



Medical Eligibility

Utility Navigation

Medical Eligibility: Utility Navigation

Introduction

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

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

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



Medical Eligibility: Utility Navigation

Introduction

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

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



The screenshot shows the top navigation bar of the KEES system. On the left is the KEES logo. To its right, the case information is displayed: "Case Name: Merri Christmas" and "Case Number: 20000802". A row of navigation buttons includes "Journal" (highlighted with a dashed border), "Tasks", "Reminders", "Contact Log", "Logout", and "Help". Below this row is a secondary row of buttons: "Case Info", "Eligibility", "Services", "Child Care", "Resource Databank", "Fiscal", "Special Units", "Reports", "Document Control", "Admin Tools", and "Worker Portal". On the far right, user and system information is shown: "User: Dana George", "Env: NPD22", "Ver: 2.6.001.0.1", and "Time: 02/10/2015 12:32 PM".

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



Medical Eligibility: Utility Navigation

Agenda

Lesson 1: Journal

Lesson 2: Tasks

Lesson 3: Contact Log

Lesson 4: Logout

Lesson 5: Help



After completing this course, you will be able to:

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





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

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





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Lesson 1: Journal > Automatic Logs

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

Templates

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

Auto Logs

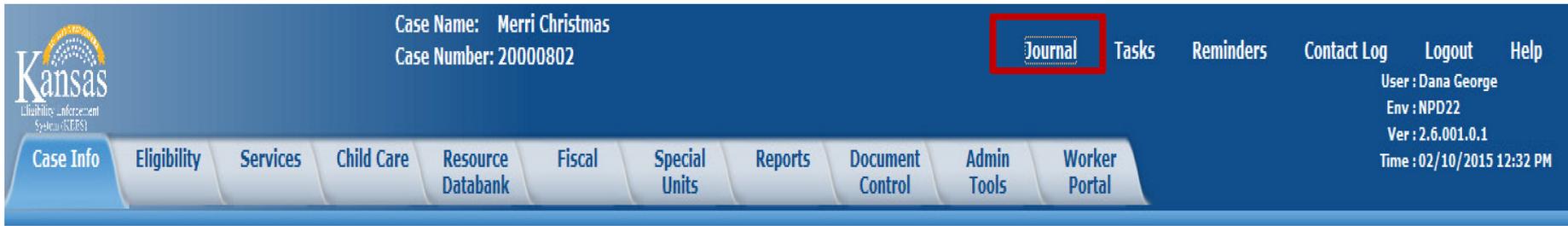
A pre-scripted system message which is automatically produced when certain actions are taken.

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Lesson 1: Journal

In order to access the Journal List:

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



The screenshot shows the top navigation bar of the KEES system. On the left is the KEES logo. In the center, the case information is displayed: "Case Name: Merri Christmas" and "Case Number: 20000802". To the right of the case information is a "Journal" button, which is highlighted with a red rectangular box. Further right are links for "Tasks", "Reminders", "Contact Log", "Logout", and "Help". On the far right, the user information is shown: "User : Dana George", "Env : NPD22", "Ver : 2.6.001.0.1", and "Time : 02/10/2015 12:32 PM". Below the navigation bar is a horizontal menu with buttons for "Case Info", "Eligibility", "Services", "Child Care", "Resource Databank", "Fiscal", "Special Units", "Reports", "Document Control", "Admin Tools", and "Worker Portal".

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Lesson 1: Journal > Journal List

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

Journal List

Case - 20000987 - Julie Jensen

Entry:

CSV Free Form

Journal List

List Options

Search Results Summary Results 1 - 9 of 9

Sort By:

Date-Asc

<input type="checkbox"/> 02/13/2015 1:33 PM	Auto Logs
CHRISTINA COOPER is Placement Provider beginning 12/01/2014 and ending 01/31/2015.	
<input type="checkbox"/> 02/13/2015 1:32 PM	Auto Logs
CINDY THOMAS is PPS Payee beginning 02/01/2014.	
<input type="checkbox"/> 02/09/2015 1:41 PM	Jennifer Estes, KH0206QAC7
CAsE registered for foster care today	

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Lesson 1: Journal > Journal List

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

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

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

The search results show:

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





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Lesson 1: Journal > Add Entry

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

Journal List

Case - 20000802 - Merri Christmas

Append Edit Copy Transfer Export: CSV Go Add Entry: Free Form **Go**

Journal List List Options

Search Results Summary Results 1 - 4 of 4

Sort By: Date-Asc Go

<input type="checkbox"/> 01/22/2015 10:42 AM	Inbound Call	Dana George,KC0105A2B8
Inbound Call from Merri Christmas regarding: Newborn. Baby was born & needs coverage.		
<input type="checkbox"/> 01/15/2015 4:00 PM	Document	Dana George,KC0105A2B8
Merri's boyfriend, Christopher Kringle has moved into the home & wants assistance.		



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Lesson 1: Journal > Add Entry

Journal Entry

(Dana George, KC0105A2B8)

Case Number:
20000802

Case Name:
Merri Christmas

Long Description:*

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

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

* - Indicates required fields

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Lesson 1: Journal > Edit Entry

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

Please note:

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





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Lesson 1: Journal > Edit Entry

To edit a journal entry:

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

Export:
 Add Entry:

Journal List

Case - 20000802 - Merri Christmas

[Journal List](#)
[List Options](#)

Search Results Summary Results 1 - 5 of 5

Sort By:

<input type="checkbox"/>	02/10/2015 12:40 PM Returned Merri's call. No answer. Will try 2nd call later today.	Dana George, KC0105A2B8
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Lesson 1: Journal > Edit Entry

https://kees-prd.kees.ks.internal/?&_portlet.contentOnly=true&FormValidationUrl=/utilities/Jour - Windows Internet...

