benefits
- [ ] Low-Income Home Energy Assistance Program (LIHEAP). For local County Assistance Office.
- [ ] Free or Reduced Price School Meals
- [ ] Home and Community Based Services*
- [ ] Long Term Care Facilities*

**Eligibility for Home and Community Based Services and Long Term Care Facilities requires that applicants meet clin*
*eligibility requirements.*

- [ ] Specific Health Services
  - [ ] Chronic Renal Disease
  - [ ] Genetic Services
  - [ ] Breast & Cervical Screening
  - [ ] Tuberculosis
  - [ ] Comprehensive Specialty C
  - [ ] Head Injury
  - [ ] Newborn Screening

*† Includes Cardiac, Cleft Palate, Cooley's Anemia, Neuromuscular Disorder, Cystic Fibrosis, Hearing & Speech Impairment, Hemophilia, Orthopedic, Spina Bifida and Ventilator Dependency.*

Back | Continue

> CLICK > APPLY > BENEFIT

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Clicking the checkboxes for the desired services and clicking CONTINUE starts the screening process for the service(s) selected

Clicking a hyperlink provides the user with more information about that specific service

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

- Before applicants enter data into COMPASS, the How to Use COMPASS page opens. This page provides an overview of COMPASS navigation

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COMPASS
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Continue

## How to Use COMPASS

| Page Features | Description |
|---|---|
| Navigation | Once you have entered the application portion of COMPASS, please do not use the Forward, Back or Stop buttons on your browser. Instead, use the COMPASS navigation buttons on the bottom of the web page. |
| Cancel | Clicking the Cancel button will erase all the information you have entered and end the process. |
| Required Fields | Whenever you see an asterisk symbol * , you are required to answer the question and enter information. |
| Drop-down Box | A drop-down box contains a list of possible options. To see the list, click on the down arrow. You may take action to choose the best option that will answer the corresponding question. |
| Continue | Clicking the Continue button Continue will save the information on that page and take you to the next page. This is the only way to save information. |
| Back | Clicking the Back button Back will take you to the previous page. |

Continue

> CLICK > APPLY > BENEFIT

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# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

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- Examples of Self-Screening pages:

**1**

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Back | Continue

## Please Identify Yourself

Please select one of the following:

- (●) I am screening for myself, for a family member, for someone in my household, and/or for a non-family member.
- ( ) I am enrolled with DPW as a MA or non-MA provider and I am applying on behalf of a client (must provide a valid MA or non-MA provider number).
- ( ) I am a community based organization screening on behalf of a client (MA provider number not required)

Back | Continue

> CLICK > APPLY > BENEFIT

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# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

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**2**

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Cancel | Back | Continue

## Individual Information

**Please tell us about the people who live in the household**

| | |
|---|---|
| Name: *A name or nickname is required to show screening results. Last name is not required.* * | Sue |
| Citizen Status: * | US Citizen |
| Sex: * | Female |
| Age: *If age is less than 1 year, please enter 0.* * | 25 |
| Does anyone else live in the household? * | |

Cancel | Back | Continue

> CLICK > APPLY > BENEFIT

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# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

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**3**

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COMPASS
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[SA7]

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Household Members | Sue

Cancel | Back | Continue

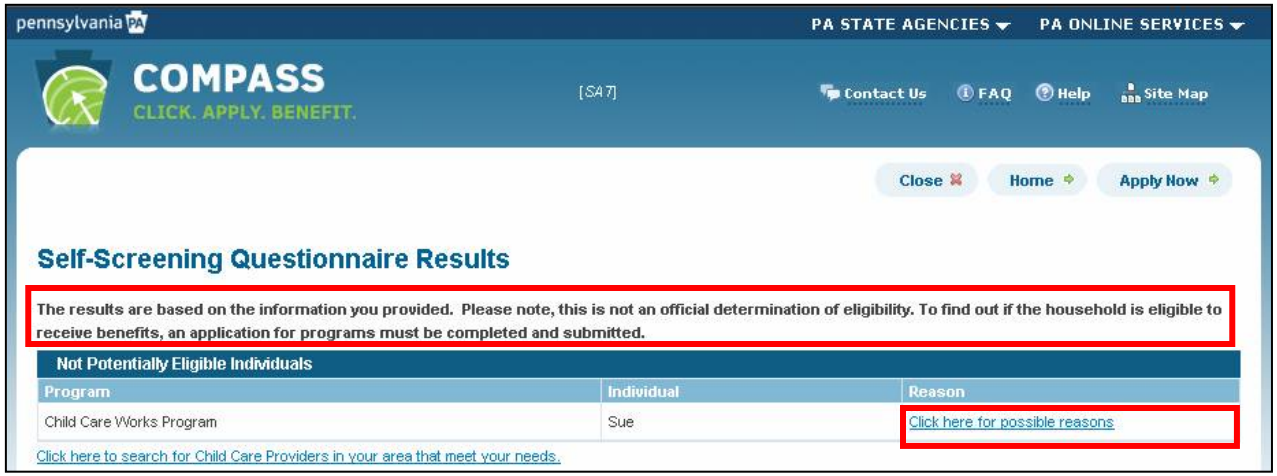
## Detailed Individual Information

Please tell us about Sue

| Income and Resource Questions (please round to the nearest dollar) | |
|---|---|
| 1. How many hours a week does Sue work? | 40 |
| 2. What is Sue's monthly income from all jobs before taxes and deductions (including self-employment)? | $ 800 |
| 3. How many hours does Sue spend in training/educational program per week? | 0 |
| 4. Is Sue receiving Cash Assistance? | No |
| 5. Is Sue receiving Food Stamp or TANF Benefits? | No |
| 6. Has Sue stopped receiving TANF in the past 6 months? | No |
| 7. What is Sue's monthly total of all other income (Social Security Retirement Survivors or Disability Income (RSDI), Supplemental Security Income (SSI), Pension/Retirement, Worker's Compensation, Unemployment Benefits, Dividends and Interest, Child Support, Alimony, Cash Assistance, etc)? | $ 0 |

| Additional Questions | |
|---|---|
| 8. Is Sue disabled? | No |
| 9. Is Sue currently enrolled in a full-time High School or GED program? | No |

- When the Screening process is complete (approximate completion time is 5 minutes), the system displays potential eligibility results. From this page, applicants can begin the application process




- If an applicant is NOT potentially eligible as in this example, they can click the REASON hyperlink to view possible reasons for potential ineligibility

- Applicants can still choose to apply for child care services if the screening process indicates they are not potentially eligible

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Screening Pages

- If an applicant completes the Screening and chooses to apply for child care services, they can click Apply Now at the bottom of the Self-Screening Questionnaire Results page

# COMPASS Key Application Processing Pages

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Application Processing Pages

- Applicants choosing to bypass Screening can click Apply for benefits, or Apply Now on the COMPASS Home page

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Application Processing Pages

- Similar to the Screening process, applicants can apply for multiple services or an individual service by checking the desired service(s)

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COMPASS
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[SA7]

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## Choose Health and Human Services

You have chosen to apply online for one or more of the health and human services offered through this Web site. Click on the appropriate link for information about a specific benefit.

Please select the programs for which you would like to apply and click on the Continue button to begin.

☐ Health Care Coverage

Medical Assistance (including MAWD and Medicare Savings Program for payment of Medicare premium)

Children's Health Insurance Program (CHIP)

adultBasic *Due to funding limitations, eligible applicants for adultBasic are being placed on a statewide waiting list. Applications for adultBasic continue to be accepted. Persons on the waiting list have the option to purchase the coverage at full cost. Electing to purchase or not purchase the coverage as an option will not effect a person's place on the waiting list.*

*CHIP is expanding to cover families who make too much money to qualify currently for either CHIP or Medical Assistance. You can screen and apply through COMPASS, or you can find out more by going to* http://www.chipcoverspakids.com.

☐ SelectPlan for Women

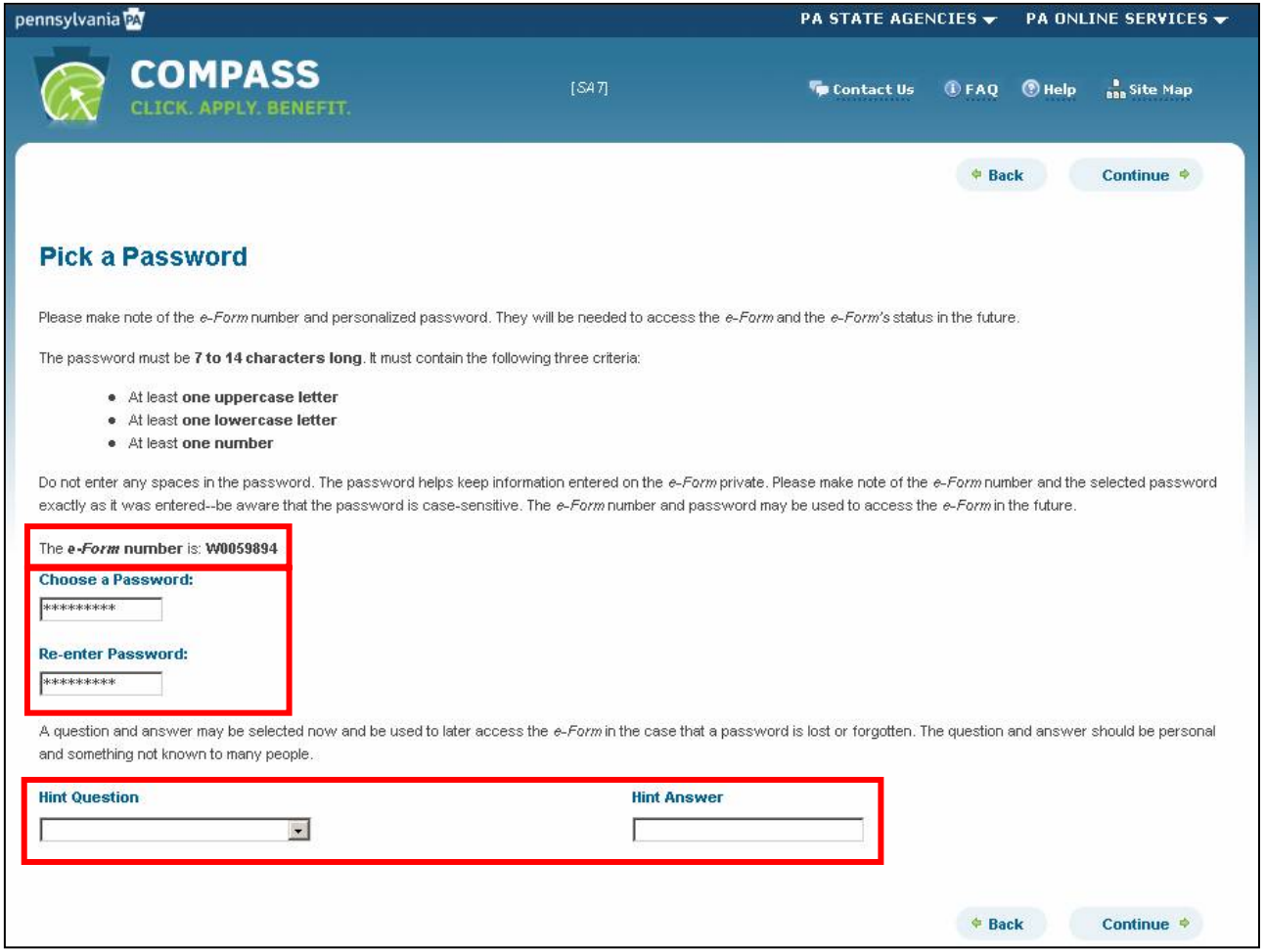
This program provides family planning services for women between age 18 through 44.

☐ Cash Assistance

☑ Child Care Works Program *Child care financial assistance for eligible families.*

# PELICAN CCW Child Care Client Self Service
# COMPASS Key Application Processing Pages

- Applicants are automatically assigned an e-Form Number that begins with a “W”. Applicants must also choose a password. This allows them to complete the application at a later time (up to 30 days from when e-form no. assigned, or until application is e-signed and submitted) and check the status of a completed application. A Hint question and answer can be entered to assist applicants with logging in if they forget their password



## PELICAN CCW Child Care Client Self Service
## COMPASS Key Application Processing Pages

- COMPASS Application pages collect the same information found on the hard copy child care application that potential clients currently complete. If applicants are applying for multiple services, the questions are modified to include information for all of the services selected

- COMPASS applicants use e-signature in lieu of signing a hard copy application. Users are required to agree to the terms of e-signature and enter the last 4 digits of their Social Security Number

- If application does not have a SSN, they can print their completed application and mail it to the CCIS. Without a SSN, a COMPASS application cannot be submitted from COMPASS

- Clients can check the status of a submitted application by going to “My COMPASS Account”

- If system problems occur during the processing of data from COMPASS to PELICAN, COMPASS attempts to resend it daily until it is received by PELICAN

- When an application is submitted, the data is sent to PELICAN CCW in a nightly batch process

- The CCIS “contact address” is displayed for the applicant in COMPASS, based on the county of residence as indicated by the parent/caretaker

- It is not the CCIS's responsibility to provide technical support to COMPASS users. Questions regarding the use of COMPASS should be directed to the DPW Help Line at the following number: 1-800-692-7462

- CCISs must respond to applicant questions regarding their child care application

# Processing New COMPASS Applications in PELICAN CCW

- COMPASS applications are assigned and sent to CCISs based on the County the applicant selected as their County of Residence in COMPASS

  Note: Philadelphia and Allegheny applications are not routed based on County

- In PELICAN CCW, the COMPASS e-Form number translates to the Application Number. If an applicant calls a CCIS, they may provide their e-Form number. CCISs should relate this to the Application Number in PELICAN CCW

- Once an application has been completed in COMPASS, the applicant is given the Name, Address and Phone Number of the CCIS that is handling their application as described previously on slide #22. Applicants can also obtain directions and a map to their local CCIS office from COMPASS

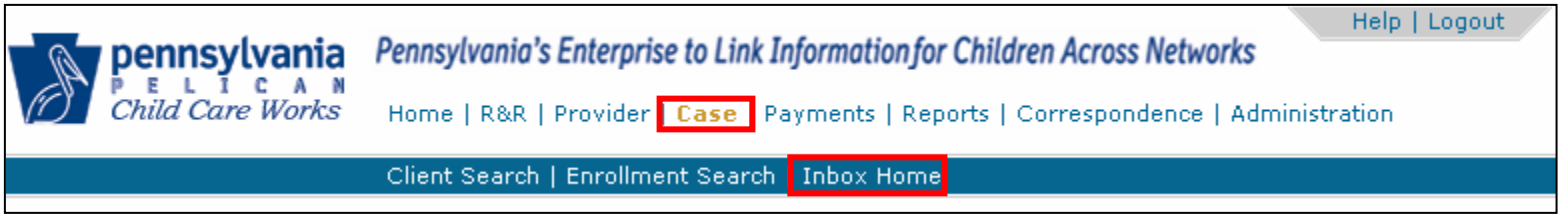
- COMPASS applications must be entered on the application log by CCISs (the same as paper applications)

## PELICAN CCW Child Care Client Self Service
## Changes to PELICAN CCW Inboxes

- One of the changes in PELICAN CCW is the redesign of how the Inboxes are accessed

- Previously, the CIS Inbox and the Update Inbox were located on the sub-navigation bar within the Case module

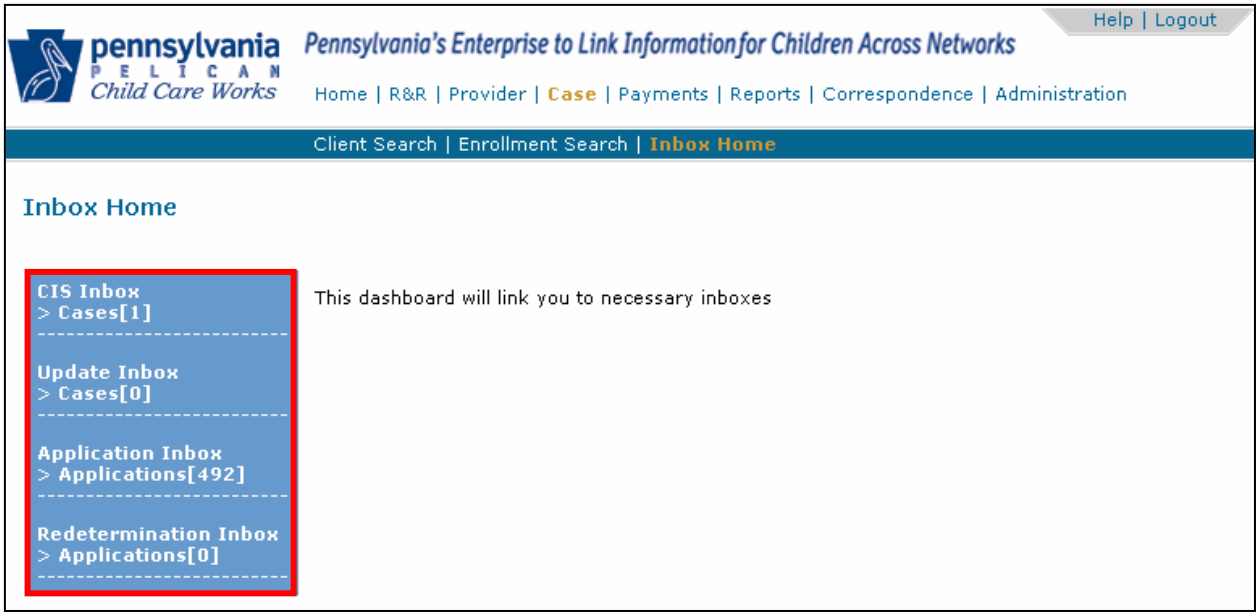
- Because there are two additional Inboxes for Child Care Client Self Service; the Application Inbox and the Redetermination Inbox, all of the Inboxes are now located within the Inbox Home page




- Navigating to the Application Inbox is done by clicking Case → Inbox Home

# PELICAN CCW Child Care Client Self Service
## The Inbox Home Page

- Once the Inbox Home button is clicked, the Inbox Home page opens
- From the Inbox Home page, all of the Inboxes can be accessed:
  - CIS Inbox
  - Update Inbox
  - Application Inbox
  - Redetermination Inbox
- The Inbox Home page displays the total number of records not yet marked reviewed within each Inbox which corresponds to records displayed in the default search
- Clicking the desired Inbox hyperlink opens that Inbox



## The Application Inbox

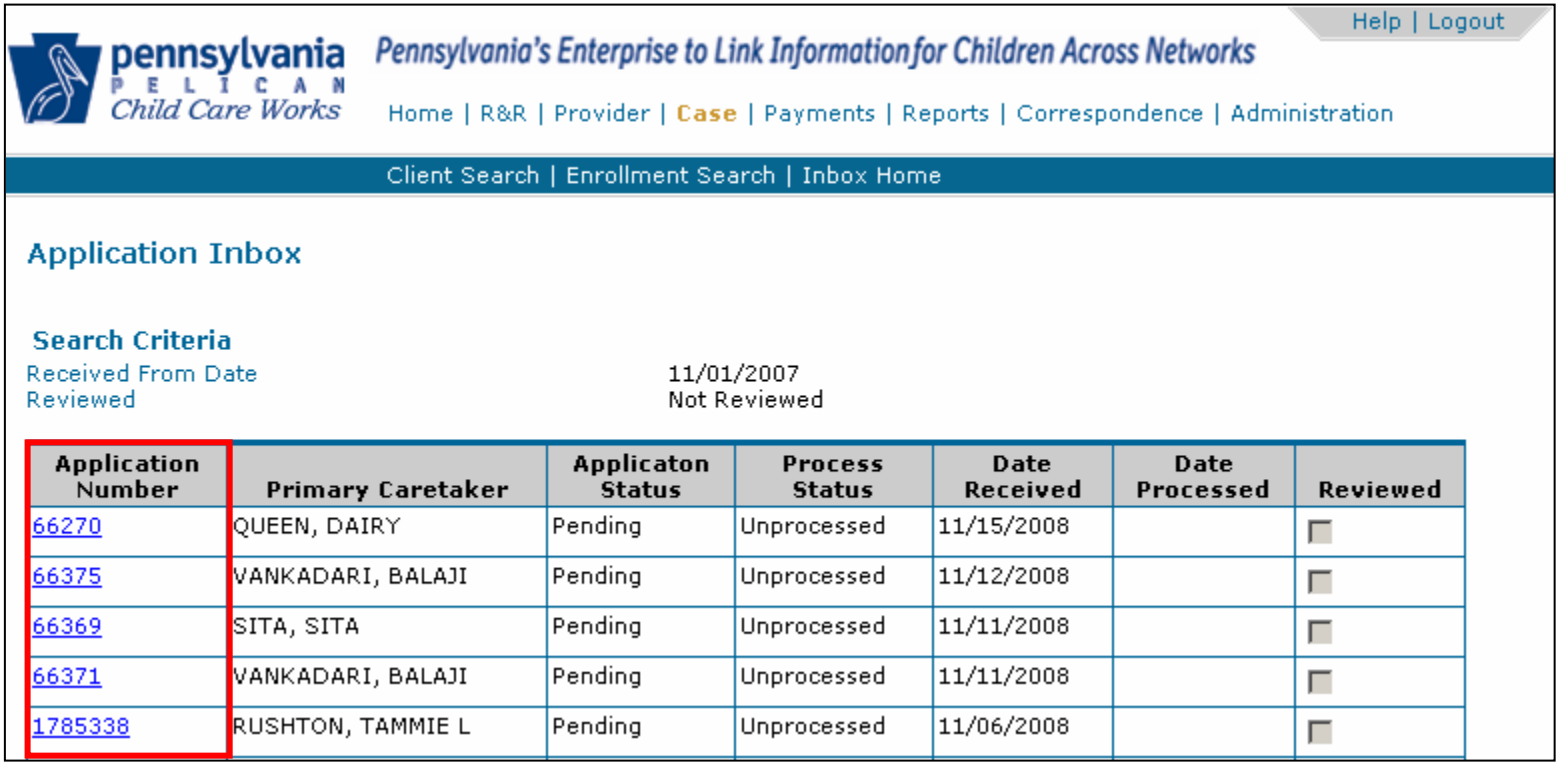
- When an application appears in the Application Inbox, a case has not yet been created. At this point, only application data has been received and it remains in a "holding tank". The CCIS staff must process this information for a case to be created

- The Application Inbox is similar to the CIS Inbox and Update Inbox. The difference is the Application Inbox houses COMPASS applications waiting to be processed and a corresponding case is <u>not</u> yet created, whereas the CIS Inbox and Update Inbox automatically process data and creates a corresponding case. COMPASS applications must be processed manually because the information is received directly from the applicant and must be reviewed by the CCIS. CIS Inbox and Update Inbox data is received from the CAO and the CAO is responsible for the accuracy of the data

- CCISs must review the Application Inbox daily

# PELICAN CCW Child Care Client Self Service
## The Application Inbox

- Once the Application Inbox is clicked, the system displays the application records that have not yet been reviewed or processed
  - Records in the Application Inbox are identified by the e-Form Number assigned by COMPASS. In PELICAN CCW, the e-Form Number translates to the Application Number
  - PELICAN CCW does not use the Preceding "W" that is assigned by COMPASS
  - Records are sorted newest to oldest by Date Received
  - Applications will default to the 0001 Workload

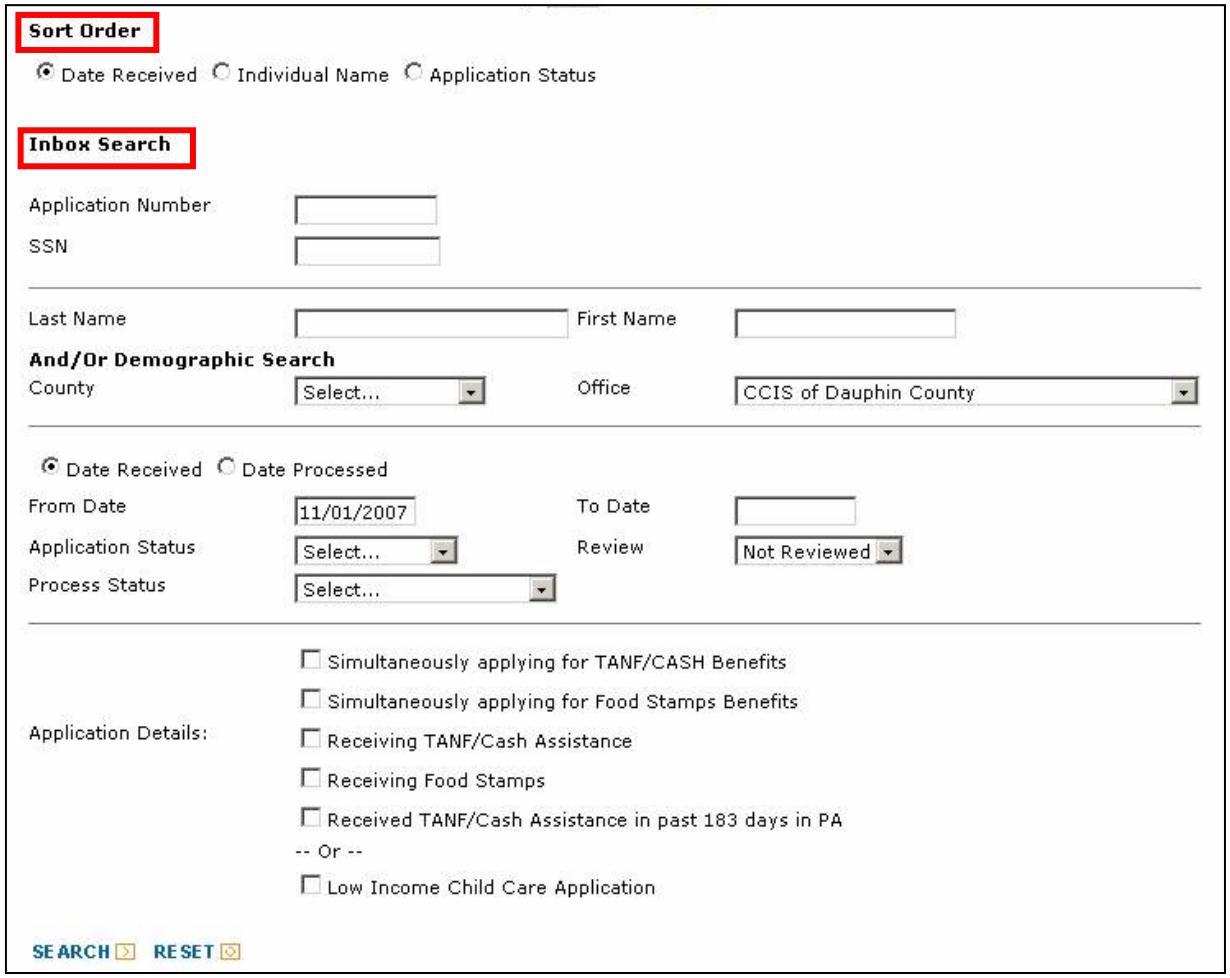



| Application Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|
| 66270 | QUEEN, DAIRY | Pending | Unprocessed | 11/15/2008 | | ☐ |
| 66375 | VANKADARI, BALAJI | Pending | Unprocessed | 11/12/2008 | | ☐ |
| 66369 | SITA, SITA | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 66371 | VANKADARI, BALAJI | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

