



EIS Replacement Project; Technical Services

Reference Guide for ARIES Workarounds

Release: R1.4

Table of Contents

Go directly to a workaround by placing the cursor over the workaround in the Table of Contents and select Ctrl + right Click using your mouse.

1. Case Association with an SSP/FFM electronic application and a pending case.....	3
2. ARIES denies the parent for parent caretaker benefits if the eligible children in the household are Disqualified aliens and applying for Emergency Services while the parent is a LAPR applying for regular Medicaid.	3
3. A client calls indicating that they intend to move to a new residence address starting next month. .	3
4. A client turns 65 years of age and is entitled to enroll in Medicare. ARIES should send a notice for enrollment to Medicare.	4
5. A Request for Verification notice is generated when Out of State client is eligible.	5
6. ET wants to submit a case to the supervisor for Second Party Review after authorizing the case (added Caps).....	5
7. Users experience exception error when wrapping up the eligibility (@gov.ak.dhss.aries.framework.exception.FrameworkException....Head of Household Not Found)	6
8. Request user to set the Application Received Date as July, the CSCD dates as July and the Coverage request date as Oct and re-run eligibility. System is displaying SSN denial reason since user has failed non-financial criteria for SSN and Alien both. If user wants to make case denial only for disqualified alien then user can provide good cause for not providing an SSN and can see denial reason for disqualified alien.....	7
9. Add the details in 'Notes From Caseworker' section.....	7
10. Add the denial reason in 'Notes from your caseworker section' of the correspondence.	7
11. A report of change processed late in system should have benefits rolling out in EIS till current month.	7
12. Avoid income double counting for Retro-Medicaid.	8
13. Second pregnancy in a 12 month period.	9
14. Expansion category - A 12 month certification period is set for an individual who will turn age 65 within a couple of months of the determination.	9
15. Time out Issues when entering case notes or entering text for correspondence.	9
16. End Non-Custodial Parent Details – When a child moves out of the home, users are required to end the NCP details on that case at the time of the reported move.	9

1. Case Association with an SSP/FFM electronic application and a pending case.

If during Application Registration, there is a case that should be associated to the application, but the case has a mode of "pending", "case action", and "add person" or "redetermination/recertification" case association cannot occur until the case is authorized. If the source of the application is an SSP/FFM electronic, follow these steps to manage the application.

ET/OA Registering the Application:

1. When a case has a status of "Pending", "Case Action", "Add Person" "Redetermination/Recertification" and the message "AR12022: The status of the Case XXXXXXXX is Pending/Case Action, Add Person, Redetermination/Recertification, so cannot be associated to the application." displays on the Individual Clearance - Associated Cases page, stop registering the application. *If application registration is completed, the ET loses Conflict Panel and auto-population functionality for this application.
2. Create a custom task on the Case to have an ET continue with registering the application after the case is authorized.

Comment [A1]: User is not able to set a "Custom Task" on an application. Error message appears "Insert failed due to invalid case number"

~~3. Custom Task verbiage on Case: T100000000 to be associated once Case Authorization occurs.~~

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ET Authorizing the Case:

1. Authorize the pending case.
2. Complete application registration.
3. Associate the application to the case.
4. Process the application in the appropriate case mode.
5. Mark the custom task as completed with the completion reason of 'Action Completed'.

2. ARIES denies the parent for parent caretaker benefits if the eligible children in the household are Disqualified aliens and applying for Emergency Services while the parent is a LAPR applying for regular Medicaid.

- ~~1. Navigate to Eligibility Determination on the top level menu and click on Eligibility Search. Enter the case number for which Eligibility was determined and the parent caretaker (LAPR) was denied benefits for. Click on Search button.~~
- ~~2. The Eligibility Determination Results screen should be loaded. Expand the left navigation and click on Override Summary.~~
- ~~3. On Override Summary screen click on Add button.~~
- ~~4. Select Type of Assistance as Denali Care Parent Caretaker. Enter Override Begin Date as 1st of Application Month. Select Benefit Period as Application Month. Select Override Reason as Incorrect Authorization. Select Eligibility Status as Approved. Select Participation Status as Eligible Adult.~~
- ~~5. Click on Submit button.~~
- ~~6. Repeat this process for all months of eligibility that have been incorrectly denied for the eligible LAPR parent.~~
- ~~7. Navigate to Eligibility Determination screen. Re-run eligibility for the case and Authorize the benefits.~~
- ~~8. The parent should be given Denali Care Parent Caretaker benefits for the application month moving forward.~~

Comment [A2]: The defect no longer applies Tested with case 34010077 in UAT 08/22/16. The parent is approved for Parent Caretaker and child is eligible for Emergency Treatment then denied following month.

