Inquiry Activities

Introduction

The Inquiry Functional Area allows staff to view case, EDG and individual summary information. This section explains common processes that are conducted using that functional area.

Data Collection Historical Information

All historical records for a source, whether end-dated or deleted, remain in history in TIERS. Historical records can be viewed, but not updated.

No Date Ranges
If you do not choose any criteria on the Initiate Interview page in Data Collection, TIERS only retrieves the current active records. Active records are those records that have open end-dates and are currently being used to determine ongoing eligibility. You can choose to view all records by selecting the View All Records check box on the Initiate Interview page. This retrieves all records, current (active) and historical.

Date Ranges
You can specify a date range on the Initiate Interview page, when in Ongoing mode, if you want to see only the records within that time frame. TIERS only retrieves the records that exist within the specified date range. When you use the Left Navigation Bar to access a logical unit of work for a specific item (for example, real property resources), the summary page only displays records existing within that time frame.

Summary/Detail Pages
When you reach a logical unit of work in Data Collection, the summary page display a list of records, within the criteria you recorded on the Initiate Interview page. When you click the Edit icon beside a listing, the detail page appears and displays the details for that record.

History Navigation Buttons
Detail pages in TIERS contain a set of History Navigation buttons. This is a pair of arrows, one pointing up and the other pointing down. The History Navigation buttons appear to the left of the row of command buttons on the page. Use these History Navigation buttons to navigate through other records.

Clicking Arrows
Clicking the top arrow displays the next record. Clicking the bottom arrow displays the previous record. Typically, records are in order by date, with the most recent record at the top of the list and the oldest record at the bottom.

Example
A case contains three records for a vehicle. The oldest is end-dated January, 20YY. The next is end-dated March, 20YY. The last and most recent record has no end-date, but a begin date of April, 20YY.

On the summary page, you select the middle record, end-dated March, 20YY. That record displays on the detail page. Clicking the top arrow of the History Navigation buttons displays the record with the open end date and the begin date of April, 20YY. If you click the down arrow, you see the record end-dated January, 20YY.

Disabled Buttons

When you reach the end of records, the appropriate History Navigation button becomes disabled. For example, when you reach the most recent record, the top button becomes disabled, as there are no more recent records to view. When you reach the oldest record, the bottom History Navigation button becomes disabled.

Background Display

When you view a historical record, the words "Read Only" appear on the background of the page. This means that the record is active, but in read-only mode.

Data Collection Summary Pages

Overview

In the Data Collection Functional Area, most logical units of work contain summary and detail pages. Records are created on the detail page. The summary page for that logical unit of work lists the associated records.

When you access a page in any other mode except Intake, the summary page appears first. You select a record and click its Edit icon, which takes you to the detail page.

Eligibility Historical Information

Overview
Use this process to find past eligibility results and detail for an Eligibility Determination Group (EDG) or Certification Group (CG).

Activity
Use the Eligibility Search function, located in the Eligibility area of the Left Navigation Bar. This displays the Eligibility Search page. Record the case and/or EDG number, program type and the date range for which you want to view historical eligibility. Selecting the Show Cancelled check box displays all eligibility results for an EDG and month, including those that were overwritten by later running of EDBC. Click the Submit button.

TIERS displays the Eligibility Summary page. It displays all EDGs disposed within the specified time period. The page displays the EDG information, listed by benefit month.

Clicking an EDG/month hyperlink takes you to the EDG Summary unit. The unit contains other pages, for example, Notice Reasons, Income, Resources, etc. You can further navigate to individual information and specific budgets. You can then return to the Eligibility Summary page and select another benefit month.

Notes/Warnings/Tips
If there is no eligibility history for the period in question, TIERS displays an error message stating that no information is found for the period.

Outcomes
TIERS retrieves and displays month-by-month eligibility information for the specified period.

Alerts/Correspondence/Reports
None.

Finding Benefit Issuance Information

Overview
Use this process to view detail for current and/or historical issuances for Food Stamps and TANF benefits.

