

Job Aid – Data Entry into the Worker Portal

Objective

The objective of this job Aid is to provide guidance to Data Entry staff on the entering of the KC1100 applications and KC Supplements into the Worker Portal in KEES.

Overview

This process is triggered when a Data Entry Specialist receives a work task, which is created when the mail room receives a paper application or supplement. Once received, the Data Entry Specialist is responsible for entering the data from the application into the Worker Portal. After the completion of the data entry sequence, a work task is automatically created for the Registration Specialist. Once registered, KEES will create a task for an Eligibility Specialist to determine the eligibility.

Important Information

Specialty Applications

- There are applications that will not be data entered into the Worker Portal. These applications are known as “**specialty**” applications.
- These applications are submitted for a program or on an application template that is not the standard application type.
- This typically covers Breast and Cervical Cancer (BCC), Tuberculosis (TB), and Inmate Applications.

Character Limit

- The Worker Portal has a limit on the number of characters that can be entered into a free text field. That limit is 200 characters.
- If there are more than 200 characters- Type “**see application**” after the limit of characters has been reached.
- **DO NOT** assume that there are more than 200 characters in the field that is being entered.
- Type as much information as you can in the field. Once you hit the maximum number of characters- backspace just enough to type “**see application**”.

Required Fields

- There are several fields marked by a red asterisk * that must be entered in order to submit the application. For all pages following page one of the Worker Portal, these fields apply only if there is a person associated with the marked field. **For example**, if there are four people in the household, all fields marked for persons 1-4 are required. The fields marked with the asterisk for persons 5-8 are *not* required. If the required information is missing, complete a person search to see if the information is known. If not, refer the application to your Supervisor or Lead for further research.

Spanish Applications

- When data entering Spanish applications into the Worker Portal, use the common translations found in the *Spanish to English Word Translations* Job Aid or use an English copy of the application as a reference.
- When a consumer provides written information that corresponds to a field requiring the worker to type the statement as it appears on the application, type “**see application**”

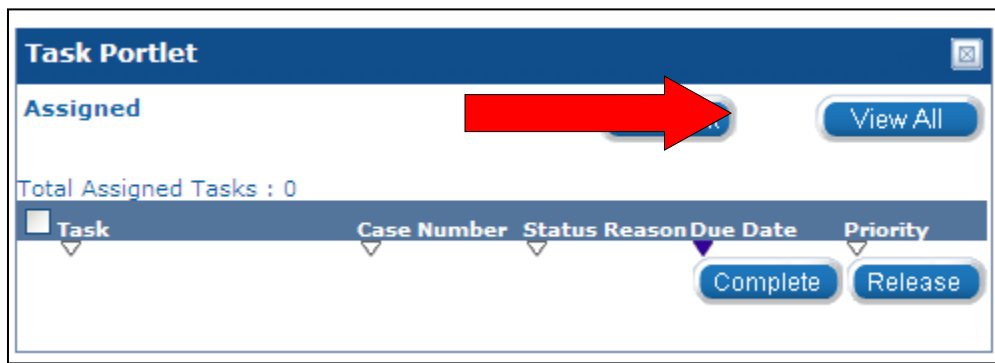
You will be responsible for keying the information. There are times in which you will have to make a decision on what information to key. These instances will be outlined in this Job Aid. This typically occurs when the information placed on the application does not match the selections in the Worker Portal.

Process

Unless otherwise indicated, the Data Entry Specialist is responsible for completing all tasks within the procedure.