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3. A client calls indicating that they intend to move to a new residence address starting next month.

1. Navigate to 'Tasks' on the Top level navigation and select 'Create Tasks' from the second level navigation. The 'Create Task' screen will be loaded.

2. Enter the Case # for which the change has been reported for Address. Select the Task as Custom task
3. Enter the Due Date by when the report of change needs to be acted upon
4. Enter the new address the client is moving to as of a future date within the Task Text field.
5. Click on Submit and a task should be successfully created for the Maintenance Team.
6. On the Due date when the client actually moves to the new address, Click on 'Tasks Inbox' from the second level navigation.
7. Blank out the Office (Select the blank value from the list), enter the Case # for which Change was reported. Click on Search
8. The 'Task List' should be populated with the task that was created earlier. Select the task and click on the Radio option of 'Assign to Self'.
9. Click on Submit. The Task Status should be flipped from NEW to IN PROGRESS and the username column should be populated with the ET Username performing this operation.
10. On Initiate Data Collection screen, enter the Case number in the Case# field.
11. Select Case Action as 'Case Change' and select next.
12. Answer 'YES' on the Case Action Confirmation screen if prompted and click on Next.
13. Navigate to Household Address-Summary screen.
14. Click on the Edit icon present in the tab next to the record.
15. On the Household Address-Details screen, enter the 'Circumstance Start / Change Date' as the date when the client actually moved.
16. Enter the Reported On / Verification Received on as today's date.
17. Update the address to the new address the client is moving to.
18. Click on the Validate Address button. Once the newly entered address gets verified, click on the Next button.
19. Navigate to 'Tasks' on the Top level navigation and select 'Tasks Inbox' from the second level navigation. The 'Search Task' screen will be loaded.
20. Enter the Case Number in the Case# field and click on Search button.
21. Task List will contain the details regarding the case number entered with Task Status as In-progress. Select the task by clicking on the extreme left of column of the record.
22. In the Task Action section select Complete Task radio button, select "Action Completed" as Completion Reasons and click on Submit button.

4. A client turns 65 years of age and is entitled to enroll in Medicare. ARIES should send a notice for enrollment to Medicare.

1. Navigate to Correspondence module on top level navigation and click on Generate Manual from the second level navigation.
2. Enter the Case number in the Case# field and click on the Search button.
3. Select the Radio button next to the individual's name and click on Next button.
4. On Search Document Information click on the Search button without entering any data in the Document Name field. Under the Search Result section, click on the Manual Insurance Medical Information hyperlink.

Client responds within the Due Date

5. If Client responds within due date, navigate to 'Data Collection' on the top level navigation and select 'Initiate Data Collection' from the second level navigation.
6. Enter the Case# which requires change "Case/Application" text field.
7. From the dropdown list "What action do you want to perform?" select option as "Case Change". Click on Next.

8. Answer 'YES' on the Case Action Confirmation screen if prompted and click on Next.
9. Click on Household Information under second level navigation.
10. Click on Medicare Details and edit the details of individual to Update Enrollment date field and answer the question 'Entitled to Enroll' as YES.
11. Search for the Custom task associated with the case through the task inbox and mark as complete with completion reason as 'No action needed'.

