

DCSS HEAplus Deskaid e-book




Basic Search

[Switch to Advanced Search](#)

Person Information

First Name Middle Name Last Name

Date of Birth 
MM/DD/YYYY

Unique Number Identifier

Person Unique Identifier Case Unique Identifier SSN

XXXX-XX-XXXX

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Mouse over a subject, hold down the **Ctrl** key and left click to follow the link.

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Chapter 1 - Introduction

Health-e-Arizona Plus (HEAplus) is an AHCCCS and DES collaborated effort that allows persons to apply for AHCCCS Health Insurance, KidsCare, Nutrition Assistance and Cash Assistance benefits and to connect to the Federal Insurance Marketplace.

The DCSS HEAplus Deskaid e-book is intended to guide users through their user profiles and system functionality within HEAplus. This guide contains several sections to be used while reviewing applications or eligibility in HEAplus.

Chapter 2 - Dashboard

After logging in the HEAplus, the first page users will see is their Dashboard. The Dashboard is divided into a number of sections. Each of these sections will be described below.

The screenshot shows the Health-e-Arizona PLUS dashboard. At the top left is a 'Minimize' button. The logo 'Health-e-Arizona PLUS' is prominently displayed. On the top right, there are links for 'Links & Contacts | Log out', font size controls (A A A A), and language options (English | Español). A search bar is also present.

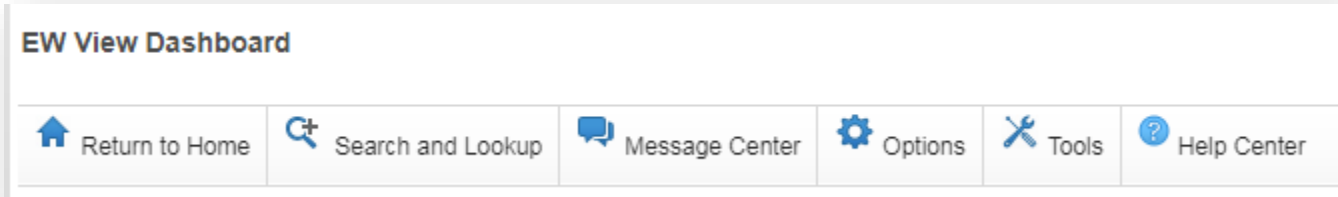
Below the header, the user's name 'Jerrold Crowder (EW View)' and site '960A (default)' are shown. A navigation bar includes 'Return to Home', 'Search and Lookup', 'Message Center', 'Options', 'Tools', and 'Help Center'.

The main content area is titled 'EW View Dashboard'. It features a 'My Account' section with a 'Hide' link. The account information for Jerrold Crowder is as follows:

Jerrold Crowder	Email jcrowder@azdes.gov
3443 N Central Ave Fl 17	
Phoenix AZ 85012-2225	Work Phone (602)774-5783

Below the account information is a 'Change My Account Information' link. On the left side of the dashboard, there is a 'Search For an Application...' section with an 'Application ID' input field and a 'Search' button. Below that is an 'Applications...' section with a 'Find a Person' link.

Toolbar

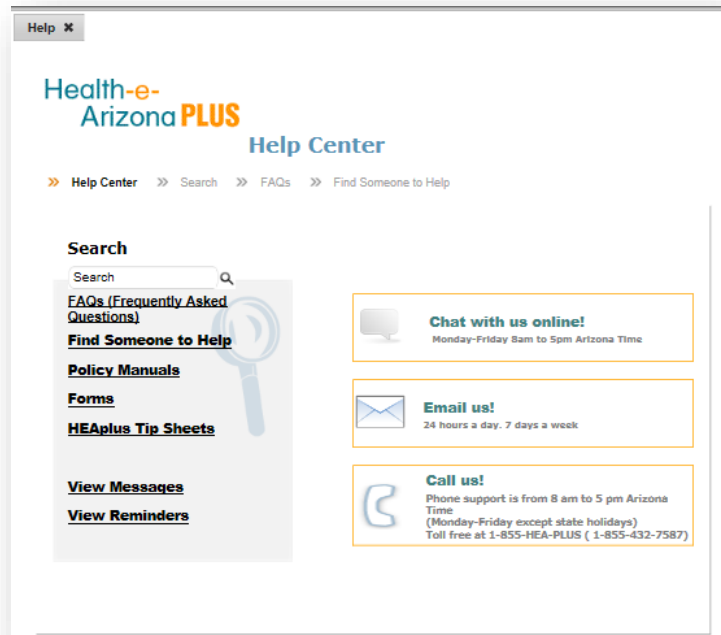


Some features of the Toolbar are persistent features, meaning they are not unique to one profile within HEAplus and so, may not have any unique use or need for your profile. Below those features that may be useful for your profile will be reviewed.

Help Center

The Help Center consists of links to

- The Policy Manual (Eligibility Policy Manual – EPM)
- HEAplus Tip Sheets
- Forms
- FAQ's



Chapter 3 – Customer Search

Many tasks in HEAplus will begin with a customer search.

The BASIC SEARCH page can be accessed on the toolbar or on the worker dashboard. The search process is identical for all user profiles.

Basic Search

The BASIC SEARCH page is divided into two separate sections:

1 Person Information

- Start with this search process when a unique identifier is unknown.
- This search process requires **THREE** fields to be completed.
- Refer to the [Help and Hints](#) box for more information.

2 Unique Identifier

- This search process requires only **ONE** field to be completed.
- Refer to the [Help and Hints](#) box for more information.

(Note: Using "Person Information" and "Unique Identifier" together will reduce results)

The screenshot shows the 'Basic Search' interface. The 'Person Information' section (1) includes fields for First Name, Middle Name, Last Name, and Date of Birth (MM/DD/YYYY). The 'Unique Number Identifier' section (2) includes fields for Person Unique Identifier, Case Unique Identifier, and SSN (format: XXX-XX-XXXX). A 'Search' button is at the bottom right. The 'Help and Hints' sidebar on the right provides instructions on how to use the page, including a note that combining both sections will reduce results.

Basic Search

Switch to Advanced Search

Person Information

First Name Middle Name Last Name 1

Date of Birth

Unique Number Identifier

Person Unique Identifier Case Unique Identifier SSN 2

Check PMMIS Alternative ID Search

Help and Hints

Basic Search

About this Page

This screen is used to find out if a customer is known to Health-e-Arizona Plus (HEAplus), Health-e-Arizona (HEA), ACE, or AZTECS.

How to Use this Page:

- Enter any known customer information and click Search.
- o Searching for first, middle or last name will search for current name and any other names used.
- o A Person Unique Identifier can be an HEAplus or HEA Person ID, an AHCCCS ID, ACE Person ID, or an AZTECS Client ID.
- o A Case Unique Identifier can be an HEAplus or HEA Case ID, ACE Group ID, or AZTECS Case Number.
- For more search options, click "Switch to Advanced Search."

Person Information Search

1. Enter the applicant's first name, last name, and date of birth into the **Person Information** section.

Click the [Search] button.

2. Match the applicant's name, gender, SSN, and date of birth on the application to the results displayed on the SEARCH RESULTS page.

Click on the person's name next to the most recent application date to access the "Information Belongs To" pop-up.