1) Select an Application from Data Entry Task

1.1. After you have logged into KEES, locate the Task Portlet on the KEES Home Page

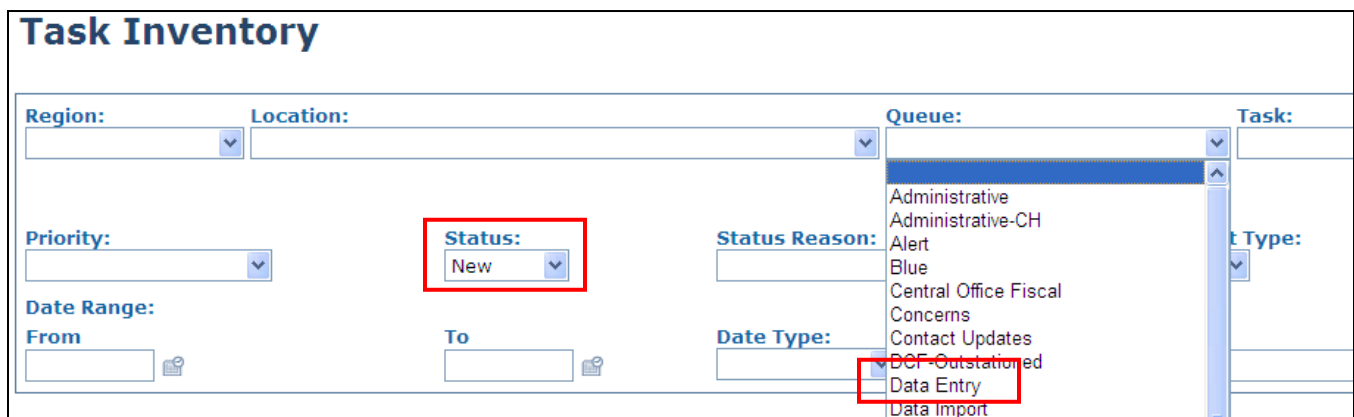


1.2. Click the **View All** button.

1.3. The **Task Inventory** page will display. All Data Entry tasks will be created in the Data Entry queue based on the day the application was received.

1.4. From the Task Inventory page, you can filter and sort the information to search for new tasks. Multiple search criteria are available in order to obtain a view of tasks that you are responsible for. The results from the search are then sorted by column to aid in locating the tasks to be worked.

1.5. Select the Data Entry queue. Make sure the status drop down is marked "New."



Hierarchy of Filtering

Date Type- Received Date, Created Date, Due Date

App ID

Assigned to Me –Yes or No

Case Number

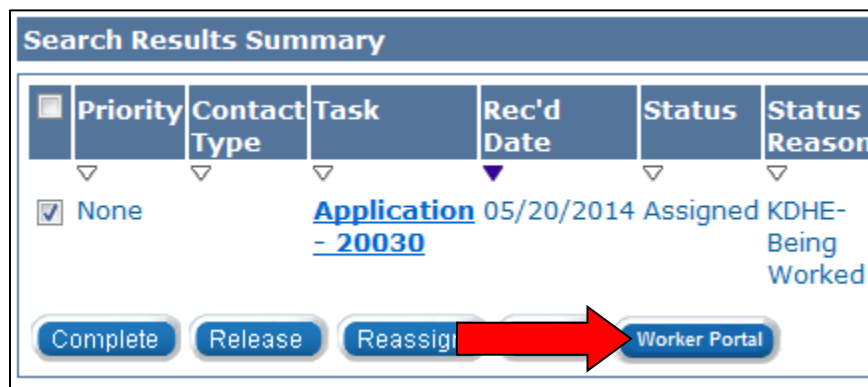
Case Name

- 1.6. Select the **Application** task. Double click on the Task Details. Click the **Images** button to open the application image, then click **Claim**.
- 1.7. Click **Refine Your Search**. When the Task Inventory Search criteria open again, use the following search criteria to find the task:

Status: Assigned

Assigned to Me: Yes

- 1.8. Place a check mark next to the task you claimed, then scroll to the bottom of the page and click the **Worker Portal** button. This will open the worker portal.