Journal Entry Check Spelling **Save** Cancel

(Eileen M Wiedwald, KC0105A3E9)

Case Number:
[Redacted]

Case Name:
[Redacted]

Long Description:*

This is my original journal entry.

Edit:*

This is my original journal entry. I always check spelling before saving my journal entries.



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Lesson 1: Journal > Append Entry

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

Please note:

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



Medical Eligibility: Utility Navigation

Lesson 1: Journal > Append Entry

To append a journal entry:

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

Journal List

Case - 20000802 - Merri Christmas

Export:
 Add Entry:

Journal List | List Options

Search Results Summary Results 1 - 5 of 5

Sort By:

<input type="checkbox"/>	02/10/2015 12:40 PM	Dana George, KC0105A2B8
	Returned Merri's call. No answer. Will try 2nd call later today.	



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Lesson 1: Journal > Append Entry

Journal Entry

Check Spelling Save Cancel

(Eileen M Wiedwald, KC0105A3E9)

Case Number:

Case Name:

Long Description:*

This is my original journal entry. I always check spelling before saving my journal entries.

Append:*

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

Check Spelling Save Cancel

* - Indicates required fields

Medical Eligibility: Utility Navigation

Lesson 1: Journal > Append Entry

Export:
 Add Entry:

Journal List

Case - [REDACTED] -

Journal List	List Options
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Search Results Summary Results 1 - 2 of 2

Sort By:

<input checked="" type="checkbox"/> 03/25/2015 1:43 PM	Eileen Wiedwald,KC0105A3E9	
This is my original journal entry. I always check spelling before saving my journal entries.		
<input type="checkbox"/> 03/25/2015 1:33 PM	Eileen Wiedwald.KC0105A3F9	

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Lesson 1: Journal > Suppress Entry

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

Please note:

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

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

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Lesson 1: Journal > Suppress Entry

To suppress a journal entry:

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

Append **Suppress** Edit Copy Transfer Export: Add Entry:
CSV Go Free Form Go

Journal List

Case - 20000198 - Kidney Bean

Journal List

List Options

Search Results Summary

Results 1 - 2 of 2

Sort By:

Date-Asc Go

- 03/31/2015 8:47 AM Training One,DW5202G1C9
Consumer reports changes in income. Updated Income screen and re-ran EDBC.
- 03/31/2015 8:46 AM Training One,DW5202G1C9
This journal entry contains sensitive information and should not be viewed by all users.



Append Suppress Edit Copy Transfer Export: Add Entry:
CSV Go Free Form Go



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Lesson 1: Journal > Suppress Entry

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

Journal Entry



(Training One, DW5202G1C9)

Case Number:

20000198

Case Name:

Kidney Bean

Long Description:*

This journal entry contains sensitive information and should not be viewed by all users.

Suppress:*

PPS Sensitive Information



* - Indicates required fields

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Lesson 1: Journal > Suppress Entry

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

Append Suppress Edit Copy Transfer

Journal List Export: CSV Add Entry: Free Form

Case - 20000198 - Kidney Bean

Journal List
List Options

Search Results Summary

Results 1 - 2 of 2

Sort By:

Date-Asc

<input type="checkbox"/>	03/31/2015 8:47 AM	Training One,DW5202G1C9
	Consumer reports changes in income. Updated Income screen and re-ran EDBC.	
<input type="checkbox"/>	03/31/2015 8:46 AM	Training One,DW5202G1C9
	(Suppressed)	

Append Suppress Edit Copy Transfer

Export: CSV Add Entry: Free Form



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Lesson 1: Journal > Copy Entry

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

Please note:

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

Medical Eligibility: Utility Navigation

Lesson 1: Journal > Copy Entry

To copy a journal entry:

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

Journal List

Case - 20000802 - Merri Christmas

Append Edit **Copy** Transfer Export: CSV Go Add Entry: Free Form Go

Journal List List Options

Search Results Summary Results 1 - 5 of 5

Sort By: Date-Asc Go

<input type="checkbox"/>	02/10/2015 12:40 PM	Dana George,KC0105A2B8
	Returned Merri's call. No answer. Will try 2nd call later today.	



To copy a journal entry:

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

APSP System - Windows Internet Explorer

Journal Entry : Copy

From Case Number: *

To Case Number: *

* - Indicates required fields



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Lesson 1: Journal > Transfer Entry

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

Please note:

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



Medical Eligibility: Utility Navigation

Lesson 1: Journal > Transfer Entry

To transfer a journal entry:

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

Journal List

Case - 20000802 - Merri Christmas

Export:
 Add Entry:

Journal List
List Options

Search Results Summary Results 1 - 5 of 5

Sort By:

<input type="checkbox"/>	02/10/2015 12:40 PM	Dana George, KC0105A2B8
	Returned Merri's call. No answer. Will try 2nd call later today.	

(A red arrow points to the checkbox in the first row of the table.)



