

CHANGE NOTICE FOR MANUAL

DATE: October 12, 2009

MANUAL: Work First User's Manual
CHANGE NO.: 2-2009
TO: County Directors of Social Services
EFFECTIVE: **October 1, 2009**, make the following changes to the Work First User's Manual

I. GENERAL

This change notice transmits revisions to the Work First User's Manual. These changes are outlined below.

II. SPECIFIC CHANGES

A. Table of Contents

The Table of Contents is being revised to:

1. WF1200 Benefit Issuance
 - a. Remove WF1200.04 Pull-Reissue Process and WF1200.05 Pull-Reissue Changes.
 - b. Renumber WF1200.06 General Instructions – DMA-5022 to WF1200.04.
 - c. Renumber WF1200.07 Requesting Replacement Checks to WF1200.05.
2. Rename WF1300 Pay After Performance to Work First Benefits.
 - a. Change WF1300.02 from Accessing the Pay After Performance Screen to Accessing the Work First Benefits Screen.
 - b. Change WF1300.03 from Pay After Performance (Codes) to Work First Benefits (Codes).
 - c. Change WF1300.07 Pay After Performance History to Work First Benefits History.
 - d. Change 1300.08 Pay After Performance and Eligibility Tracking to Work First Benefits and Eligibility Tracking.
3. WF1501 Managed Care (HMO)
 - a. Remove WF1501.12 Pull/Reissue.
 - b. Renumber WF1501.13 HMO Reports to WF1501.12.

4. Add new section WF1800 Broadcast Messages.
5. EP700 Administrative Procedures
 - a. Remove EP700.01 Correcting Erroneous Data.
 - b. Renumber WF700.02 Ordering Forms to WF700.01.
 - c. Renumber WF700.03 Records Retention to WF700.02.

B. WF100 EIS Logon and Logoff Procedures

WF100.02.D EIS Logon Instructions is being revised to:

1. Remove selection 'PP' Pay After Performance from the EIS Menu (Update) screen.
2. Add Selection 'WB' Work First Benefits to the EIS Menu (Update) screen.
3. Remove Selection 'ME' MC Enrollment from the EIS Menu (Update) screen.
4. Add selections 'MC' Medicare C and 'ME' Medicare D ENRL to the EIS Menu (Inquiry) screen.
5. Rename selection 'MD' from Medicare D to Medicare D ENTL on the EIS Menu (Inquiry) screen.

C. WF300 EIS Inquiries

1. WF301.01.C. Social Security Number-Application Inquiry is being revised to add fields Q11, NCHC, FAMPLN, and BD to the inquiry screen and remove field PEN-REA from the inquiry screen.
2. WF301.02.A. Pending Applications is being revised to add fields Q11, NCHC, and FAMPLN to the inquiry screen and remove field PEN-REA from the inquiry screen.
3. WF301.02.B. Disposed Applications is being revised to add fields NCHC and FAMPLN to the inquiry screen and remove field HLTH CH from the inquiry screen.
4. WF303.01 Current Case Data (CD) is being revised to rename CASEHEAD/PAYEE to CHEAD/PAYEE on the inquiry screen and to add SPOUSE IND to the inquiry screen.
5. WF306.01 Current Individual Data (ID) is being revised to change the field name JOB WORK REG to WORK REGISTRA on the inquiry screen and add field CRD ISSUE DTE to the inquiry screen.
6. WF306.02 Current Individual Profile (IP) is being revised to rename field HMO PVDR to CA/HMO PVDR on the inquiry screen, add field PCHP IND to the inquiry screen, and remove field CA PVDR# from the inquiry screen.

D. WF610 Reports

WF610.01.B.4.Special Messages is being revised to change message Eval Pay After Performance MMCCYY to Eval Work First Benefits MMCCYY.