Basic Search

Switch to Advanced Search

Person Information

First Name Middle Name Last Name

Date of Birth

Unique Number Identifier

Person Unique Identifier Case Unique Identifier SSN

Check PMMIS Alternative ID Search

Search Results

You have chosen to search for persons that match the following criteria:

Last Name that contains **Skywalker**
 First Name that contains **Luke**
 Date of birth that matches **01/26/1989**

Filter: Add Filter

Rows per Page: 10

Member ID	Name	Gender	SSN	Date of Birth	Application ID	Created Date	Average Score
39900375160153	Skywalker, Luke	Male	999-92-3339	01/26/1989	2015160001539	06/10/2015	100.00%

1 Total Record(s).

Back to Search Begin Application Add New Consumer

3. The "Information Belongs To" pop-up window will display all Application IDs associated with this individual's Person ID.

The most recent application will display at the top of the list.

Demographic information will appear in this pop-up for all members listed in the household on each application.

(Note: Household members may change from one application to another make sure to review)

Information Belongs To: 39900121077180

Jerroldine Childsupport (02/02/1995) Assigned To: Not assigned

2018077001048

Name	Creation Date	App Received Date	Type	Status	Program	Application Source
Jerroldine Childsupport	03/19/2018	03/19/2018	INITIAL	Submitted	Other	Call Center Representative

Home Address: 201 W Jefferson St Phoenix, AZ 850032205
 Mailing Address: 201 W Jefferson St Phoenix, AZ 850032205

Member ID	Member Name	Date of Birth	Relationship
39900122077189	Son Childsupport	01/01/2015	Son
39900123077188	Daughter Childsupport	02/02/2017	Daughter

Current RFI Due Date: 04/03/2018

[View Application Summary](#)
[View Verification Status \(Verification Factor Page\)](#)
[Voluntarily Withdraw an Application or Stop Benefits](#)
[View Fair Hearing Request Summary](#)
[View Disposition History](#)
[View Case Summary](#)
[View Notice Summary](#)
[View Notification History](#)
[View Budget Worksheet](#)

Help And Hints

4. The “Information Belongs To” pop-up window will display the status of the application. Always review the status of the most recent Application ID.

The application status refers to the submission status of the application, NOT the overall case status. Use the grid provided to interpret the status as displayed in the pop-up window.

If the application status is...	It means that...
Submitted	The application has been fully submitted and may or may not have been dispositioned.
Pending	No programs have been submitted (application has not been signed).
Partially Submitted	At least one program has been submitted and at least one program has not been submitted.

Unique Number Identifier Search

Person Unique Identifier

- Person Identification Number (PID)
- AHCCCS ID
- AHCCCS Customer Eligibility (ACE) Person ID
- AZTECS Client ID

Case Unique Identifier

- HEAplus Application ID
- ACE Group ID
- AZTECS Case Number

Social Security Number

1. Search by entering the customer's SSN.

Click on the [Search] button.

If SSN is unknown or not applicable, use another Unique Identifier or use Person Information Search.

Basic Search
[Switch to Advanced Search](#)

Person Information

First Name ?

Middle Name

Last Name ?

Date of Birth

Unique Number Identifier ?

Person Unique Identifier ?

Case Unique Identifier ?

SSN

[Check PMMIS](#)
[Alternative ID](#)

- Match the applicant's name, gender, SSN, and date of birth on the application to the results displayed on the SEARCH RESULTS page.

Just like the Person Information Search if a match is found, click on the name of the correct client to access the "Information Belongs To" pop-up.

If your search criteria is incorrect, click the [Back to Search] button to return to the BASIC SEARCH page to perform another search.

Search Results

You have chosen to search for persons that match the following criteria:

SSN that contains 480-12-3680

Filter: [Add Filter](#)

Rows per Page: 10

Member ID	Name	Gender	SSN	Date of Birth	Application ID	Created Date	Average Score
3	Email, Jerrold (ID Verified)	Male	480-12-3680	01/01/1965	201327602235	10/04/2013	100.00%
39900664276132	Email, Jerrold (ID Verified)	Male	480-12-3680	01/01/1965	2016272000245	09/29/2016	100.00%

2 Total Record(s).

[Back to Search](#) [Begin Application](#) [Add New Consumer](#)

Advanced Search

The ADVANCED SEARCH page is divided into seven separate sections:

Advanced Search

[Switch to Basic Search](#)

Person Information

<i>First Name</i> <input type="text"/>	<i>Middle Name</i> <input type="text"/>	<i>Last Name</i> <input type="text"/>
<i>Date of Birth</i> MM/DD/YYYY	<i>Suffix</i> ---Select One---	<i>Gender</i> <input type="radio"/> Male <input type="radio"/> Female
<i>Role</i> All		

Unique Number Identifier

<i>Person Unique Identifier</i> <input type="text"/>	<i>Case Unique Identifier</i> <input type="text"/>	<i>SSN</i> XXX-XX-XXXX
<i>Medicare ID</i> <input type="text"/>		

Eligibility Worker's Information

<i>First Name</i> <input type="text"/>	<i>Last Name</i> <input type="text"/>	<input type="checkbox"/> <i>Cases Assigned to Me</i>
---	--	--

Application Submitted Date Range

<i>From</i> MM/DD/YYYY	<i>To</i> MM/DD/YYYY	<i>In last # days</i> ---Select One---
---------------------------	-------------------------	---

Interview Completion Date Range

<i>From</i> MM/DD/YYYY	<i>To</i> MM/DD/YYYY	<i>In last # days</i> ---Select One---
---------------------------	-------------------------	---

Address Information

<i>Address</i> <input type="text"/>	<i>City</i> <input type="text"/>	<i>Zip</i> <input type="text"/> <input type="text"/>
<i>From</i> MM/DD/YYYY	<i>To</i> MM/DD/YYYY	

Other Information

<i>Program's Applied for</i> Select One or More	<i>Priority</i> Select One or More	<i>Status</i> Select One or More
--	---------------------------------------	-------------------------------------

Check PMMIS
Alternative ID
Search

SEARCH page is divided into seven separate sections:

1 Person Information

- Suffix, Gender and Role are now added to the search option.
- Three fields are still required but any combination of 3 can be used.

2 Unique Identifier

- Medicare ID has been added to the search option.
- Only identifier is needed and does not have to be used in combination with any person information.

The following Search options need to be used along with Person Information or Unique Identifier:

3 Eligibility Worker's Information

- This search process requires only one field to be completed.
- Refer to the [Help and Hints](#) box for more information.

4 Application Submitted Date Range

- Timeframe in which an application was submitted in HEAplus "From" and "To"
- Specified range (7, 20, 30, 45, 60 or 90 days)

5 Interview Completion Date Range

- Timeframe in which an interview was completed in HEAplus "From" and "To"
- Specified range (7, 20, 30, 45, 60 or 90 days)

6 Address Information

- Physical Address, City and Zip Code
- Timeframe in which that address existed "From" and "To"

7 Other Information

- Programs Applied for
- Priority
- Status

Check PMMIS

PMMIS (PRE-PAID MEDICAL MANAGEMENT INFORMATION SYSTEMS INTERFACE) is utilized to find AHCCCS information regarding member enrollment and eligibility.

In order to Search PMMIS use both the customer's Date or Birth and Social Security Number and then click the "Check PMMIS" hyperlink in the bottom left-hand corner or the search screen.

When a match is found click on the "View AHCCCS Enrollments" hyperlink in the pop-up to see the results.

