



Medical Eligibility

Resource Databank for Workers



Medical Eligibility: Resource Databank for Workers

Introduction

The Resource Databank (RDB) is the main location to store resource information.

A resource is defined as any entity that provides a service, paid or unpaid and includes vendors, providers with agreements, community resources, employers, and schools.





After completing this course, you will be able to:

- Search and locate the Resource Databank for the appropriate resource.
- Determine if a resource is listed and information is accurate.
- Request the addition of a resource or a change of a resource's information or status.
- Connect a resource to a consumer case in the context of working on a case.



Agenda

- **Lesson 1: Using the Resource Databank**
- Lesson 2: Connecting a Resource to a Case





Introduction

To effectively use the Resource Databank you will need to know how to:

- Search for a resource
- Request a new resource
- Request a change to an existing resource





Searching is always the first step when requesting to add new resources or making changes to an existing resource.

This is to:

- Avoid duplicates when adding a new resource
- Confirm information is correct

Searching is standard functionality that is the same throughout KEES.

Lesson 1: Using the RDB > Searching

The standard defaults in KEES are search pages, so the first page in RDB is the Resource Search page.

On this page there are mandatory fields indicated by a red asterisk.

Resource Search

Name: **ID:** **Status:**

Category:

Vendor ID: **Tax ID:**

Starting Address:*

City:* **State:*** **Zip Code:**

Maximum Distance From Address:*

* - Indicates required fields

Results per Page: **Search**



All the fields on the Resource Search screen have “wildcard functionality”. This means you can type three letters and an asterisk and the search results will return all resources that start or contain those letters.

To get more specific results, complete as many fields with accurate information as possible.

These fields are recommended to be completed for more accurate results:

- **Category:** Employer, Provider, School
- **Status:** Active, Pending, Suspended, Denied, Closed



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Lesson 1: Using the RDB > Searching

The Service Category and Service Type fields are dynamic and will display when “Provider” is chosen.

Service Category: Community Resource, EES Providers, Medical-Facilitators, Medical-Institutional Care, Medical-HCBS, PPS Adult Protective Services, PPS Family Services-Health Related, PPS Family Services-Other, PPS Non-Placement PA Required, PPS Placements, PPS Youth Independent Living, Rehab Services

Service Type: This is a dynamic field where values change dependent on Service Category



The results of a search will determine whether a resource needs to be added to the RDB or if the resource is inaccurate and needs edited.

Eligibility Enforcement System (KEES) User : Dana George
Env : NDD22

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

Workload Inventory | **Resources** | Money Management | Resource Requests | Job Orders | Foster Care

Resource Search

▶ **Refine Your Search**

[Add Resource](#) [Request Resource](#)

Name	Resource Category	Service Type	County Approved	Address	Distance
No Data Found					

[Add Resource](#) [Request Resource](#)



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Lesson 1: Using the RDB > Add or Change Resource

- A manual, external process is used to request additions or changes to resources managed by the Clearinghouse such as Long Term Care and Representative/Facilitator providers.
- Requests to add or update Resources will come through the form sent to KSRDBMedicalRepandFa@Policy-Studies.com.
- A response from the Clearinghouse will be sent indicating that the change was made or an explanation of why it was not made.





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Lesson 1: Using the RDB > Medical RDB Request Form

Medical RDB Request Version 3
10/26/2012

* Case Name: * Case Number:
 Response E-Mail Address:

Request Information

<p style="text-align: center;">Add Resource</p> <p>* Select One Type Value: Representative/Facilitator: Choose an item. Institutional Care: Choose an item. E-mail: <input type="text"/> Fax Number: (<input type="text"/>) <input type="text"/> - <input type="text"/> HCBS: Choose an item. E-mail: <input type="text"/> Fax Number: (<input type="text"/>) <input type="text"/> - <input type="text"/></p> <p>Complete the following: * Resource Name: <input type="text"/> * Mailing Address Line 1: <input type="text"/> Mailing Address Line 2: <input type="text"/> * City: <input type="text"/> * State: <input type="text"/> * Zip Code: <input type="text"/> Primary Phone Number: (<input type="text"/>) <input type="text"/> - <input type="text"/> Primary Phone Type: Choose an item. Secondary Phone Number: (<input type="text"/>) <input type="text"/> - <input type="text"/> Secondary Phone Type: Choose an item.</p>	<p style="text-align: center;">Change Resource</p> <p>* Resource ID Number: <input type="text"/></p> <p>* Check all that apply:</p> <p><input type="checkbox"/> Change in Address Street Address 1: <input type="text"/> Street Address 2: <input type="text"/> City: <input type="text"/> State: <input type="text"/> Zip Code: <input type="text"/></p> <p><input type="checkbox"/> Change in Phone Number Old Phone Number: (<input type="text"/>) <input type="text"/> - <input type="text"/> New Phone Number: (<input type="text"/>) <input type="text"/> - <input type="text"/> New Primary Phone Type: Choose an item.</p> <p><input type="checkbox"/> Change Resource Name Resource Name: <input type="text"/></p> <p><input type="checkbox"/> End Institutional Care Resource Date Closed: <input type="text"/></p>
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* Indicates a required field