E. WF700 DSS-8124, DSS-8125, and Check History Codes

1. WF700.01 Case Level Coding is being revised to:
 - a. Add codes 39 Crisis Prevention Check, 49 Crisis Prevention Check (Native Americans in Graham County), and 59 Crisis Prevention Check for Indo-Chinese to the Check History codes table.
 - b. Change Special Review Code P message from Evaluate Pay After Performance to Work First Benefits and date to enter from PAP to WFB.
2. WF700.02 Individual Level Coding is being revised to:
 - a. Change the Work Registration Code F from 'Disabled and incapacitated individuals' to 'Disabled and incapacitated individuals with youngest child age 6 years or older.'
 - b. Add Work Registration Code O, Disabled or incapacitated individuals with youngest child age 5 years or younger.
3. WF701.03 Approval Codes
 - a. WF701.03.A. Benefit Diversion Approvals is being revised to add the sentence: The Payment Type must be '1'.
 - b. WF701.03.B. Ongoing Approvals (Application Types '1', '2', and '6') is being revised to indicate each individual name and Individual ID Number display on the notice. Up to 18 individuals can be displayed on the notice.
 - c. WF701.03.B.1. is being revised to add that approval codes A1 and A2 are for Child Only approvals and the Payment Type must be '1'.
 - d. WF701.03.B.2. is being revised to add that approval codes A0, A6, A7, A8, and S2 are for Child Only approvals and the Payment Type must be 'S'.
 - e. WF701.03.B.3. is being revised to add that approval codes B6, B7, and S1 must be used when approving with Payment Type '2'.
 - f. WF701.03.C.1. is being revised to add that use of approval code A4 may be used when approving with Payment Types '1', '2', or 'S' and the individual name(s) and the Individual ID Number(s) display on the notice.

- g. WF701.03.C.2. is being revised to add that approval code A5 may be used when approving with Payment Types '1', '2', or 'S' and that the individual name(s) and Individual ID Number(s) display on the notice.
 - h. WF701.03.C.3. is being revised to add that approval code D1 is used when approving with Payment Type '2' and the individual name(s) and the Individual ID Number(s) display on the notice. The notice text is also being changed to: Has been approved for Work First Benefits because he/she complied with Child Support requirements. Your family will receive a check when you have completed the requirements stated in the Mutual Responsibility Agreement(s).
 - i. WF701.03.D Open/Shut Approvals (Application Types '1', '2', and '6') is being revised to add that approval code A3 may be used when approving with Payment Types '1', '2', or 'S' and that the individual name(s) and the Individual ID Number(s) display on the notice.
4. WF702 Change Codes
- a. WF702.A. Deletions of Any Members of the Case (Including Children) is being revised to include the notice message: IF AN INDIVIDUAL(S) BECOMES INELIGIBLE FOR MEDICAID, DO NOT THROW AWAY THE CARD. THE INDIVIDUAL MAY BECOME ELIGIBLE AGAIN AND WILL NEED THE CARD.
 - b. WF702.B. Other Downward Revisions is being revised to indicate change codes 3A and 8A are used with Payment Type '2' cases only.
 - c. WF702.D. Work First Family Assistance Sanctions is being revised to:
 - (1) Add Payment Type '1' to 'S' in the title.
 - (2) The notice text is changed to read: Your family is ineligible for a Work First Family Assistance Payment. Beginning MMCCYY you will no longer receive a Work First Family Assistance check until you comply with the sanction applied to your case.
 - (3) Change text for Change Codes 61 and 11 to: You did not cooperate with child support and did not comply with your MRA. Your children will continue to receive Medicaid, however, you will be evaluated for Medicaid.
 - d. WF702.E. Work First Pay After Performance is being revised to change the title to Work First Benefits.

The text for Change Codes 9X and 4X is being revised to read: Your case is now a Work First Benefits Case. Change Codes 9X and 4X are valid when changing payment types '1' or 'S' to '2'.

e. WF702.J. Program Transfer Codes AAF Pay Type '1', '2', or 'S' to MAF, MIC, MPW, AAF Payment Type 4, or AAF Payment Type '5' is being revised to:

(1) AAF to MAF

(a) Change Code 83 is being added to the AAF to MAF table with the text: You failed to meet the requirements of your MRA and will no longer receive Work First Benefits. Your Medicaid will continue.

Use 83 when changing from Payment Type '2' to MAFC. This code can be either worker entry or system generated.