AHCCCS Benefits and History will appear for customer.

Key data will show in the Current Status table. The Customer's

- AHCCCS ID
- Renewal Date
- Annual Enrollment Choice
- Date

Below in the Other Information section will show hyperlinks for:

- 2 year history
- Medicare Information (if any)
- Other Insurance (if any)

In the Information for other persons in your family section will show hyperlinks for:

- All persons in the household who also have Medicaid

Current AHCCCS Status for	
Name	SARA GOLD
AHCCCS ID	A69002035
Gender	Female
Date of Birth	2/14/1985
Eligibility Renewal Date	9/30/2016
Annual Enrollment Choice Date	4/1/2017

Current Eligibility	Begin Date	End Date
N/A	N/A	N/A

Current Medical Enrollment	Begin Date	End Date
N/A	N/A	N/A

Co-Pay Level	Service Type	Amount
NO RECORDS	N/A	N/A

For substance abuse or behavioural health services call the number on your AHCCCS ID card

Other Information

[2 Year History Eligibility And Medical Enrollment](#)

[Medicare Information](#)

[Other Insurance](#)

Information for other persons in your family/household/case

[Sunshine Gold](#)

The 2-year history will show the Eligibility enrollments and changes and the health plan selected. This will also show the begin and end dates of that enrollment period.

Other Information
2 Year History Eligibility And Medical Enrollment

Eligibility History	Begin Date	End Date
AHCCCS Medical Assistance	9/1/2014	1/31/2015
AHCCCS Medical Assistance	2/1/2015	5/31/2015
AHCCCS Medical Assistance	5/1/2015	12/31/2015
AHCCCS Medical Assistance	12/1/2015	2/29/2016

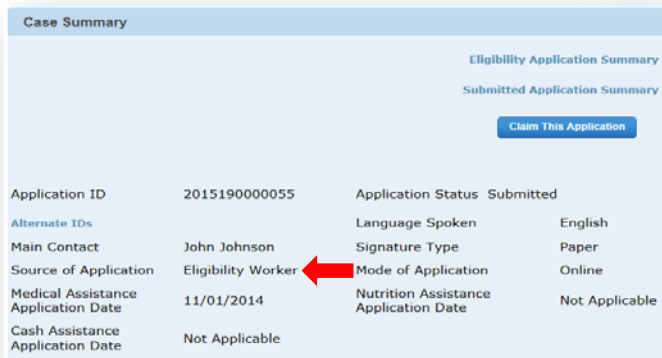
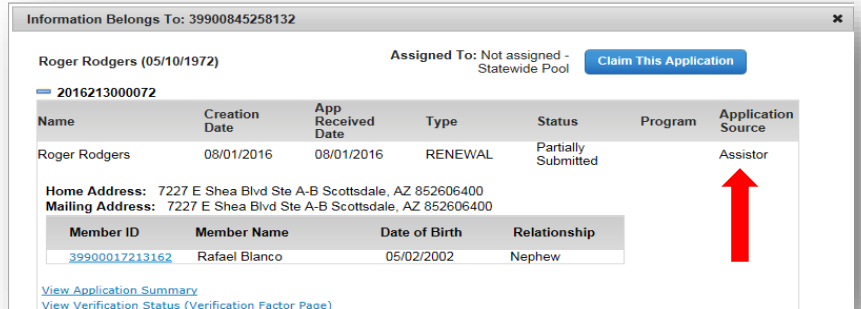
Medical Enrollment History	Begin Date	End Date
CARE 1ST ARIZONA	9/21/2014	5/31/2015
CARE 1ST ARIZONA	6/1/2015	11/30/2015
CARE 1ST ARIZONA	12/1/2015	2/29/2016
CARE 1ST ARIZONA	3/1/2016	8/31/2016

Chapter 4 – Application Sources

Applications are available in HEAplus from a number of sources. Applications can be “Public Access”, information entered by the Customer using their own account or from an “Assistor”, someone entering the application on the Customer’s behalf.

Below is a list of the different application sources you may see while working in HEAplus and information that might be helpful in understanding how that information got into HEAplus and how to process those applications if need be.

Most Application Sources can be seen at the “Information Belongs To” pop-up as you are doing a search for the client or the Application Source can be seen at the top of the Case Summary.



Common Application Sources

Application Source	Programs	How Application Was Created
Public Access	All Programs	Client using their own account
Assistor	All Programs	Community Partner Organization application complete using the organization account
Eligibility Worker	All Programs	State Worker logged in to their account
Call Center Representative	All Programs	Conduent employee completing phone application
PMMIS Postback	MA Only	Primarily generated by the birth of a child or Incarcerated client
Auto Renewal	MA Only	System generated for medical renewals
Auto Job	MA Only	System generated when client has transitioned into a new medical category (ex. Child to Adult)

*NOTE: For full list of Application Sources, see HEAplus Application Source DeskAid

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- The "Information Belongs To" pop-up window will display the status of the application. Always review the status of the most recent Application ID.

The application status refers to the submission status of the application, NOT the overall case status. Use the grid provided to interpret the status as displayed in the pop-up window.

If the application status is...	It means that...
Submitted	The application has been fully submitted and may or may not have been dispositioned.
Pending	No programs have been submitted (application has not been signed).
Partially Submitted	At least one program has been submitted and at least one program has not been submitted.

Chapter 5 - Case Summary

Case Summary is a landing point for all application data for each application in HEAplus. The data found at the Case Summary include information about the each individual in the home, the programs being applied for, the status of these programs and links that show the history of the applicants and their benefits.

Top Section

SOLQI Summary


SOLQI is an online version of the SSN Verification, Title II, and Title XVI query. The results for the Social Security verification will appear as verified **1** or not verified **2**. If not verified a reason will appear in the description.



SAVE/VLP

HEAplus uses Verify Lawful Presence (VLP) and Systematic Alien Verification for Entitlements (SAVE) web services, provided by the Department of Homeland Security (DHS) and the Federal Data Services Hub (FDSH) to verify Immigration statuses for non-Citizens as well as Citizenship for Naturalized Citizens.

From the Case Summary, click on the SAVE/VLP Summary hyperlink. After the Summary opens, each client in which a SAVE/VLP was ran will appear with the data of the run.

SAVE/VLP Summary		
 SAVE/VLP Summary		
Name	Source	
Kaitlyn Chang	SAVE [STATE]	Immigration Status Summary


Clicking the hyperlink next to the name will display the SAVE/VLP data results.

SAVE/VLP Summary Details			
 SAVE Summary 04/18/2018			
<u>Case Info</u>			
CaseNumber:	2018108214726SB		
<u>Case Status</u>			
Lawful Presence Verified:	Yes		
Five Year Bar Met (if applicable):	Not Applicable		
Last Response Received Step:	First		
Has Sponsor Data:	No		
Case Resolved:	No		
Case Closed:			
Photo Matching Required:	No		
<u>Step One Responses</u>			
Eligibility Statement Text:	LAWFUL PERMANENT RESIDENT-EMPLOYMENT AUTHORIZED		
First Name:	KAITLYN		
Middle Name:			
Last Name:	CHANG		
Admitted To Date:		Admitted To Text:	Indefinite
Birth Date:	06/24/1957	Country Birth Code:	CHN
Entry Date:	12/10/2012	EAD Expire Date:	
Class Of Admission:	RE6	Grant Date Reason:	REFUGEE ENTRY ON/AFTER 4/1/80
Grant Date:	12/10/2012		

Equifax Summary

The Equifax Workforce Solutions, formerly known as TALX is used to find income sources for applicants and members in the budget group/unit.