# Application Inbox – Sort and Search Options

- Records can be sorted by:
  - Date Received
  - Individual Name
  - Application Status
- Records can be searched by :
  - Application Number:
    - This number can be searched in the Application Inbox for 60 days. After 60 days, all applications are purged from the Application Inbox
  - SSN
  - Name
  - Demographics
  - Dates
  - Application Status
  - Review Status
  - Process Status
  - Application Details

  Note: From Date defaults to today's date minus 60 days

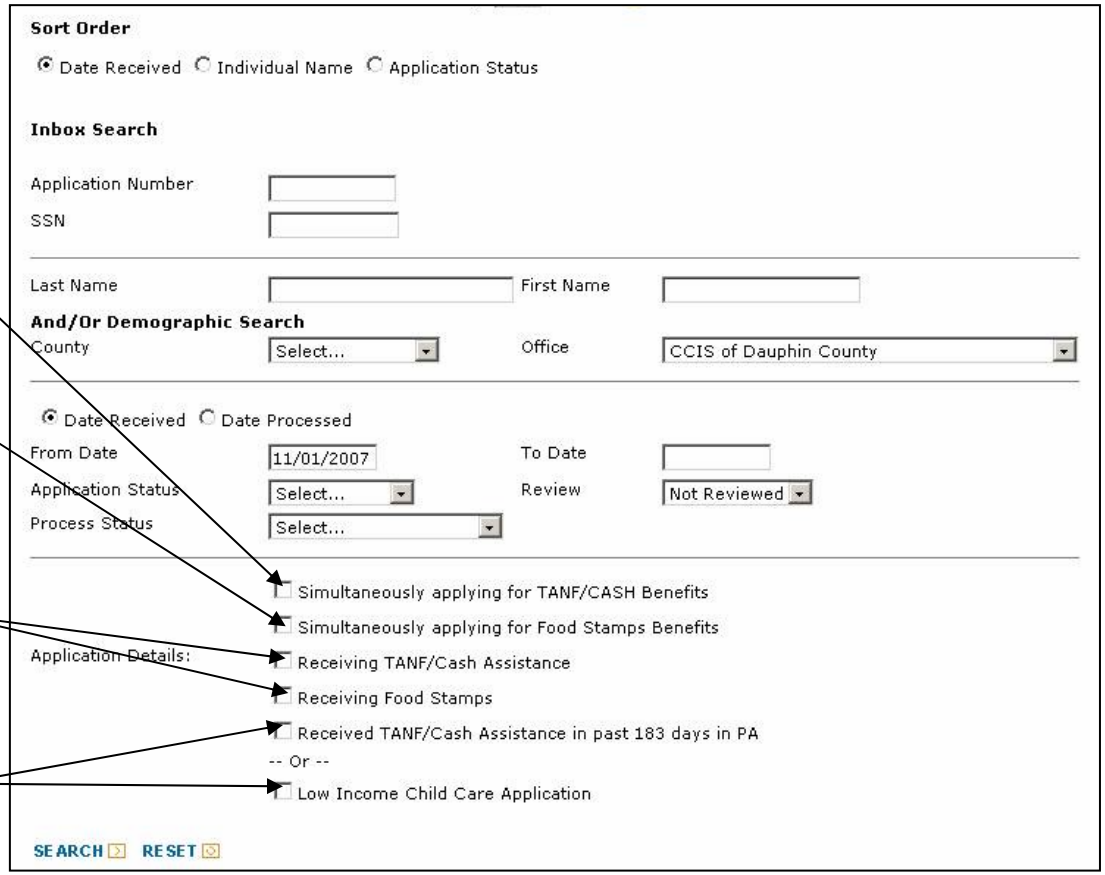


- Application Inbox – Sort and Search Options (cont.)

- The Application Details section allows searches for various application scenarios relating to how the application was submitted. Based on information from the applicant, they are:

1. **Scenario 1 – Dual Submit to CAO and CCIS.** Simultaneously applying for TANF/CASH Benefits and child care (at CAO and CCIS)
2. **Scenario 2 – Dual Submit to CAO and CCIS.** Simultaneously applying for Food Stamps benefits and child care (at CAO and CCIS)
3. **Scenario 3 – TANF/FS Client is Currently Receiving CAO Benefits and Requesting Child Care.** Receiving TANF/Cash Assistance or Food Stamps (at CAO) and now applying for child care
4. **Scenario 4 – COMPASS Application only sent to CCIS, LI/FT Application.** Received TANF/Cash Assistance in past 183 days in PA (FT) or Low Income Child Care Application

- We will review how to process COMPASS applications based on the Application Details in the Application Scenarios section of this training



- Application Inbox – Application Status

➢ There are two types of statuses in the Application Inbox:

1. Application Status
2. Process Status

Help | Logout

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Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Client Search | Enrollment Search | Inbox Home

## Application Inbox

### Search Criteria

Received From Date 11/01/2007
Reviewed Not Reviewed

| Application Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|
| 66270 | QUEEN, DAIRY | Pending | Unprocessed | 11/15/2008 | | ☐ |
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| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

## The Application Inbox

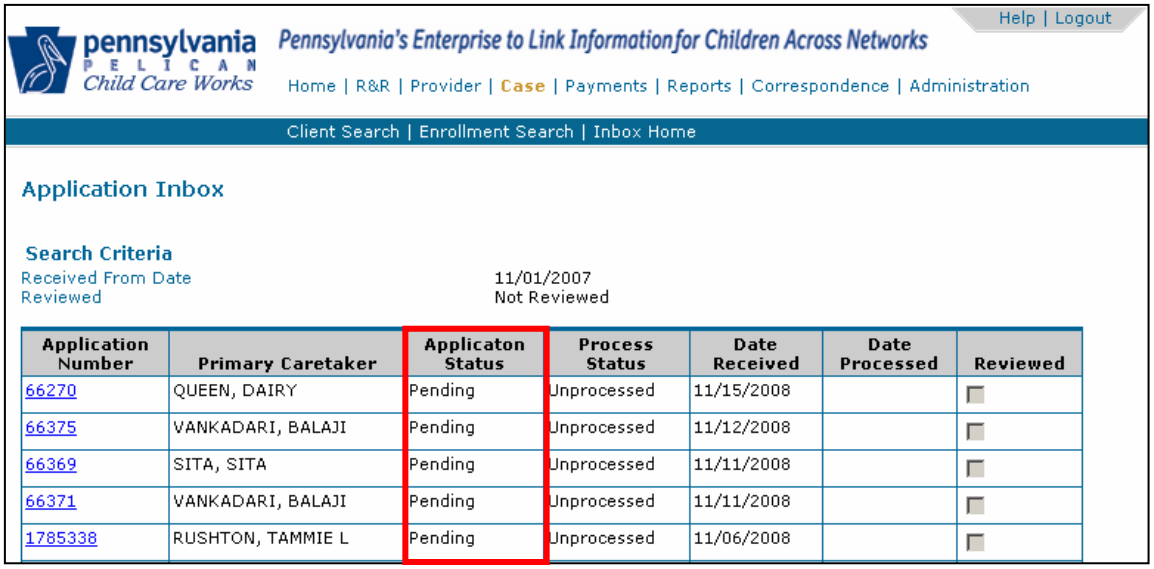
- Application records that appear in the Application Inbox are in a “Holding Tank”. A case has not been created in PELICAN CCW

- A case is not created in PELICAN CCW case until the application has been completely processed and you see the message “Case successfully created”

- Application Inbox – Application Status (cont.)

- **Application Status:**
  - The Application status shown to applicant in COMPASS is derived from the Application Status shown here with the exception of Cancelled
- There are 3 Application Statuses:

1. **Pending:**
   - The Application has not been processed in PELICAN CCW
2. **Processed:**
   - The Application has been processed in PELICAN CCW. This does not guarantee eligibility
3. **Cancelled (only visible in PELICAN CCW):**
   - The Application was rejected by CCIS. The applicant will see a status of Processed in COMPASS

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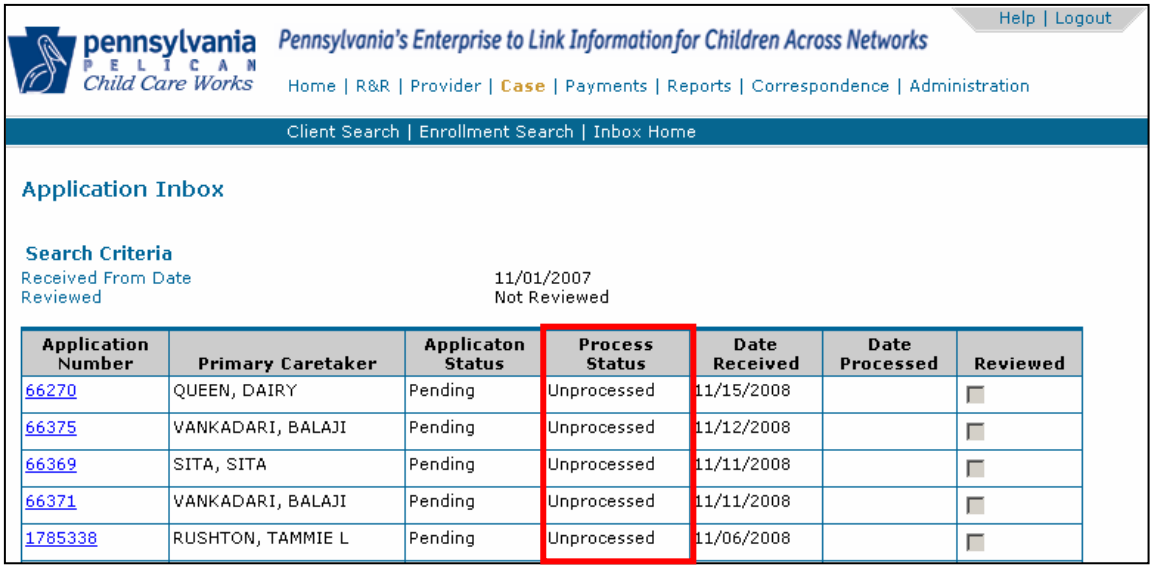
## Application Inbox – Process Status

- **Process Status:**
  - The Status of application processing in PELICAN CCW
- There are 4 Process Statuses:

1. **Unprocessed:**
   - The application has not been processed or was rejected before a case is created
2. **Processed:**
   - The application was processed, a case was created and all application data transferred to the case
3. **Processed With Failures:**
   - A case was created, but some data did not transfer to the case
4. **Failed:**
   - The application data could not be used. A case was not created

- We will review Processed with Failures and Failed in more detail in the Processed with Failures and Failed Applications section of this training

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| 66371 | VANKADARI, BALAJI | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

- Application Inbox – Date Fields

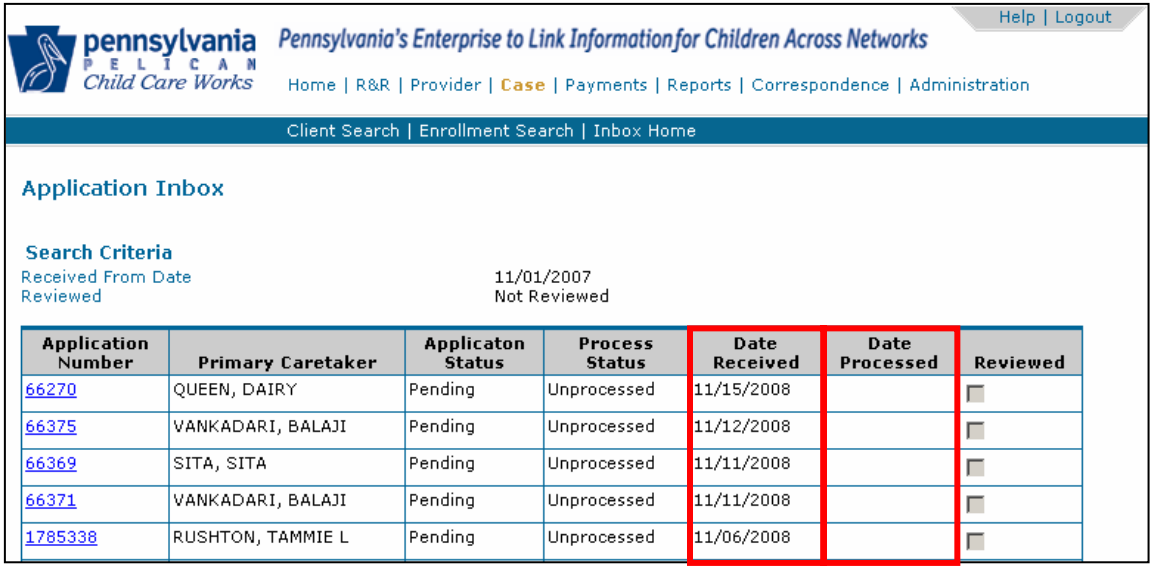
➢ There are 2 application date fields:

**1. Date Received:**

- ❑ The date the application was received from COMPASS (appeared in Application Inbox)

**2. Date Processed:**

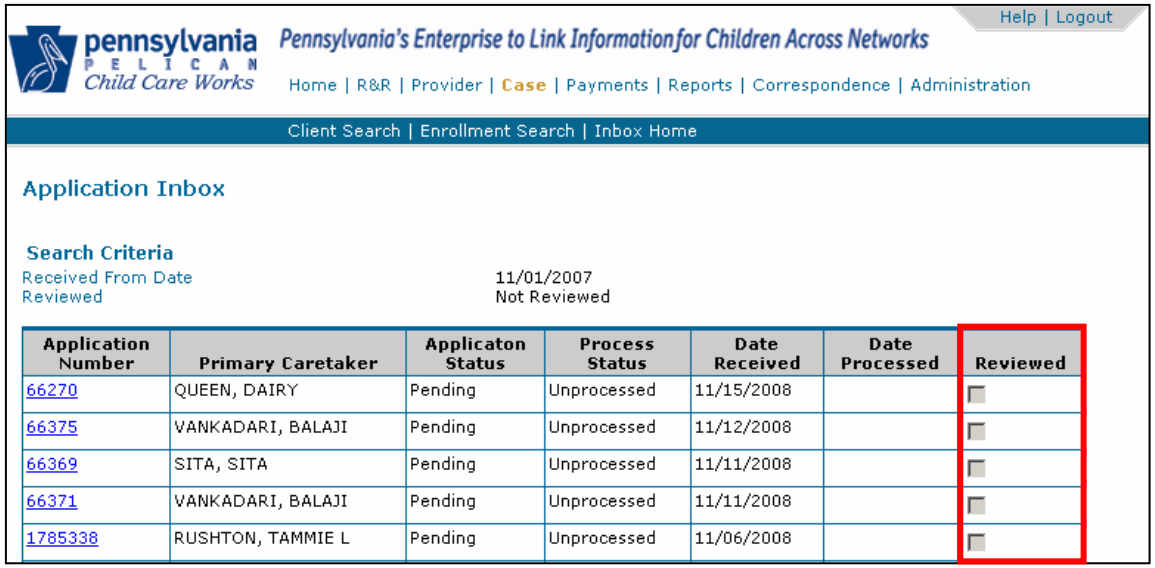
- ❑ The date the application was successfully processed




| Application Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|
| 66270 | QUEEN, DAIRY | Pending | Unprocessed | 11/15/2008 | | ☐ |
| 66375 | VANKADARI, BALAJI | Pending | Unprocessed | 11/12/2008 | | ☐ |
| 66369 | SITA, SITA | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 66371 | VANKADARI, BALAJI | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

- Application Inbox – Reviewed Checkboxes

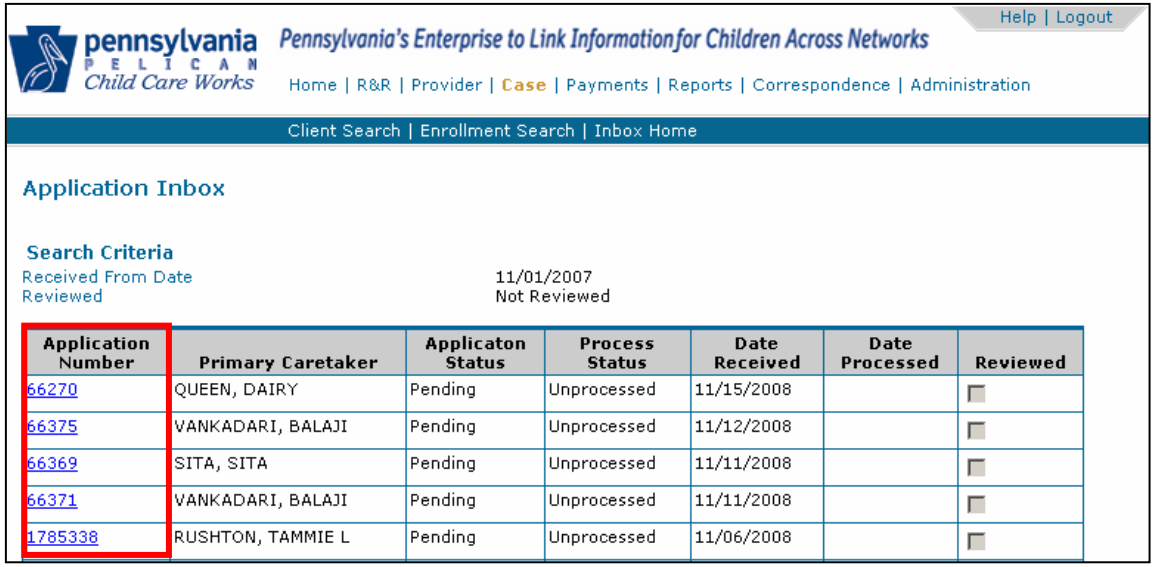
- Reviewed checkboxes are disabled in the Application Inbox to prevent accidental checking of applications as reviewed
- Reviewed checkboxes are system controlled. When an application is processed or rejected, the reviewed checkbox is automatically checked and that application record is removed from the default search results




| Application Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|
| 66270 | QUEEN, DAIRY | Pending | Unprocessed | 11/15/2008 | | ☐ |
| 66375 | VANKADARI, BALAJI | Pending | Unprocessed | 11/12/2008 | | ☐ |
| 66369 | SITA, SITA | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 66371 | VANKADARI, BALAJI | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

- Application Inbox – Opening an Application

➢ Click an Application Number hyperlink to open the Application Summary page




| Application Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|
| 66270 | QUEEN, DAIRY | Pending | Unprocessed | 11/15/2008 | | ☐ |
| 66375 | VANKADARI, BALAJI | Pending | Unprocessed | 11/12/2008 | | ☐ |
| 66369 | SITA, SITA | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 66371 | VANKADARI, BALAJI | Pending | Unprocessed | 11/11/2008 | | ☐ |
| 1785338 | RUSHTON, TAMMIE L | Pending | Unprocessed | 11/06/2008 | | ☐ |

- Any user with access to the Inbox can process an application with the exception of simultaneously submitted applications (sent to the CAO and CCIS at the same time). These must be processed by the Application Manager

- Directors are not automatically included in the Application Manager role. The Application Manager Role is required to process the following 4 groups of applications:
    1. Applications simultaneously submitted to the CAO and CCIS for TANF/Cash benefits
    2. Applications simultaneously submitted to the CAO and CCIS for FS benefits
    3. Applications indicating that the user is currently receiving TANF/Cash benefits
    4. Applications indicating the user is currently receiving FS benefits

- The Application Manager role will not receive alerts. Alerts will be sent to the case worker and supervisor associated to the caseload the application is assigned to. If the application is not assigned to a workload, the alert will be sent to the supervisor of the default 0001 workload

# New COMPASS Application Alerts

- COMPASS Application Alerts are generated in PELICAN CCW from the Application Inbox

- Alerts are automatically generated for COMPASS applications (based on scenarios that will be reviewed later):
  - 10 day alert – "Application W999999 has not been processed"
  - 30 day alert – "Application W999999 has not been processed and eligibility must be assessed"

  Notes:
  - Alerts are received by the person(s) assigned to the default caseload
    - Simultaneously submitted applications (to the CAO and CCIS) can only be processed by CCIS users assigned to the new Application Manager role. Simultaneous applications only receive the 30 day alert to the Application Manager role. Simultaneous applications are reviewed in the "Application Scenarios" section of this training
  - Once a case is created and assigned to an individual workload, standard alerts apply

- Alerts are system cleared once the application is processed or rejected in PELICAN CCW

## PELICAN CCW Child Care Client Self Service
## 6 Steps to Create a Case from a COMPASS Application

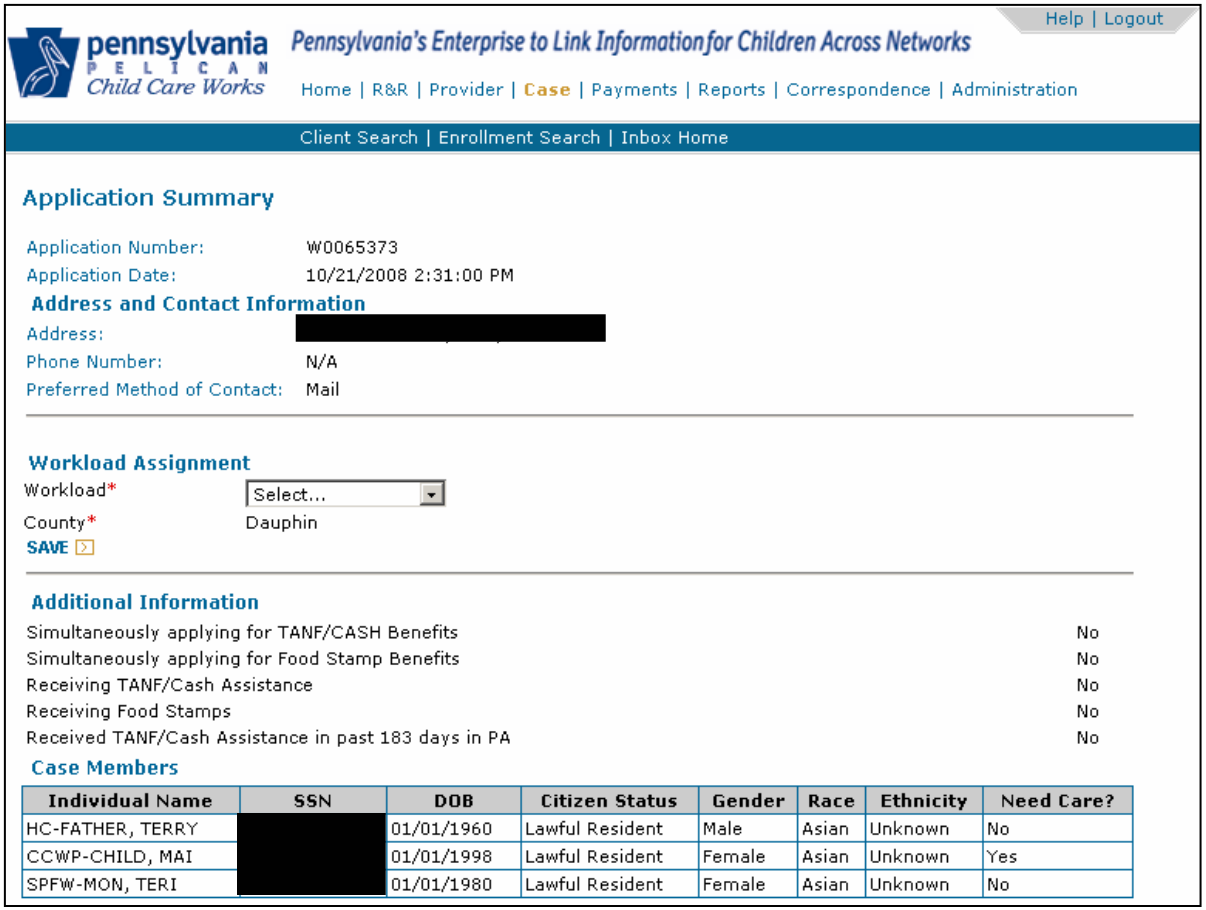
- There are 6 basic steps to create a case from a COMPASS application:
    1. Review the Application Summary Page
    2. Assign a Workload
    3. Address Clearance
    4. Individual Selection
    5. Individual Clearance
    6. Case Selection

- Once a case is created, follow the standard process to assess eligibility, enroll, etc.