(b) Add the new Change Code 5T: You failed to complete work activities listed on the MRA.

Use 5T when changing from Payment Type '2' to MAFC. This code can be either worker entry or system generated.

(c) Add the new Change Code 9A: You failed to cooperate with substance abuse treatment.

Use 9A when changing from Payment Type '2' to MAFC. This code can be either worker entry or system generated.

(2) AAF to MAF, MIC, or MPW is being revised to remove Change Code 83 and Change Code 33 which are no longer valid.

(3) AAF to AAF Payment Type '5' is being revised to change the notice text for change codes 8M and 4M to read: Your family is no longer eligible for Work First Benefits due to an increase in earned income.

Also, use 8M, 4M, 6Y, and 1X when a change from Payment Type '2' to '5'. Codes 6Y and 1X may also be used when changing payment type "1" or "S" to "5".

f. WF702.L. Automatic System Generated Program Transfer AAF to MAF is being revised to include:

Code 83 – Failure to meet requirements of MRA (AAF Payment Type '2' to MAF)

Code 5T – Failure to complete work activities listed on MRA (AAF Payment Type '2' to MAF)

Code 9A – Failure to cooperate with substance abuse treatment (AAF Payment Type '2' to MAF)

- g. WF702.N. MAFC to AAF Payment Type '2' is no longer allowed and must be a reapplication. Change Code 5K is no longer valid and is removed.
5. WF703 Termination Codes-DSS-8110A
- a. WF703 Termination Codes-DSS-8110A is being revised to include the notice message: IF AN INDIVIDUAL(S) BECOMES INELIGIBLE FOR MEDICAID, DO NOT THROW AWAY THE CARD. THE INDIVIDUAL MAY BECOME ELIGIBLE AGAIN AND WILL NEED THE CARD.
 - b. WF703.D. Automatic EIS Terminations is being revised to:
 - (1) Include Program Category Transfer in the title.
 - (2) Include Codes:
 - 52 – Program Transfer due to failure to return QR by established deadline (AAF to MAF)
 - 83 – Program Transfer due to failure to meet requirements of MRA (AAF Payment Type '2' to MAF)
 - 5T – Program Transfer due to failure to complete work activities listed on MRA (AAF Payment Type '2' to MAF)
 - 9A – Program Transfer due to failure to cooperate with substance abuse treatment (AAF Payment Type '2' to MAF)

F. WF1100 On-Line DSS-8125 Screen Instructions

- 1. WF1100.01 Accessing the DSS-8125 Process is being revised to add fields SP1, 2, 3, SPOUSE, and ISSUE CRD. Also, Job/Work Reg is being changed to WORK REGISTRA.
- 2. WF1100.03 Application Approvals
 - a. WF1100.03.A. Benefit Diversion – Individual Level is being revised to add ISSUE CRD. A 'Y' or 'N' must be entered to indicate if a Medicaid Card is to be issued.
 - b. WF1100.03.B. MRA or IV-D Sanction is being revised to add Child Only Cases to the title.

Job/Work Reg is being changed to WORK REGISTRA at the Individual Level.

ISSUE CRD is being added and must enter 'Y' or 'N' to indicate if a Medicaid Card is to be issued.
 - c. WF1100.03.C. Substance Abuse Sanction is being revised to change the title to Work First Benefits Approvals Including Substance Abuse Sanctions (Payment Type '2').

Job/Work Reg is being changed to WORK REGISTRA at the Individual Level.

ISSUE CRD is being added and must enter 'Y' or 'N' to indicate if a Medicaid Card is to be issued.