Additional Comments:

Response Information

Resource ID:
 Response Comments:

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Summary

- In the previous Lesson you learned how to use the RDB by:
- Searching
- Requesting new resources
- Changing an existing resource



Agenda

- Lesson 1: Using the Resource Data Bank
- **Lesson 2: Connecting a Resource to a Case**



Introduction

- Resources kept in the RDB are accessed from various pages in KEES.
- Most are within the context of a case. The most common is setting Administrative Roles.





Administrative Role Detail

Save and Return Cancel

Administrative Role:*

PPS Payee ▼

- Additional Correspondence Recipient
- Facilitator
- Guardian/Conservator/Legal Custodian
- Medical Representative
- PPS Payee
- Placement Provider
- Primary Applicant/Recipient
- Representative Payee for Social Security

Resource:

Select

Begin Date:*

End Date:

Save and Return Cancel

* - Indicates required fields.

The Administrative Role is accessed from the **Case Summary Page**. PPS workers will choose either PPS Payee or Placement Provider for the Administrative Role.

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Lesson 2: Connecting a Resource to a Case > Select Resource

Case Name: Andy Apple
Case Number: 20000914

User: Dana George
Emp: NDD22

Journal Tasks Reminders Contact Log Logout Help

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

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Select Resource

Name: Lucy Lions ID: Status:

Category: Type:

City: Topeka State: KS Zip Code: 66612

Vendor ID: Tax ID:

Results per Page: 25

Enter the Name, City, State & Zip Code for the Resource you are trying to find.

The **Select Resource** page will display with any matching record.

Case Name: Andy Apple
Case Number: 20000914

User: Dana George
Emp: NDD22

Journal Tasks Reminders Contact Log Logout Help

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

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Select Resource

Case Number Request ID

Person Search

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

Select Resource

Search Results Summary Results 1 - 1 of 1

Name	Category	Status	County Approved	Address
Lucy Lions	Provider	Active		915 SW HARRISON ST TOPEKA, KS 66612-1505

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Lesson 2: Connecting a Resource to a Case > Admin Role

Case Name: Andy Apple
Case Number: 20000914

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Emp : NPD22

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

New Application Case Summary Worker Assignment Customer Schedule e-Tools

Case Number
Request ID
Go

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

Administrative Role Detail

Administrative Role:*
PPS Payee

Resource:
Lucy Lions Remove

Begin Date:* 01/01/2015
End Date:

* - Indicates required fields.

Save and Return Cancel

Once the resource is selected, it will populate on the **Administrative Role Detail** page. The user will add the **Begin Date** and click the **Save and Return** button to complete this page.

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Lesson 2: Connecting a Resource to a Case > Case Summary

Medical Programs

Worker:	TAMMY JOHNSON	Primary Applicant/Recipient:	Andy Apple
Worker ID:	DE4602L1A2	Language:	English
Program Status:	Pending	Phone Number:	
		PPS Payee:	Lucy Lions
		Application Date:	01/01/2015

Name	Requested Medical Type	Review Month	Relationship To Primary Applicant	Role	Role Reason	Status	Status Reason
Andy Apple	PPS		Primary Applicant	MEM		Pending	

[View Details](#)

All People Associated with the Case

The **Case Summary** page will display the Administrative Role information in the **Medical Programs** block.

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Lesson 2: Connecting a Resource to a Case > Resource Search

If a user searched on a resource and that resource was not found, the user would need to either send the request to add the resource or, if PPS, would add the resource by clicking the **Add Resource** button.