- A Missing Information Letter is required for all COMPASS applications because completion of an Authorization to Release Information form is required within 30 days

## STEP 1 – Review the Application Summary Page

- Review applicant information
- Additional Information:
  - Identifies the scenario the application falls under (this is reviewed in the Application Scenario section of this training)
- Case Members:
  - Lists individuals that will be included in the case



Help | Logout

pennsylvania PELICAN Child Care Works — Pennsylvania's Enterprise to Link Information for Children Across Networks

Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Client Search | Enrollment Search | Inbox Home

**Application Summary**

Application Number: W0065373
Application Date: 10/21/2008 2:31:00 PM

**Address and Contact Information**

Address: [redacted]
Phone Number: N/A
Preferred Method of Contact: Mail

**Workload Assignment**

Workload* Select...
County* Dauphin
SAVE

**Additional Information**

| | |
|---|---|
| Simultaneously applying for TANF/CASH Benefits | No |
| Simultaneously applying for Food Stamp Benefits | No |
| Receiving TANF/Cash Assistance | No |
| Receiving Food Stamps | No |
| Received TANF/Cash Assistance in past 183 days in PA | No |

**Case Members**

| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | [redacted] | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | [redacted] | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | [redacted] | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

pennsylvania PELICAN Child Care Works
Pennsylvania's Enterprise to Link Information for Children Across Networks

## STEP 1 – Review Application Summary Page (cont.)

- Other information on this page includes:
  - Schedules/Immunization
  - Disability
  - Employment
  - Training
  - Education
  - Other Income

**Child Care Schedules/Immunization Information**

| Individual Name | Schedule Type | Hours | Immunization |
|---|---|---|---|
| CCWP-CHILD, MAI | Weekdays | 50 | Yes. Immunized |

**Disability Information**

| Individual Name | Disability Type | Disability Begin Date | Able to take care of children | Able to meet work hours requirement |
|---|---|---|---|---|
| No Data Found | | | | |

**Employment Information**

| Individual Name | Employer | Begin Date | Hours per Week | Hourly Pay Rate | Calculated Weekly Pay | Pay Frequency | Gross Amount | Estimated Monthly Amount |
|---|---|---|---|---|---|---|---|---|
| No Data Found | | | | | | | | |

**Training Information**

| Individual Name | Program Name | Hours/Week | Begin Date | Anticipated Completion Date |
|---|---|---|---|---|
| No Data Found | | | | |

**Education Information**

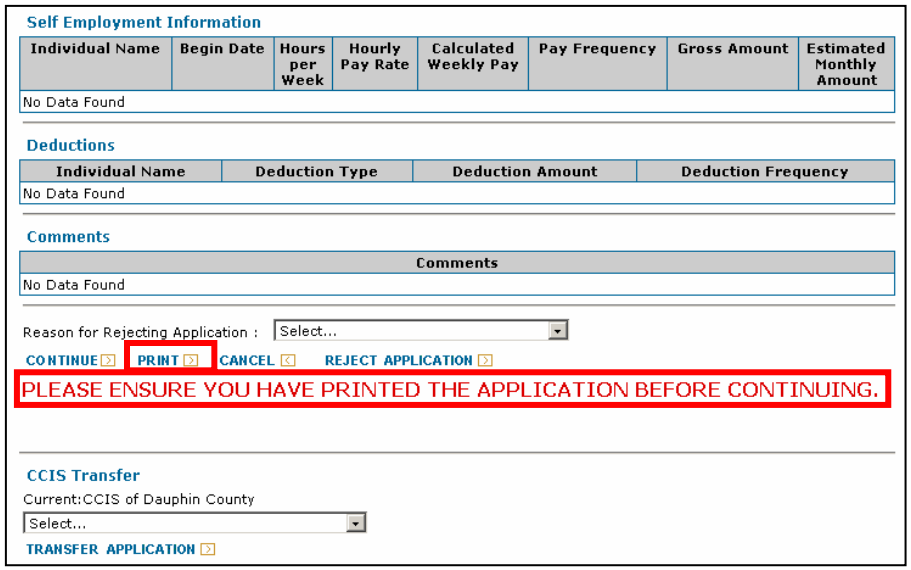
| Individual Name | School Name | School Type | Attendance Type | Graduation Date |
|---|---|---|---|---|
| No Data Found | | | | |

**Other Income Information**

| Individual Name | Income Type | Income Amount | Income Frequency |
|---|---|---|---|
| No Data Found | | | |

- STEP 1 – Review Application Summary Page (cont.)

- Clicking CANCEL on any Application Processing page takes you back to the Application Inbox, IT DOES NOT CANCEL THE APPLICATION
- Per Policy, the Application Summary page must be printed by clicking PRINT at the bottom of this page:
  - As a business practice, once printed, a physical file should be created
- Clicking REJECT APPLICATION will cancel the application and a case can no longer be created from it. The Reject function is reviewed in the Application Scenarios section of this training



Self Employment Information

| Individual Name | Begin Date | Hours per Week | Hourly Pay Rate | Calculated Weekly Pay | Pay Frequency | Gross Amount | Estimated Monthly Amount |
|---|---|---|---|---|---|---|---|
| No Data Found | | | | | | | |

Deductions

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| No Data Found | | | |

Comments

| Comments |
|---|
| No Data Found |

Reason for Rejecting Application : Select...

CONTINUE PRINT CANCEL REJECT APPLICATION

PLEASE ENSURE YOU HAVE PRINTED THE APPLICATION BEFORE CONTINUING.

CCIS Transfer

Current:CCIS of Dauphin County

Select...

TRANSFER APPLICATION

Note: Per standard process, a copy of the Application Summary page must be retained as specified in 55 Pa Code § 3041.85 (relating to record retention)

- STEP 1 – Review Application Summary Page (cont.)

➢ Comments added by an applicant will display in the Comments section of the Application Summary page

**Self Employment Information**

| Individual Name | Begin Date | Hours per Week | Hourly Pay Rate | Calculated Weekly Pay | Pay Frequency | Gross Amount | Estimated Monthly Amount |
|---|---|---|---|---|---|---|---|
| No Data Found | | | | | | | |

**Deductions**

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| No Data Found | | | |

**Comments**

| Comments |
|---|
| No Data Found |

Reason for Rejecting Application : Select...

CONTINUE PRINT CANCEL REJECT APPLICATION

PLEASE ENSURE YOU HAVE PRINTED THE APPLICATION BEFORE CONTINUING.

**CCIS Transfer**

Current:CCIS of Dauphin County

Select...

TRANSFER APPLICATION

- Depending on the application scenario, certain applications will not be processed for 30 days. If paperwork is received for these applications prior to case creation, the paperwork must be tracked and eventually connected to a case (if created)

- **Recommended process:**
  1. When you receive a COMPASS application, print the Application Summary page (do not time/date stamp - the Received Date is the date it was submitted from COMPASS and appeared in the Application Inbox)
  2. Create a physical file filed by Parent/Caretaker name
  3. If/when you receive paperwork (verification forms, etc.), perform a Client Search for the Parent/Caretaker. If no match, search the Application Inbox. If found in Application Inbox:
     a) File paperwork with the Application Summary page
     b) File can be created based on current business practice
     c) If a COMPASS application is processed and a case is created, pull the file and search for verification forms
     d) Use this file for the newly created PELICAN CCW case
     e) If the application is rejected, properly mark the physical file as rejected
     f) If a case already exists for that particular Parent/Caretaker, combine the documents with the existing file

## Application Transfers - POLICY

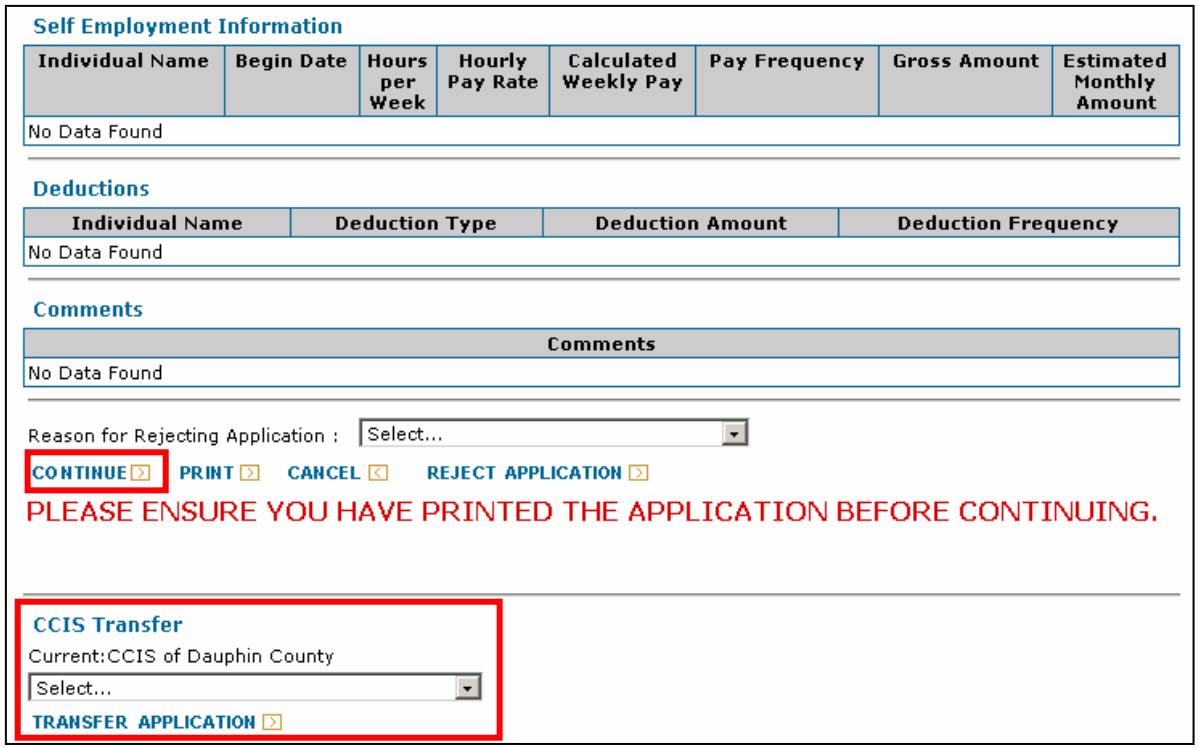
- If a CCIS receives an application that does not belong to their geographical coverage area:

1. Print the Application Summary page
2. Use the transfer function in the Application Summary page to transfer the application to the appropriate CCIS office
3. Print the Application Transfer Letter and make a copy for your records
4. Mail the Application Transfer letter to the applicant
5. File the Application Summary page and a copy of the Application Letter

Note: A Word document of the Application Transfer Letter was provided to CCISs. This document must be used until the letter is able to be generated through PELICAN (see PCR #17453)

## STEP 1 – Review Application Summary Page (cont.)

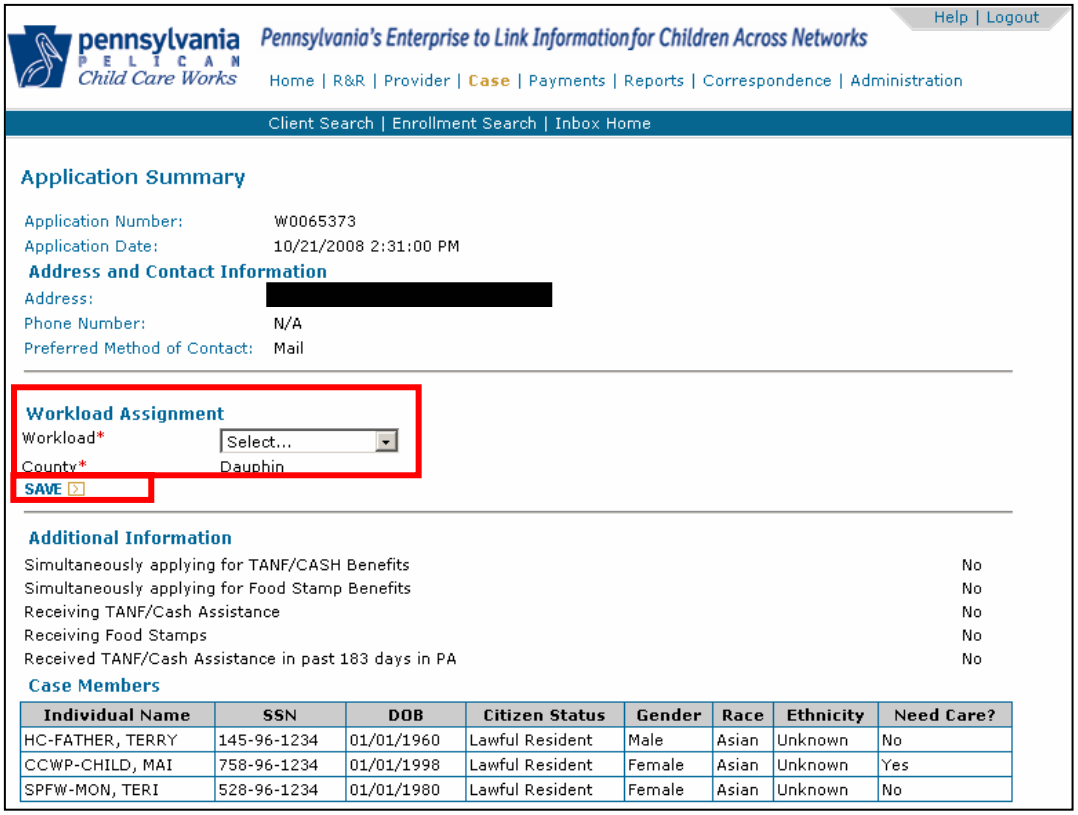
- Applications can be transferred to other CCISs if received at the wrong CCIS via entry error by the applicant. To process a transfer:
  - Select correct CCIS in the dropdown box
  - Click TRANSFER APPLICATION
  - The application appears in the receiving CCIS's Application Inbox
  - The application record is removed from the Application Inbox at sending CCIS
  - All critical dates and alerts associated to the application are reset when received at the new CCIS
- To continue processing the application (no transfer required):
  - Click CONTINUE below the Deductions section
  - The Address Clearance page opens



- STEP 2 – Assign Workload

- Select a Workload from the Workload Assignment dropdown box
- Click SAVE
- You are returned to the Application Summary page

  Note: The workload assignment is not final until a case is created

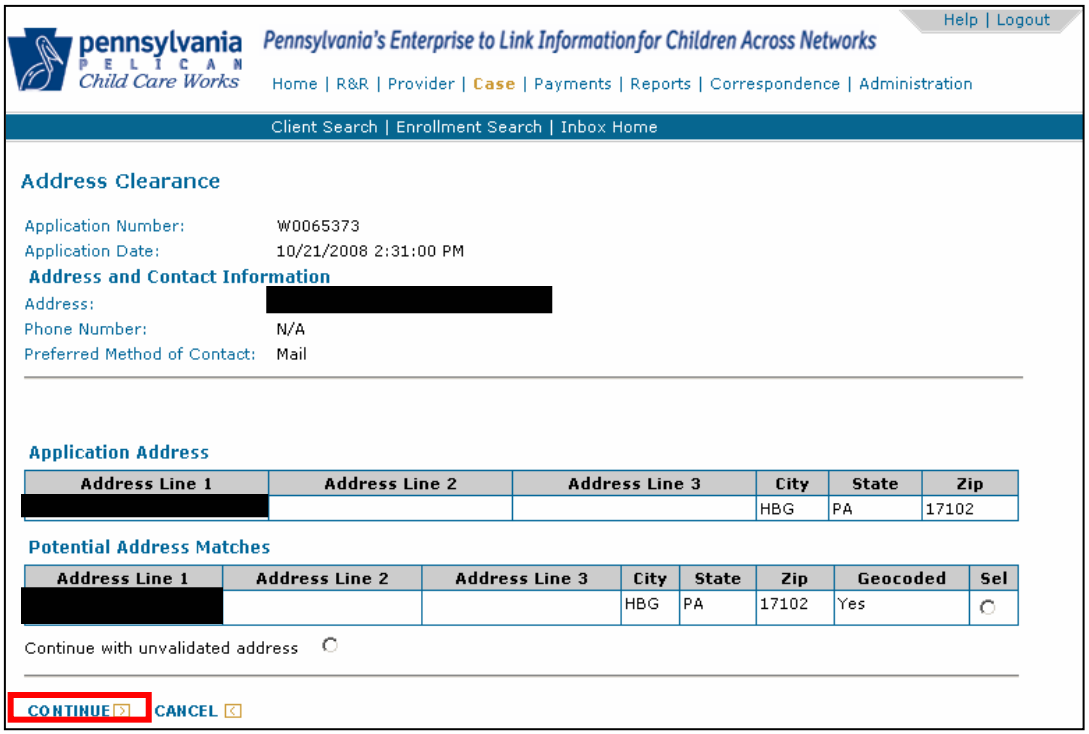



| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | 145-96-1234 | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | 758-96-1234 | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | 528-96-1234 | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

- STEP 3 – Address Clearance

  - Select an address in Potential Address Matches (Geocoded Address) or select Continue with unvalidated address (one of these options must be selected)
  - Click CONTINUE
  - Individual Selection page opens

<u>Note:</u> CCISs are required to obtain verification of residence as specified in § 3041.66 (relating to verification of residence). A written Self Declaration may be accepted as specified in § 3041.64 (relating to Self Declaration)

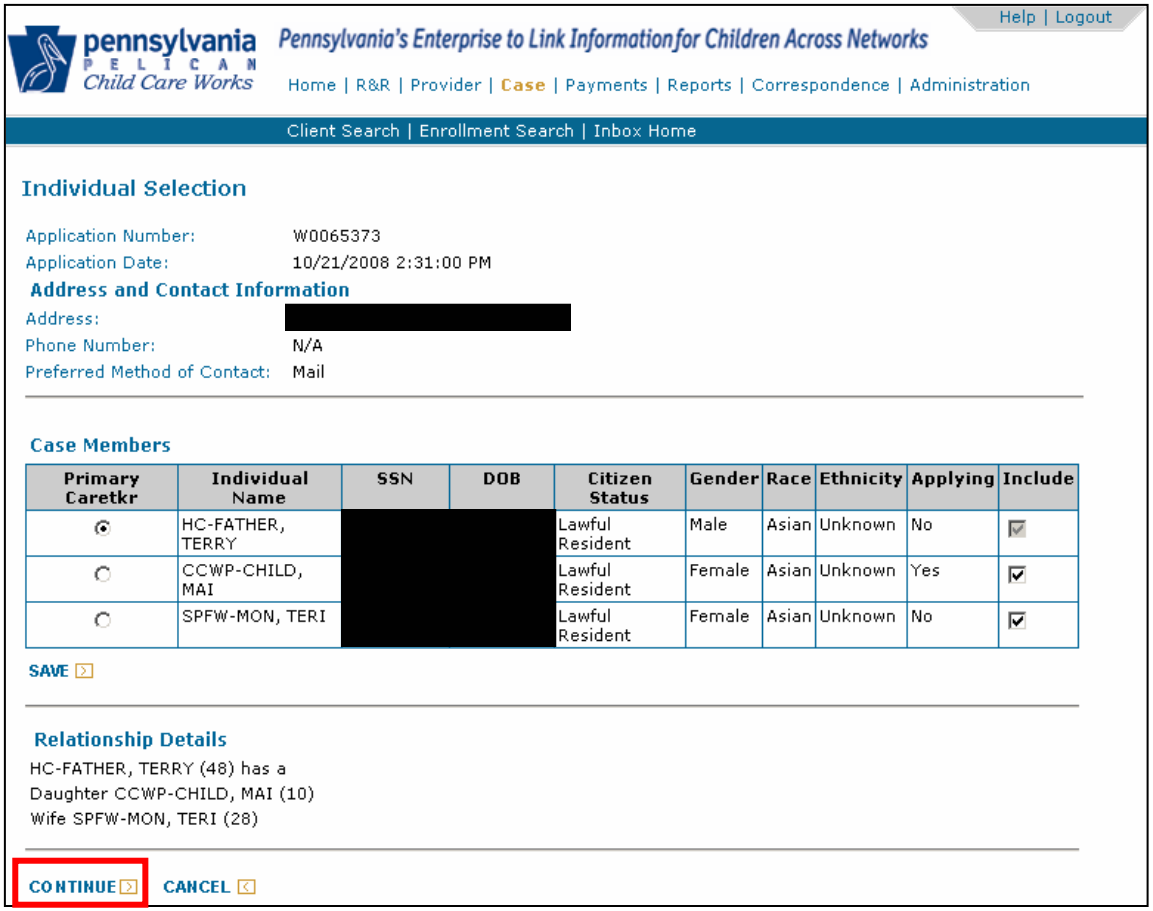


## STEP 4 – Individual Selection

- Review Case Members section:
  - All case members are selected by default
  - If an Individual is deselected and SAVE is clicked, that individual will not be included in the case
- Relationship details:
  - Relationship details are provided to assist with selecting/deselecting appropriate case members
- If changes are made, click SAVE (if SAVE is not clicked, changes are discarded)
- Click CONTINUE
- The Individual Clearance page opens

  Note: Children indicated on the COMPASS application as requiring care should not be deselected. The Primary Caretaker cannot be deselected

- If an individual is deselected, all corresponding information (income, etc.) is automatically removed from the case that is created



## Individual Clearance – POLICY

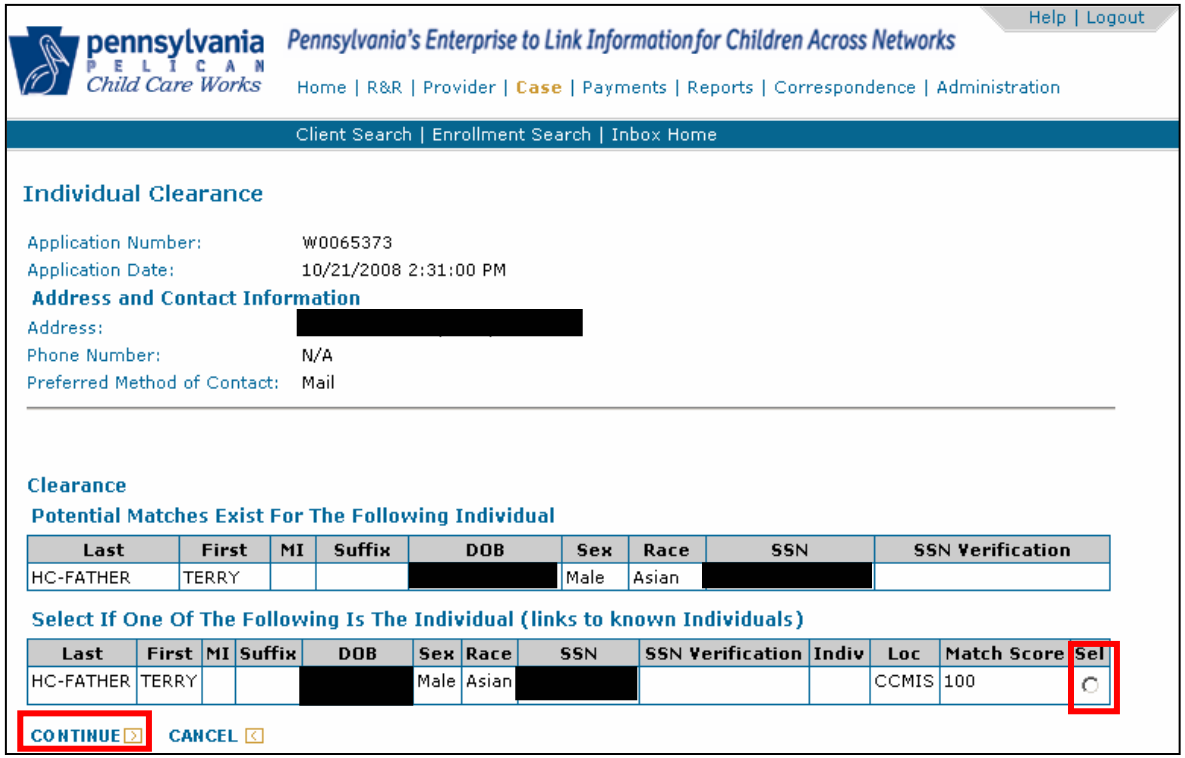
- If an INCORRECT match is returned based on SSN during the Individual Clearance Process, the CCIS will NOT continue to process the COMPASS application. A case must be created manually
- PELICAN CCW Parent/Caretaker selection can be made before a case is created if the incorrect individual is listed as the Primary Caretaker

  **Example:**
  Mary Smith applies online through COMPASS for subsidized child care services. She inadvertently transposed two digits of her SSN. During the Individual Clearance process, the SSN returns an incorrect match because that SSN belongs to Jane Wilson.