- d. WF1100.03.E. Adding an Individual to an Application (Including Open/Shut Approvals) is being revised to include the statement: The user must update the ISSUE CRD field with 'Y' or 'N' for the individuals already included on the case in addition to the individual being added.
- e. WF1100.03.F. Including an Individual in an Ongoing Case is being revised to include the statement: The user must update the ISSUE CRD field with 'Y' or 'N' for the individuals already included on the case in addition to the individual being added.
- f. WF1100.03.H. Work First Applications and Inclusions
 - (1) PAY TYPE ('1', '2', or 'S') is being revised to include the statement. Payment Type '1' and 'S' are for Child Only approvals. Payment Type '2' is for Work First Benefits approvals.
 - (2) PAY EFF DATE is being revised to change wording from Pay After Performance to Work First Benefits.
 - (3) JOB/WORK REG is being revised to WORK REGISTRA.
 - (4) ISSUE CRD is being included and 'Y' or 'N' must be entered to indicate if a Medicaid Card is to be issued and to enter when completing an add individual for individuals already included on the case.
- g. WF1100.03.I. Inclusions of an Adult(s) After Compliance with Child Support is being revised to
 - (1) Indicate on day one the PAY TYP must be '1' and day two the PAY TYP must be '2' when the individual is being added to the WF case.
 - (2) Change JOB/WORK REG to WORK REGISTRA.
 - (3) Add ISSUE CRD field. A 'Y' or 'N' must be entered if a Medicaid Card is to be issued, including other individuals already included on the case.
- 3. WF1100.05 Making Changes To An Active Case is being revised to include the:
 - a. The ISSUE CRD field is not allowed to be entered at the time a change is being made. If a Medicaid Card is needed, the DB/PML screen must be used. The ISSUE CRD field is only valid at application approval.

- b. A change from AAF Payment Type '1' or '2' to 'S' is valid; however, Payment Type 'S' is valid only with Child Only cases.
- c. WF1100.05.A. Updating Payment Effective Date is being revised to include MAF to AAF Payment Type '1' for Program Transfer.
- d. WF1100.05.B. Updating Medicaid Effective Date is being revised to include MAF to AAF Payment Type '1' for Program Transfer.
- e. WF1100.05.C. Removal of Information is being revised to change Jobs/Work Registration/Exemption Code to Work Registra Code.
- f. WF1100.05.D. Updating Information For A Timely Notice is being revised to change Job Work Registration to Work Registration.
- g. WF1100.05.F. Applying an MRA Sanction to an Ongoing Case is being revised to add (Child Only Cases) to the title.
- h. WF1100.05.H. Payment Revision is being revised to change Pay After Performance to Work First Benefits in the ONGOING PAYMENT AMOUNT, NOTE.
- i. WF1100.05.K. Transfers from AAF to MAF and From MAF to AAF is being revised to:
 - (1) Change title to Transfers from AAF to MAF and From MAF to AAF Payment Type '1'.
 - (2) Remove automatic transfer to MAF for Pay After Performance.
 - (3) Change pull night to the 4th work night from the end of the month (Regular Run).
- j. WF1100.05.K.1. Transfer from AAF Payment Type '1', '2', 'or 'S' to MAF-C is being revised to change Pay After Performance to Work First Benefits, change automatic transfers to the 4th work night from the end of the month (Regular Run), and change JOB/WORK REG to WORK REGISTRA.
- k. WF1100.05.K.2. Transfer from MAF-C to Payment Type '1' is being revised to change JOB/WORK REG to WORK REGISTRA.
- l. WF1100.05.K.3. Transfer from MAF-C to AAF Pay Type 'S' is being revised to include Pay Type '2'.
- m. WF1100.05.K.4. Change from AAF Payment Type '1' to AAF Payment Type '2' or 'S' is being revised to change JOB/WORK REG code to Work Registration code.
- n. WF1100.05.K.5. Change from AAF Payment Type '2' or 'S' to AAF Payment Type '1' is being revised to include (Child Only) in the title and to change JOB/WORK code to Work Registration code.

- o. WF1100.05.K.6. Change from AAF Payment Type '1', '2', or 'S' to AAF Payment Type '4' or '5' is being revised to change JOB/WORK code to Work Registration.
 - p. WF1100.05.K.9. Ending an MRA or IVD Sanction to an Ongoing Case is being revised to add Payment Type '1' (Child Only) to the title.
4. WF1100.06.A. Administratively Reopening a Terminated Case (Change Code 99) is being revised to update example dates to current year.