To transfer a journal entry:

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

Journal Entry : Transfer

From Case Number:*

To Case Number:*

Transfer **Cancel**

* - Indicates required fields



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Lesson 1: Journal > Export/Print Entry

The Export/Print process is used:

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

Please note:

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



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Lesson 1: Journal > Transfer Entry

To export a journal entry:

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

Journal List

Case - 20000802 - Merri Christmas

Append Edit Copy Transfer Export: CSV Go Free Form Go Add Entry:

Journal List List Options

Search Results Summary Results 1 - 5 of 5

Sort By: Date-Asc Go

02/10/2015 12:40 PM Dana George, KC0105A2B8
Returned Merri's call. No answer. Will try 2nd call later today.





In this lesson we have discussed how to:

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

Next, we will discuss Lesson 2: Tasks



Agenda

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



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Lesson 2: Tasks > Introduction

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

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

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

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

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Lesson 2: Tasks > Introduction

After completion of this lesson you will be able to :

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





Tasks can be viewed from the:

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



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Lesson 2: Tasks > View Task

Task Portlet

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

The screenshot displays the KEES Worker Portal interface. At the top, there is a navigation bar with the KEES logo and the text 'Eligibility Enforcement System (KEES)'. To the right of the logo are links for 'Journal' and 'Tasks'. Below this is a secondary navigation bar with tabs for 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Databank', and 'Fiscal'. A 'Worker Portal' tab is also visible.

On the left side, there is a search area with radio buttons for 'Case Number' (selected) and 'Request ID', a text input field, and a 'Go' button. Below this are links for 'KEES Online User Guide' and 'Password Reset'.

The main content area features two portlets. The 'Reminders' portlet has a table with columns 'Type', 'Description', and 'Date', and buttons for 'Clear Selected', 'View All', and 'Add Reminder'. The 'Task Portlet' is highlighted with a red box and contains the following elements:

- A title bar with 'Task Portlet' and a close button.
- An 'Assigned' section with 'Add Task' and 'View All' buttons.
- A status indicator: 'Total Assigned Tasks : 0'.
- A table with columns: 'Task', 'Case Number', 'Status Reason', 'Due Date', and 'Priority'. Below the 'Due Date' and 'Priority' columns are 'Complete' and 'Release' buttons respectively.

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Lesson 2: Tasks > View Task

To access **Task Inventory**:

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

The screenshot displays the KEES Worker Portal interface. At the top, there is a navigation bar with the following tabs: Case Info, Eligibility, Services, Child Care, Resource Databank, and Fiscal. Below this is a 'Worker Portal' section. On the left side, there is a search area with radio buttons for 'Case Number' (selected) and 'Request ID', a text input field, and a 'Go' button. Below the search area are links for 'KEES Online User Guide' and 'Password Reset'. The main content area contains two portlets. The 'Reminders' portlet has a table with columns 'Type', 'Description', and 'Date', and buttons for 'Clear Selected', 'View All', and 'Add Reminder'. The 'Task Portlet' has a section for 'Assigned' tasks with buttons for 'Add Task' and 'View All' (highlighted with a red box). Below this, it shows 'Total Assigned Tasks : 0' and a table with columns 'Task', 'Case Number', 'Status Reason', 'Due Date', and 'Priority'. At the bottom of the task table are buttons for 'Complete' and 'Release'.



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Lesson 2: Tasks > View Task

Task Inventory

Allows the user to search for tasks using criteria entered.

Task Inventory

Region:	Location:	Queue:	Task:	Review Due:	Worker:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Process Application"/>	<input type="text"/>	<input type="text"/>
				<input type="button" value="Select"/>	<input type="button" value="Select"/>

Priority:	Status: *	Status Reason:	Contact Type:	Case Number:	Case Name:
<input type="text"/>	<input type="text" value="New"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
					<input type="button" value="Select"/>

Date Range:		Date Type:	App Id:	Assigned to Me:
From	To	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="02/10/2015"/>	<input type="text" value="02/10/2015"/>			<input type="text"/>



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Lesson 2: Tasks > View Task

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

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

Task Inventory

Results per Page: 25

Search Results Summary																Results 1 - 2 of 2	
<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id	
<input type="checkbox"/>	None		Change - 330082	12/16/2014	New		12/26/2014	Purple	1683:06			Topeka Service Center		20000210	Audrey Mason		
<input type="checkbox"/>	None		Change - 370114	01/20/2015	New		01/28/2015	Purple	839:36			Topeka Service Center		12297409	KIMBERLY A JOHNSON		



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Lesson 2: Tasks > View Task

Task Management

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

To access Task Management:

- Click on Tasks from the Utility Navigation bar.

Case Name: Merri Christmas
Case Number: 20000802

Journal Tasks Reminders Contact Log Logout Help
User : Dana George
Env : NPD22
Ver : 2.6.001.0.1
Time : 02/10/2015 12:32 PM

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

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Lesson 2: Tasks > View Task

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

Task Management - Microsoft Internet Explorer provided by The State of Kansas

Case 20000797 Tasks:

Task	Queue	Received Date	Status	Actions
Address Change	Contact Updates	01/16/2015	New	Claim Void
Add Newborn	Eligibility	01/21/2015	Assigned	Claim Void

[Add Task](#)