Each individual will have his or her own TALX Summary if the source is available.

TALX Summary Details		
 TALX Summary Details		
Name	Employer Code	
Daughter Studentstatus	1009885	TALX Summary
Granddaughter Studentstatus	1009883	TALX Summary

TALX Summary	
 TALX Summary Data Not Provided	
1009885	BEST GRILL
FedId Number	285866355
Employment Status	Active
Most Recent Start Date	06/02/2015
Original Start Date	06/02/2015
Reason For Termination	Data Not Provided
Total Time With Employer	180 Months
Job Title	OFFICER
Union Affiliation	Data Not Provided
EMPLOYMENT INCOME	
Pay Frequency	Hourly
Rate Of Pay	Data Not Provided
Average Hours Worked	Data Not Provided
Pay Period Frequency	Bi-Weekly
Last Pay Period	
Period End	06/02/2017
Date Paid	06/08/2017
Hours Worked	61.18
Gross Earning	734.50
Net Earning	622.33

Important data relating to the employee will appear at the top:

- Employment Status
- Most Recent Start Date
- Reason For Termination (if there is one)
- Pay Frequency
- Rate Of Pay

RETIREMENT INCOME (90 DAYS)						
Retirement Date						
Retirement Amount						
Retirement Income (Annually)						
Annual Compensation						
Year	Base Pay	Overtime	Commission	Bonus	Other	Total
2017	0.00	0.00	0.00	0.00	0.00	0.00
Pay Period Summary						
Period End	Date Paid	Hours Worked	Gross	Net		
06/02/2017	06/08/2017	61.18	734.50	622.33		
05/19/2017	05/25/2017	79.05	791.00	666.02		
05/05/2017	05/11/2017	80.12	801.95	682.21		
04/21/2017	04/27/2017	76.05	764.15	645.25		
04/07/2017	04/13/2017	45.17	545.55	473.50		
03/24/2017	03/30/2017	79.05	791.00	666.02		
03/10/2017	03/16/2017	80.12	801.95	682.21		
02/24/2017	03/02/2017	61.18	734.50	622.33		

Submitted Application vs Eligibility Application Summary

A Submitted Application Summary is the information that was present on the application at the time, which it was initially completed in HEAplus. How the Submitted Application Summary appears will depend on how the application was completed, by customer or by a worker in Data Entry. However, the Submitted Application Summary will not change.

The Eligibility Application Summary is the information that is in the application during the Process Application. This will show the information that is in the application now. This summary may continuously update.

Customer Contact Information

Displays both Home and Mailing address and a "View Address History" which allows a view if an address has been changed and when (see below). This section also will show if a client lives on a reservation and an applicable phone numbers.

Address History		
Address Type	Address	Updated Date
Home	201 W Jefferson St, Phoenix, Arizona 85003 - 2205	04-30-2018

Program Status

Document Status (hyperlink)

Identifies if documents have been received by HEAplus (uploaded, faxed or emailed). The status will identify the status of the documents as:

- N/A
- Pending = Documents received but not reviewed by Eligibility Worker
- All Documents Verified = Documents received and verified by Eligibility Work

Verification Status (hyperlink)

- Pending = At least one verification factor is pending
- All Factors Verified = All factors have been verified

Program and Category

For Medical Assistance the category will appear:

Examples

- Children
- Caretaker
- Adult
- Pregnant Woman

Key Code

KEY CODE	DESCRIPTION
586	ADULTS <40% of FPL
588	ADULTS 40 – 100%

Eligibility key codes can be defined by the client's income level, age, disability or pregnancy status. Listed above are examples of common key codes.

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Current Status (program)

The "Current Status" column displays the disposition status per person per program. The following show the statuses that should appear:

- Pending = client has not been dispositioned
- Denied = client has been denied (mostly not previously approved)
- Enrolled = client has been approved
- Disenrolled = client was previously approved and as now denied

Daughter Childsupport (DOB:02/02/2017; PID:39900267121180)	AHCCCS Medical Assistance - Children		350-Acute AFDC MAO S.O.B.R.A. Child	Pending
+ Jerroldine Childsupport (DOB:02/02/1995; PID:39900268121189)	AHCCCS Medical Assistance - Caretaker		232-Acute AFDC MAO 1931 Expanded Eligibility	Decision Pending Review
+ Son Childsupport (DOB:01/01/2015; PID:39900266121181)	AHCCCS Medical Assistance - Children	05/03/2018	350-Acute AFDC MAO S.O.B.R.A. Child	Denied

Household Information

Displays demographic information for all individuals listed in the home whether that are applying for benefits on not.

Linked Groups

Reveals all known applications a household member is known to, whether or not they are an applicant of just a household member. The date of the application and the status of the application with appear. Clicking on the application id with display the household details.

Household Information						
Name	Age	Relationship to Main Contact	Date of Birth	SSN	Linked Groups	Other
Jerrold Foster (M)	23	Self	01-01-1995 (23)	036-03-3109	2018031000078 - 02/01/2018 - Submitted	

Case Details				
Application ID	Name	Creation Date	Type	Status
2018031000078	Jerrold Foster	02/01/2018	Initial	Submitted

Address 2001 W Camelback Rd, Phoenix, AZ 850153466

Household Income Information

Includes the Names and Income Source for individuals listed in the home.

Name	Income Source
Jerroldine Childsupport (F) (23)	FISHERS LANDING INCORPORATED
Son Childsupport (M) (3)	Joe Dirt
Daughter Childsupport (F) (1)	H G Wells

Medicare Information

*ONLY IF A CLIENT HAS MEDICARE

Incarceration Details

*ONLY IF A CLIENT IS INCARCERATED

Hospitalization Details

*ONLY IF A CLIENT IS HOSPITALIZED

RFI Due Date Information

Shows the date that the Request for Information is/was due.

Bottom Section

At the bottom of Case Summary are a number of useful hyperlinks that allow users to navigate to different parts of HEAplus. Below are a few of the most commonly used hyperlinks that may assist if making certain elements of one's job easier.