- In this case the CCIS MUST:
  1. Use the printed copy of the Application Summary page to manually create a case, with the exception of the incorrect Parent/Caretaker's SSN
  2. Generate and send a Missing Information Letter to the Parent/Caretaker requesting additional information as needed to create the case and/or determine eligibility.
  3. Reject the COMPASS application using the appropriate rejection reason code (Rejection Reason Codes are reviewed in the Application Scenario section of this training)
- Parent/Caretaker is NOT required to complete a new application

  Note: Policy States "We may not require SSN from client". If the client willingly provides a SSN, the CCIS must verify it is correct prior to entering it into PELICAN. Because the client reported the SSN and may incorrectly enter it in COMPASS, the CCIS must verify the SSN

- STEP 5 – Individual Clearance
  - If matches are found for any Individuals and they are indeed a match, select the individual
  - If you are not satisfied the suggested individual is a match or if no matches are found, select Individual unknown to MCI and create a new Individual
  - Click CONTINUE
  - The Case Selection page opens

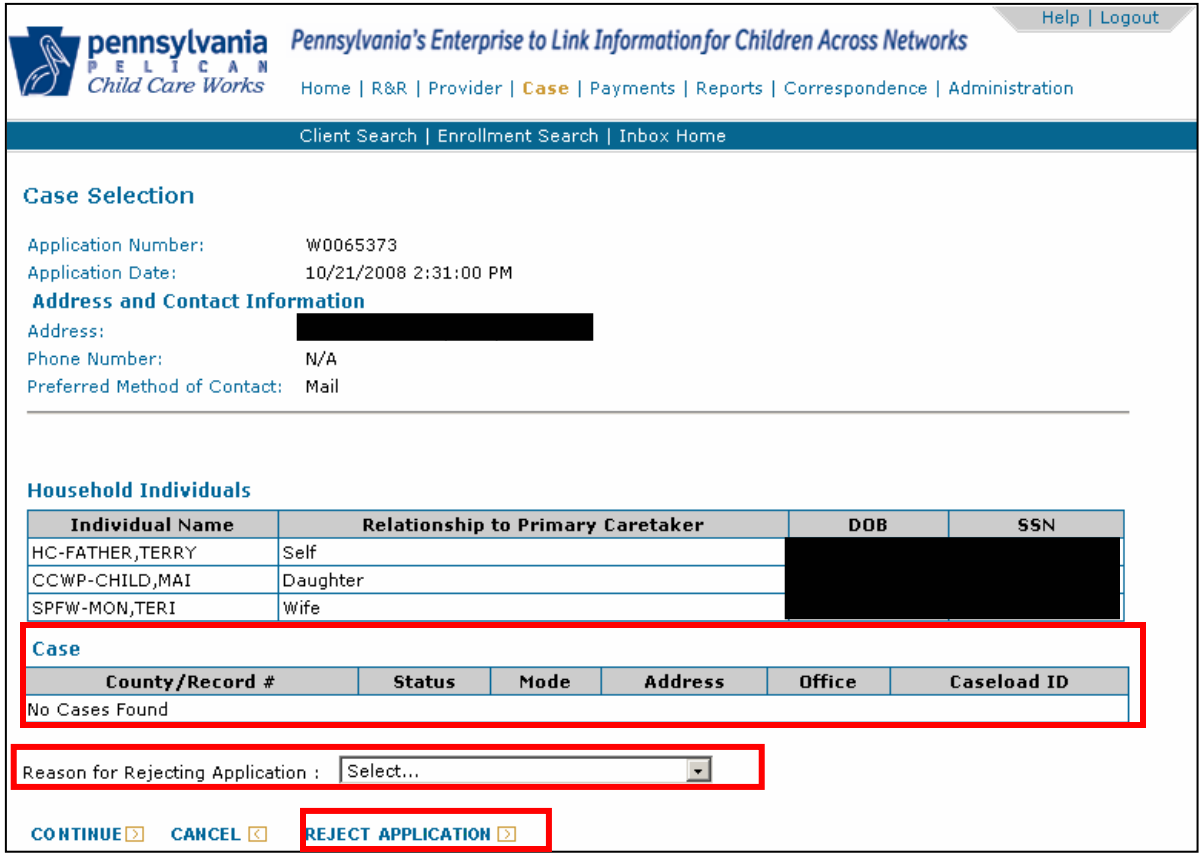


## STEP 6 – Case Selection

- This page indicates if the Primary Caretaker already exists in a case. If so, the case information appears in the Case section
- At this point you have the option to CONTINUE (create a case using the COMPASS application),

  -OR-
- REJECT APPLICATION (do not create a case using the COMPASS application)

  Note: If the application is rejected, a warning message appears that you will be rejecting the application (this is reviewed in the Reject Application section of this training)
- Once an application is rejected, a case cannot be created from it. If an application is rejected in error, the Application Summary page is still available in the Application Inbox. Manually create the case using the Application Summary Page information

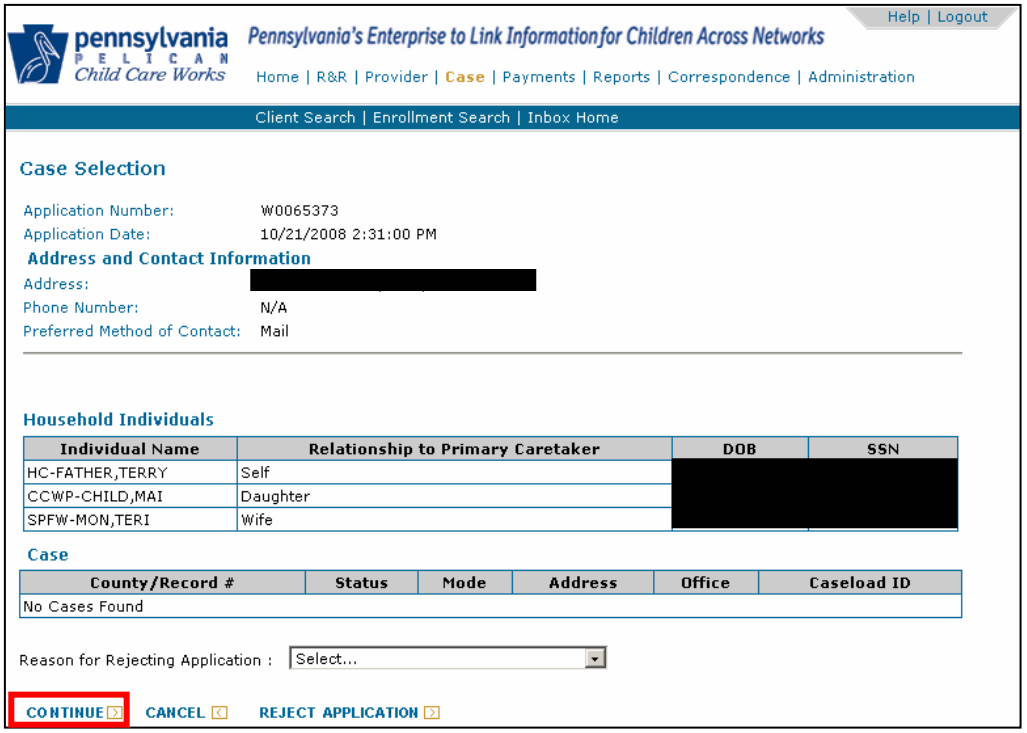


- STEP 6 – Case Selection (cont.)

- Determine if case exists in PELICAN for the Primary Caretaker
- Click CONTINUE

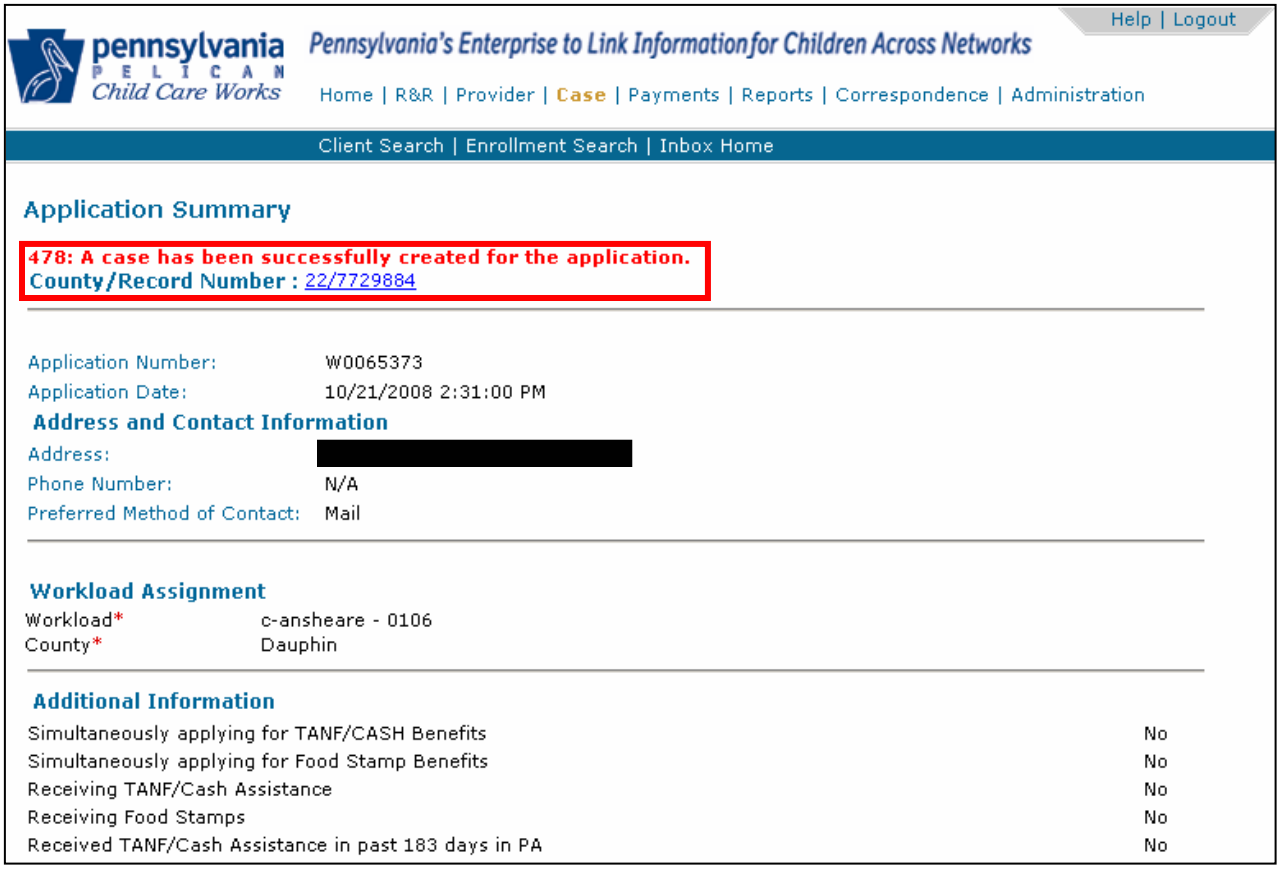
  -OR-
- If a case exists, you may have to reject the application

  Note: We review specific processes for this in the Application Scenario section of this training



# PELICAN CCW Child Care Client Self Service
# 6 Steps to Create a Case from a COMPASS Application

- CONGRATULATIONS! A PELICAN CCW case has been created
  - You are directed back to the Application Summary page
  - Here you can click the County/Record Number hyperlink to open the case
  - Follow the standard process for assessing eligibility, enrollment, etc.



# PELICAN CCW Child Care Client Self Service
# Processed with Failures and Failed Applications

- Addressing Processed with Failures Applications

- On the Application Summary page, if anything failed during the transfer of COMPASS data to PELICAN CCW, it displays here
- In this example, a Child's Disability age is questionable. This did not stop the case from being created (Processed with Failures). Follow one of the following steps to address this:

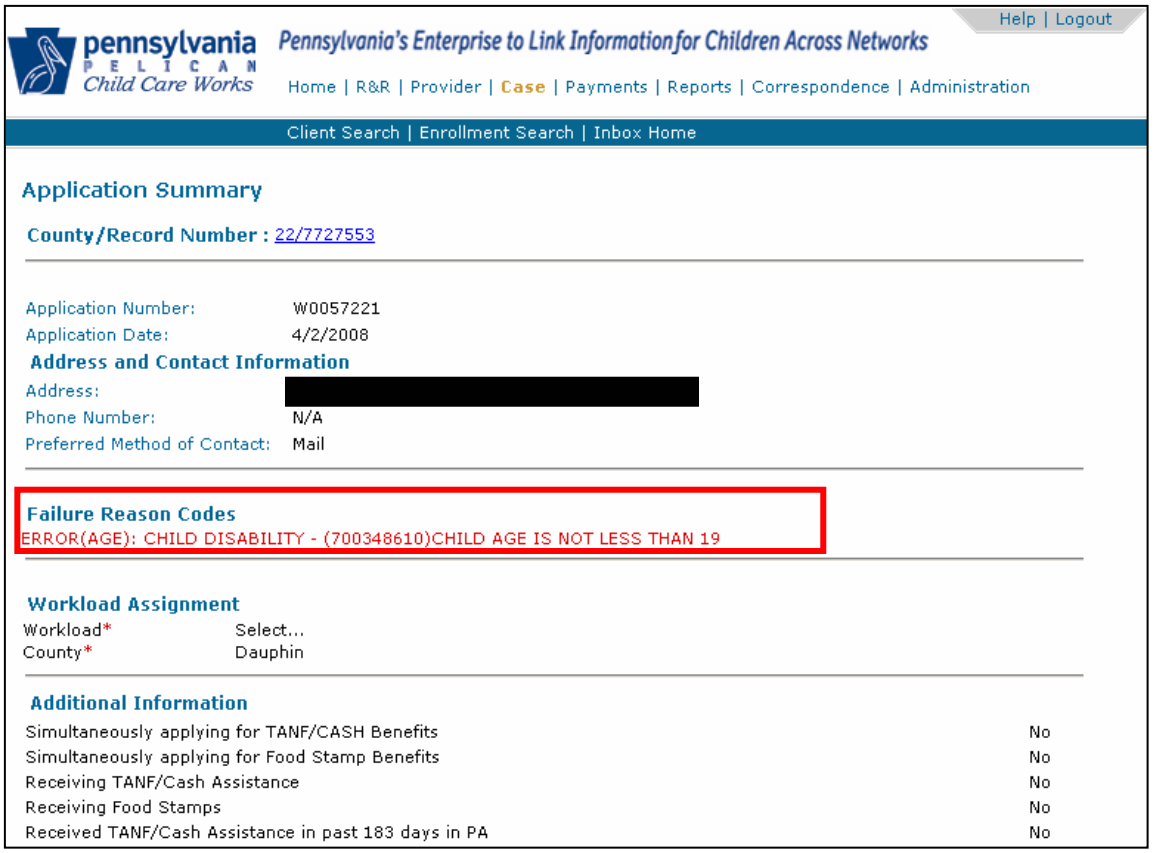
1. Check the Application Summary page and manually enter the information

   -OR-

2. Send a Missing Information Letter to the Parent/Caretaker

- The record in the Application Inbox shows a Process Status of Processed With Failures

  Note: When searching the Application Inbox, select Reviewed to find the record and view the Application Summary page. You must select "Reviewed" because the system automatically marks the application as reviewed when it is processed

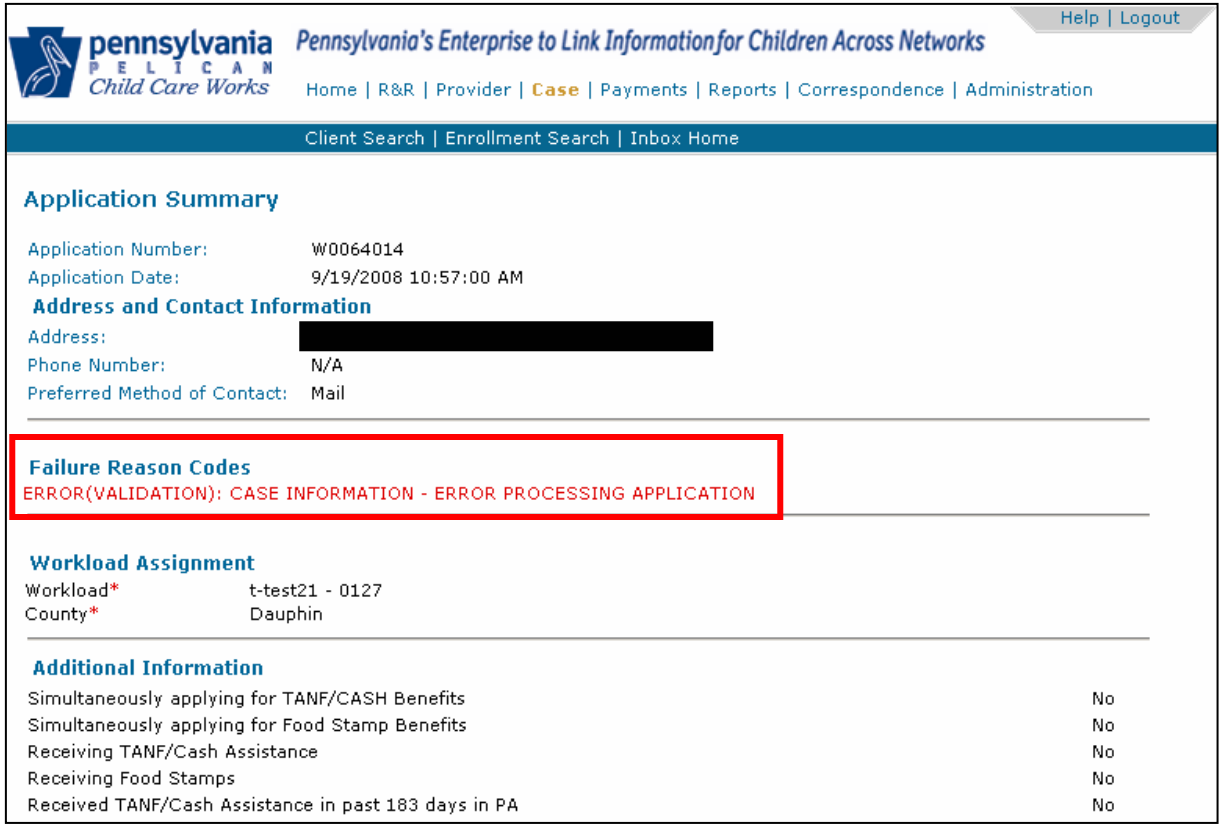


# PELICAN CCW Child Care Client Self Service Processed with Failures and Failed Applications

## Addressing Failed Applications

- On the Application Summary page, if anything failed during the transfer of COMPASS data to PELICAN CCW, it displays here
- In this example, PELICAN CCW could not validate critical case information. A case was not created (Failed). Follow these steps to address this:
  - Use the Application Summary page and manually create a case
  - If information is missing from the Application Summary page, send a Missing Information Letter to the Parent/Caretaker
- The record in the Application Inbox shows a Process Status of Failed

  Note: When searching the Application Inbox, select Reviewed to find the record and view the Application Summary page. You must select "Reviewed" because the system automatically marks the application as reviewed when it is processed



# Processing Different COMPASS Application Scenarios

## Application Processing – POLICY

Prior to creating a new case from a COMPASS application, the CCIS MUST do the following in PELICAN CCW:

- Confirm that all individual demographic information matches the information on the MCI Individual Clearance page in PELICAN CCW
- Thoroughly research any existing County/Record Number returned on the Case Selection page in PELICAN CCW
- Use any existing County/Record Number available when determining whether to process or reject a COMPASS application based on Job Aids #1 and #2
- Review the hierarchy in case creation to determine whether an existing case must be used, reopened or maintained. The case creation hierarchy is:

| Preference in Selection | Child Care Program |
|---|---|
| 1st | TANF |
| 2nd | FS |
| 3rd | GA |
| 4th | FT |
| 5th | HS/PK |
| 6th | LI |

Note: A family may be eligible for FS and Low-income simultaneously if the parent(s) are meeting the work requirement. Therefore, the CCIS may need to process a FS case and create an LI case to be placed on the waiting list.

## Scenario 1

## Dual Submit to CAO and CCIS (Simultaneously Applying for TANF and Child Care) – POLICY

- The CCIS is not required to process the COMPASS application until Day 30 to allow sufficient time for the TANF case to be pushed from CIS to PELICAN CCW
  - The push establishes and maintains a link between CIS and PELICAN CCW

- The CCIS MUST determine eligibility on Day 30

- On Day 30, if the TANF case has not been pushed, the CCIS MUST pull the TANF case. If the case does not exist in CIS, the COMPASS application may have been rejected by the CAO and the CCIS MUST process the application as LI

- If the COMPASS application is processed as LI, the CCIS MUST set all verifications to Self-Declared on Day 30 and send a completed Self Declaration form along with a Missing Information Letter to the Parent/Caretaker, giving an additional 30 days (until Day 60) to submit verifications. The CCIS must select the checkbox to "Display CAO Rejection/CIS Case Ineligible Paragraph". The following policy approved language will be displayed just above the Supplemental Text field of the Missing Information Letter:

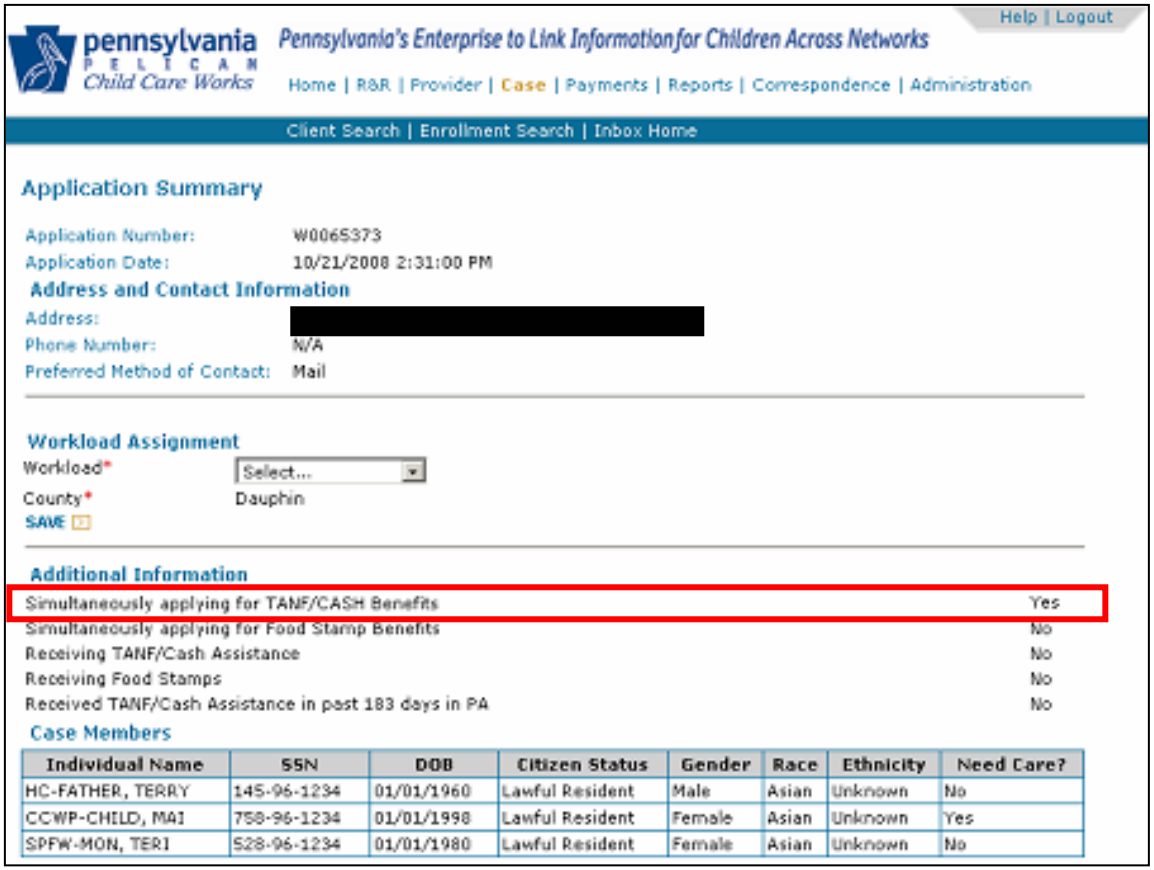
  "The County Assistance Office received your online request for services. You do not qualify for child care through the County Assistance Office. Our office may be able to help you with your child care costs through the Subsidized Child Care program. We have completed a form on your behalf. We need more information to determine if you qualify for child care services. You have 30 days from the date on this letter to provide written confirmation of the information listed above no later than <RESPOND-BY DATE repeated here>. If you have any questions, please contact our office immediately."