2) Select the Images Button

- 2.1. Open the image of the application.
- 2.2. Move the image of the application to the 2nd monitor. This is the information that will be data entered into the Worker Portal.
- 2.3. The image received will be either a KC1100 application, KC1500 application, or an Application Supplement to the KC1100 or KC1500.
- 2.4. If the application is a KC1100 or KC1500, **proceed to step 3**. If the application is a specialty application (BCC applications, TB applications, Inmate Applications), continue to Step 2.5

NOTE: If the Images button on the task does not work, use WA 167

If the image presented is a “Specialty” application- please reassign the Task to the Registration queue using the following steps:

- 2.5. Return to the KEES Home page.
- 2.6. Click **View All** in the Task Portlet.
- 2.7. Search for your task using the App ID in the Task Inventory. Change the status to **Assigned**.

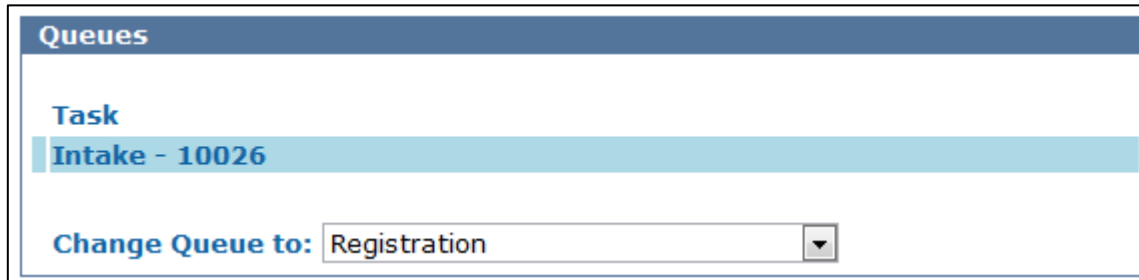
- 2.8. The **Reassign** button will display at the bottom of the **Task Inventory** page once the task is located.
- 2.9. Click the check mark next to the task that needs to be reassigned.

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status
<input type="checkbox"/>	None		Application - 10001	06/12/2015	New
<input checked="" type="checkbox"/>	None		Application - 10024	06/13/2015	New
<input type="checkbox"/>	None		Application - 10028	06/15/2015	New

Claim Reassign

- 2.10. Click the **Reassign** button.
- 2.11. In the first block, you can change the queue to which the task is assigned. Select **Registration** from the Queue drop-down.

2.12. Click on the name of the task to be reassigned (it will not appear as a link)



2.13. Click **Save and Continue**.



INMATE APPLICATIONS NOTE: Inmate applications are received on the KC1100 KanCare application. These applications will state that they are inmate applications on the front page of the application.

3) Determine if there are more than 8 members listed on the application

- 3.1. View the application to determine if more than 8 people are listed in the household.
- 3.2. Use the arrows in Image now to move quickly through the application and determine if more than 8 people applied. **If there are 8 applicants or less, proceed to step 4.**
- 3.3. **If more than 8 applicants**, the worker will decide on which 7 people to enter, using the guidelines listed below:



Enter “See Application” for the name of the eighth person in the Worker Portal. Do not enter a date of birth or any other information under Person 8.

3.4. Create a Note in ImageNow

In Image now, after you search and open the image, **select the “Notes”** field to the lower right of the image.

- **Type all of the remaining individuals that were not already entered into the Worker Portal in the text box.**

Continue data entry of Section A.

4) Begin Data Entry



Best Practice:

Unless you determine in Step 3 that there are more than 8 people on the application (**or that the applicant has listed a child as person one rather than the name of the person who signed the application**) and you need to follow a different order for entering them, enter all information for Person #1, and then enter all information for Person #2, etc.

- 4.1. The image of the application is on the 2nd monitor, and the KEES system is on the other monitor. By viewing the information on the application, begin entering this information into the worker portal. The information from Section A is entered on the first screen in the Worker Portal.

KC1100 information in Section A: Tell us about yourself and the People in Your Home.