- [View Disposition](#)
- [View Disposition History](#)
- [Voluntary Withdrawal](#)
- [PMMIS Transaction History](#)
- [View Notification History](#)
- [View Case Audit History](#)
- [Payment History](#)
- [Generate Temporary AHCCCS ID Card](#)
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View Disposition History

In order to see a client's medical history the Disposition History hyperlink will show the application that was processed and all pertinent information involved in the disposition:

- Program Category (ex. Adult, Caretaker)
- Disposition (ex. Approved, Disenrolled)
- Key Code (ex. 586 Adult <40% of FPL)

View Disposition History									
Person ID 39900025031184					Person Name Jerrold Foster				
Application ID	Application Received Date	Program Name	Program Category	Disposition	Disposition Date	Effective Date	End Date	Key Code	Disposition By
2018031000078	02/01/2018	AHCCCS Medical Assistance	Adult	Approved	5/3/2018 1:59:18 PM	02/01/2018	N/A	586 (Acute MI Adult < 40%)	Jerrold Crowder (jcrowder_OM)
2018122001035	05/03/2018	AHCCCS Medical Assistance	Adult	Disenrolled	5/3/2018 2:08:50 PM	05/31/2018	05/31/2018	586 (Acute MI Adult < 40%)	Jerrold Crowder (jcrowder_OM)

[Return to Case Summary](#)
[PMMIS Transaction History](#)



PMMIS Transaction History

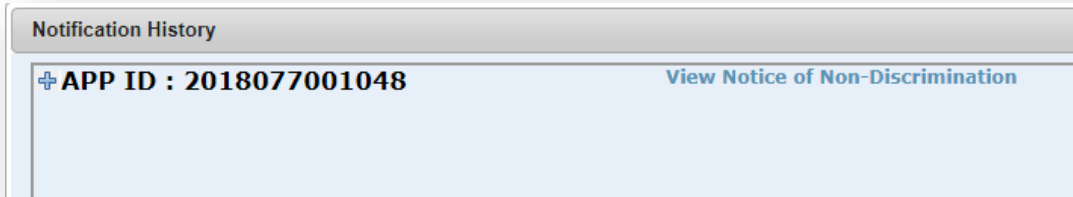
Allows a search of transaction dates for medical dispositions in HEAplus. Also on the PMMIS Transaction are options to view:

- Demographic
- Address
- Eligibility/Enrollment
- Medicare / Third Party Liability

PMMIS Transaction History								
<input type="text" value="01/01/2014"/> Transaction Start Date <input type="text" value="01/26/2017"/> Transaction End Date <input type="button" value="Search"/> <input type="button" value="Reset"/>								
PID	Application ID	AHCCCS ID	Name	Date of Birth	Transaction Date	Transaction Type	Key Code	Other Action
399035	2016	A8300	Autumn	2/13/1994	12/9/2016	ADD	360	View Demographic View Address View Eligibility/Enrollment View Medicare/TP/L
399035	2016	A8300	Autumn	2/13/1994	12/8/2016	TERM	231	View Demographic View Address View Eligibility/Enrollment View Medicare/TP/L
399035	2016	A8300	Autumn	2/13/1994	3/4/2016	ADD	231	View Demographic View Address View Eligibility/Enrollment View Medicare/TP/L

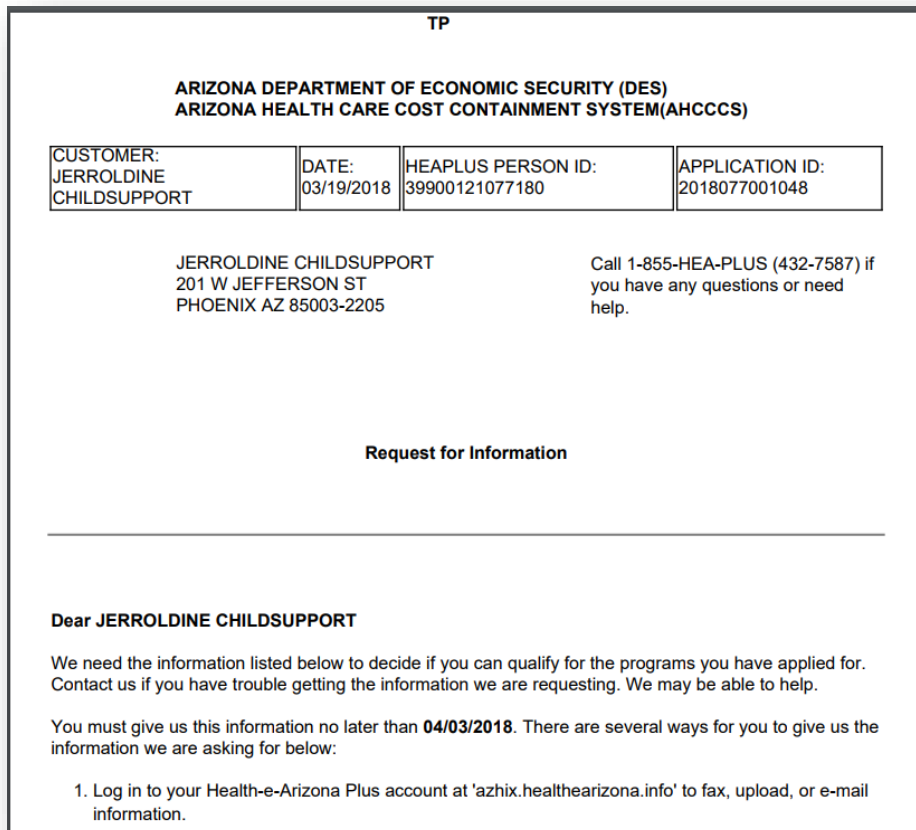
View Notification History

From the Case Summary a “View Notification History” hyperlink will appear. The history of all letters/notices are available at this page. A  (plus sign) will appear next to available applications. Clicking on the  will expand to view all available letters/notices and the status of each.



Notification History									
APP ID : 2018077001048 View Notice of Non-Discrimination									
Notice Type	Document Creation Date	Communication Method	Status	Reason	Bulk Reference #	Date Sent	Date Viewed	Suppressed	Suppre Details
Request for Information			Not Yet Batched					No	

Next to the “Notice Type” will be a hyperlink labeled “[View](#)”, clicking on this will open the letter.



Chapter 6 - View Notes

Case Notes are used to document any discrepancies or information not recorded elsewhere in HEAplus. Notes are viewable by all internal staff as well as approved third party employees with special permissions.

1. In order to access Case Notes as an EW View only profile, perform a search for the client you are seeking, access Case Summary from the information belongs to pop-up. At the top of the Case Summary a hyperlink titled "Case Notes" will appear. Upon clicking on the hyperlink all notes, pertaining to a case will appear. The following information will appear in the pop-up.



Case Notes			
Name	Creation Date	Worker Name	Comment Text
Daughter Childsupport	04/13/2018	Jerrold Crowder	Not sure if there are care expenses, need to contact client.
Son Childsupport	04/13/2018	Jerrold Crowder	Review School Information for Son ChildSupport
Jerroldine Childsupport	04/13/2018	Jerrold Crowder	Absent parent paying child support

EXCEPTION: If the Case Notes hyperlink does not appear on the Case Summary, there are no Case Notes currently available.

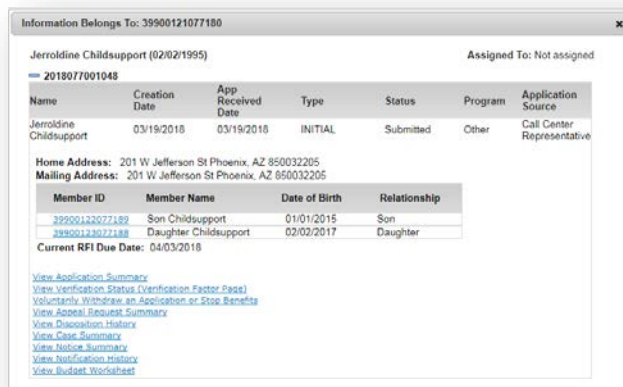
Chapter 7 - View Eligibility Factors

Use these procedures to review verification documents on the VERIFICATION STATUS (VERIFICATION FACTOR PAGE). First review the general information regarding accessing and interpreting the page.