Note: Only CCIS users assigned to the Application Manager role can access and process these applications

- **Scenario 1 – Dual Submit to CAO and CCIS (Simultaneously Applying for TANF and Child Care)**

➢ The Case in the Application Inbox indicates Simultaneously applying for TANF/CASH Benefits = Yes

1. An Alert is received on Day 30 to review the application
2. Search PELICAN CCW. If a case exists, follow the steps in Job Aid #1
3. If a case does not exist, check CIS and if a case exists, PULL it from CIS
4. If case does not exist in CIS:
   a. Process the COMPASS application and create a LI case
   b. Mark all pending verifications to Self Declared
   c. Assess and Confirm Eligibility
   d. Generate a Missing Information Letter using the policy-approved language (slide #61)
   e. Send the Missing Information Letter requesting verification paperwork within 30 days
   f. Set a manual 30 Day Tracking Date Alert
   g. Follow the standard process



## Scenario 2

## Dual Submit to CAO and CCIS (Simultaneously Applying for FS and Child Care) – POLICY

**FS MEETING the Work Requirement:**

1. The CCIS MUST review the COMPASS application no later than Day 10 to determine if the case meets LI work requirements
2. If the case meets LI work requirements on Day 10, the CCIS MUST process the COMPASS application as LI and set a manual Tracking Date Alert for Day 30 to pull the FS case (if the LI case is waitlisted)
   Implications:
   a. The CCIS has 30 days to determine eligibility
   b. The Parent/Caretaker does not understand the routing of COMPASS applications or the difference in verification requirements for different child care programs
   c. The Parent/Caretaker must be given adequate time to submit the necessary verification paperwork
3. If the COMPASS application is processed as LI, the CCIS MUST send a Missing Information Letter to the Parent/Caretaker on day 10, giving the parent/caretaker 30 days to submit verifications
4. The CCIS MUST Assess and Confirm Eligibility on or before Day 30

## Scenario 2

## Dual Submit to CAO and CCIS (Simultaneously Applying for FS and Child Care) – POLICY

**FS NOT MEETING the Work Requirement:**

1. The CCIS MUST review the COMPASS application no later than Day 10 to determine if the case meets LI work requirements
2. If the case does NOT meet LI work requirements on Day 10, the CCIS CANNOT process the COMPASS application until Day 30 in order to:
   - Allow sufficient time for the FS case to be pushed by the CAO from CIS
     - The push establishes and maintains a link between CIS and PELICAN CCW
3. On Day 30, if the FS case has not been pushed, the CCIS MUST pull the FS case and Assess and Confirm Eligibility. If the case does not exist in CIS, assess eligibility under LI

4. If the COMPASS application is processed as LI, the CCIS must:
   a) Set all pending verifications to Self-Declared on Day 30
   b) Send a completed Self-Declaration from along with a Missing Information Letter to the Parent/Caretaker, giving an additional 30 days (until Day 60) to submit verifications
   c) The CCIS must include the Policy-approved language specified on slide #61 when generating the Missing Information Letter

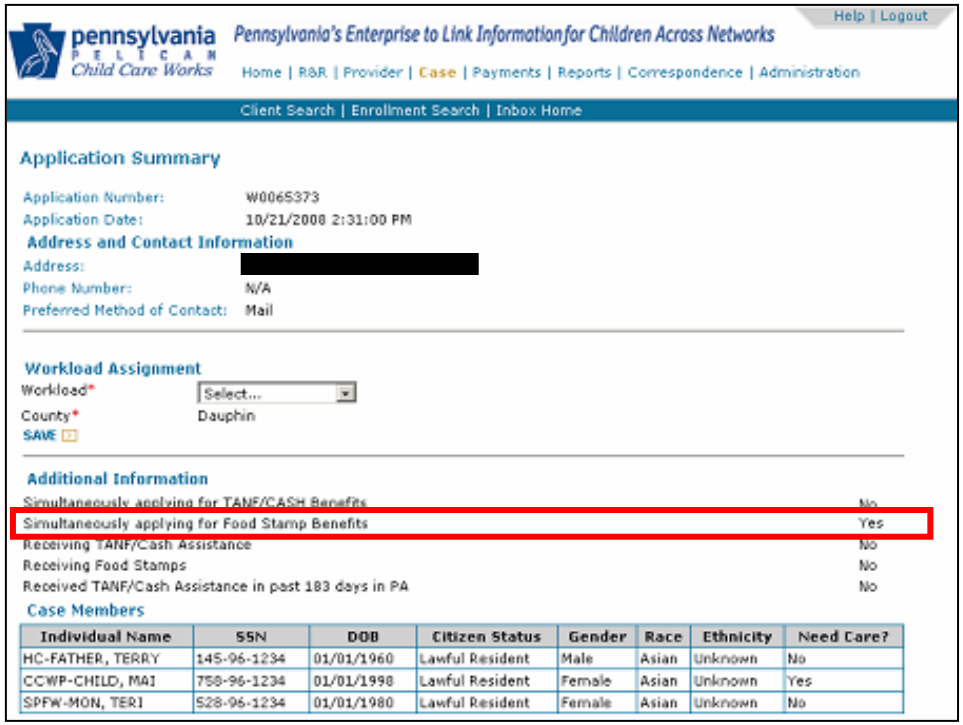
   Note: Only CCIS users assigned to the Application Manager role can access and process these applications

5. If the CAO pushes a FS case prior to, or following Day 30, the CCIS MUST follow the standard process from the CIS Inbox and reject the application using the appropriate Rejection Reason Code

- Scenario 2 – Dual Submit to CAO and CCIS (Simultaneously Applying for FS and Child Care)

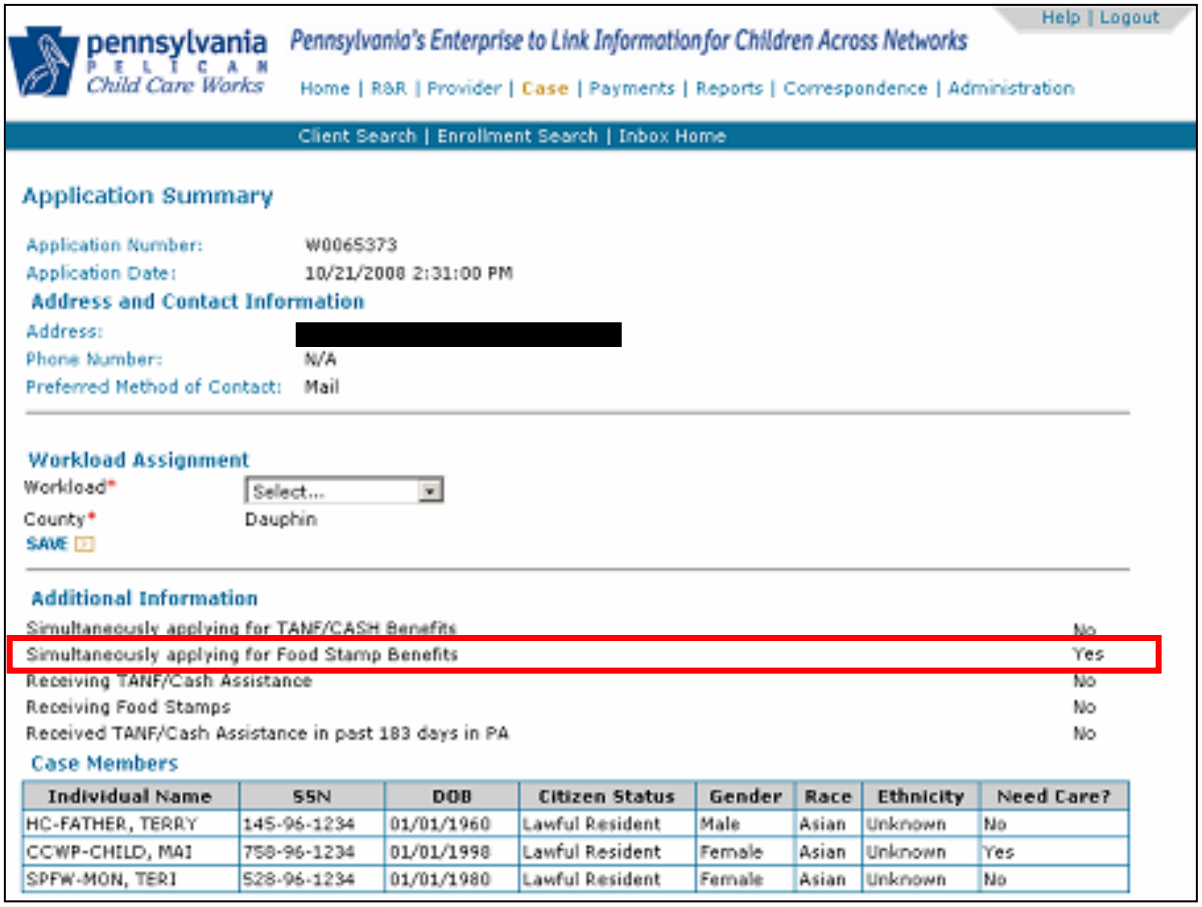
➢ The Case in the Application Inbox indicates Simultaneously applying for Food Stamp Benefits = Yes

1. An Alert is received on Day 10 to review the application (this alert is NOT generated for dual submit TANF applications to the CAO and CCIS)
2. Search PELICAN CCW. If a case exists, follow the steps in Job Aid #1
3. If a case does not exist, determine if the case is a FS working case (i.e., LI if meeting work requirements)
4. If the case does NOT meet LI work requirements, do not process the application until Day 30:
   a. On Day 30, PULL the case if it exists in CIS and is eligible, but has not been pushed. Otherwise, process the COMPASS application as LI
   b. Mark all pending verifications to Self Declared
   c. Assess and Confirm Eligibility
   d. Generate a Missing Information Letter using the policy-approved language (slide #61)
   e. Send a Missing Information Letter requesting verification paperwork within 30 days
   f. Set a manual 30 Day Tracking Date Alert



- Scenario 2 – Dual Submit to CAO and CCIS (Simultaneously Applying for FS and Child Care) (cont.)

5. If a case MEETS LI work requirements:
   a. Process the COMPASS application as LI
   b. Send a Missing Information Letter giving the Parent/Caretaker until Day 30 to submit verifications
   c. Set a manual 20 Day Tracking Date Alert to determine eligibility for the LI case and pull the FS case if it has not been pushed and the LI case is waitlisted
   d. Update verifications if paperwork is received
   e. Assess and Confirm Eligibility no later than Day 20
   f. Follow the standard process



## Scenario 3

## TANF/FS Client is Currently Receiving CAO Benefits and Requesting Child Care – POLICY

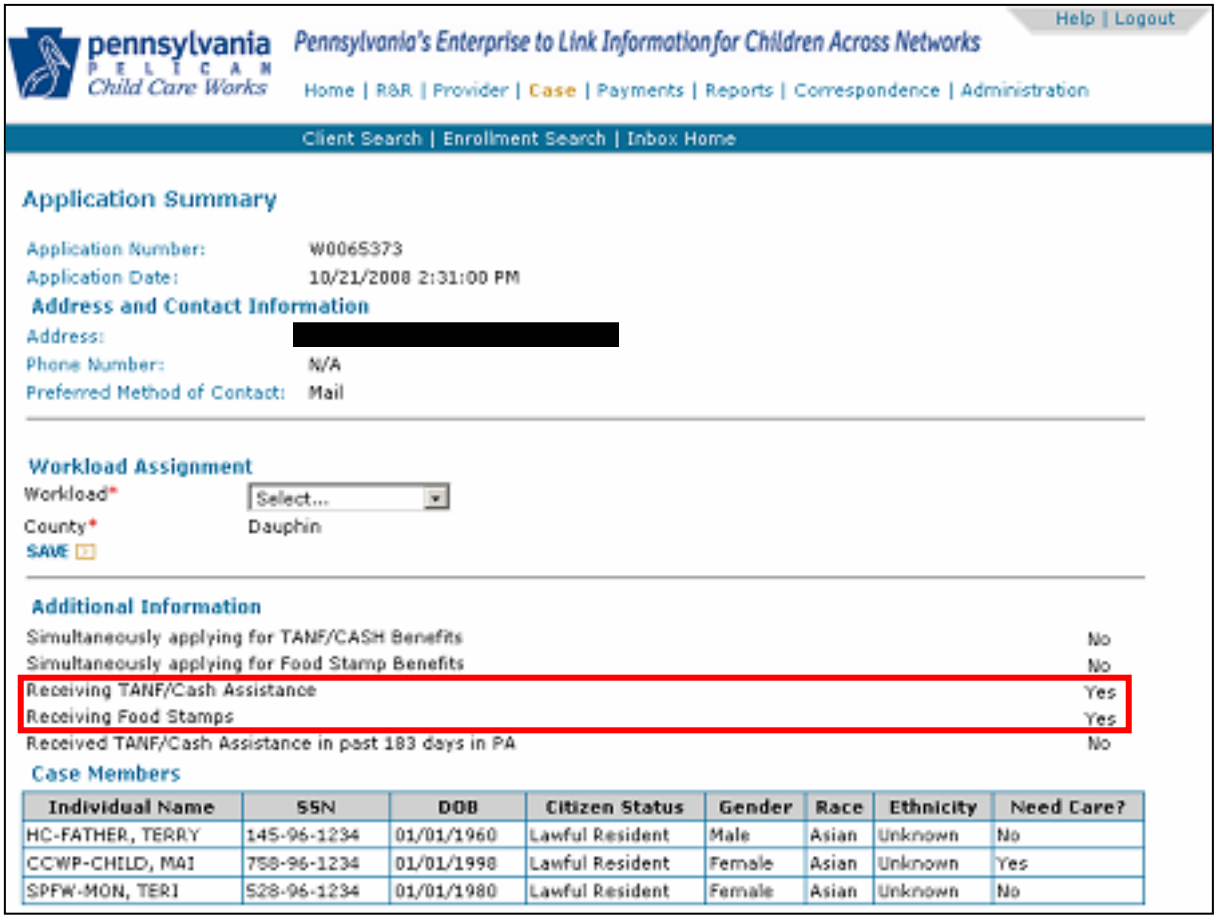
The CCIS MUST review the COMPASS application no later than Day 10 to determine if the case must be pulled from CIS

1. If a case does NOT exist in PELICAN CCW, the CCIS MUST pull the case and follow the standard process from the CIS Inbox
2. The CCIS must determine eligibility by Day 15 following the pull
3. If the CAO Pushes a TANF case; or FS case NOT meeting LI work requirements, the CCIS must use the pushed case and REJECT the COMPASS application by Day 10
4. If a case is marked as receiving FS benefits and MEETS LI work requirements at the time of the pull or push, the CCIS must also:
   - Process the COMPASS application as LI
   - Send a Missing Information Letter giving the Parent/Caretaker until Day 30 to submit verifications
   - Update verifications (if received)
   - Set a manual 20 Day Tracking Date Alert (for Day 30) to determine eligibility
   - Assess and Confirm Eligibility by Day 30
   - Follow the standard process

- Scenario 3 – TANF/FS Client Currently Receiving CAO Benefits and Requesting Child Care

➢ The case in Application Inbox indicates Receiving TANF/Cash Assistance or Receiving Food Stamps = Yes

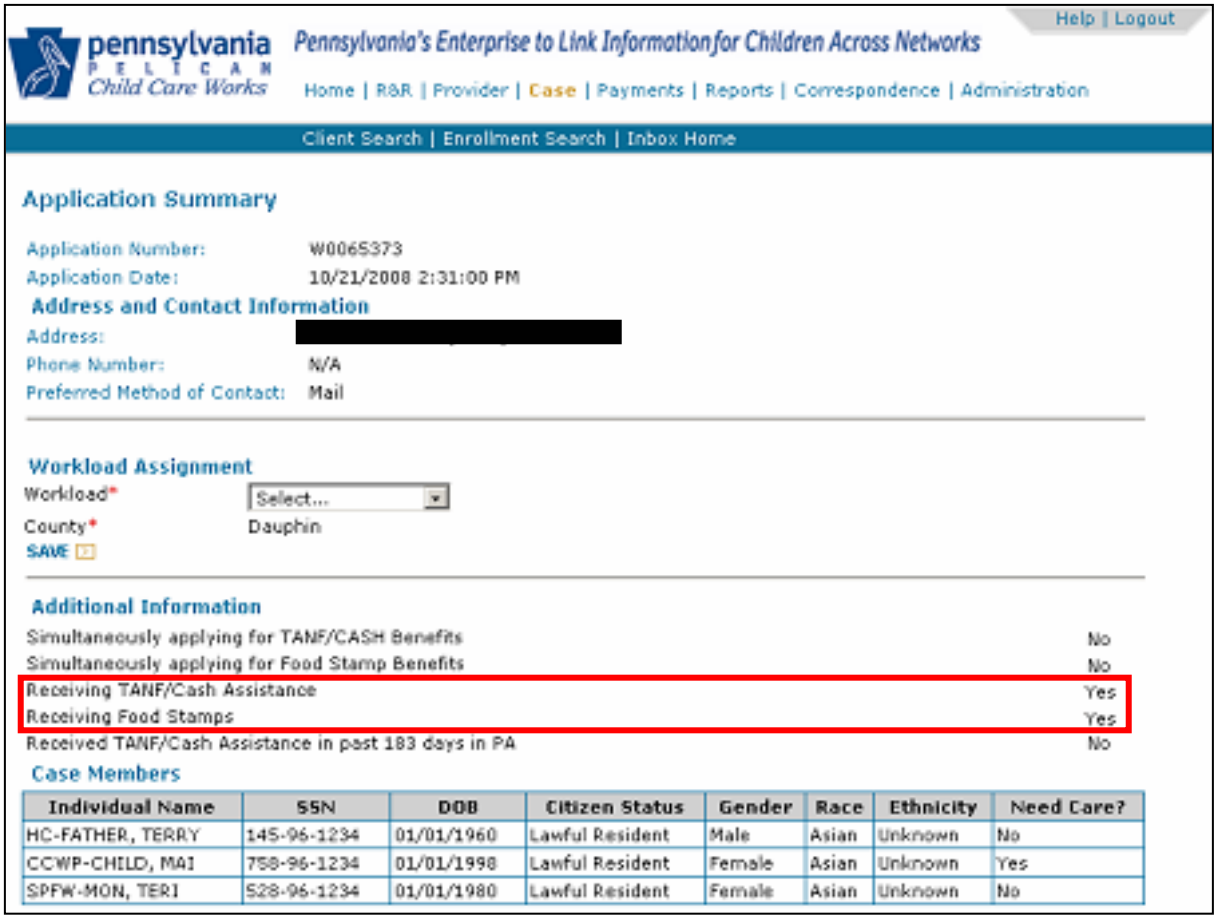
1. Review the Application Summary page
2. Process the application
3. If a case exists in the Case Selection page, follow steps in Job Aid #2
4. If a case does not exist, check CIS:
   a. If a case exists PULL it from CIS
   b. Process the case in PELICAN CCW from the CIS Inbox
   c. Reject the COMPASS application UNLESS it is a FS case meeting LI work requirements (if so, go to step 5)




| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | 145-96-1234 | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | 758-96-1234 | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | 528-96-1234 | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

- Scenario 3 – TANF/FS Client Currently Receiving CAO Benefits and Requesting Child Care (cont.)

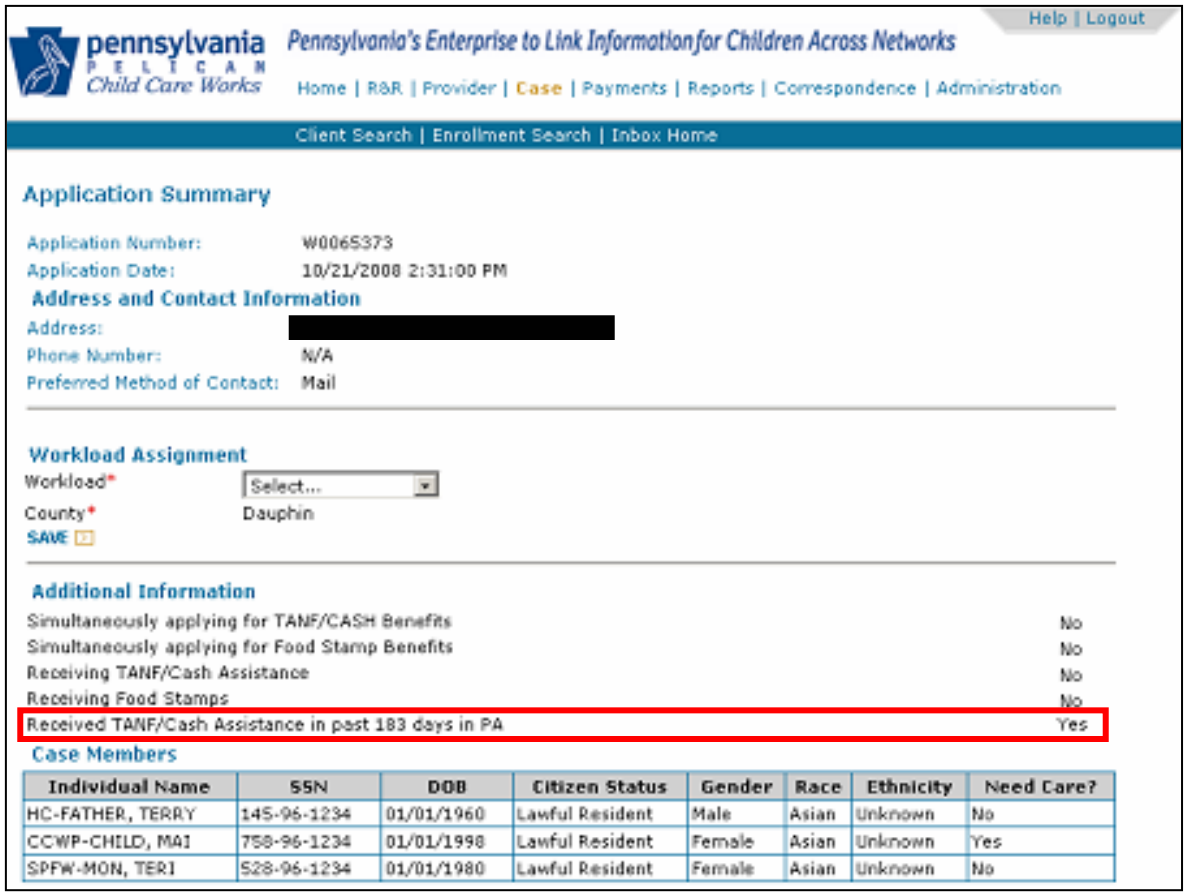
5. The case in Application Inbox indicates Receiving Food Stamps = Yes and IS meeting LI work requirements:
   a. Process the COMPASS application as LI
   b. Send a Missing Information Letter giving the Parent/Caretaker until Day 30 to submit verifications
   c. Update verifications if paperwork is received
   d. Set a manual 20 Day Tracking Date Alert (for Day 30) to determine eligibility
   e. Assess and Confirm Eligibility no later than Day 30
   f. Follow the standard process




| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | 145-96-1234 | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | 758-96-1234 | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | 528-96-1234 | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

## Scenario 4 – COMPASS Application Only Sent to CCIS, LI/FT Application

- Search PELICAN CCW. If no cases exist, process the Application
- If a case does exist and it is active:
  1. Review the Family Composition page
  2. If it matches the application, Reject the application
  3. Use the Rejection Reason – Active Case/Receiving Services
- If a case does exist and it is closed:
  1. Review the Family Composition page
  2. If it matches the application, print the Application Summary page and:
     a. Complete a Re-open of the closed case with this information
     b. Once the closed case is Re-opened and it is in Intake/Pending status, Reject the COMPASS application using the Rejection Reason – Using Existing County/Record Number – A Confirmation Notice is not needed. A Rejection Notice is automatically generated



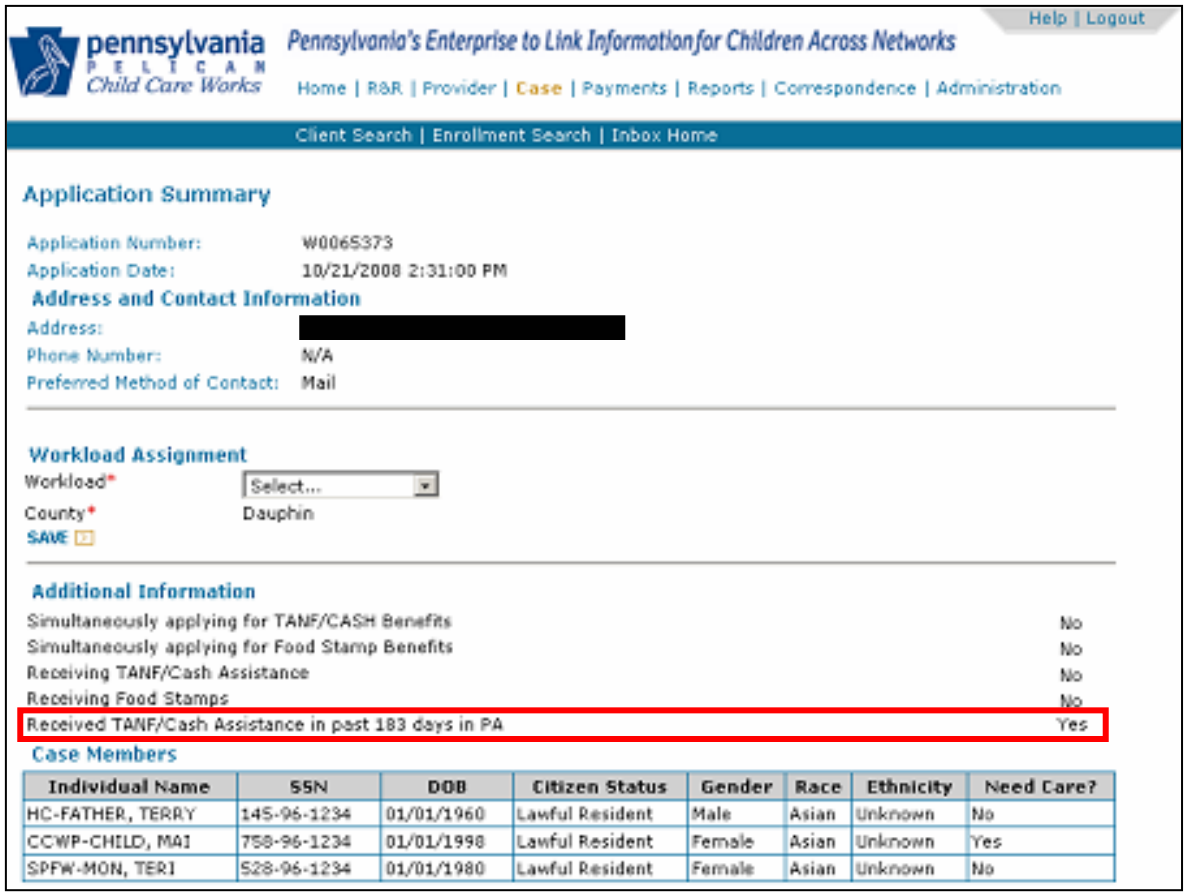

| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | 145-96-1234 | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | 758-96-1234 | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | 528-96-1234 | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

- Scenario 4 – COMPASS Application Only Sent to CCIS, LI/FT Application (cont.)