Client does not respond within the Due Date

12. Once due date approaches, click on 'Tasks Inbox' from the second level navigation.
13. Blank out the Office (Select the blank value from the list), enter the Case # for which the Custom task was created to follow-up for Enrollment to Medicare.
14. The 'Task List' should be populated with the relevant custom task. Select the task and click on the Radio option of 'Assign to Self'.
15. Click on Submit. The Task Status should be flipped from NEW to IN PROGRESS and the username column should be populated with your ARIES User ID.
16. Check if Enrollment details are available electronically.
17. If not, run eligibility for the case and close benefits for the individual.
18. Navigate to Task on top level navigation and Click on 'Tasks Inbox' from the second level navigation.
19. Blank out the Office (Select the blank value from the list), enter the Case # for which notice was sent. Click on Search.
20. The 'Task List' should be populated with the task that was created earlier. Select the task and click on the Radio option of 'Mark as Complete' and enter a Completion Reason.
21. Click on Submit. The Task Status should be flipped from IN PROGRESS to COMPLETE.

5. A Request for Verification notice is generated when Out of State client is eligible.

Comment [JK3]: Slatted for removal in R1.4

1. From the View Pending Correspondence page.
2. Select the trash can icon to delete the pending Request for Verification correspondence

6. ET wants to submit a case to the supervisor for Second Party Review after authorizing the case (added Caps)

1. Navigate to 'Tasks' on the Top level navigation and select 'Create Tasks' from the second level navigation. The 'Create Task' screen will be loaded.
2. Enter the Case # which requires a review. Select the Task as 'Custom Task'.
3. Enter the Due Date by which the case review needs to be completed.
4. ~~Add Task Text as defined by policy within the SPMG.~~
5. Click on Submit and a task should be successfully created for the Office / Team and Case number selected.
6. Navigate to 'Tasks Inbox' and blank out the Office / Team drop-down values. Enter the Case # for which the task was created and click on Submit.
7. The recently created task will be displayed as part of the Search result.
8. Select the task and click on 'Assign to user' task action. Search for your immediate supervisor and click on submit. The task should move into 'In-progress' status and should be assigned to your immediate supervisor.

Comment [A4]: There is no guidance for task verbiage in the SPMG or ARIES Help Guide to for a "Custom Task" for Supervisory Review

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Note: If the case file is being assigned to another office than it was originally assigned, navigate to 'Case Information Details' within Data collection and update the File location to 'In transit'.

Completing the Case Review process – (The below steps are applicable to Supervisor performing the case Review)

9. Navigate to 'Tasks' on the Top level navigation and click on 'Tasks Inbox' from the second level navigation.
10. Blank out the Office (Select the blank value from the list), enter the Case # which requires second party review. Click on Search
11. The 'Task List' should be populated with the review task relevant to the case and should currently be assigned to you.
12. Navigate to 'Data Collection' on the Top level navigation and select 'Initiate Data Collection' from the second level navigation.
13. Enter the Case# which requires second party review in "Case/Application" text field.
14. From the dropdown list "What action do you want to perform?" select option as "View data collection screens (read-only)". Click on Next.
15. Review the case data in read only mode.
16. If any changes/corrections are needed, navigate to 'Tasks' on the Top level navigation and select 'Create Tasks' from the second level navigation. The 'Create Task' screen will be loaded.
17. Enter the Case # for which the review was completed. Select the Task as 'Custom Task'.
18. Enter the Due Date by when the correction/change needs to be completed by the ET.
19. Add Task Text as "Return for correction".
20. Click on Submit and a task should be successfully created for the Office / Team and Case number selected.
21. Navigate to 'Tasks' on the Top level navigation and click on 'Tasks Inbox' from the second level navigation.
22. Blank out the Office (Select the blank value from the list), enter the Case # for which the correction task was created.
23. The 'Task List' should be populated with the task that was created earlier. Select the task and click on the Radio option of 'Assign to Username'. (Assign to the ET who had worked on the case)
24. Click on Submit. The Task Status should be flipped from NEW to IN PROGRESS and the username column should be populated with the "ET" Username.
25. In-case no changes to case date is required for the case being reviewed, Click on Case Notes on left hand side navigation bar.
26. Click on "ADD CASE NOTE" button on the pop-up.
27. Select Description as "Others" and add details in CASE NOTE TEXT "Supervisor Approved". Click on "SAVE AND CLOSE" button.
28. Navigate to Task on top level navigation and Click on 'Tasks Inbox' from the second level navigation.
29. Blank out the Office (Select the blank value from the list), enter the Case # for which the case review was completed.
30. The 'Task List' should be populated with the case review task assigned to your name. Select the task and click on the Radio option of 'Mark as Complete' and enter a Completion Reason.
31. Click on Submit. The Task Status should be flipped from IN PROGRESS to COMPLETE.