G. WF1200 Benefit Issuance

1. WF1200.01 General Information is being revised to remove Medicaid ID cards being issued monthly but issued annually for each eligible individual and added referral to WF1300.01 for Work First Benefit Check issuance.
2. WF1200.02 Regular Run/Program Cut-off is being revised to change pull cut-off to program cut-off deadline and Regular Run.
3. WF1200.03 Program Deadlines is being revised to include: The Program Cut-off deadline and Regular Run for all money payment programs is the fourth worknight from the end of the month.
4. WF1200.04 Pull Re-Issue Process and WF1200.05 Pull-Reissue Changes are being removed. WF1200.06 and WF1200.07 renumbered to WF1200.04 and WF1200.05.

H. WF1300 Pay After Performance

1. WF1300 Pay After Performance is being revised to change the title to Work First Benefits.
2. WF1300.01 General Information is being revised to remove reference to Pay After Performance and add Work First Benefits and describe Work First Benefit cases and Child Only cases.
3. WF1300.02 Accessing the Pay After Performance Screen is being revised to change the title to Accessing the Work First Benefits Screen, change 'PP' to 'WB', and change the Pay After Performance screen name to Work First Benefits.
4. WF1300.03 Pay After Performance (Codes) is being revised to change the title to Work First Benefits (Codes) and corrected outline to A. thru G. from 1. thru 7.
5. WF1300.03.3.TYPE is being revised to add for 'A' (Adjusted Payment) the amount from the retro pay 1 and 2 fields are for application types '3' and '6' approvals.
6. WF1300.04 Check Issuance Through The Pay After Performance Screen is being revised to change the title to Check Issuance Through Work First Benefits Screen and corrected outline to A. thru C. from 1. thru 3.

7. WF1300.04.1. is being revised to remove the Note regarding '3rd Consecutive Check, Eval For Pay Type '1' and outline corrected to A.
8. WF1300.04.3. is being revised to indicate that the system does not allow checks to be issued after regular run of the next month. There is no longer a Pull/Reissue Process. Corrected outline to C.
9. WF1300.06 Payments With A System Generated Frozen Status is being revised to remove pull/reissue and add regular run.
10. WF1300.07 Pay After Performance History is being revised to change the title to Work First Benefits History, change PAP to WFB, and change the Pay After Performance screen name to Work First Benefits.
11. WF1300.08 Pay After Performance and Eligibility Tracking is being revised to change the title to Work First Benefits and Eligibility Tracking and change PAP to WFB screen.
12. WF1300.09 AAF Automatic Transfer to MAFC is being revised to remove payment type '2', remove pull/reissue, and add regular run.

I. WF1400 Tracking Functions

WF1400.03.I. General Information is being revised to remove Family Status code 'O'.

J. WF1500 Medicaid Coverage Procedures

1. WF1500.01 Deductible Balance/Patient Monthly Liability Screen/SP(DB/PML) is being revised to add that replacement Medicaid cards can be issued through the DB/PML screen.
2. WF1501.08.A. ID Inquiry is being revised to add fields to the Individual Inquiry screen, REL TO PAYEE, PACE ENROLLED, CRD ISSUE DTE, PF5=MED ABC, PF4=MED D, and change the field name JOB WORK REG to WORK REGISTRA.
3. WF1501.12 Pull/Reissue is removed.

K. WF1600 TDC-TANF Collection Report Instructions

1. WF1600.02 System Access is being revised to update the new contact phone number (919) 733-4530, for the Data Management Team.
2. WF1600.03 General Rules for Data Completion for TANF Sample Cases is being revised to update the new contact phone number (919) 733-4530, for the Data Management Team.

L. WF1800 Broadcast Messages

WF1800 Broadcast Messages is a new section providing a link to instructions to receive email messages via Listserv.

M. EP400 DSS-6908

EP400.03 DSS-6908 Data Fields is being revised indicating Field 22 Assessment Date, Field 23 Educational Status, Field 24 Work History, and Field 25 Employment Status are all protected and allows no data entry. Field 44 Beginning Date, cannot be greater than the current calendar date.