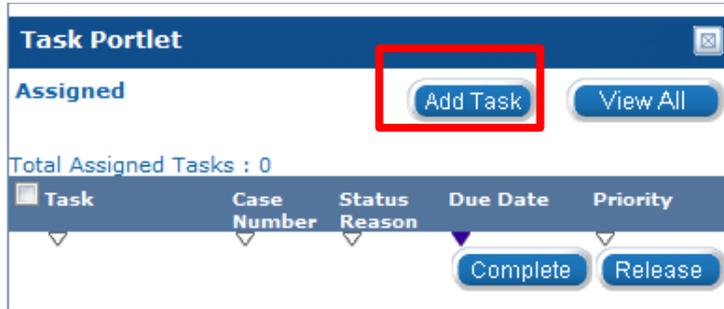
Assigned Tasks:

Page: 1 ▼ 1 2

Task	Queue	Name	Status Reason	Actions
Add New Person	Eligibility	Merri Christmas - 20000802	KDHE-Being Worked	Release Complete Void
Add New Person	Eligibility	Shirley Connor - 20000848		Release Complete Void
Add Newborn	Eligibility	Sally Sunshine - 20000797	KDHE-Being Worked	Release Complete Void

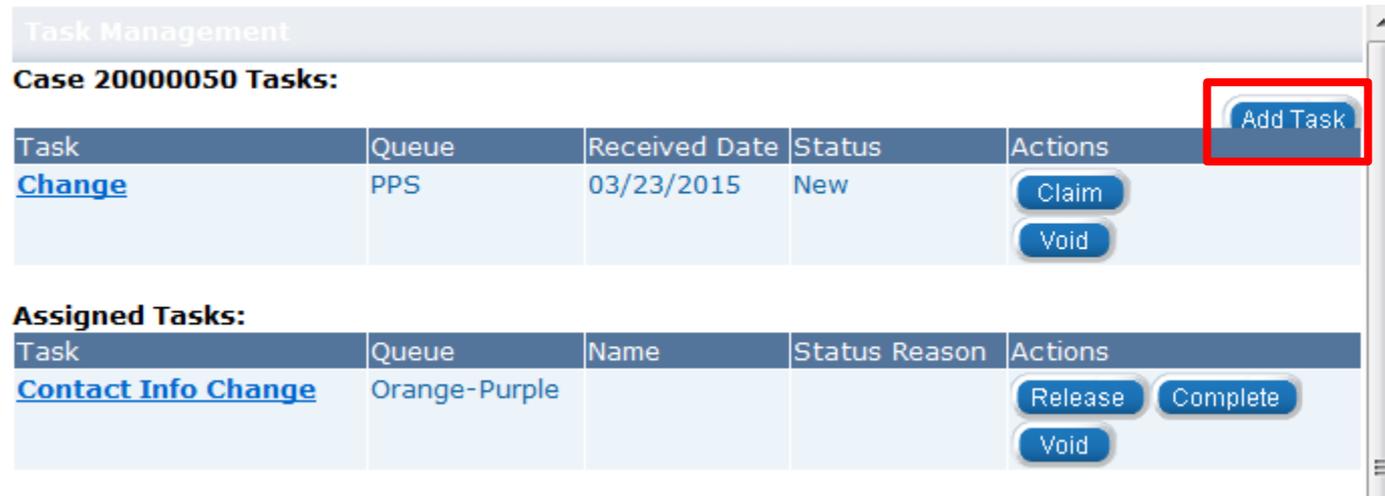
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Lesson 2: Tasks > Add Task



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

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





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Lesson 2: Tasks > Add Task> Task Details

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

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

Case #: 20000050

Save and Continue

Cancel

Case Name: Johna Mitchell

Status New	Status Reason <input type="text"/>	Priority <input type="text"/>
----------------------	--	---

Created Date: 03/26/2015	Created Time: 9:47 AM	Due Date: * <input type="text"/>	Review Due: <input type="text"/>
Received Date: * <input type="text"/>	Region: * <input type="text"/>	Location: * - Select -	Worker Assigned: <input type="button" value="Select"/>

Queue * - Select -	Task * - Select -	Created By: Eileen Wiedwald DA3102G1B5
Contact Type: <input type="text"/>	Work Time	Wait Time

Task Details: *

Comments:

* - Indicates required fields

Check Spelling

Save and Continue

Cancel

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Lesson 2: Tasks > Add Task> Task Details

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

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

Case #: 20000050 Save and Continue Cancel

Case Name: Johna Mitchell

Status New	Status Reason <input type="text"/>	Priority <input type="text"/>
Created Date: 03/26/2015	Created Time: 9:47 AM	Due Date: * <input type="text"/>
Received Date: * <input type="text"/>	Region: * <input type="text"/>	Location: * - Select -
		Review Due: <input type="text"/>
		Worker Assigned: <input type="button" value="Select"/>
Queue * - Select -	Task * - Select -	Created By: Eileen Wiedwald DA3102G1B5
Contact Type: <input type="text"/>	Work Time	Wait Time
Task Details: * <input type="text"/>		
Comments: <input type="text"/>		

* - Indicates required fields Check Spelling Save and Continue Cancel



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Lesson 2: Tasks > Add Task > Task Details

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

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

Case #: 20000050 Save and Continue Cancel

Case Name: Johna Mitchell

Status New	Status Reason <input type="text"/>	Priority <input type="text"/>
Created Date: 03/26/2015	Created Time: 9:47 AM	Due Date: * <input type="text"/>
Received Date: * <input type="text"/>	Region: * <input type="text"/>	Location: * - Select -
		Review Due: <input type="text"/>
		Worker Assigned: <input type="button" value="Select"/>
Queue * - Select -	Task * - Select -	Created By: Eileen Wiedwald DA3102G1B5
Contact Type: <input type="text"/>	Work Time	Wait Time
Task Details: *		
<input type="text"/>		
Comments:		
<input type="text"/>		