Resource Search

Name: Karen Catepillar ID: Status: All

Category: Provider Service Category: PPS Placements Service Type: Relative

Vendor ID: Tax ID:

Starting Address: 915 SW Harrison City: Topeka State: KS Zip Code: 66612

Maximum Distance From Address: 50 miles

* - Indicates required fields

Results per Page: 25 Search

Resource Search

► Refine Your Search

Name	Resource Category	Service Type	County Approved	Address	Distance
No Data Found					

Add Resource Request Resource

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Lesson 2: Connecting a Resource to a Case > Resource Detail

System: KEES Ver: mmis_redesign_2 Time: 01/29/2015 10:34 AM

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

Workload Inventory Resources Money Management Resource Requests Job Orders Foster Care

Resource Search
Notification List

Resource Detail

Save Cancel

Basic Information

ID: Smart Vendor ID: Child Care Provider ID: Status:* Active Effective Date:

Name:* Karen Catepillar Payee Name:* Karen Catepillar

HQ: HQ Name: Is this provider known to an active case? Is this provider a State employee?

Category*

Employer
 Provider
 School

Tax Information

Type: -Select- ID: ID Type: -Select-

Addresses*

Type	Address	Edit
Billing	915 SW HARRISON ST TOPEKA, KS 66612-1505	Edit
Mailing	915 SW HARRISON ST TOPEKA, KS 66612-1505	Edit
Physical	915 SW HARRISON ST TOPEKA, KS 66612-1505	Edit

Remove Add Address

Phone Information*

Type	Number	Extension	Add
Home	785-999-9999		Add

Remove

Internet Information

PPS:

The worker will fill out all mandatory fields.



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Lesson 2: Connecting a Resource to a Case > Resource Detail

PPS:

The worker will fill out all mandatory fields. The worker filling out this page will be the Worker ID entered in the last field.

Resource Detail

[Edit](#) [Close](#)

Basic Information				
ID: 1067346	Smart Vendor ID:	Child Care Provider ID:	Status:* Active	Effective Date: 01/01/2018
Name:* Karen Catepillar	Payee Name:* Karen Catepillar			
HQ:	HQ Name:	Is this provider known to an active case?	Is this provider a State employee?	
Category*				
Provider				
Tax Information				
Type:	ID:	ID Type:		
Addresses*				
Type	Address			
Billing	915 SW HARRISON ST TOPEKA, KS 66612-1505			
Mailing	915 SW HARRISON ST TOPEKA, KS 66612-1505			
Physical	915 SW HARRISON ST TOPEKA, KS 66612-1505			
Phone Information*				
Type	Number	Extension		
	Home	(785)999-9999		
Internet Information				
Type	Address			
No data found				
Additional Information				
Recruitment Method:				
Contact Information:		Hours of Operation:		Languages Spoken:
Comments:				
Preferred Method of Communication:				
Does This Resource accept Vouchers:				
Maintainer Information				
Update Frequency:* Every 3 Years	Next Review Date:* 01/01/2018		Worker ID:* DE4602L1A2	

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Lesson 2: Connecting a Resource to a Case > LTC Data Detail

System: KEES

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

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

Case Number
Request ID
Go

Person Search

Non Financial

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.

LTC Data Detail

Save and Add Another Save and Return Cancel

Name:* Lilly Sunshine
LTC Type:* Institutional Care
Recorded Date:* 02/03/2015

Facility Information

Provider Number: Facility Name/Location:* Phone: Facility Fax: Facility Email:

Select

Address Line 1:

Address Line 2:

City: State: ZIP Code: Name of Agency/Person Placing Resident:

The RDB will be accessed on the **LTC Data Detail** page by clicking the **Select** button under the **Facility Name/Location** heading.

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Lesson 2: Connecting a Resource to a Case > Select Provider Resource

The screenshot shows the 'Select Provider Resource' form within the KEES system. The form is titled 'Select Provider Resource' and has a 'Cancel' button in the top right corner. Below the title is a 'Search' button. The form contains several input fields and dropdown menus:

- Name:** A text input field containing 'Brewster'.
- ID:** An empty text input field.
- Status:** A dropdown menu.
- Category:** A dropdown menu with 'Provider' selected.
- City:** An empty text input field.
- State:** A dropdown menu.
- Zip Code:** An empty text input field.
- Vendor ID:** An empty text input field.
- Tax ID:** An empty text input field.