N. EP500 Codes

EP500 Codes is being revised to:

1. Add to Field 10 Program Status Work Eligible Individuals Codes:
 - a. 'F' – Disabled and incapacitated individuals with youngest child age 6 years or older.
 - b. 'G' – Individuals age 65 and over
 - c. 'H' – Unable to participate because assistance with necessary child care and transportation cannot be located or provided.
 - d. 'O' – Disabled and incapacitated individuals with youngest child age 5 years or younger.
2. Remove from Field 10 Program Status Non-Work Eligible Individuals Codes 'F', 'G', and 'H'. These are being added to Work Eligible Individuals Codes.
3. Field 31/32 Component/Administrative Action – Activity Combinations Summary Table and Detail Table are being revised to remove Code 'DE'.
4. Field 37 Self-Initiated is being revised to remove Code 'DE'.

O. EP600 Data Entry

1. EP600.01.A. General Information is being revised to remove the last paragraph concerning Assessment, Educational Status, Work History, and Employment Status.
2. EP600.01.B. 1.Case Data is being revised to remove Assessment, Educational Status, Work History, and Employment Status fields as these are now protected and allows no data entry. These codes have been added to B.2. not to be keyed.
3. EP600.12 Error Messages is being revised to:
 - a. Remove messages WFJ017, WFJ019, WFJ035, WFJ036, and WFJ043.
 - b. Remove code 'DE' from messages WFJ021, WFJ023, and WFJ072.
 - c. Remove reference to assessment date from message WFJ054.

P. EP601 Historical Data Entry

EP601.03.II. Component Hours is being revised to remove code 'DE'.

Q. EP700 Administrative Procedures

1. EP700.01 Correcting Erroneous Data is being removed.
2. EP700.02 is being renumbered to EP700.01 and is being revised to indicating DSS-6908 forms are no longer stored at the State Office.
3. EP700.03 Records Retention is being renumbered to EP700.02.

III. INSTRUCTIONS FOR MAINTENANCE OF THE WORK FIRST USER'S MANUAL**To maintain your current hard copy of the Work First User's Manual:**

- A. Go to the DSS On-Line Manuals Change Notice website at
<http://info.dhhs.state.nc.us/olm/manuals/dss/csm-96/chg/>
- B. Click on Change No. 2-2009.
- C. Click on the "CN 2-2009" and attachment links at the bottom of the page to print the Change Notice and the attached documents.
- D. Open the files using Adobe Acrobat Reader and print the pages. Insert or replace the appropriate pages in your current hard copy as indicated below.

Note: Adobe Acrobat Reader may be downloaded for free at
<http://www.adobe.com/>

To update your current hard copy of the manual:

Remove		Insert	
SECTION	PAGES	SECTION	PAGES
TOC	1-7	TOC	1-7
WF100	1-3	WF100	1-3
WF300	1-4, 9-10	WF300	1-4, 9-10
WF610	1-2, 13-14	WF610	1-2, 13-14
WF700	1-6, 13-32	WF700	1-6, 13-34
WF1100	1-2, 5-68	WF1100	1-2, 5-66
WF1200	1-7	WF1200	1-5
WF1300	1-5	WF1300	1-5
WF1400	1-4, 7-8	WF1400	1-4, 7-8
WF1500	1-2, 13-22	WF1500	1-2, 13-19
WF1600	1-2, 5-6	WF1600	1-2, 5-6
		WF1800	1
EP400	1-2, 5-15	EP400	1-2, 5-14
EP500	1-14	EP500	1-14
EP600	1-4, 19-27	EP600	1-4, 19-26
EP601	1-4	EP601	1-4
EP700	1-2	EP700	1

If you have any questions, please contact the DSS Information Support Unit Staff at (919) 733-8938.

Sincerely,

A handwritten signature in black ink that reads "Hank Bowers". The signature is written in a cursive style with a long, sweeping underline.

Hank Bowers, Chief
Performance Management/Reporting &
Evaluation Management Section

HB:ba

Attachments

[WF_CN2-2009](#)

[WFumTOC](#)

[WFum100](#)

[WFum300](#)

[WFum610](#)

[WFum700](#)

[WFum1100](#)

[WFum1200](#)

[WFum1300](#)

[WFum1400](#)

[WFum1500](#)

[WFum1600](#)

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