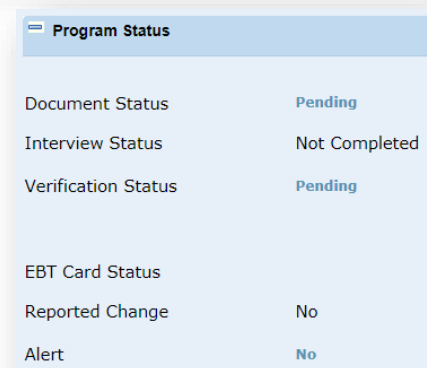
Accessing the Page

The VERIFICATION STATUS page can be accessed directly from the "Information Belongs To" pop-up window.

The VERIFICATION STATUS page can also be accessed from the CASE SUMMARY page by scrolling to the **Program Status** section and clicking on the link next to "Verification Status."



The "Verification Status" field will display one of three hyperlinks (see the table below) which will all link to the ELIGIBILITY & INFORMATION STATUS page.



If the Verification Status displays...	It means that...
Pending	Verification factors are pending for 1 or more programs. An RFI has NOT been issued.
Pending MM/DD/YYYY	Verification factors are pending for 1 or more programs. An RFI has been issued, the verification due date is displayed.
All Factors Verified	All verification factors have been reviewed and verified by a worker. For NA/CA consider additional requirements that are not included on the Eligibility & Information Status page (for additional information see here (Step 5 Note on RFI deskaid)).

Interpreting the Page

The **VERIFICATION STATUS** page will display the status of verification factors required for each member of the household for each program. This screen can be accessed from the Case Summary by clicking on:

- Document Status hyperlink under Program Status section
- Verification Status hyperlink under Program Status section
- View Eligibility Information Status (Verification Factor Page) hyperlink at the bottom

Information will be either “Pending” or “Verified.” Review each column to understand the status of each factor in each row.

- Document** – The column identifies if a document has been attached to a factor.
 - Blank – no document attached
 - Pending Review – document attached needs to be reviewed by Eligibility Worker.
 - Document Name – what was used to verify the factor.
- Status** – This will appear as “Pending” or “Verified”
- Verified By** – Shows who or what verified a particular factor.
 - System – not required worker or hub intervention
 - Worker Name – The worker’s name who verified the factor
 - Hub Source –
 - Federal Hub and source
 - State Hub and source
- Action Date** – When the factor was verified, both date and time.

Verification Status (Read Only) Case Notes

Jerroldine Childsupport 02/02/1995(23)

Factors	Document	Status	Verified By	Action Date	History	Check Hub
Signature		Verified	System	3/19/2018 2:23:08 PM	View	<input type="checkbox"/>
Age		Pending <input type="text" value="Pending"/>			View	<input type="checkbox"/>
SSN 015-84-4908		Pending <input type="text" value="Pending"/>			View	<input type="checkbox"/>
Citizenship	Pending Review	Pending <input type="text" value="Pending"/>			View	<input type="checkbox"/>
State residency AZ Resident	Arizona drivers license	Verified	Jerrold Crowder(EW)	4/30/2018 2:21:34 PM	View	<input type="checkbox"/>
Verified Income (Electronic Verification from any Hub Source) FISHERS LANDING INCORPORATED \$1,050.25 Monthly		Verified	STATE(Base Wage)	4/30/2018 2:54:20 PM	View	<input type="checkbox"/>
Identity		Pending <input type="text" value="Pending"/>			View	<input type="checkbox"/>

Document History

Name Category

Document Document Source

Date Received To

Name	Category	Document	Document ID Number	Document Source	Original Application	Document Received Date	Status	Worker
Daughter Childsupport	Income	Court document	S2411713	HEAplus	2018077001048	4/27/2018 9:31:43 AM	Pending	



The bottom of the **VERIFICATION STATUS** page will display all prior verification attempts and the list of documents uploaded into HEAplus. Similar to the section above where the factors appear the person a document is for; the factor the document is attached to, the type of document that was used and the verification status.

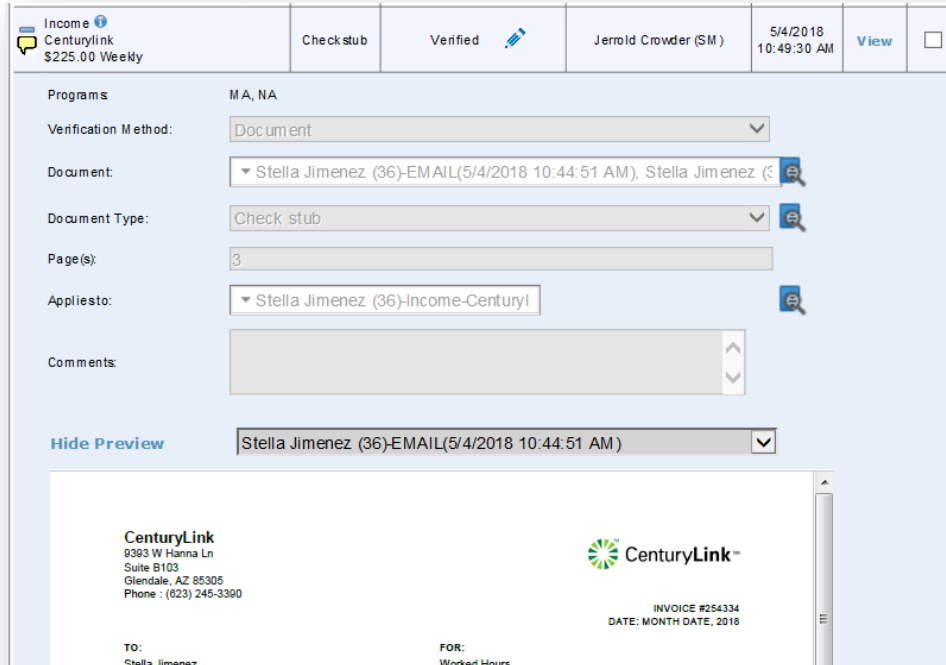
- a. **Factor** – The factor will display the factor if verification is completed or if the document is Emailed or Faxed it will show as “**Other Supporting Document**”


Person	Factor	Type	Status	Verified By	Action Date	History
Jerroldine Childsupport 02/02/1995(23)	Citizenship	Birth Certificate	Pending			View
Jerroldine Childsupport 02/02/1995(23)	State residency	Arizona driver's license	Used as Verification	Jerrold Crowder(EW)	4/30/2018 2:21:34 PM	View
Jerroldine Childsupport 02/02/1995(23)	Other Supporting Document	EMAIL	Pending			View
Daughter Childsupport 02/02/2017(1)	Income	Court document	Pending			View


- b. **Type** – This will appear as the document type if the document was uploaded (pending or verified) but if the document is emailed or faxed, it will appear as follows
- i. EMAIL
 - ii. FAX
- c. **Status** – Displays how the documents were used. See the following to identify what each status means.
- i. Pending – document has not been used
 - ii. Insufficient – relevant document received but doesn't have sufficient information
 - iii. Duplicate – same document has already been received
 - iv. Used as Verification – document was used to verify a factor
 - v. Not Relevant – document was received but not relevant for that factor
- d. **Document History** will display all documents uploaded to HEAplus associated with this application ID along with the verification status and who verified it and when.