A. Tell us about Yourself and the People in Your Home	
Tell us about yourself. The person filling out this application is the Primary person who is "head of household."	
Your Name: (First, Middle, Last) Michelle Rachel Brown	Other names used: None

4.2. Enter into the Worker Portal Section 1: Tell us about yourself and your household.

Section 1: Tell us about yourself and your household		
First Name:* <input type="text"/>	Middle Name/Initial: <input type="text"/>	Last Name:* <input type="text"/>
Other Names Used:		
First Name: <input type="text"/>	Middle Name/Initial: <input type="text"/>	Last Name: <input type="text"/>

- 4.3. See above how First name, last name and middle initial are all in one box on the application-but are in 3 different boxes in the Worker Portal. Once all information from Section A is entered into the worker portal, click the **Next** button.

NOTE: For all individuals with hyphenated last names, use a space instead of a hyphen. For example, the last name "Smith-Jones" becomes "Smith Jones" when entered into the Worker Portal.

- 4.4. The application date, name, and address (including the county) are all required fields for the first page. If the name is missing (and the name of an adult who signed the application is not provided on further pages), or the address is missing, refer the case to the Data Entry Supervisor or Lead for additional research.
- 4.5. If the county is missing, refer to the County Codes job aid below:

<S:\PSI HP KHPA Shared\Training\Instructional Materials\Job Aids\Other\County Codes>

- 4.6. Beginning on the second page of the job aid the City and County listing can be found, which can match the city to the appropriate county.

5) Data Enter Person #1

- 5.1. There will be a difference in the information you enter for relationships. Verify that the information the consumer listed is in the context to the first person entered on the application. All information for Persons 1, 2, and 3 will be entered on the second page of the Worker Portal, including the tax information. Persons 4, 5, and 6 will be data entered on the lower half of this page as well.
- 5.2. Example: First person is the PA, and it indicates “Self” in the relationship field. If Person #2’s relationship to the PA is Spouse or Husband- Person #2 relationship field would indicate “Spouse or Husband”. It would not indicate Dad or Father because that would be the relationship to the children, not the PA.

NOTE: Person 1 on the second page of the Worker Portal is the PA – the same person who was entered on the first page of the Worker Portal. Make sure that Person 1 is the person who signed the application. If the person listed as Person 1 on the application is *not* the person who signed the application (or his or her spouse), enter the person who signed the application as Person 1.

Persons 1, 2, and 3		
Please tell us about all the people in your household. See page 2 for more information a		
+ Start with yourself!		
	Person 1 Yourself	Person 2
First Name	Michelle	Robert
Middle Name	Rachel	Dean
Last Name	Brown	Brown
Maiden Name	Johnson	N/A
What is this person’s relationship to you?	Self	Husband

6) Enter Race/Ethnicity information

- 6.1. Enter the Race/Ethnicity information from the application. As this information is not listed in the same order in the Worker Portal as on the application, make sure that the information is entered accurately based on the response on the application, not the placement of the selection.

6.2. Special consideration will need to be given to the American Indian/Alaska Native section of the application at this time as well. If the applicant does not report any information for the Race/Ethnicity questions, but indicates one or more members of the household are American Indian or Alaska Native, that information will be entered in this section of the worker portal.

7) Enter Dependent Information

- 7.1. When reviewing page 5 of the KC1100 Application or the Federal Tax household information, determine if there are dependents listed.
- 7.2. Enter “Yes” or “No” from the drop-down menu and list the names of the dependents in the following field.

KC 1100

2. Does this person have any dependents on their tax return?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
If yes, list name(s) of dependents		

Worker Portal

2. Does this person have any dependents on their tax return:

If Yes, list the names(s) of dependent's

8) Continue to enter data for the remaining members of the household

Once all information for persons 1 through 6 has been entered, click the **Next** button. On this page, all information for persons 7 and 8 will be entered, as well as the prior medical information and immigration information for non-citizens. Once these fields have been entered if necessary, click **Next**.

9) Enter employment and other household income into the Worker Portal

When entering information for page 9 of the KC1100 Application or the Jobs and Other Household Income, determine if there are more than 4 jobs.