* - Indicates required fields Check Spelling Save and Continue Cancel



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Lesson 2: Tasks > Add Task> Future Task

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

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

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



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Lesson 2: Tasks > Claim a Task

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

From the Task Inventory page:

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

Task Inventory

Results per Page: 25

Search Results Summary Results 1 - 1 of 1

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/>	None		Change = 580115	03/23/2015	New		08/15/2015	PPS	88:16			Topeka Service Center		20000050	Johna Mitchell	



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Lesson 2: Tasks > Claim a Task

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

- Click the **Claim** button.

Case #:
20000050

Name:
Johna Mitchell

Status: **New** **Status Reason:*** - Select - **Priority:** None

Created Date: 03/23/2015 **Created Time:** 3:29 PM **Due Date:*** 08/15/2015 **Review Due:**

Received Date: 03/23/2015 **Region:** DCF East **Location:** Topeka Service Center **Worker Assigned:**

Queue: PPS **Task:** Change - 580115 **Created By:** 1008533

Contact Type: Written **Work Time:** 00:04 **Wait Time:** 88:21

Task Details:

Comments:

* - Indicates required fields

Check Spelling Claim Save and Continue Cancel



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Claim a Task

A task can be claimed on the Task Management window.

- Click the **Claim** button.

Task Management - Microsoft Internet Explorer provided by The State of Kansas

Task Management

Case 20000797 Tasks: Add Task

Task	Queue	Received Date	Status	Actions
Address Change	Contact Updates	01/16/2015	New	Claim Void
Add Newborn	Eligibility	01/21/2015	Assigned	Claim Void

Assigned Tasks: Page: 1 1 2

Task	Queue	Name	Status Reason	Actions
Add New Person	Eligibility	Merri Christmas - 20000802	KDHE-Being Worked	Release Complete Void
Add New Person	Eligibility	Shirley Connor - 20000848		Release Complete Void
Add Newborn	Eligibility	Sally Sunshine - 20000797	KDHE-Being Worked	Release Complete Void



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Release Task

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

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

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

There are multiple screens from which to release a task.



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Release Task

From the **Task Portlet**:

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

Reminders

Type Description Date

Clear Selected View All Add Reminder

Task Portlet

Assigned Add Task View All

Total Assigned Tasks : 2
Results 1 - 2 of 2

<input type="checkbox"/>	Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/>	Contact Info Change - 580450			03/31/2015	None
<input type="checkbox"/>	Change - 580115	20000050		08/15/2015	None

Complete **Release**

Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Release Task

From the **Task Inventory**:

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

Task Inventory

Region: Location: Queue: Task: Review Due: Worker:

Priority: Status: **Assigned** Status Reason: Contact Type: Case Number: Case Name:

Date Range: From To Date Type: App Id: Assigned to Me: **Yes**

Results per Page: 25

Search Results Summary

Results 1 - 2 of 2

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/>	None		Change - 580115	03/23/2015	Assigned		08/15/2015	PPS	88:21	00:28	Eileen Wiedwald	Topeka Service Center		20000050	Johna Mitchell	
<input type="checkbox"/>	None		Contact Info Change - 580450	03/26/2015	Assigned		03/31/2015	Orange-Purple	00:00	23:26	Eileen Wiedwald	Topeka Service Center				

Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Release Task

From the **Task Management** window:

- Click **Release**.

Task Management				
Assigned Tasks:				
Task	Queue	Name	Status Reason	Actions
Change	PPS	Johna Mitchell - 20000050		<input type="button" value="Release"/> <input type="button" value="Complete"/> <input type="button" value="Void"/>

Task Details - Windows Internet Explorer

Status: Assigned
Status Reason:* - Select -
Priority: None

Created Date: 03/26/2015
Created Time: 8:52 AM
Due Date:* 03/31/2015
Review Due:

Received Date: 03/26/2015
Region: DCF East
Location: Topeka Service Center
Worker Assigned: Eileen Wiedwald

From the **Task Details** window:

- Click **Release**.



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

- Queue
- Worker
- Location
- Case

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

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





Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Reassign Task

From the **Task Inventory** window:

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

Task Inventory

Search Results Summary

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason
<input type="checkbox"/>	None		Change - 580115	03/23/2015	Assigned	
<input type="checkbox"/>	None		Contact Info Change - 580450	03/26/2015	Assigned	

Results 1 - 2 of 2

Case Name	App Id
Johna Mitchell	



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Reassign Task

From the **Task Inventory** window:

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

Reassign Tasks

Queues		
Task	Queue	Received Date
Change - 580115	PPS	2015-03-23 00:00:00
Change Queue to: <input type="text"/>		
Worker		
Task	Worker	Received Date
Change - 580115	Eileen Wiedwald	2015-03-23 00:00:00
Change Worker to: <input type="button" value="Select"/>		
Location		
Task	Location	Received Date
Change - 580115	Topeka Service Center	2015-03-23 00:00:00
Change Location to: <input type="text"/>		
Case		
Task	Case	Received Date
Change - 580115	20000050	2015-03-23 00:00:00
Change Case to: <input type="button" value="Select"/>		