- LI/FT Case
- Verifications for Self Service requirements are automatically set to Self Certified when a case is created with the exception of:
  - Training
  - Employment
  - Education
  - Disability (Adult and Child)
  - Address

  Note: These verifications are set to Pending
- Review the COMPASS application by Day 10
- Send a Missing Information Letter to the Parent/Caretaker on Day 10 giving them until Day 30 to submit verifications
- Set a manual 20 day Tracking Date Alert (for Day 30) to determine eligibility

  Note: Applicants can print verification forms from the COMPASS website and mail or drop them off at the CCIS




| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Need Care? |
|---|---|---|---|---|---|---|---|
| HC-FATHER, TERRY | 145-96-1234 | 01/01/1960 | Lawful Resident | Male | Asian | Unknown | No |
| CCWP-CHILD, MAI | 758-96-1234 | 01/01/1998 | Lawful Resident | Female | Asian | Unknown | Yes |
| SPFW-MON, TERI | 528-96-1234 | 01/01/1980 | Lawful Resident | Female | Asian | Unknown | No |

## PELICAN CCW Child Care Client Self Service
## COMPASS Application Notice Reason Codes

- There are 7 Application Rejection Reason Codes:
  1. Active Case/Receiving Services – CIS
  2. Active Case/Receiving Services
  3. Active Case/Waitlisted
  4. Using Existing County/Record Number
  5. Incorrect Individual Match
  6. Applied in Error – CIS
  7. Applied in Error – PELICAN CCW

- There are 5 new Rejection Notice Notices. Rejection Notices automatically generate when the CCIS rejects an application using Rejection Reason Codes 1 – 3 and 6 and 7 listed above

- An Authorization to Release Information is still required for COMPASS applications. This form will not be posted online. It must be signed during the face-to-face or mailed to the client, completed, and sent back to the CCIS

- If a client is Self-Employed, the verification information for Self-Employment must be requested in the Missing Information Letter

# COMPASS Redeterminations

## PELICAN CCW Child Care Client Self Service
## COMPASS Redeterminations

- Existing child care clients can complete their redeterminations online from the COMPASS website. Clients are informed of this feature on the Redetermination Letter:
  - The Redetermination Letter has been revised to advise clients of the online option for completing their redetermination
  - The Redetermination Summary Form has been changed to include indicators regarding whether the client is receiving Housing Assistance, Food Stamps, Federal Cash Income or Federal Declared Emergency funds

  Note: The CCIS must check CIS to verify the accuracy of the indicators for changes on the Redetermination Summary page. If the information in CIS matches the Redetermination Summary page, this information can be added to PELICAN CCW

- When a client completes a redetermination online, COMPASS pulls all of the current case data from PELICAN CCW in real-time for the client to review/update

- We will review some of the key COMPASS Redetermination pages relating to submitting a redetermination online

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Pennsylvania's Enterprise to Link Information for Children Across Networks

- **Revised Client Redetermination Letter**

**REDETERMINATION LETTER**

CCIS of Dauphin County
110 North 26th Street
Harrisburg, PA 17103

Worker Name: LISA B.
Phone Number: (717) 233-8454

DONNA M. SCHAUERMAN
9999 CENTERFIELD RD
HARRISBURG, PA 17109-2426

CO RECORD
22 0132930

Date: 01/09/2009

Dear DONNA M. SCHAUERMAN,

You must submit information to our office **no later than 02/16/2009** in order to maintain your eligibility for subsidized child care. You may update your information using the enclosed Redetermination Summary Form OR you may update your information online. If you have any questions about what proof you must submit for changes or you require assistance in completing your Redetermination Packet, please contact our office immediately.

***INSTRUCTIONS FOR UPDATING INFORMATION USING THE ENCLOSED FORM:***

The form gives you the most current information you reported to our office. Please review the information on the form carefully.
If there are NO CHANGES to the information on the form:
- Sign the form;
- Provide proof of pay received for 4 weeks out of the past 6 weeks; and
- Return ALL PAGES OF THE FORM to our office.

If there are CHANGES to the information on the form:
- Note the changes directly on the form;
- Sign the form;
- Provide proof of the changes you noted;
- Provide proof of pay received for 4 weeks out of the past 6 weeks; and
- Return ALL PAGES OF THE FORM to our office.

***INSTRUCTIONS FOR UPDATING INFORMATION ONLINE:***

If you would prefer to update your information online you must:
- Go to www.compass.state.pa.us and click on "Renew your benefits" under the red "Returning Users" block.
- On the "Benefit Renewal" screen, choose "A Subsidized Child Care Redetermination;" and click "Continue;"
- Type in the following 3 items in the spaces provided on the web page:
  1. Your Social Security Number*; and
     **NOTE: If you have never reported your Social Security Number to the CCIS, you will be unable to update your information online.*
  2. Your County/Record Number: 22/0132930; and
  3. Your family's Redetermination Date: 02/15/2009.
- Click "Continue," then compare the information online to the information shown on the enclosed Redetermination Summary Form;
- Update any information that has changed or add information as needed by following the online directions;
- Click "Submit" when you are finished updating your information online;
- Provide proof of the changes you made or of the information you added online;
- Provide proof of pay received for 4 weeks out of the past 6 weeks.

If you need help while updating your information online, click on "Help."

**If you or your spouse have a disability and do not receive disability payments,** you must also submit a Medical Assessment Form completed by a licensed physician or psychologist.

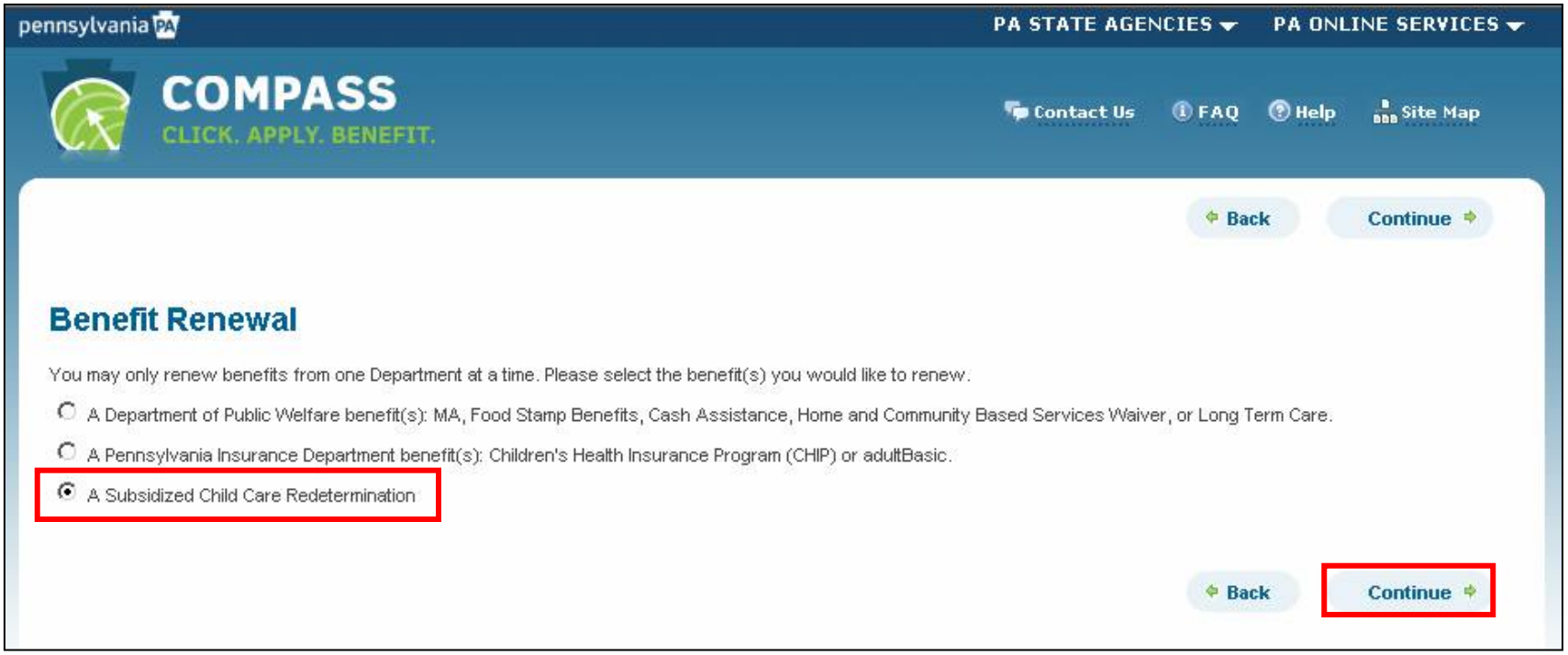
**If you are receiving subsidy for a foster child,** you must submit written verification by the county children and youth agency indicating whether the child continues to be a foster child.

# PELICAN CCW Child Care Client Self Service
# The Main COMPASS Page

- To access Child Care Redeterminations, clients click the Renew your benefits button

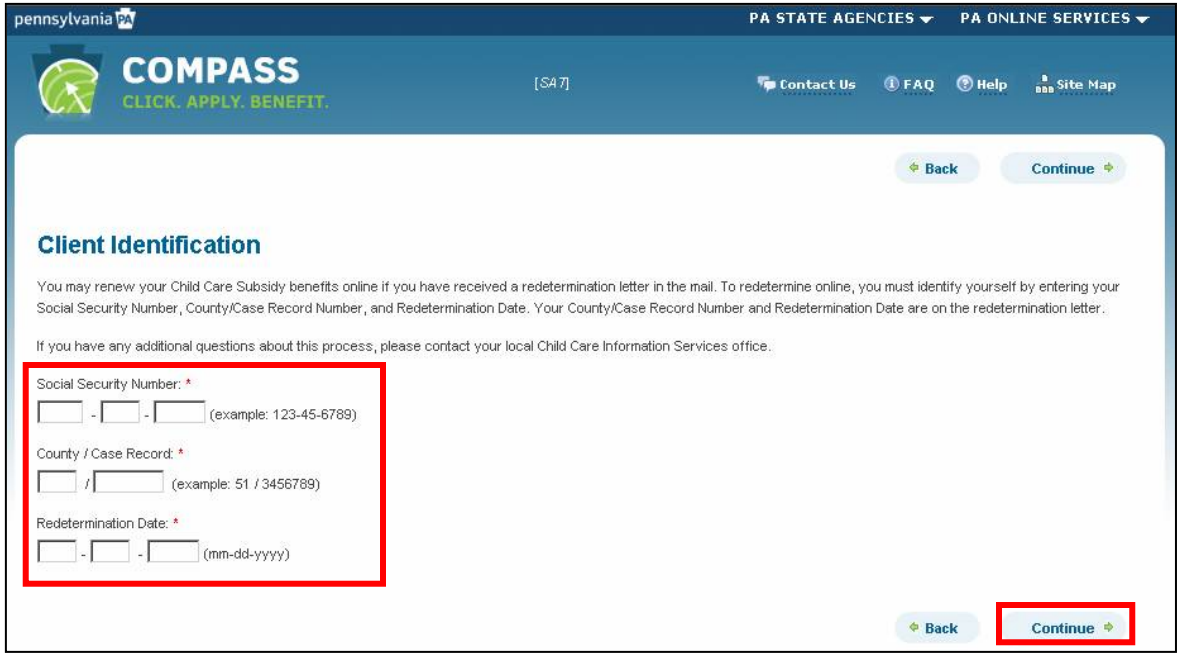
# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- Child Care Clients select “A Subsidized Child Care Redetermination” to begin their redetermination



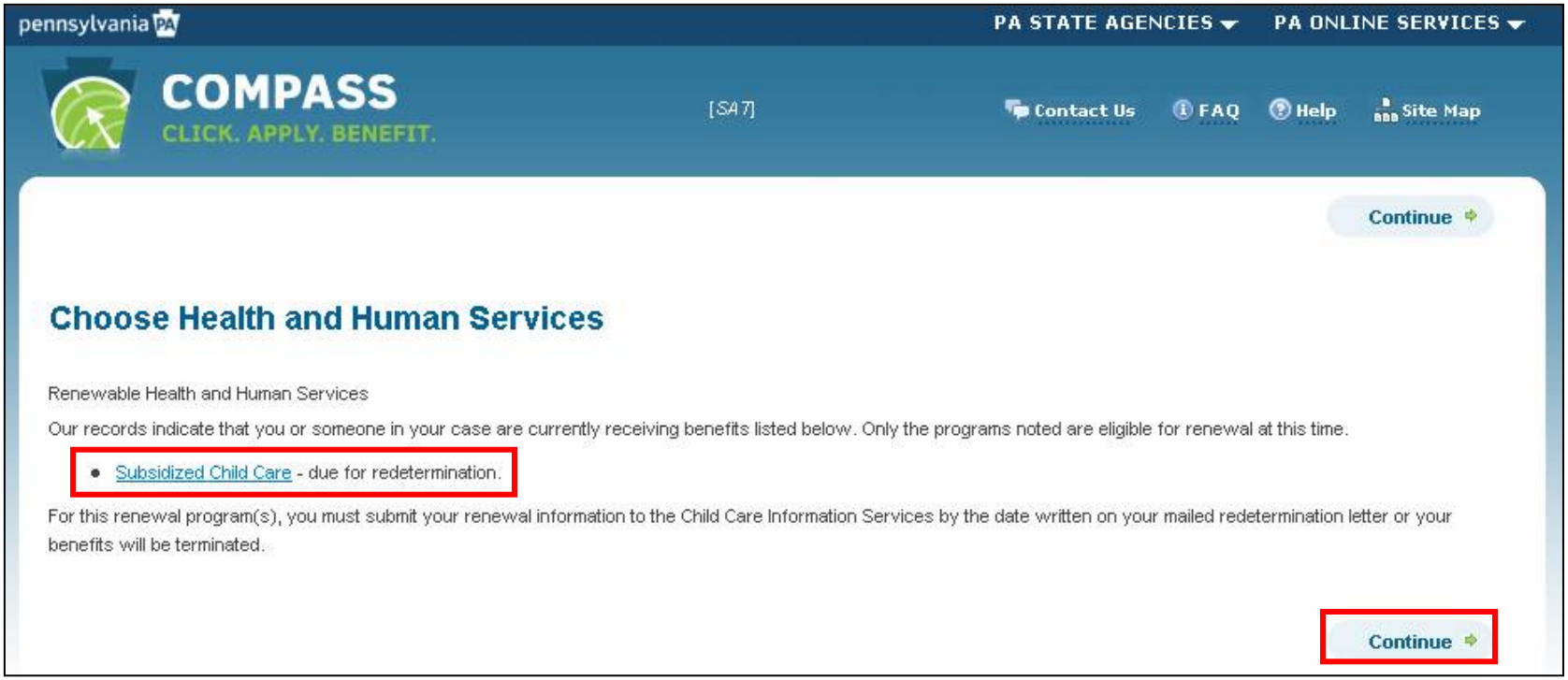
# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- Clients must validate themselves by Entering:
  - Their SSN
  - County/Record Number
  - Redetermination Date
- If a client's SSN is not in PELICAN CCW, COMPASS will not allow the redetermination. The Client must call the CCIS and once proper verification is received it must be entered in PELICAN CCW before the client can complete their redetermination online. Clients not willing to provide their SSN must submit their redetermination manually



# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- Clicking the Subsidized Child Care hyperlink provides the client with information about child care benefits



# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- The client is provided with instructions and a list of information that is required to complete their redetermination in COMPASS

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[S47]

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## This is the Online Access Point to Health and Human Services for Pennsylvania Residents.

Completing this online form should take between 10 and 20 minutes, depending on the benefits you selected and the number of individuals in the household.

Before you start, you may need the following information to help you complete this *e-Form*:

- Household income from a job, child support, and other income
- Social Security Numbers and birth dates of household members
- Current or recent health insurance information
- Current car insurance information
- Housing and utility expense information
- Resource information, such as bank accounts, vehicles, homes, property, life insurance, etc.
  Note: Some health and human services, to include LIHEAP, do not need resource information. Resource questions will only be asked if this information is needed to see if the applicant(s) is eligible.
- Proof of citizenship and identity if you are a US citizen.
  Example: Birth Certificate; Driver's License; State ID

As a part of the renewal process, the signature page at the end of the e-Form will automatically be electronically signed (or e-Signed). By e-Signing the signature page, you do not have to mechanically or physically sign and return this page via mail or fax. The electronic signature indicates that you understand the following rights and responsibilities of the online form, including:

- I authorize the release of personal, financial and medical information for the purpose of determining eligibility.
- I understand that I must report all changes in my household or financial situation, even if I am unsure of the need to report, to the Child Care Information Services Office within 10 calendar days.
- I understand that my situation is subject to verification from employers, financial sources and other third parties.
- I certify that all information that has been entered is true under penalty of perjury.

You will have a chance to review all the information that you enter and make any changes or corrections before submitting the *e-Form*. Everything entered here is sent through a secure server, transmitted with 128-bit encryption, and is considered strictly confidential. For more information on the security and confidentiality of this Web site, please view the Commonwealth of Pennsylvania Privacy Policy , the Health Insurance Portability and Accountability Act (HIPAA) Notice, the Confidentiality and Waiver Statement , and this application's Rights and Responsibilities.

# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- Each time a client completes a Redetermination in COMPASS, they are given a new Application Number and they must select a new password and if desired a new Hint Question and Answer

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## Pick a Password

Please make note of the *e-Form* number and personalized password. They will be needed to access the *e-Form* and the *e-Form's* status in the future.

The password must be **7 to 14 characters long**. It must contain the following three criteria:

- At least **one uppercase letter**
- At least **one lowercase letter**
- At least **one number**

Do not enter any spaces in the password. The password helps keep information entered on the *e-Form* private. Please make note of the *e-Form* number and the selected password exactly as it was entered--be aware that the password is case-sensitive. The *e-Form* number and password may be used to access the *e-Form* in the future.

The ***e-Form*** **number** is: **R0059897**

**Choose a Password:**

**********

**Re-enter Password:**

**********

A question and answer may be selected now and be used to later access the *e-Form* in the case that a password is lost or forgotten. The question and answer should be personal and something not known to many people.

**Hint Question** | **Hint Answer**

Back | Continue

# PELICAN CCW Child Care Client Self Service
# COMPASS Benefit Renewal Pages

- The client is now able to review/update their information

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----------Go To---------- Go

0% Complete

Household Members
- TASHA RUSH
- HKJH FAB
- TEQUALA A. BONES
- AALIYAH D. IRVIN
- TASHA K. PAM
- DARRIUS D. PIERC

Your e-Form Number R0059897 | Continue

## Name and Address

This is the information we currently have on file for this case. Please make any necessary updates to incorrect or missing information.

Head of Household Name: TASHA[redacted]

Street Address: *
700[redacted]
APT[redacted]

City: * HARRISBURG
State: * PENNSYLVANIA
Zip: * 17104 -

Other Information

Home or Contact Phone Number:
717 - [redacted] - [redacted]

Work Phone Number:
717 - [redacted] - [redacted] Ext:

Mobile Phone Number:
- -

Best Time to Call:

- Any changes the client makes on these pages will result in a proposed record change in PELICAN CCW
- E-signature is used for COMPASS redeterminations

## PELICAN CCW Child Care Client Self Service
## COMPASS Redetermination Tracking in PELICAN

- When a Client begins their redetermination in COMPASS, a Redetermination Number is automatically assigned

- The Redetermination Number begins with an “R” and is used to track redetermination processing in PELICAN CCW. The Client can log into COMPASS and view the status of their redetermination online (just as new applicants can check the status of a submitted application)

- Clients have 42 days from the date the Redetermination Packet is generated, to complete their redetermination in COMPASS. After 42 days, they will be unable to complete the redetermination through COMPASS

- Redetermination information is sent to PELICAN CCW in a nightly batch process

- Similar to Update Inbox records, redeterminations are viewed by specific caseloads. You can view other CCIS staff’s caseloads by searching for records for that specific caseload. Redeterminations for all caseloads can be viewed by clearing the Caseload ID (just as the Update Inbox)

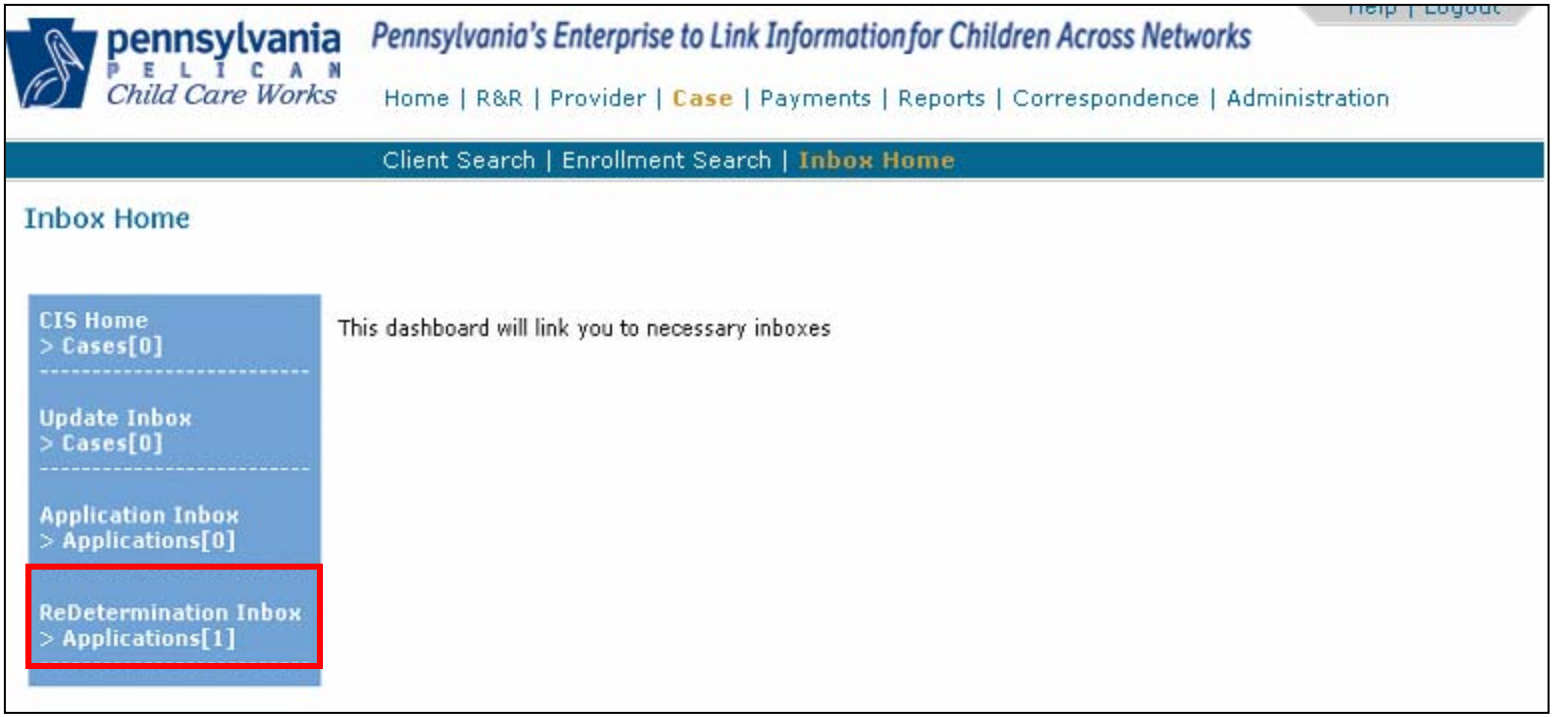
- The standard redetermination process still exists for clients that do not submit their redetermination online

- If a client is not eligible to complete a redetermination, they will receive an error message in COMPASS

- Clients can check the status of a submitted redetermination by going to “Check application status” on the COMPASS home page

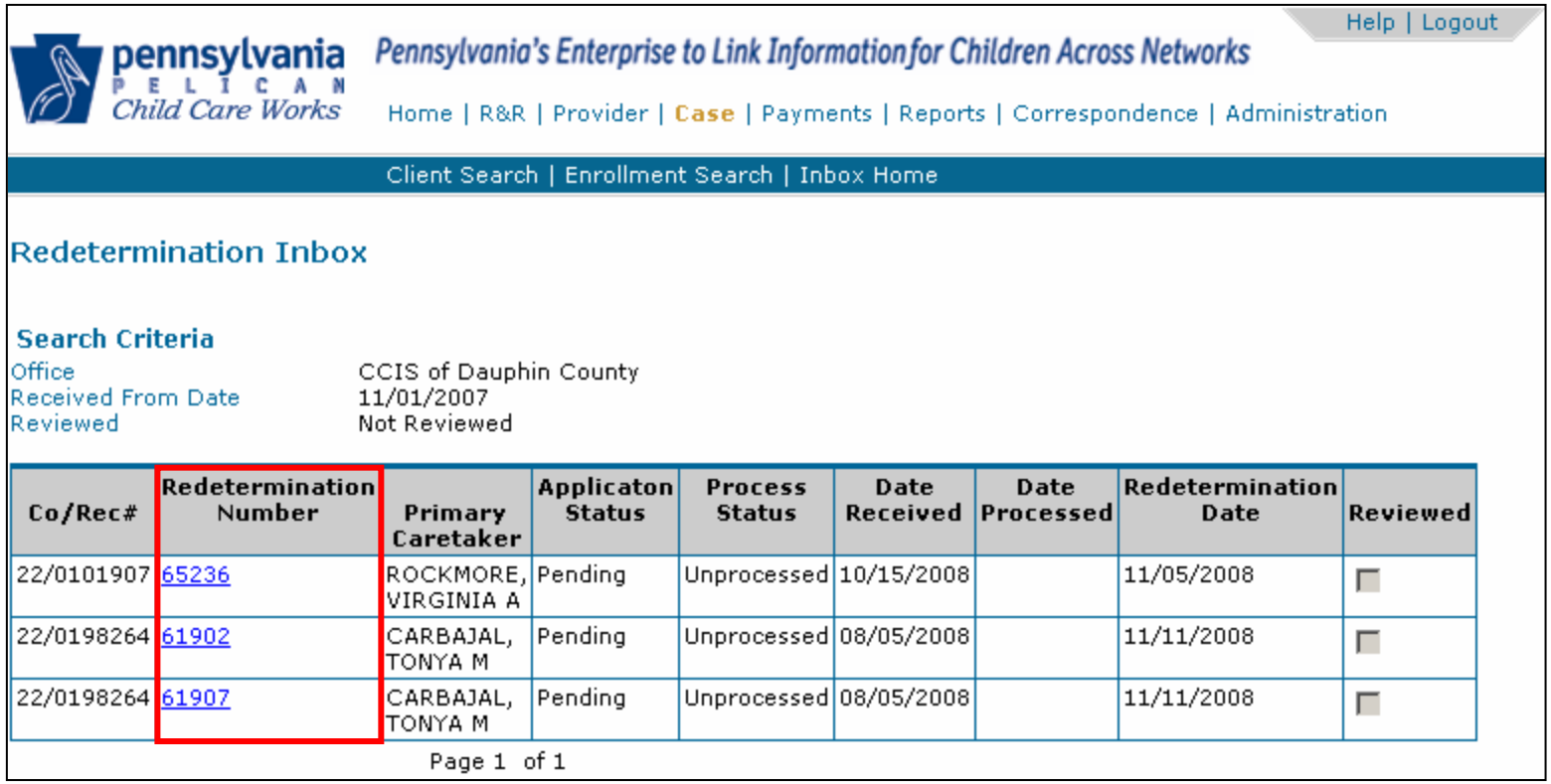
- Redetermination Inbox

- Displays redeterminations from COMPASS
- The Inbox Home page displays the total number of records not reviewed within each Inbox which corresponds to the records displayed in the default search
- Click the Redetermination Inbox hyperlink to open the Redetermination Inbox



- Redetermination Inbox (cont.)