Viewing Verification Documents

At the bottom of the Verification Status screen, there are two areas to view documents. The "Documents" section and the "Document History" section. A  (plus sign) will appear next to both sections, Clicking on the  will expand each section for full view of the columns in each section. Documents used for verification can also be view next to the factor it verified.



Income 
Centurylink
\$225.00 Weekly

Check stub Verified  Jerrold Crowder (SM) 5/4/2018 10:49:30 AM View

Programs M A, NA

Verification Method:

Document:

Document Type:

Page(s):

Appliesto:

Comments:

Hide Preview

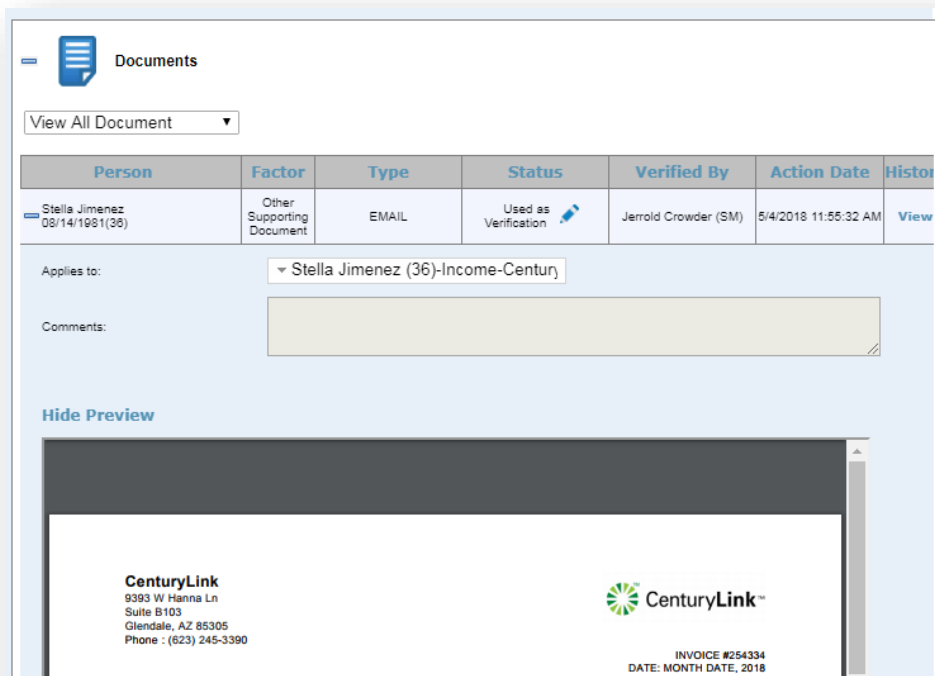
CenturyLink
9393 W Hanna Ln
Suite B103
Glendale, AZ 85305
Phone : (623) 245-3390


CenturyLink™

INVOICE #254334
DATE: MONTH DATE, 2018



TO: Stella Jimenez FOR: Worked Hours

Documents



 Documents

View All Document

Person	Factor	Type	Status	Verified By	Action Date	History
 Stella Jimenez 08/14/1981(36)	Other Supporting Document	EMAIL	Used as Verification 	Jerrold Crowder (SM)	5/4/2018 11:55:32 AM	View

Appliesto:

Comments:

Hide Preview

CenturyLink
9393 W Hanna Ln
Suite B103
Glendale, AZ 85305
Phone : (623) 245-3390

CenturyLink™

INVOICE #254334
DATE: MONTH DATE, 2018

Document History

Document History allows users to filter all documents received by the name of the client in which the documents were received for, the document type, document source and date range. Clicking on the hyperlink under the "Document" column will open up the visual of the document per line.

Document History

Name: --Select One-- Category: --Select One--
 Document: --Select One-- Document Source: --Select One--
 Date Received: MM/DD/YYYY To: MM/DD/YYYY

Search **Reset**

Name	Category	Document	Document ID Number	Document Source	Original Application	Document Received Date	Status	Worker
Stella Jimenez	Other Supporting Document	EMAIL	S2412900	HEAplus	2018123000648	5/4/2018 10:44:51 AM	Used as Verification	Jerrold Crowder(SM) 5/4/2018 11:55:32 AM
Stella Jimenez	Other Supporting Document	EMAIL	S2412899	HEAplus	2018123000648	5/4/2018 10:44:50 AM	Used as Verification	Jerrold Crowder(SM) 5/4/2018 10:49:30 AM

Chapter 8 - SOLQI Response Data Summary

The State Online Query Internet (SOLOI) Response Data Summary page allows real-time online access to SSA's SSN verification service and, if permitted, retrieval of Title 2 and/or Title 16 data. SOLQI enables access to obtain information about individuals applying for programs.

The SOLQI Data Summary page can be retrieved from the top of the CASE SUMMARY page or the top of the VERIFICATION STATUS page and a request for updated information is sent every time a hub check is run. However, it is only updated if there has been a change to the personal information.

Return to Home Search and Lookup Administrative Message Center Options Tools Favorites Help Center

Case Summary Help and Hints

Eligibility Application Summary
SOLQI Response Summary

Assign To Me

NOTE: Information displayed in the SOLQI response can be used for all programs, but may not display unless MA is attached to the application. The amount of information displayed within the pop-up window will vary.

- A. **Demographics** displays the name, gender, DOB, SSN, and DOD (when applicable)
- B. **Verification** displays the verification status for the name and SSN.
- C. **Claim Numbers** displays the verified SSN and enrollment in Medicare Part A and/or B.
- D. **Demographics Verified** displays the demographics as verified by the SSA.
- E. **Benefits** display the current payment status and SSA Benefits received.
- F. **Medicare Data** displays the monthly Medicare premium and who is paying.

SOLQI Response Data Summary

**Health-e-
Arizona PLUS**

SOLQI Response Data Summary
05/12/2014

A Demographics

Name	[REDACTED]	ID	[REDACTED]
Gender	N/A	SSN	[REDACTED]
Date of Birth	[REDACTED]	Date of Death	[REDACTED]

B Verification

Verification	V	Description	SSN is Verified
Input Name	[REDACTED]	Input SSN	[REDACTED]
Requestor	N/A		

C Claim Numbers

SOLQI confidential social security data - Claim Number	[REDACTED]	Individual Own Social Security data	[REDACTED]
Medicare Part A	E Yes - automatic; no premium necessary	Part A Begin Date	04/01/2012
Medicare Part B	Y Yes (good cause)	Part B Begin Date	10/01/2012

D Demographics verified

Name	[REDACTED]	Address	[REDACTED] RD
			AZ,85301-4032
Gender	Male	DOB	[REDACTED]
DOD	N/A	Railroad Indicator	N/A

E Benefits

Entitled	04/01/2010	Payment_status	C Current payment status (except railroad payment)
Gross Monthly Amount	\$1151	Black Lung Status	N/A
Special Monthly Payment	\$0.00	Special Pay Date	N/A
SSN/CAN-BIC	N/A	Prior Due Amount	\$0.00

F Medicare Data

Insurance Type	Entitled	Terminated	Premium	Buy-In	Code	Start	Stop
	04/01/2012		\$0.00	No	N/A		
	10/01/2012		\$104.90	Yes	030 Arizona	10/01/2012	

G. Disability displays the disability status and date of entitlement.

H. Xref Account displays whether the applicant is receiving additional benefits, such as black lung, civil service, or military.