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Complete Task

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

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

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

Status Reason: *

- Select -
- Select -
- DCF-Complete
- DCF-No Show
- DCF-Pending
- KDHE-Being Worked
- KDHE-New Information
- KDHE-On Hold
- KDHE-Partial
- KDHE-Past Due
- KDHE-Return
- KDHE-State



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Complete Task

From the **Task Details** window:

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

Task Details - Microsoft Internet Explorer provided by The State of Kansas

Case #:
20000802

Name:
Merri Christmas

Complete **Release** **Save and Continue** **Cancel**

Status: Assigned **Status Reason:*** **Priority:**

Created Date: 01/15/2015 **Created Time:** 4:00 PM **Due Date:*** 01/25/2015 **Review Due:**

Received Date: 01/15/2015 **Region:** **Location:** KanCare Clearinghouse **Worker Assigned:** Dana George

Queue: Eligibility **Task:** Add New Person - 367857 **Created By:** 1007364

Contact Type: Document **Work Time:** 619:29 **Wait Time:** 00:06

Task Details:
Merri's boyfriend, Christopher Kringle has moved into the home & wants assistance

Comments:



Medical Eligibility: Utility Navigation

Lesson 2: Tasks > Void Task

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

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

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

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

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

Task Inventory

Search Results Summary

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason
<input type="checkbox"/>	None		Change - 580115	03/23/2015	Assigned	
<input type="checkbox"/>	None		Contact Info Change - 580450	03/26/2015	Assigned	

Results 1 - 2 of 2

Case Name	App Id
Johna Mitchell	

This completes our lesson.

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

We discussed:

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





Agenda

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



After completing this lesson you will be able to:

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





Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Introduction

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

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

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

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



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log

To access the Contact Log:

- Click **Contact Log**

The screenshot shows the navigation bar of the KEES system. On the left is the KEES logo. In the center, the case information is displayed: "Case Name: Merri Christmas" and "Case Number: 20000802". To the right of the case information are several menu items: "Journal", "Tasks", "Reminders", "Contact Log", "Logout", and "Help". A red arrow points to the "Contact Log" menu item. Below these items is a row of buttons for various system functions: "Case Info", "Eligibility", "Services", "Child Care", "Resource Databank", "Fiscal", "Special Units", "Reports", "Document Control", "Admin Tools", and "Worker Portal". On the far right, user and system information is shown: "User : Dana George", "Env : NPD22", "Ver : 2.6.001.0.1", and "Time : 02/10/2015 12:32 PM".



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

Contact Log Entry

Case Number: **Person:** **Contact Type:***

Contacted By:* **Representative Type:**

First Name: **Middle Name/Initial:** **Last Name:**

Phone Number: **DOB:**

Name of Agency/Organization/Provider/Inquirer:

Address Line 1:

Address Line 2:

City: **State:** **ZIP Code:**

Job title:

National Provider Id: **Tax Id:** **Provider Id:**

Agency:* **Category:*** **Contact Reason:*** **Work Completed During Contact**

Additional notes:

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

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

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

Contact Log Entry

Case Number:

20000050

Select

Person:

Johna L Mitchell

Contact Type:*

Walk-In

Contacted By:*

Household Member

Location:

Agency:* **Category:*** **Contact Reason:***

- Select -

- Select -

- Select -

Work Completed During Contact

Add

Additional notes:

Contact Type:*

- Select -

- Select -

Document

Email

Inbound Call

Outbound Call

Slf Service Portal

Verbal

Walk-In

Written

Contacted By:*

- Select -

- Select -

Agency

Employer

Facilitator

General Inquiry - No Established Case

Household Member

Placement Provider

Provider

Representative

Third Party no-release

Cancel

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

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

Agency:* **Category:*** **Contact Reason:*** Wc

DCF Change Requests - Select -

Additional notes:

- Select -

Address Change
Changes in HH Comp
Contact Info Change- Phone/Email
Cooperation Request
Customer Data Update
Income Change
Non-Cooperation Request
Orange/Purple-Change
Purple-Change
TPL-Adding
TPI Deletion

Check Spelling Save Cancel

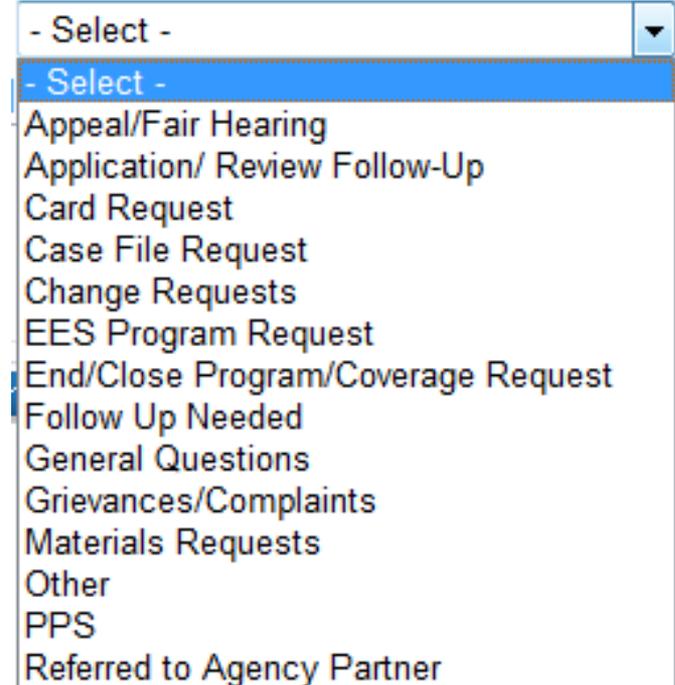
Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Create Contact Log