7. Users experience exception error when wrapping up the eligibility (@gov.ak.dhss.aries.framework.exception.FrameworkException....Head of Household Not Found)

From the initiate Data Collection page

1. Enter the case number and the case action. ~~(Get rid of the second "1")~~
"Continue previously selected action"
2. Navigate to "Program Request - Individuals" screen and confirm the "Application Received Date".
3. Check if any household member is applying ~~to to~~ for retro month benefits. ~~(change "to" to "for")~~

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4. Write down or make note of the application received date or the earliest retro month, if present. The earliest date out of the two will be used for the next page.
5. The 1st of the month should be used for the date noted in the previous step
6. Navigate to "Primary Individual" screen and enter either the application received date or the earliest month date requested (whichever is the earliest) into the 'Primary Individual Begin Month' date.
7. Re-run eligibility on the case.
8. The error message will not be encountered by the user.

8. Request user to set the Application Received Date as July, the CSCD dates as July and the Coverage request date as Oct and re-run eligibility. System is displaying SSN denial reason since user has failed non-financial criteria for SSN and Alien both. If user wants to make case denial only for disqualified alien then user can provide good cause for not providing an SSN and can see denial reason for disqualified alien.

From the Person Demographics - SSN Application/Armed Services page

1. Select 'Yes' to the question "Is there a good cause for SSN refusal?".
2. Click Next
3. Complete the required information on the Alien - Details page if it is not already completed and select Continue.
4. Run eligibility
5. The individual will be denied for not meeting alien status requirements.

9. Add the details in 'Notes From Caseworker' section.

Comment [A5]: This is not a work around, no normal function to add "Notes from your worker"

~~From the View Pending Correspondences page~~

- ~~1. Enter the case number and select Search~~
- ~~2. Select the link to the correspondence in the Document Name column~~
- ~~3. Enter the detail information in the Free Form Text field on the Pending Correspondence Detail page~~
- ~~4. Select the Central Print button and receive an Update Successful message.~~

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10. Add the denial reason in 'Notes from your caseworker section' of the correspondence.

Comment [A6]: ARIES provides denial reason for each individual when a case is closed or denied.

~~From the View Pending Correspondences page~~

- ~~1. Enter the case number and select Search~~
- ~~2. Select the link to the correspondence in the Document Name column~~
- ~~3. Enter the denial reason in the Free Form Text field on the Pending Correspondence Detail page~~
- ~~4. Select the Central Print button and receive an Update Successful message~~

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11. A report of change processed late in system should have benefits rolling out in EIS till current month.

If a report of change is received for a household and is processed late, then the following steps need to be taken to process the report of change in ARIES.

1. Evaluate the report of change received by the designated DPA office.
2. Enter the Application received date as the day the report of change is received.
3. Enter the coverage request date as the first day of the next month. This is based on the assumption that the benefits for current and past month have been rolled out of EIS system.
4. Process the case for the rest of the information and verify the eligibility results.

Note: If the report of change was received at an earlier date but is being processed now, the coverage date needs to be set correctly to the next month so that the certification period is correctly evaluated by the system.

12. Avoid income double counting for Retro-Medicaid.

Issue: When processing a case that has a Retro-Medicaid request and the only available data on the earned income is paychecks received during the Retro-Medicaid month, take the following steps to ensure that actual income amounts are counted for the retro month, average is used for the application month, and the income does not double count for the retro-month.

Scenario A1: Application date of 9/1/15, Retro-Medicaid requested for August 2015 at time of application. Paystubs provided by the applicant are 8/5/15 \$100 and 8/20/15 \$200 (paid every two weeks twice per month).