- Records in the Redetermination Inbox are identified by the e-Form Number assigned by COMPASS. In PELICAN CCW, this is translates to the Redetermination Number
- PELICAN CCW does not use the Preceding "R" that is assigned by COMPASS
- Records are sorted newest to oldest by Date Received

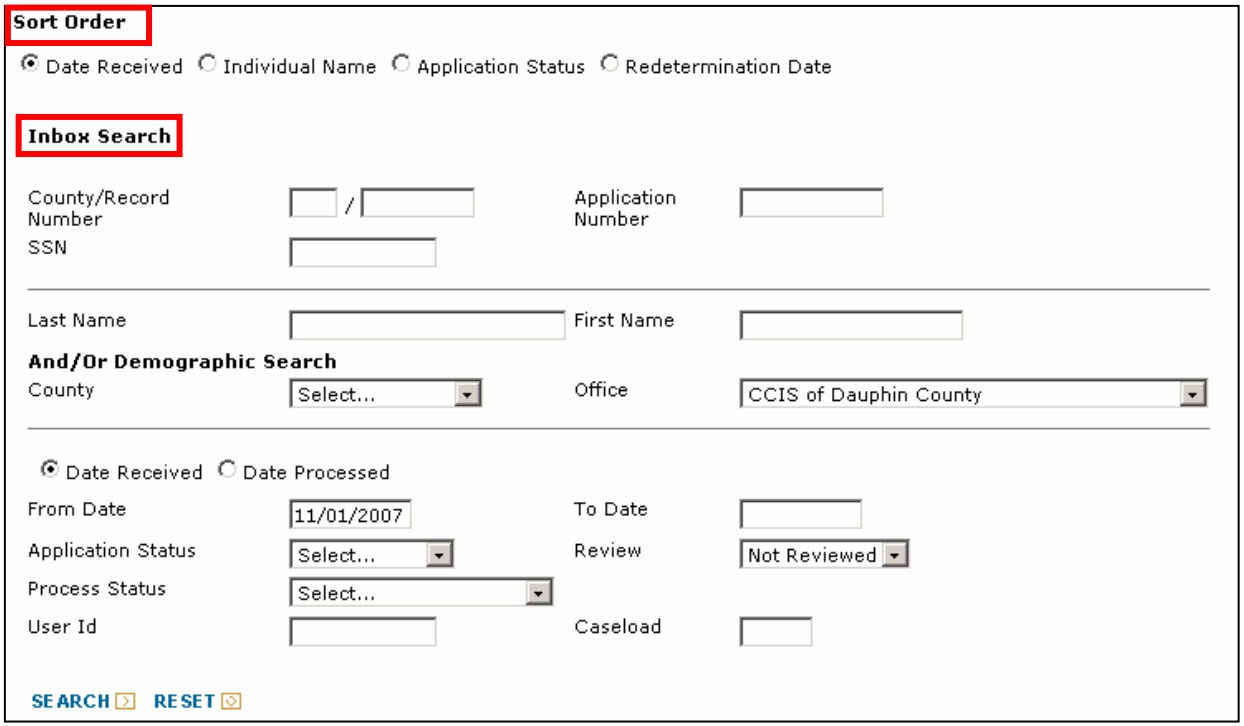



| Co/Rec# | Redetermination Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Redetermination Date | Reviewed |
|---|---|---|---|---|---|---|---|---|
| 22/0101907 | 65236 | ROCKMORE, VIRGINIA A | Pending | Unprocessed | 10/15/2008 | | 11/05/2008 | ☐ |
| 22/0198264 | 61902 | CARBAJAL, TONYA M | Pending | Unprocessed | 08/05/2008 | | 11/11/2008 | ☐ |
| 22/0198264 | 61907 | CARBAJAL, TONYA M | Pending | Unprocessed | 08/05/2008 | | 11/11/2008 | ☐ |

- Redetermination Inbox (cont.)

- Records can be sorted by:
  - Date Received
  - Individual Name
  - Application Status
- Records can be searched by :
  - County/Record Number
  - Application Number:
    - This number can be searched in the Redetermination Inbox for 60 days. After 60 days, all redeterminations are purged from the Redetermination Inbox
  - SSN
  - Name
  - Demographics
  - Dates
  - Application Status
  - Review Status
  - Process Status
  - User ID
  - Caseload

Note: The From Date defaults to today's date minus 60 days



## The Redetermination Inbox

- Redetermination records that appear in the Redetermination Inbox are in a “Holding Tank”. No changes are made to the PELICAN CCW case

- Changes are not made to the PELICAN CCW case until the redetermination has been completely processed and the “Redetermination successfully processed” message is displayed

- Redetermination Inbox – Statuses

➢ There are two types of statuses in the Redetermination Inbox:

1. Application Status
2. Process Status

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Home | R&R | Provider | Case | Payments | Reports | Correspondence | Administration

Client Search | Enrollment Search | Inbox Home

## Redetermination Inbox

### Search Criteria

Office: CCIS of Dauphin County
Received From Date: 11/01/2007
Reviewed: Not Reviewed

| Co/Rec# | Redetermination Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Redetermination Date | Reviewed |
|---|---|---|---|---|---|---|---|---|
| 22/0101907 | 65236 | ROCKMORE, VIRGINIA A | Pending | Unprocessed | 10/15/2008 | | 11/05/2008 | ☐ |
| 22/0198264 | 61902 | CARBAJAL, TONYA M | Pending | Unprocessed | 08/05/2008 | | 11/11/2008 | ☐ |
| 22/0198264 | 61907 | CARBAJAL, TONYA M | Pending | Unprocessed | 08/05/2008 | | 11/11/2008 | ☐ |

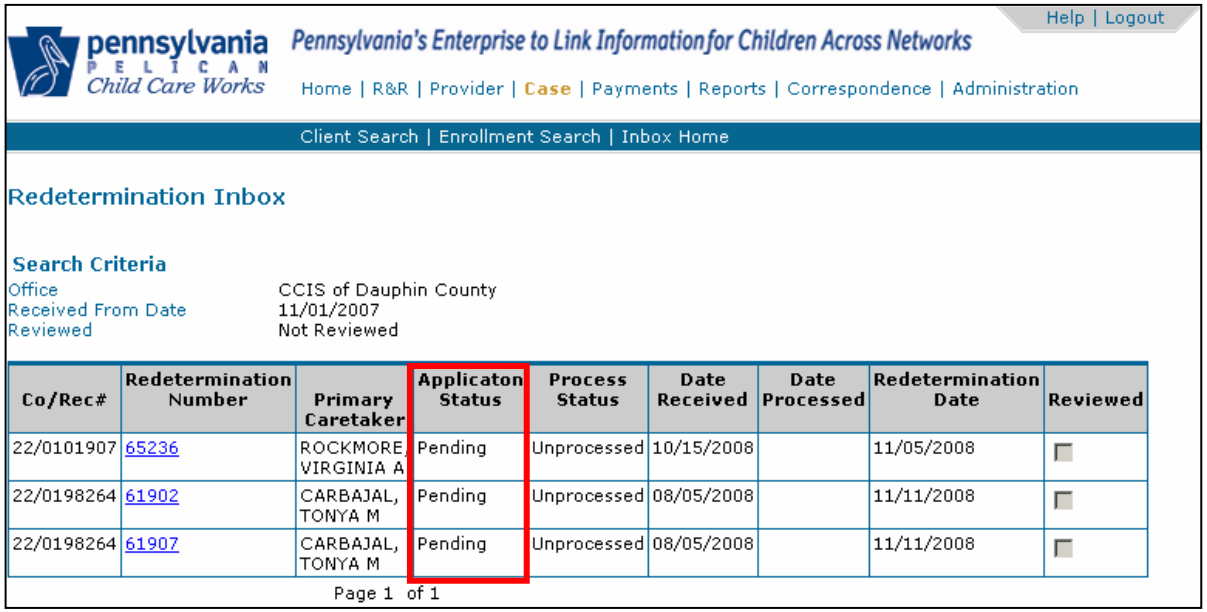
Page 1 of 1

- Redetermination Inbox – Application Status

➢ **Application Status:**
- ❑ The Application status shown to client in COMPASS is a result of the Application Status shown here

➢ There are 3 Application Statuses:

1. **Pending** :
   - ❑ The Redetermination has not been processed in PELICAN CCW
2. **Processed**:
   - ❑ The Redetermination has been processed in PELICAN CCW
3. **Cancelled**
   - ❑ The Redetermination has been reviewed and Rejected




| Co/Rec# | Redetermination Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Redetermination Date | Reviewed |
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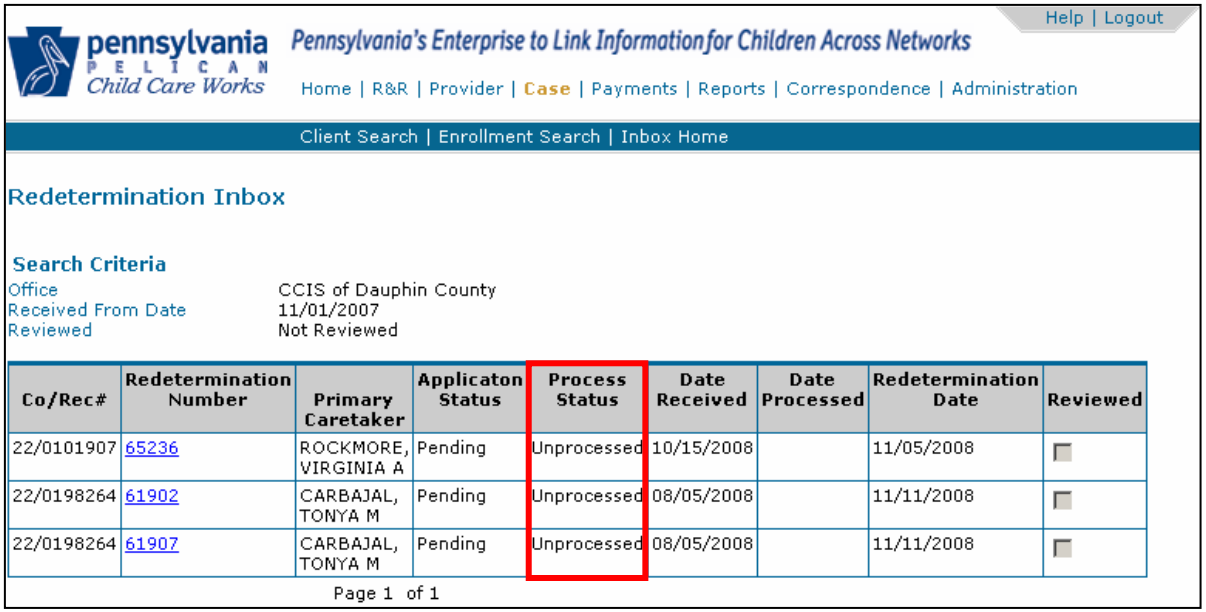
## Redetermination Inbox – Process Status

- **Process Status:**
  - The status of redetermination processing in PELICAN CCW
- There are 4 Process Statuses:

1. **Unprocessed:**
   - The redetermination has not been processed
2. **Processed:**
   - The redetermination was processed and All redetermination data transferred to the case
3. **Processed With Failures:**
   - The redetermination processed, but some data did not transfer to the case
4. **Failed:**
   - The redetermination data could not be used. The redetermination was not completed

- We will review Processed with Failures and Failed in more detail in the Processed with Failures and Failed Redeterminations section of this training

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- Redetermination Inbox – Date Fields

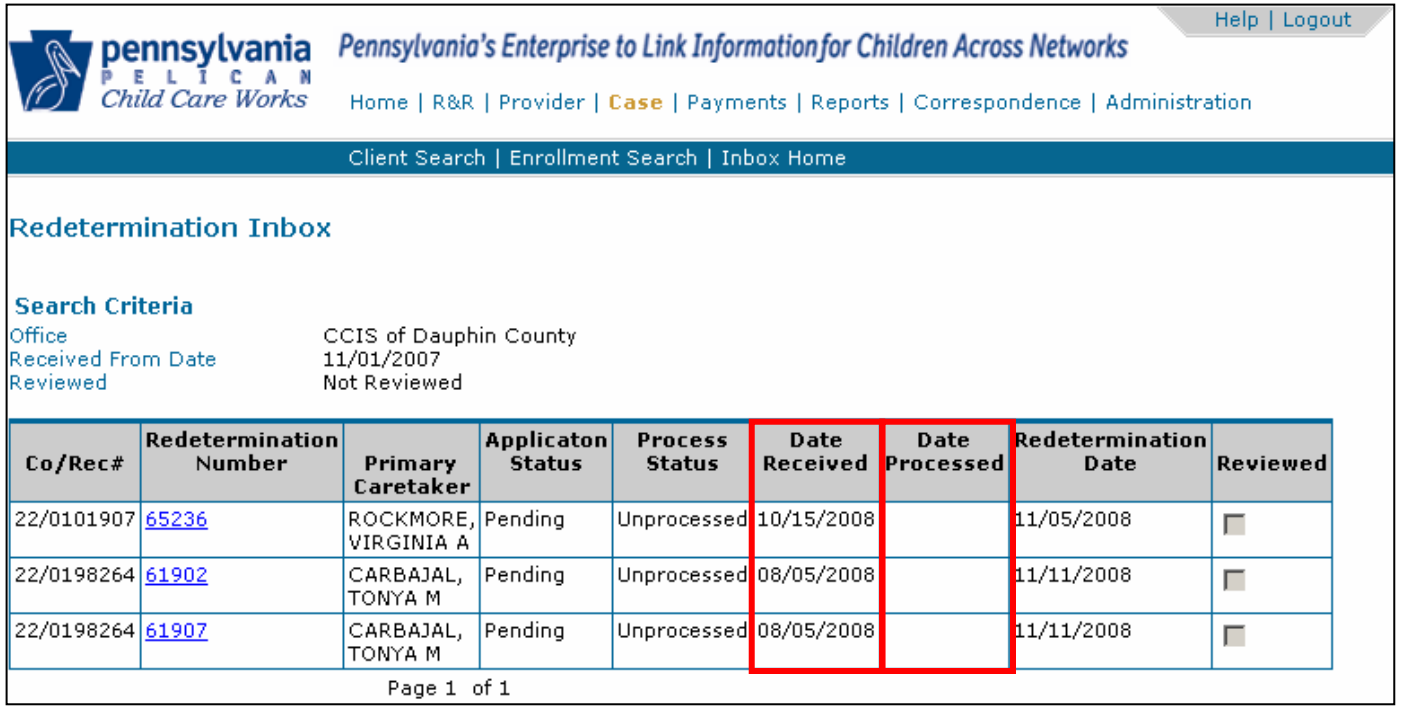
➢ There are 2 redetermination date fields:

**1. Date Received:**

- The date the redetermination was received from COMPASS (when it appeared in Redetermination Inbox)

**2. Date Processed:**

- The date the redetermination was successfully processed

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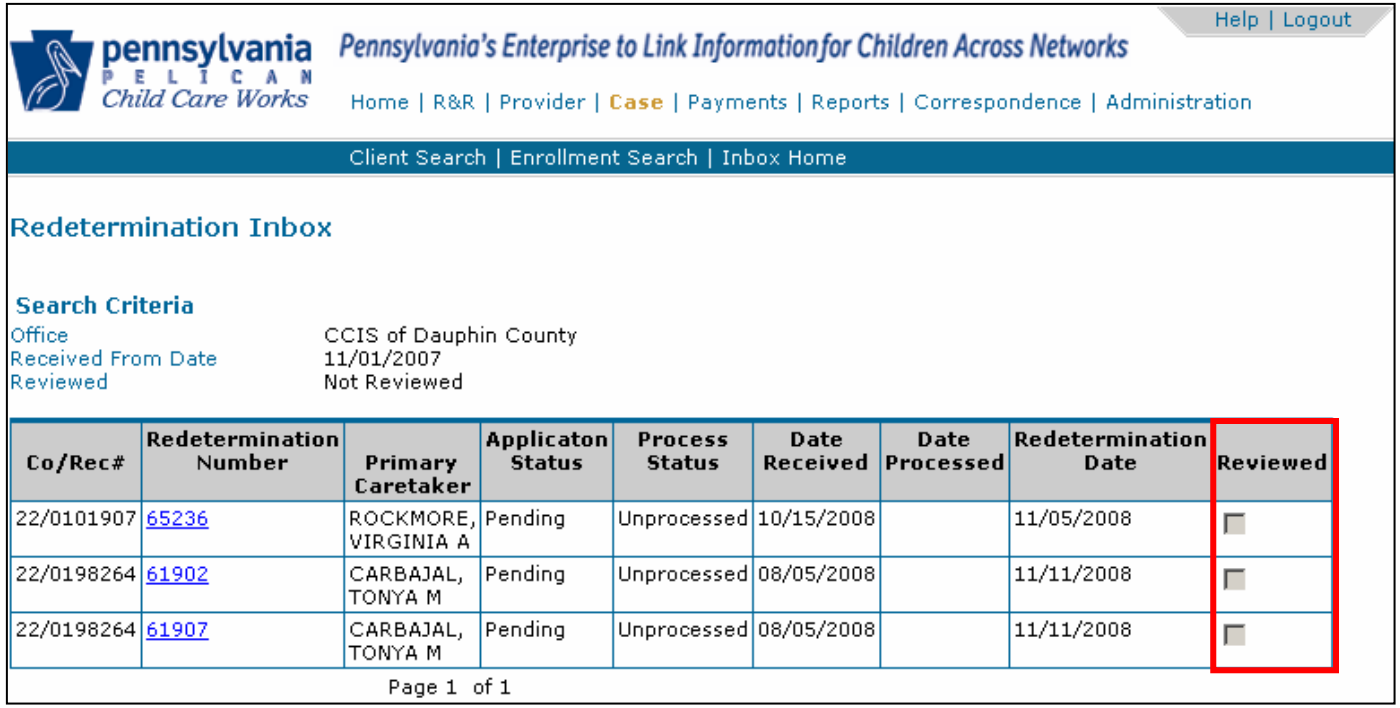
- Redetermination Inbox – Reviewed Checkboxes

- The reviewed checkboxes are disabled in the Redetermination Inbox to prevent accidental checking of redeterminations as reviewed
- The reviewed checkboxes are system controlled. When a redetermination is processed or rejected, the reviewed checkbox is automatically checked

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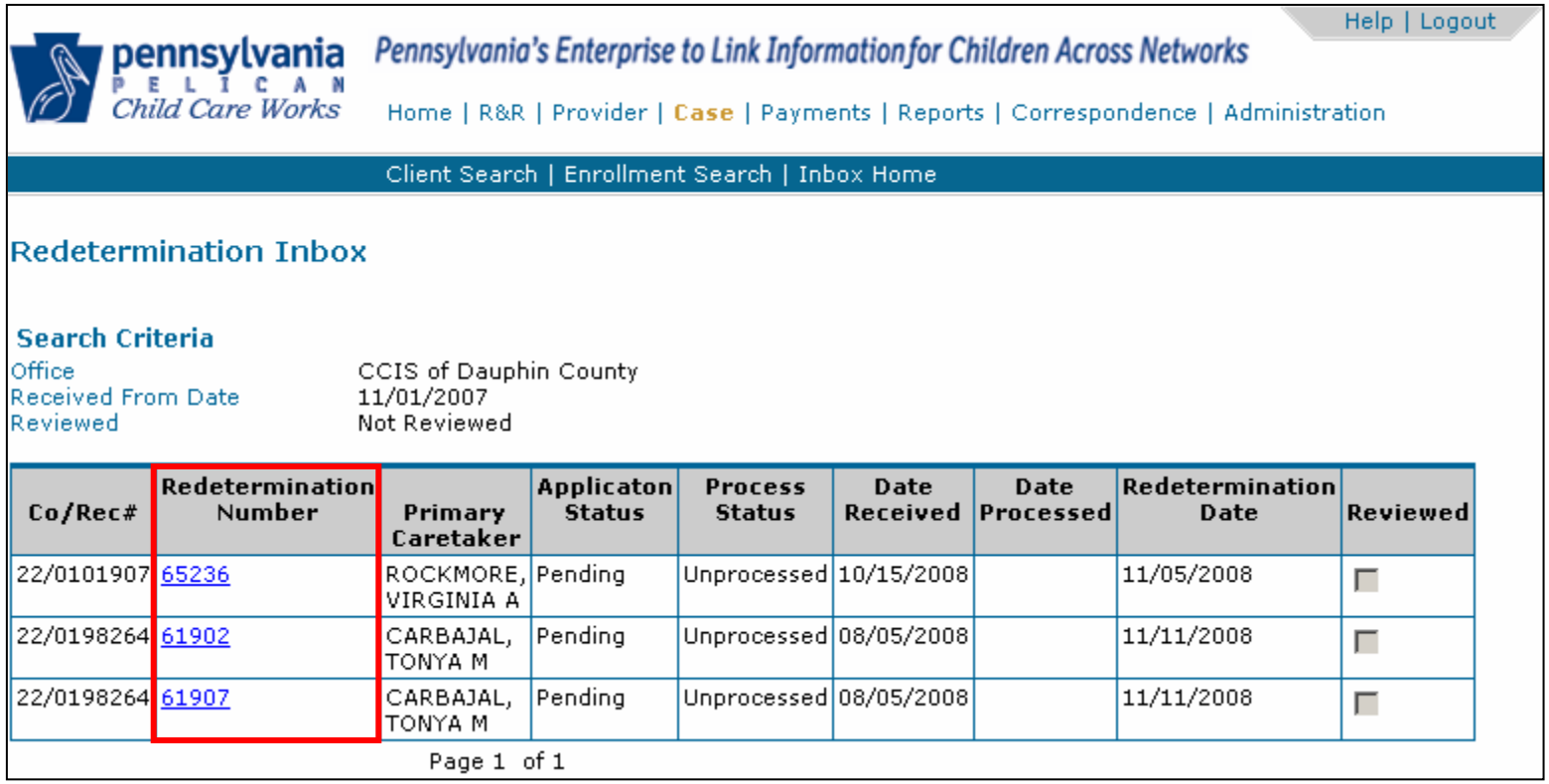
## The Redetermination Inbox

- Currently a client can submit multiple redeterminations within the 42-day window from COMPASS, or until the CCIS processes the redetermination. Once the redetermination is processed in PELICAN CCW, the client cannot access their case redetermination in COMPASS until the next Redetermination Packet is generated

- If a client submits more than one redetermination, each redetermination must be reviewed separately in order to determine which should be processed. Once the CCIS determines which determination to process, the CCIS must:
  1. Print the Redetermination Summary for each COMPASS redetermination submitted
  2. Process the appropriate Redetermination and reject any duplicate/supplemental redeterminations
- Any Redetermination left in the Inbox will be purged after 60 days

- Redetermination Inbox – Opening a Redetermination

➢ Click a Redetermination Number hyperlink to open the Redetermination Summary page

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- Redetermination Summary Page
  - The redetermination Summary page contains information entered by the client in COMPASS