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

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

Category:*



A screenshot of a web application's dropdown menu for the 'Category' field. The menu is open, showing a list of options. The top option is '- Select -'. Below it is another '- Select -' option, which is highlighted in blue. The rest of the options are: Appeal/Fair Hearing, Application/ Review Follow-Up, Card Request, Case File Request, Change Requests, EES Program Request, End/Close Program/Coverage Request, Follow Up Needed, General Questions, Grievances/Complaints, Materials Requests, Other, PPS, and Referred to Agency Partner.



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Lesson 3: Contact Log > Create Contact Log

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

Contact Log Entry

Case Number: **Person:** **Contact Type:***

Contacted By:* **Location:**

Agency:* **Category:*** **Contact Reason:*** **Work Completed During Contact**

Additional notes:

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Imaged Documents

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

Imaged Documents:

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





Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > General Inquiry

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

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

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

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

Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

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

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



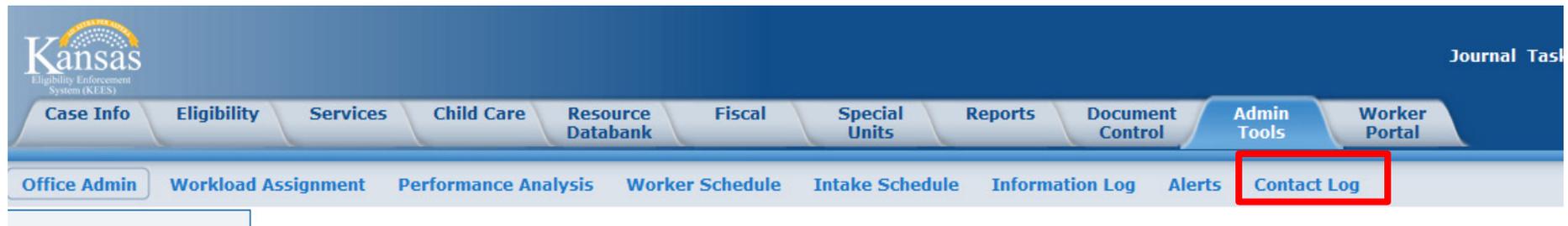


Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

To access the **Contact Log Search**:

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



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

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

The screenshot displays the 'Contact Log Search' interface. At the top, there is a navigation bar with tabs for Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The 'Admin Tools' tab is active. Below the navigation bar, there is a secondary menu with options like 'Assignment', 'Performance Analysis', 'Worker Schedule', 'Intake Schedule', 'Information Log', 'Alerts', and 'Contact Log'. The 'Contact Log' option is selected. The main content area is titled 'Contact Log Search'. A red asterisk indicates required fields. The 'Search By:' dropdown menu is highlighted with a red box and shows 'Worker ID' selected. Below it, there is a 'Worker ID:' field with a 'Select' button. Another 'Worker ID:' field is present. The 'Contact Reason:' field is a dropdown menu. The 'Date Range:' section includes 'Date From:' and 'Date To:' fields. At the bottom right, there is a 'Results per Page:' dropdown set to '25' and a 'Search' button.



Medical Eligibility: Utility Navigation

Once all the search criteria have been entered:

- Click **Search**

The screenshot shows the 'Contact Log Search' interface. At the top, there are navigation tabs: Services, Child Care, Resource Databank, Fiscal, and Special Units. Below these are links for Assignment, Performance Analysis, Worker Schedule, and Intake Schedule. The main heading is 'Contact Log Search'. A legend indicates that a red asterisk (*) denotes required fields. The search form contains the following fields:

- Search By:** A dropdown menu currently set to 'Worker ID'.
- Worker ID:** A text input field with a 'Select' button next to it.
- Worker ID:** A second text input field, marked as required with a red asterisk.
- Contact Reason:** A dropdown menu.
- Date Range:** A section containing 'Date From' and 'Date To' text input fields.

A red arrow points from the 'Contact Reason' dropdown to the 'Search' button, which is highlighted with a red box. A dropdown menu is open, listing various actions:

- Add New Person
- Address Change
- Adoption Support-medical
- Adoption Support-subsidy
- Adult
- Appeal/Fair Hearing Request
- Application Status
- Blue-IR
- Blue-Review
- CH Start/End- Determine Coverage
- CHIP Premium Paid after Denial/Closure
- CHIP Premiums
- Case File Request
- Changes in HH Comp
- Child
- Civil Rights Complaints
- Clarification Needed
- Clearinghouse Materials
- Complaint/Concern
- Contact Info Change- Phone/Email
- Cooperation
- Cooperation Request
- Customer Data Update
- Customer Self Service Portal
- Customer Service
- DCF Ended Coverage-Need CH Coverage
- DCF Started Coverage-End CH Coverage
- E and D Medical Change
- EBT

At the bottom right, there is a 'Results per Page: 25' dropdown and another 'Search' button. The top right corner of the page displays system information: 'Env: NPD22', 'Ver: 2.6.001.0.6', and 'Time: 03/10/2015 03:21 PM'.