I. Demographics Verified is a recap of all that has been verified in this SOLQI Summary up to this point.

J. Payment History of Net Benefits Paid displays a limited history of SSA benefits received.

G

Disability

Disability Begin	11/01/2009	Initial Entitlement	04/01/2010
Proof of Age	Q Established other than Birth/Baptismal or Convincing evidence	Assistance	F Food Stamps

H

Xref Account Number Information

EntitlementBICCode

0 Number on which beneficiary is or may be potentially entitled to benefits Q Quayle N/A legislation for Veterans Administration(MAMPSC controls/annotates this information for the entire nation)

N/A/N/A
N/A/N/A
N/A/N/A
N/A/N/A

I

Title XVI - Part 1

Demographics Verified

Name	[REDACTED]	Gender	Male
Residence Address	[REDACTED]	DOB	[REDACTED]
DOD	[REDACTED]	Mailing Address	[REDACTED]
Death Source Code	N/A	Ethnicity	H Hispanic
Type of Person	D1 Disabled individual	Citizen	A Proven U.S. born, U.S.
Residency	N/A	Other Name	
Application Date	01/10/2011	Entitled	01/01/2011
Payment Status	T31 Terminated - System generated termination (payment previously made or refund on record)	Payment Date	04/01/2012
Disability Status	F Final determination	Disability Date	11/01/2009
Net Current Benefit for State Amount	N/A	Federal Amount	\$0.00
Appeal		ESS Per	0
Medicaid Effective Date	01/10/2011	Rec Est Date	01/10/2011
Third Insurance	N Third party liability does not exist (1634 State only)	Country	[REDACTED]
UnPaid Medical Denial Code	Not applicable	Telephone	[REDACTED]
	N/A	Over/Under Pay Denial Date	N/A

J

Title XVI - Part 2

Payment History of Net Benefits Paid

Date	Federal Amount	State Amount	Payment Type 1	Payment Type 2
04/01/2012	\$0.00	\$0.00	0	T
05/01/2011	\$0.00	\$0.00	0	N
04/13/2011	\$1348.02	\$0.00	2	E
	\$0.00	\$0.00		
	\$0.00	\$0.00		
	\$0.00	\$0.00		
	\$0.00	\$0.00		
	\$0.00	\$0.00		

Chapter 9 - Review

Disposition History

To view the disposition history for the current Application ID and any other linked Application IDs, navigate to the CASE SUMMARY page and click the Disposition History link at the bottom of the page.



The VIEW DISPOSITION HISTORY page displays all the dispositions made on the case. Each MA applicant is listed individually.

Note: MA eligibility is approved for one year from the month of disposition

View Disposition History									
Person ID 39900125090148					Person Name David Smith				
Application ID	Application Received Date	Program Name	Program Category	Disposition	Disposition Date	Effective Date	End Date	Key Code	Disposition By
2014090000679	04/01/2014	AHCCCS Medical Assistance	Caretaker	Approved	5/16/2014 8:43:25 AM	04/01/2014	N/A	232 (Acute AFDC MAO 1931 Expanded Eligibility)	Benjamin Poepsel (EW)
Person ID 39900127090146					Person Name Mary Smith				
Application ID	Application Received Date	Program Name	Program Category	Disposition	Disposition Date	Effective Date	End Date	Key Code	Disposition By
2014090000679	04/01/2014	AHCCCS Medical Assistance	Caretaker	Approved	5/16/2014 8:43:40 AM	04/01/2014	N/A	232 (Acute AFDC MAO 1931 Expanded Eligibility)	Benjamin Poepsel (EW)
Person ID 39900128090145					Person Name Matt Smith				
Application ID	Application Received Date	Program Name	Program Category	Disposition	Disposition Date	Effective Date	End Date	Key Code	Disposition By
2014090000679	04/01/2014	AHCCCS Medical Assistance	Children Age 5 or Above	Approved	5/16/2014 8:43:54 AM	04/01/2014	N/A	350 (Acute AFDC MAO S.O.B.R.A Child)	Benjamin Poepsel (EW)

If the disposition column indicates "Denied" or "Discontinued," hover the mouse over the word to display the disposition reason.

View Disposition History									
Person ID 39900125090148					Person Name David Smith				
Application ID	Application Received Date	Program Name	Program Category	Disposition	Disposition Date	Effective Date	End Date	Key Code	Disposition By
2014090000679	04/01/2014	Nutrition Assistance	- Expanded Catorgically Eligible	Denied Voluntary Withdrawal - Immediate	5/19/2014	N/A	N/A		Benjamin Poepsel(EW)
2014090000679	04/01/2014	AHCCCS Medical Assistance	Caretaker	Approved	5/16/2014 8:43:25 AM	04/01/2014	N/A	232 (Acute AFDC MAO 1931 Expanded Eligibility)	Benjamin Poepsel(EW)

Name	Program Name	Program Category	Application Received Date	Due Date	Most Current Status	Disposition Date	Effective Date	Key Code	Dispositioned By
[Redacted]	AHCCCS Medical Assistance	Adult	07/15/2014		Enrolled	07/20/2014	07/01/2014	586-Acute MI Adult < 40%	Marcella Gonzalez (Super System Admin)

If the MA was auto adjudicated, the "Disposition By" column will indicate "Super System Admin."

Chapter 10 - Case Audit History

The CASE AUDIT HISTORY page is accessed from the CASE SUMMARY. The information found on this page is similar to the ACHI screen in AZTECS. The page displays information regarding who has taken actions on a case and a brief description of any changes (if applicable).

[View Disposition](#)
[View Disposition History](#)
[Voluntary Withdrawal](#)
[PMMIS Transaction History](#)
[View Notification History](#)
[View Case Audit History](#)
[Payment History](#)
[Generate Temporary AHCCCS ID Card](#)
[View Eligibility Information Status \(Verification Factor Page\)](#)
[View Submitted Application](#)
[Upload or View Documents to Support Verifications](#)
[Re-Print Document Coversheet](#)

- 1. Start Date and End Date** allows you to narrow your search results within a certain date range.
- 2. Action Date** displays both the date and time of the action.
- 3. Action Taken By** displays the name and title of the worker who accessed the case.
- 4. Application ID** displays the ID of the application that was accessed; it will show all Application IDs linked to the main contact.
- 5. Application Event** displays the type of event. For example, it could be View or Change.
- 6. Change Level** displays the page that was accessed by the worker.
- 7. Information Before and After** will display information about any changes made by the worker.

Case Audit History						
Start Date	<input type="text" value="05/11/2014"/>	<input type="text" value="05/18/2014"/>	End Date			
<input type="button" value="Search"/>						
Contact Name	Troy Caretaker					
Action Date	Action Taken By	Application ID	Application Event	Change Level	Information Before	Information After
5/18/2014 2:53:32 PM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Case Summary page	N/A	N/A
5/16/2014 8:17:44 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Case Summary page	N/A	N/A
5/14/2014 10:07:08 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Group Search page	N/A	N/A
5/14/2014 9:52:59 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Group Search page	N/A	N/A
5/14/2014 9:33:14 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Case Notice Queue page	N/A	N/A
5/14/2014 9:33:04 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Group Search page	N/A	N/A
5/14/2014 9:31:57 AM	Benjamin Poepsel(Eligibility Worker)	2014097000169	View	Application -View of Group Search page	N/A	N/A
Case Summary						