- 9.1. If there are **NOT more than 4 jobs** on the application, enter the information for the jobs into the Worker Portal.
- 9.2. If you determined that there **ARE more than 4 jobs**, enter the information for the first 4 jobs, and **enter a note indicating which job was not entered**.
- 9.3. If on the application there is more than one entry for a single job for tips, commissions, and bonuses, enter only one of these sources in the worker portal under that job, the other would be in the next job

listing. For example, if the applicant reported a job at Chili’s with both \$500/week in tips and \$70/month in bonus income, the information would be entered like this:

<p>Do any of these jobs include tips, commissions or bonuses? Yes</p> <p><i>Job 1 - CHILIS</i></p> <p>What type? <input checked="" type="checkbox"/> Tips <input type="checkbox"/> Commissions <input type="checkbox"/> Bonus</p> <p>What is the usual amount? (before deductions): 500</p> <p>How often? Every Week</p>	<p>Do any of these jobs include tips, commissions or bonuses? Yes</p> <p><i>Job 2 – CHILIS (same job as Job 1)</i></p> <p>What type? <input type="checkbox"/> Tips <input type="checkbox"/> Commissions <input checked="" type="checkbox"/> Bonus</p> <p>What is the usual amount? (before deductions): 70</p> <p>How often? Once a Month</p>
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10) Enter Self Employment information

When entering information for page 9 of the KC1100 Application or the Jobs and Other Household Income, determine if there are more than 4 Self Employment jobs.

- 10.1. If there are **NOT more than 4 jobs listed** for Self Employment, enter the information for the jobs into the Worker Portal.
- 10.2. If you determined that there **ARE more than 4** sources of self-employment income, enter the information for the first 3 jobs, and enter **“See Application” in the 4th Business Name box.**

Self-employed 4

Name of self-employed person:

Business Name:

What type of business is it?

11) Complete this process for all other income sections on page 10 of the KC1100 application

12) Enter the “Other Health Insurance” information page

- 12.1. If information about other health insurance has been provided, enter all information from the application in this section (on page 5 of the Worker Portal). Once this section is complete, skip the sections indicated below.



12.2. If the applicant reports insurance for more than four people, enter the comprehensive insurance policy for the first four members of the household (the policy that covers doctor’s visits/hospital stays), and add a Sticky Note to the application image indicating that the insurance was not entered for all household members and for whom it is missing. (See **Step 4** for instructions for adding a Sticky Note)

13) Enter the “Insurance from Job” section, and the “American Indian or Alaska Native” section on the KC1100 application (Pages 11-13)

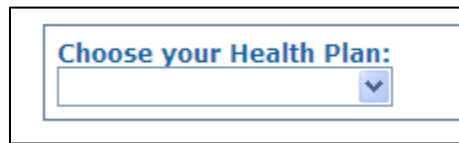
NOTE: If the applicant has indicated that they *have* other health insurance through their job that was not reported on the “Other Health Insurance” information page, this information should be entered in the “Other Health Insurance” section in the worker portal. If the applicant has indicated that any household member is an American Indian or Alaska Native, this information should be entered in the Race fields for these individuals.

14) Check for Medical Representatives and Facilitators

Check Section G of the application for the facilitator information. If the applicant has indicated they want a facilitator or medical representative to assist them, the Resource Databank will need to be updated with the facilitator’s information before closing the application image. Additionally, check for any Release of Information documents with the application. If a facilitator or medical representative has been reported, complete Steps 15-19, and then refer to *Job Aid – Adding Facilitators to the Resource Databank*.