At the bottom right of the form, there is a 'Results per Page' dropdown menu set to '25', and two buttons: 'Search' and 'Cancel'.

The worker will enter the name of the facility and then click the **Search** button.

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Lesson 2: Connecting a Resource to a Case > Select Provider Resource



The screenshot shows the 'Select Provider Resource' page within the KEES system. The top navigation bar includes tabs for Case Info, Eligibility (selected), Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. Below this is a secondary navigation bar with options like Workload Inventory, Case Summary, Customer Information, Reporting, Distributed Documents, Customer Schedule, and Courtesy Month. On the left, there are search filters for Case Number and Request ID, and a sidebar menu for 'Non Financial' categories such as Contact, Root Questions, Individual Demographics, Citizenship/Identity, Household Status, Relationship, Non-Citizenship, Pregnancy, and Residency. The main content area is titled 'Select Provider Resource' and shows a search results summary for 'Results 1 - 1 of 1'. A table lists the search results:

Name	Status	County Approved	Address
<input checked="" type="radio"/> BREWSTER HEALTH CENTER	Active		1001 SW 29TH ST TOPEKA, KS 66611

Buttons for 'Cancel', 'Select', and 'Go' are visible throughout the interface.

The **Select Provider Resource** page will display with any matching records. The worker will click the radio button to the left of the name they would like to choose and then click the **Select** button. If unsure of resource, the worker will click on the Name hyperlink to be taken to the **Resource Detail** page.



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Lesson 2: Connecting a Resource to a Case > Resource Detail

Resource Name: BREWSTER HEALTH CENTER
Resource Number: 1057471

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

User : Dana George
Email: NDD22

[Admin Tools](#)
[Worker Portal](#)

[Case Info](#)
[Eligibility](#)
[Services](#)
[Child Care](#)
[Resource Databank](#)
[Fiscal](#)
[Special Units](#)
[Reports](#)
[Document Control](#)

[Workload Inventory](#)
[Resources](#)
[Money Management](#)
[Resource Requests](#)
[Job Orders](#)
[Foster Care](#)

Resource Search

Resource Detail

Notification List

Resource Detail Edit Close

Basic Information

ID: 1057471	Smart Vendor ID:	Child Care Provider ID:	Status:* Active	Effective Date:
Name:* BREWSTER HEALTH CENTER	Payee Name:* BREWSTER HEALTH CENTER			
HQ:	HQ Name:	Is this provider known to an active case?	Is this provider a State employee?	

Category*
Provider

Tax Information

Type:	ID:	ID Type:

Addresses*

Type	Address
Mailing	1001 SW 29TH ST TOPEKA, KS 66611
Physical	1001 SW 29TH ST TOPEKA, KS 66611

Phone Information*

Type	Number	Extension
Main	(785)267-1666	
Fax	(785)267-9355	

The **Resource Detail** page displays with all of the resource's information.

System: KEES1 Env: NRD22

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

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

Case Number
 Request ID

Person Search

Non Financial

- Contact
- Root Questions
- Individual Demographics
- Citizenship/Identity
- Household Status
- Relationship
- Non-Citizenship
- Pregnancy
- Residency
- Other Prog. Assist.
- Non-Compliance
- Customer Options
- Money Mngmt
- Time Limits
- Purch. and Prep.

LTC Data Detail

Name:* **LTC Type:***

Recorded Date:*

Facility Information

Provider Number: 1057471	Facility Name/Location:* <u>BREWSTER HEALTH CENTER</u> <input type="button" value="Select"/>	Phone: 7852671666	Facility Fax:	Facility Email:
Address Line 1: 1001 SW 29TH ST				
Address Line 2:				
City: TOPEKA	State: KS	ZIP Code: 66611	Name of Agency/Person Placing Resident: <input type="text"/>	

The **LTC Data Detail** page will display showing all the selected resource information populated under the **Facility Information** block.

After completing this lesson you learned the following:

- Resources are connected via different pages in KEES
- In certain scenarios, specific actions must be taken to connect a resource



Wrap up

After completing this course, you are able to do the following using the Resource Databank pages

- Search and locate the Resource Databank for the appropriate resource
- Determine if a resource is listed and information is accurate
- Request the addition of a resource or a change of a resource's information or status
- Connect a resource to a consumer case in the context of working on a case