Comment [A7]: Based on the pay periods the individual is paid twice per month for both examples

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1. Enter the income for the Retro-Medicaid month as the actual income received.
 - CSCD is 8/1/15
 - Final Payment Date is 8/20/15
 - Worksheet Start Date is 8/15
 - Paychecks entered into the worksheet as:
 - 8/5/15 \$100 Actual
 - 8/20/15 \$200 Actual
2. Enter the income for the application month using the same income as received in 8/2015, but setting pay dates as the anticipated pay dates for 9/2015.
 - CSCD is 9/1/15
 - No final payment date
 - Worksheet start date is 9/15
 - Paychecks entered into the worksheet as:
 - 9/5/15 \$100 Anticipated
 - 9/20/15 \$200 Anticipated

Scenario A2: Application date of 9/1/15. Paystubs provided by the applicant are 8/5/15 \$100 and 8/20/15 \$200 (paid every two weeks twice per month). Retro-Medicaid for August 2015 is requested at a later time and after the original application has been processed.

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Step 1: In Intake Mode (retro has yet to be requested), enter the income

- CSCD is 9/1/15
- No final payment date
- Worksheet start date 8/15
 - Paychecks entered into the worksheet as:
 - 8/5/15 \$100 Actual
 - 8/20/15 \$200 Actual

Step 2: In Case Change Mode, Retro-Medicaid is now requested, add the income for the Retro-Medicaid month

- Navigate to the Program Request Summary page and add the Retro-Medicaid month.
- Navigate to the Earned Income Summary and select the Add Income button to add a record for Retro-Medicaid.
- On the Earned Income Details page, under Earned Income Dates change the CSCD to 8/1/15.
- For the Do you expect the income to continue button – select No from the drop-down list

- On the Earned Income Payment Page enter:
 - Final Payment Date to 8/20/15
 - Worksheet Start Date to 8/15
 - Worksheet End Date to 8/15
 - Paychecks entered into the worksheet as:
 - 8/5/15 \$100 Actual
 - 8/20/15 \$200 Actual

Step 3: Navigate back to the Earned Income Summary Page and select the 9/1 Income Record to

- Modify the existing income record
- CSCD is 9/1/15 (no change)
- No final payment date (no change)
- Clear the worksheet and **do not** use worksheet for calculating income
- Add a case note identifying why the worksheet was cleared and identifying the income amount that will be used under Income by Rate/Unit/Frequency
- Pay Rate per Unit: enter the amount of an average paycheck. This will need to be calculated manually. For this scenario, enter \$150
- Units of Pay *Frequency* = enter "1"

13. Second pregnancy in a 12 month period.

~~If an individual becomes pregnant for the second time in a 12 month period, ARIES incorrectly moves the case to Expansion and provides extra benefits to the individual. There is no workaround in ARIES for a second pregnancy entry. To generate benefits for an individual who is pregnant for a second time in a 12 month period, the second pregnancy needs to be entered into EIS.~~

Comment [A8]: This has been fixed user can now add 2nd pregnancy.

Comment [JK9]: Slatted for potential removal with R 1.4

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14. Expansion category - A 12 month certification period is set for an individual who will turn age 65 within a couple of months of the determination.

~~This defect is being monitored for the next 90 days. There is no known individual where this will occur. If you encounter a case where this may happen, use the Certification Adjustment to shorten the certification before authorizing the case.~~

Comment [A10]: This is no longer a defect. Tested case 34010079 08/22/16- the individual turned 65 as of 08/01/16 ARIES denied the individual for expansion as of 08/16

Comment [JK11]: Slatted for potential removal with R1.4

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15. Time out Issues when entering case notes or entering text for correspondence.

Users should not spend a lot of time crafting text. The system is looking for an action to be taken which then resets the timer. If no action is taken, you will be logged out

Comment [A12]: Check with DTT on this, I presume its fixed

16. End Non-Custodial Parent Details – When a child moves out of the home, users are required to end the NCP details on that case at the time of the reported move.

To avoid the errors on the closed case, end the Non-Custodial Parent Cooperation Details record first, then update the child's Household Status and Living Situation. Next re-run eligibility on the old case. You do not need to end the Non-Custodial Parent Cooperation Page.

1. On the existing case, go to the Non-Custodial Parent page and input an end date on the Non-Custodial Parent – Child – Details page.
2. Update the Household and Living Situation screens on the existing case to be current with moving the child to the other case and run wrap up. This should remove the child from the case.
3. On the new case, enter the effective dates correctly and verify the living situation for the child as "In Home" . Add the new Non-Custodial Parent parent-child information and the Non-Custodial Parent cooperation information on the new case for the child.