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

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

Contact Log Search

* - Indicates required fields

Search Results Summary Results 1 - 1 of 1

Search Results Summary

Date	Worker ID	Case Number	Contact Reason
03/30/2015	DA3102G1B5	20000050	Foster Care Placement Change



Medical Eligibility: Utility Navigation

Lesson 3: Contact Log > Searching the Contact Log

On the **Contact Log Detail**:

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

Contact Log Detail

Close

▼ 03/30/2015

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

Edit

Close



In this lesson you learned:

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



Medical Eligibility: Utility Navigation

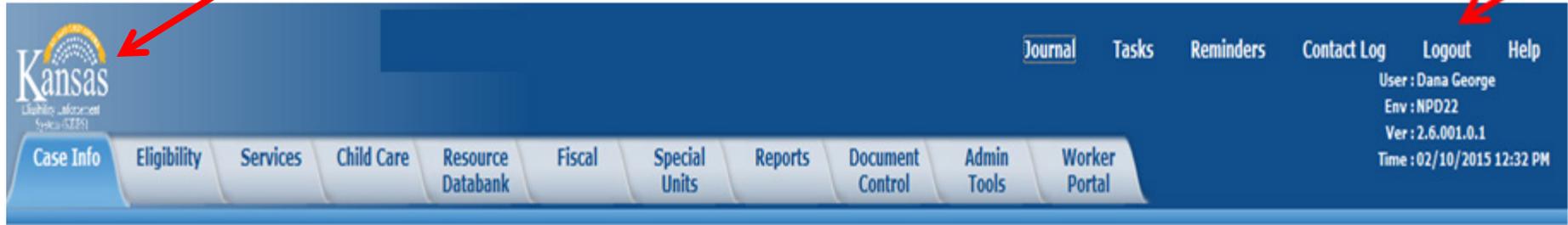
Agenda

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



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

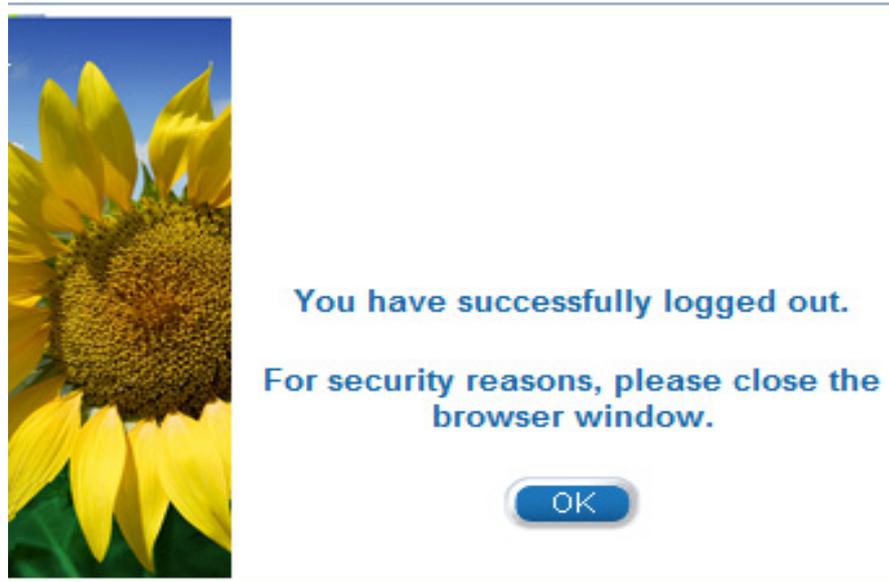
- If the user is in the context of a case, they **MUST** click the KEES logo located in the left corner.
- Click **Logout**.



Lesson 4: Logout

To complete the Logout process:

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





Medical Eligibility: Utility Navigation

Lesson 4: Logout > Summary

This completes our lesson.





Medical Eligibility: Utility Navigation

Agenda

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





Case Name: Merri Christmas
Case Number: 20000802

Journal Tasks Reminders Contact Log Logout **Help**

User : Dana George
Env : NPD22
Ver : 2.6.001.0.1
Time : 02/10/2015 12:32 PM

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

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

Case Summary

Purpose: Use this page to view the case summary of an entire case. You will learn the following:

How To

- ▶ [Go to the Case Summary Page](#)
- ▶ [Access Person History Information](#)
- ▶ [Access Program Detail Information](#)
- ▶ [Remove a Companion Case](#)
- ▶ [Set-up Data Collection Pages for Re-Evaluation](#)

What Is This?

- ▶ [Description of Items on this Page](#)



Medical Eligibility: Utility Navigation

Lesson 5: Help

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

How To

Go to the Case Summary Page

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

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

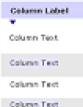
Access the Person Search Page to Add Companion Case

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

What Is This?

Description of Items on this Page

Buttons	The purpose of the Buttons 
Add	This button accesses the Person Search page to add a companion case.
Remove	This button removes companion cases.
Evaluate	This button starts the program re-evaluation. Root question not applicable.
Case Number	This check box is clicked to select the corresponding companion case to remove the relationship.
Check All	This check box is clicked to check all the companion cases.

Columns	The purpose of the Columns 
---------	--

Medical Eligibility: Utility Navigation

Lesson 5: Help > Summary

This completes our lesson.



Course Summary

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

We discussed:

- Journal
- Tasks
- Contact Log
- Logout
- Help