G. Choose Someone to Help You With Your Medical Assistance Case			
You can name a person to help you with your medical assistance case. You can choose either a “Medical Representative” or a “Facilitator.”			
Medical Representative is a person who can sign your application, answer questions for you, and use your medical assistance card for you. We will share information with this person. This person will get copies of letters sent to you about your case. This person is responsible for completing your review each year and for telling us about changes in your situation. The Medical Representative can be a relative, neighbor, friend, or other person you trust. You may not name someone who is trying to collect a medical debt against you.			
Facilitator is a person who can help you fill out your application and help you through the application process. We will be able to share information with this person. This person will get copies of letters sent to you about your application. After your application is processed, this person is not connected to your case. A facilitator can be someone such as a relative, neighbor, friend, medical office staff, or community organization employee.			
I want to appoint the following person to help me.			
First and Last Name			
Organization Name			
Address Line 1			
Address Line 2			
City	State	Zip Code	
Phone Number	Email Address		
What is this person’s relationship to you? (for example: child, friend, neighbor, etc)			
I appoint the above named person to be my <input type="checkbox"/> Medical Representative, or <input type="checkbox"/> Facilitator.			
Signature	Date		
Witness signatures are required if the signature above is made with a mark.			
Witness	Date		
Witness	Date		

15) Do not forget to select the requested Health Plan Choice



16) Indicate Signature

Check the application for a signature. If the applicant signed and dated the application, mark the **Signed?** drop-down “Yes” and enter the date the application was signed.

17) Elderly and Disabled Supplement Pages

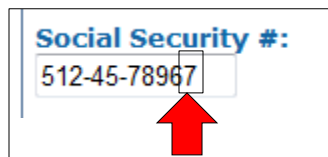
The next three pages are only used if an Elderly and Disabled medical supplement is received with the application or the KC1500 application is received. If this application or supplement was not received, click **Next** until you reach the last page (the options will change to **Back** and **Submit**). If the KC 1500 or the Elderly and Disabled supplement was received, continue data entry of the additional pages. Include all information provided by the PA in the E&D Supplement.

18) Click the Submit Button

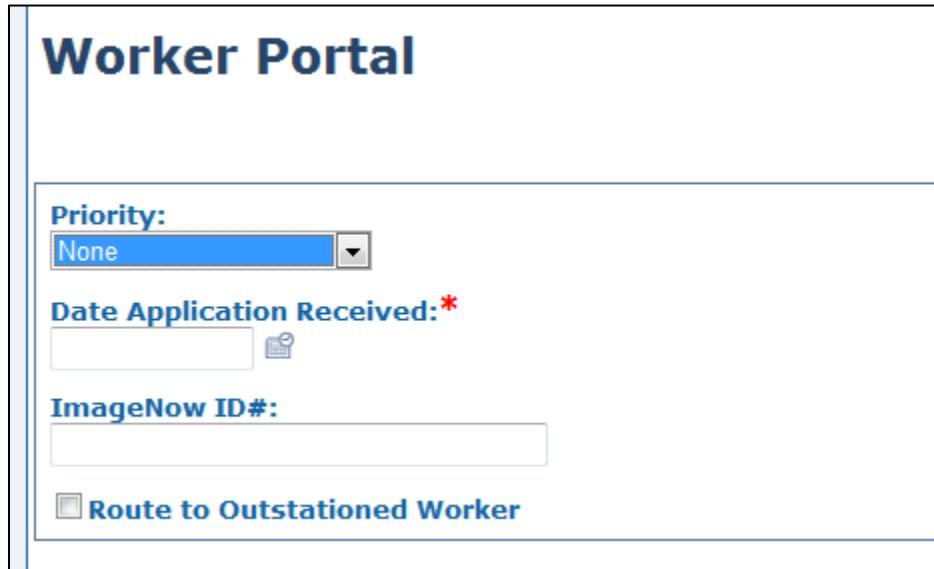
- 18.1. Scroll all the way to the bottom of the page, and on the bottom right hand side of the Data Entry fields locate the **Submit** button.
- 18.2. **Click the Submit Button** when all information has been entered.
- 18.3. If a **RED** error message displays, review the information entered for errors.