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## Redetermination Summary

**County/Record Number :** 22/0101907

Redetermination Number: R0065236
Application Date: 10/14/2008 2:02:00 PM

**Address and Contact Information**

**eForm**

Address: [redacted]
Phone Number:
Preferred Method of Contact: Mail

**Case**

Address: [redacted]
Phone Number:
Preferred Method of Contact: Mail

**Individual Information**

**eForm**

| Individual Name | SSN | DOB | Citizen Status | Gender | Race | Ethnicity | Applying |
|---|---|---|---|---|---|---|---|
| ROCKMORE, VIRGINIA A | [redacted] | | Citizen | Female | Black or African American | Non-Hispanic | No |
| ROCKMORE, JERICHO D | [redacted] | | Citizen | Male | Black or African American | Non-Hispanic | Yes |

- Redetermination Summary Page

- Information includes changes the client made in COMPASS and what information currently exists in the PELICAN CCW case

**Child Care Schedules/Immunization Information**

**eForm**

| Individual Name | Schedule Type | Hours | Immunization |
|---|---|---|---|
| ROCKMORE, JERICHO D | Weekdays | 40 | Yes. Immunized |
| ROCKMORE, MARY | Weekdays | 40 | Yes. Immunized |
| ROCKMORE, CORETHIA T | Weekdays | 40 | Yes. Immunized |

**Case**

| Individual Name | CC Request | Reason Ending Care | Age Appropriate Immunization | Verified |
|---|---|---|---|---|
| ROCKMORE, JERICHO D | No | 10-day absence | Yes. Immunized | Self-Certified |
| ROCKMORE, CORETHIA T | No | 10-day absence | Yes. Immunized | Self-Certified |
| ROCKMORE, MARY | No | 10-day absence | Yes. Immunized | Verified |

**Disability Information**

**eForm**

| Individual Name | Disability Type | Disability Begin Date | Able to take care of children | Able to meet work hours requirement |
|---|---|---|---|---|
| No Data Found | | | | |

**Case**

| Individual Name | Disability Type | Disability Begin Date | Able to take care of children | Able to meet work hours requirement |
|---|---|---|---|---|
| No Data Found | | | | |

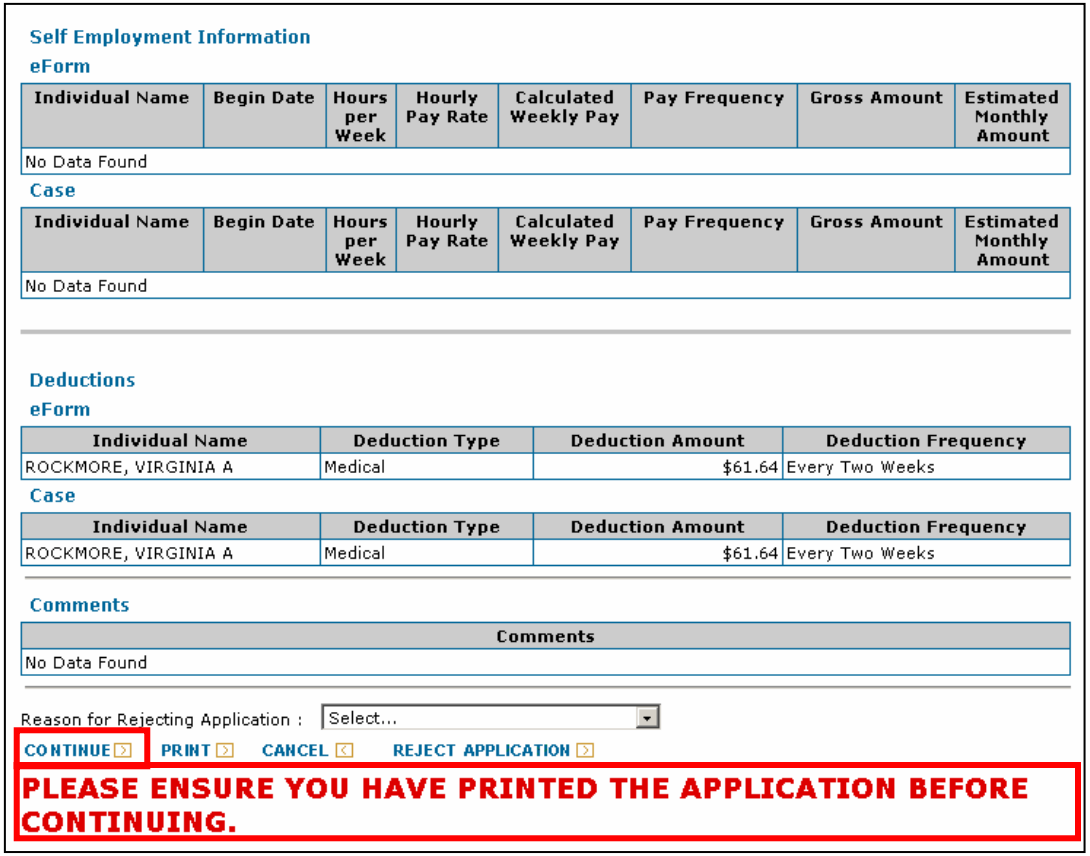
- Schedules will not change in PELICAN when a COMPASS redetermination is processed. CCISs must verify schedule changes and manually modify schedules

## Redetermination Summary Page

- **Per Policy, the Redetermination Summary Page must be printed for each redetermination received in the Inbox**

  Note: If the CCIS forgets to print the Redetermination Summary page prior to processing the redetermination, the e-Form and case information will be identical and the CCIS will not have an accurate Redetermination Summary as it was reported by the Parent/Caretaker in COMPASS
- The printed Redetermination Summary will assist with processing the redetermination
- Clicking CANCEL on any redetermination processing page takes you back to the Redetermination Inbox, IT DOES NOT CANCEL THE REDETERMINATION
- Click CONTINUE

  Note: The Redetermination Summary page can be printed until the redetermination is completely processed. As stated above once it is processed, the Redetermination Summary page will only show the updated information in PELICAN CCW
- If multiple redeterminations are submitted, **ALL** Redetermination Summary pages must be printed. Once the redeterminations are processed, this is the only record you will have for these changes



Self Employment Information

eForm

| Individual Name | Begin Date | Hours per Week | Hourly Pay Rate | Calculated Weekly Pay | Pay Frequency | Gross Amount | Estimated Monthly Amount |
|---|---|---|---|---|---|---|---|
| No Data Found | | | | | | | |

Case

| Individual Name | Begin Date | Hours per Week | Hourly Pay Rate | Calculated Weekly Pay | Pay Frequency | Gross Amount | Estimated Monthly Amount |
|---|---|---|---|---|---|---|---|
| No Data Found | | | | | | | |

Deductions

eForm

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| ROCKMORE, VIRGINIA A | Medical | $61.64 | Every Two Weeks |

Case

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| ROCKMORE, VIRGINIA A | Medical | $61.64 | Every Two Weeks |

Comments

| Comments |
|---|
| No Data Found |

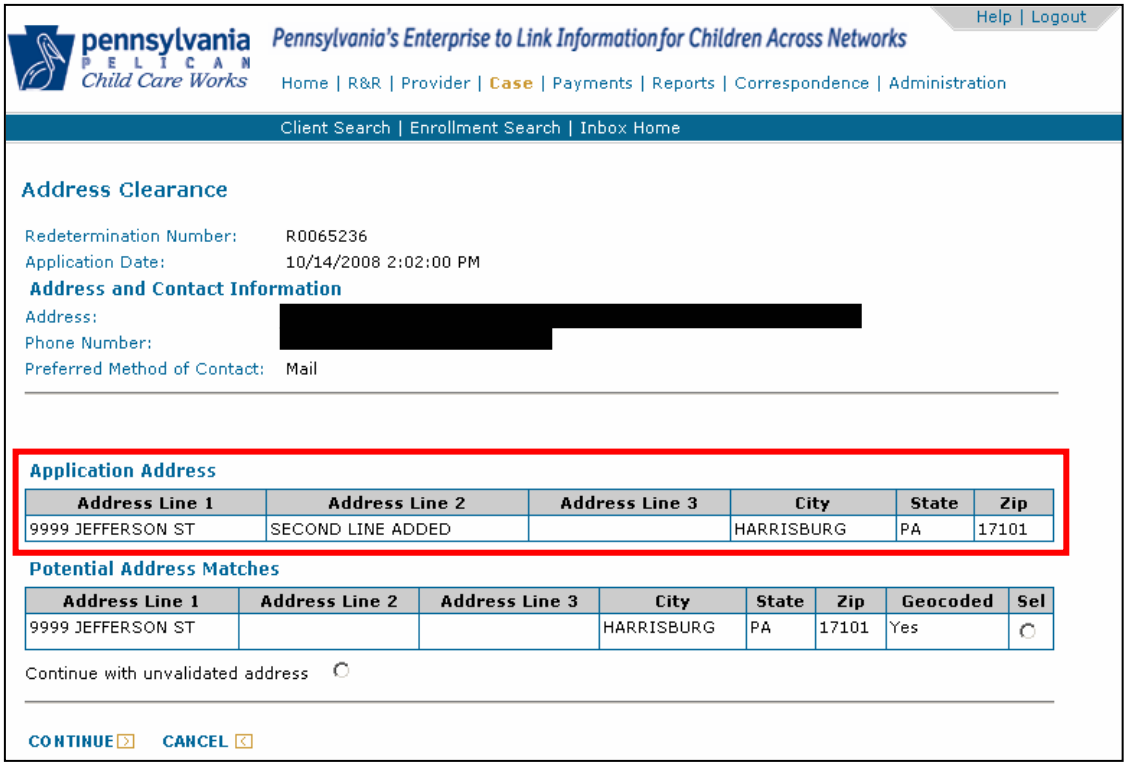
Reason for Rejecting Application : Select...

CONTINUE PRINT CANCEL REJECT APPLICATION

PLEASE ENSURE YOU HAVE PRINTED THE APPLICATION BEFORE CONTINUING.

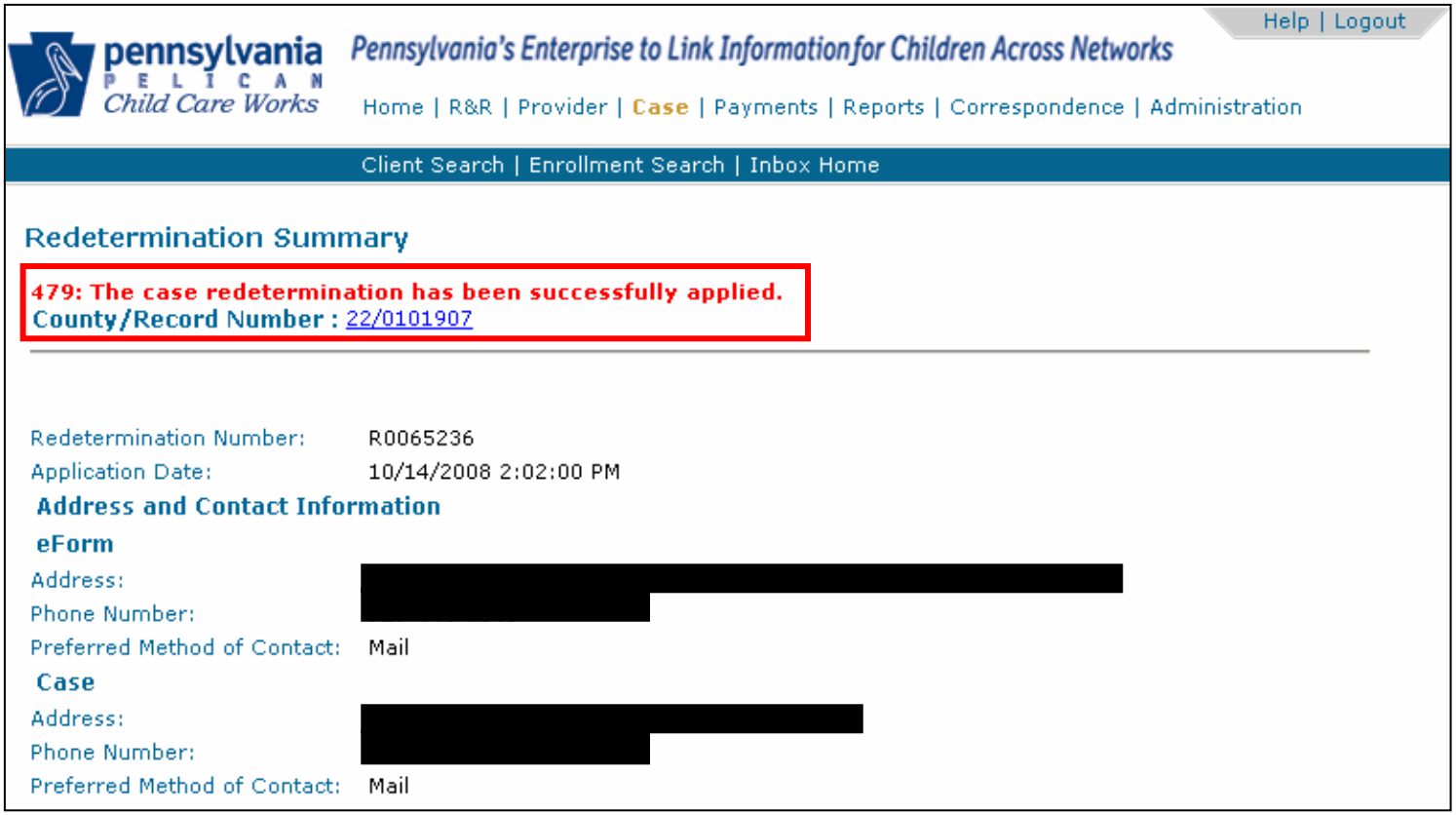
- Processing a Redetermination

- Client changes made in COMPASS must be reviewed during redetermination processing
- Use the printed Redetermination Summary page to compare the updated information to existing information
- Review all necessary pages of updated information, click CONTINUE to review each page



- Processing a Redetermination

➢ Once all of the appropriate changed pages have been reviewed (this is limited to Address Clearance, Individual Selection and MCI Clearance), a confirmation displays; "The case redetermination has been successfully applied"



- Once the redetermination is processed by reviewing the Address Clearance, Individual Selection, MCI Clearance and Case Selection pages the following settings are made to the case in PELICAN CCW:
  - All updates are applied
  - Verifications for updated data are automatically set to Pending
  - The CCIS must update verifications to Verified/Self-Certified
  - The Income verification for both Employment and Self Employment, as well as disability verification (adult and child) are set to Pending, even if it was not updated. This information must be confirmed with appropriate paperwork
  - Has the redetermination packet been returned question is set to YES
  - The Returned Date is the COMPASS submission date (the date it appeared in Redetermination Inbox)
  - The PELICAN CCW Case Status is set to Open/Rede mode
  - Standard redetermination alerts apply to COMPASS Redeterminations

- Redeterminations received from COMPASS follow the same regulations and Policy guidelines that apply to manual redeterminations

- The case status is not changed in PELICAN CCW until the redetermination is processed as described on the previous slide

- You may run eligibility before the Redetermination Due Date in LI cases or FT cases that appear to be eligible. When conducting the first redetermination for a FT case, you may not run eligibility before the Redetermination Due Date if it is potentially ineligible. This prevents the 183-Day FT eligibility segment from ending prematurely

- Redeterminations must be processed with in 10 calendar days. If it is discovered that verifications are missing, a Missing Information Letter must be generated on Day 10 requesting all verifications be submitted no later than the Redetermination Due Date

- When missing verifications are not received in the required timeframe, changing the verification status to “Not Available” will trigger the failure reason on the AA. The CCIS may also change the “Has the redetermination packet been received” question to “No” based upon current business practice

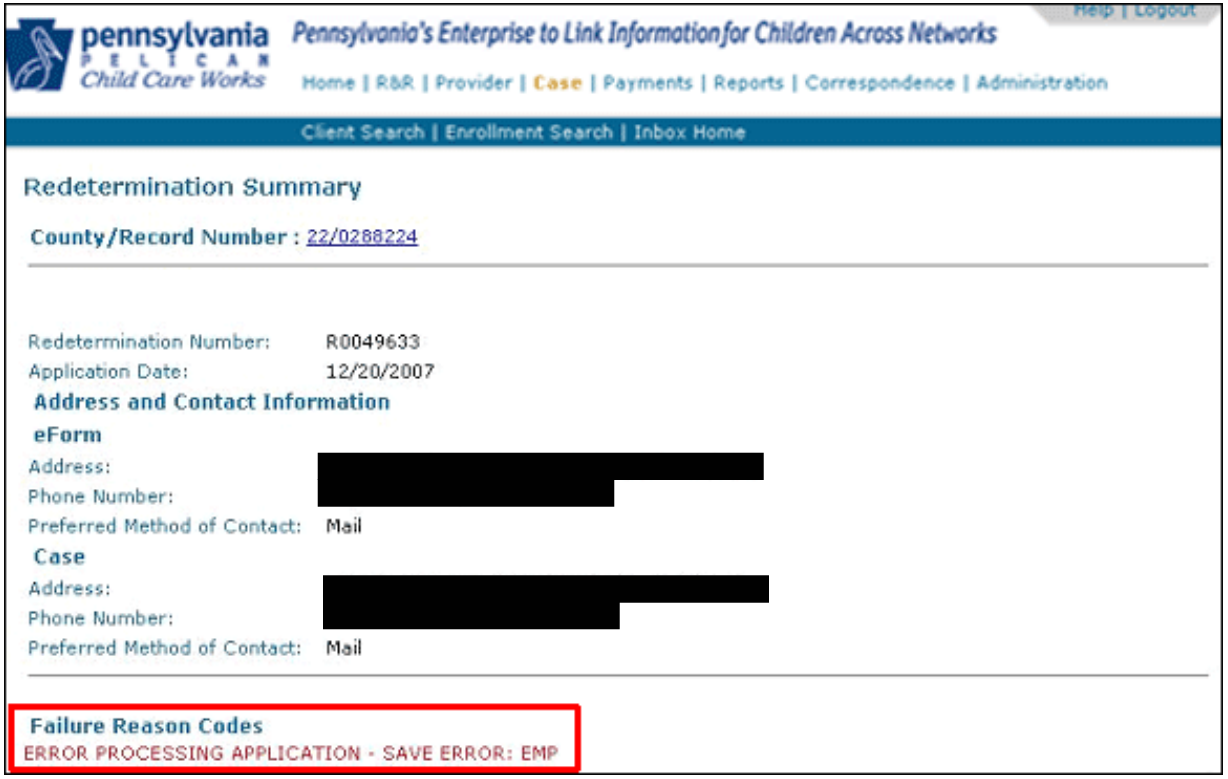
## Processing a COMPASS Redetermination – General Information

- Once a redetermination is processed, the following alert message is displayed 479; The Case Redetermination has been successfully applied". The warning message; "Data has changed, please assess and confirm eligibility" is also displayed

- If system problems occur during the processing of data from COMPASS to PELICAN, COMPASS attempts to resend it daily until it is received by PELICAN

- Addressing Processed with Failures Redeterminations

- Once a redetermination is processed, failures are listed on the Redetermination Summary page, which opens when processing is complete
- Processed with Failures indicates that some of the information was successfully applied to the case
- Information that did not get updated is listed
- Use the Redetermination Summary page to manually update the case and follow the standard process
- If necessary, contact the Parent/Caretaker and advise them their online redetermination failed and complete a manual redetermination



# PELICAN CCW Child Care Client Self Service
# Processed with Failures and Failed Redeterminations

- COMPASS Redetermination – Processed with Failures and Failed

➢ The redetermination record in the Redetermination Inbox indicates what type of failure occurred (Processed with Failures or Failed)

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Client Search | Enrollment Search | Inbox Home

## Redetermination Inbox

**Search Criteria**

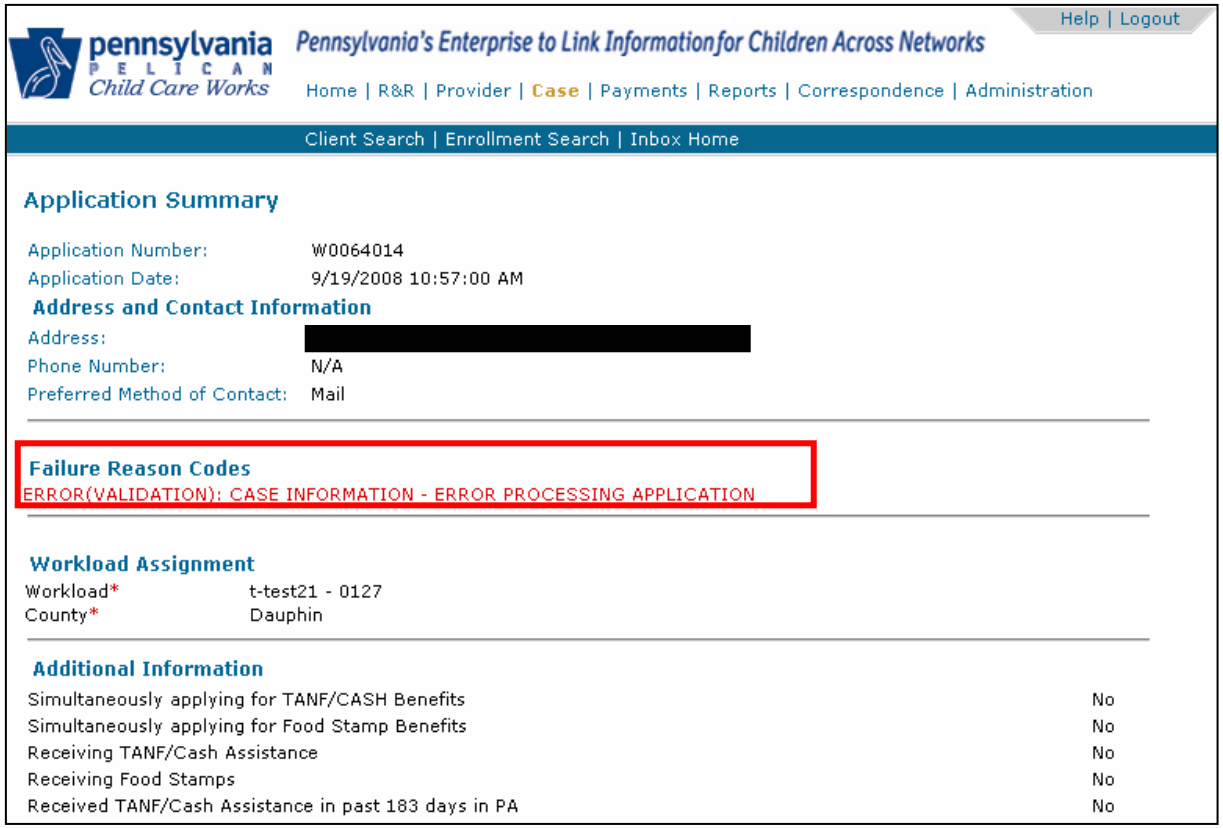
| | |
|---|---|
| Office | CCIS of Dauphin County |
| Received From Date | 11/01/2007 |
| Process Status | Processed With Failures |
| Reviewed | Reviewed |

| Co/Rec# | Redetermination Number | Primary Caretaker | Applicaton Status | Process Status | Date Received | Date Processed | Reviewed |
|---|---|---|---|---|---|---|---|
| 22/0288224 | 49633 | LASTDB, FIRSTDB | Processed | Processed With Failures | 12/20/2007 | 12/20/2007 | ☑ |
| 22/0189171 | 49596 | MAYNARD, LAKISHA | Processed | Processed With Failures | 12/20/2007 | 12/20/2007 | ☑ |
| 22/0250008 | 49597 | SALSBURY, JENNIFER A | Processed | Processed With Failures | 12/20/2007 | 12/20/2007 | ☑ |

Page 1 of 1

## Addressing Failed Redeterminations

- If a redetermination fails, the case was not updated
- The Failure Reason Codes are listed on the Redetermination Summary page
- Use the Redetermination Summary page to enter the information into the case manually and follow the standard process
- The Process Status will show FAILED in the Redetermination Inbox
- Use the Redetermination Summary page to manually update the case and follow the standard process
- If necessary, contact the Parent/Caretaker and advise them their online redetermination failed and complete a manual redetermination



- Rejecting a COMPASS Redetermination

- If a redetermination must be Rejected, select a Reason for Rejecting Application and click Reject Application
- When a redetermination is Rejected, it will have an Application Status of “Cancelled” in the Redetermination Inbox

**Deductions**

**eForm**

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| ROCKMORE, VIRGINIA A | Medical | $61.64 | Every Two Weeks |

**Case**

| Individual Name | Deduction Type | Deduction Amount | Deduction Frequency |
|---|---|---|---|
| ROCKMORE, VIRGINIA A | Medical | $61.64 | Every Two Weeks |

**Comments**

| Comments |
|---|
| No Data Found |

Reason for Rejecting Application : Select...

CONTINUE PRINT CANCEL REJECT APPLICATION

PLEASE ENSURE YOU HAVE PRINTED THE APPLICATION BEFORE CONTINUING.

# Public Provider Searches From COMPASS

## PELICAN CCW Child Care Client Self Service
## Public Provider Searches from COMPASS

Parents can perform R&R Provider searches at their leisure. The search works as a component of COMPASS, however OCDEL has established a direct web address to the search page without navigating through COMPASS: www.compass.state.pa.us/childcaresearch

The Welcome Page to the search is a portal of information for parents as they enter the search function. Highlights of the searching capabilities include:

- Radial, zip code, and County - geographic searches
- Basic and advanced search parameters
- Sort search results, provider detail information
- Maps and directions to provider (if both A to B locations are geo-coded);
- Add to Shopping Cart functionality

CCIS expectations regarding provider search:

- Become familiar with the use, functionality, and limitations of the search
- Refer to parents as needed
- Follow-ups are not required for online searches. CCISs must still follow-up on referrals given in the CCIS office

# Questions?