- 18.4. Pay special attention to required fields (marked with a *****) and the SSN field (make sure the correct number of digits has been entered). Correct the information and submit the information again.



18.5. If no error has occurred, the first page of the Worker Portal will appear without any entered information.



The screenshot shows a web form titled "Worker Portal". It contains the following fields and controls:

- Priority:** A dropdown menu with "None" selected.
- Date Application Received:*** A text input field with a calendar icon to its right.
- ImageNow ID#:** A text input field.
- Route to Outstationed Worker**

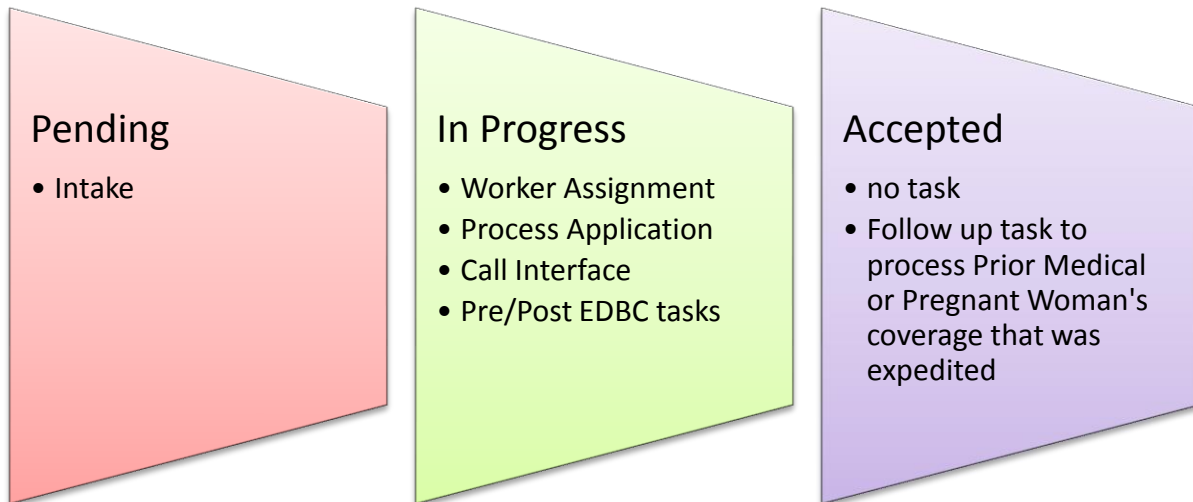
19) Verify Downstream Task Created

Verify the task for either Registration or Eligibility was created using the steps below:

Check the e-Tools to locate the e-Application.

- 19.1. Click on the **Case Info** tab.
- 19.2. Click on the **e-Tools** link in local navigation.
- 19.3. When the e-Application Search page displays, enter the following criteria:
 - **e-App Status:** All
 - **Type:** e-Application
 - **Search By:** All
- 19.4. Click on the arrow next to **Advanced Search**.
- 19.5. Enter the first and last name, and SSN if available for the person who was entered as Person 1, then click **Search**.

19.6. If the e-App displays, copy the e-App number. **Note:** do not click on the e-App number itself, the number is a link. Note whether or not there is a case number associated with the e-Application and the e-App status. Use the following chart to determine the type of task you are searching for:



Search the Task Inventory for the task associated with the e-Application.

- 19.7. Click on the KEES logo to return to the home page.
- 19.8. Click on the **View All** button in the Task Inventory.
- 19.9. On the Task Inventory Search page, paste the e-App number in the Application ID field and click **Search**.
- 19.10. If no task displays and the e-Application is not in Accepted status, re-enter the application by clicking on the Worker Portal tab and entering the application **including the Application ID from the image** again.

20) Mark Task as complete

- 20.1. **Click the KEES Logo.**
- 20.2. The KEES home page will display. Locate the current task in the task inventory by searching by the Application ID. Click on the task name.
- 20.3. When the Task Details window opens, mark the Task as **Complete**.