Activity
Use the View Benefits function, located in the Benefit Issuance area of the Left Navigation Bar. The Benefit Summary Inquiry page appears.

Record the case or EDG number. Record the benefit number and month, if available. You can also specify a date range in which to search. Click the Search button. Matching benefits appear in the Benefit Search Results area.

Click on the desired benefit. The Benefit Details page appears, listing the detail for that benefit.

You can view one benefit at a time. To view another benefit, click the Previous button to return to the Benefit Summary Inquiry page. Choose another benefit from the displayed list or use the search criteria to find another benefit.

Notes/Warnings/Tips
The Comment field on the Benefit Details page is display only. It shows comments recorded by staff when issuing a manual benefit.

If you check the Show History check box, the Benefit Details page displays a history of all statuses (changes) for a benefit. If the check box is left unchecked, the page only displays the last status of the benefit.

Outcomes
TIERS displays the detail for the selected benefit.

Alerts/Correspondence/Reports
None.

Finding Case Information

Overview

Use this process to find summary information for a case.

Activity

Use the Case function, located in the Inquiry area of the Left Navigation Bar. This displays the Case - Search/Summary page.

Record the case number and click the Search button. Case information displays in the Case Summary Information area. The Currently Associated EDGs search results area lists any EDGs, including Pending and undisposed EDGs.

Clicking on an EDG Number hyperlink takes you to the EDG Search/Summary page and displays the EDG information.

Notes/Warnings/Tips

None.

Outcomes

The page displays case and EDG information.

Alerts/Correspondence/Reports

None.

Finding a Case Number

Overview
Use this process to find a case number for a case. You can find the case number if you know the name of an individual in the case.

Activity
Use the Individual function, located in the Inquiry area of the Left Navigation Bar. This displays the Individual - Search page. Record the individual's name or other criteria and click the Search button. Matching individuals appear in the Search Results area. For each matching individual, the displayed record includes the case number.

Click an individual name hyperlink. This displays the Individual Summary page, which shows individual detail, including case number.

Notes/Warnings/Tips
You can also search using SSN, SSCN, client identification number, and/or date of birth.

There may be more than one match displayed. You must look at individual information to determine if you have the correct case.

Outcomes
TIERS displays matching individual information, including case number.

Alerts/Correspondence/Reports
None.

Finding Correspondence Information

Overview

Use this process to view information for correspondence that has been generated.

Activity

Pending Correspondence

Use the View Pending Correspondence function, located in the Correspondence area of the Left Navigation Bar. This displays the View Pending Correspondence page.

Record the case/application number and any other search criteria, then click the Search button. Correspondence displays in the Search Results area. Click the listing for the desired correspondence.

The Pending Correspondence Detail page appears. It displays general information about the correspondence. Click the Generate Form button. Another page opens and displays the correspondence in PDF (Portable Document Format), appearing exactly as it looks when printed. You can print the document by clicking the Print icon within the document page.

Historical Correspondence

Use the View History Correspondence function, located in the Correspondence area of the Left Navigation Bar. This displays the View History Correspondence page.

Record the case/application number and any other search criteria, then click the Search button. Correspondence displays in the Search Results area. Choose the desired correspondence by clicking the radio button next to the listing. Click the Next button.

The History Correspondence Detail page appears. You can select the recipient for the correspondence by selecting the appropriate radio button beside the name.

Clicking the Generate Form button displays the correspondence in PDF (Portable Document Format), appearing exactly as it looks when printed. You can print the document by clicking the Print icon within the document page.

Clicking the Preview button displays the correspondence. When you choose this action, you cannot print the correspondence from the PDF (Portable Document Format) window. This allows you to view the correspondence and, if necessary, return to the Detail page.

Clicking the Reprint Later button sends a reprint of the correspondence to Pending status. You can then print the correspondence using the Pending

Correspondence process. It also adds a record to the correspondence history, indicating that it was reprinted.

Notes/Warnings/Tips
None.

Outcomes
The correspondence displays in PDF (Portable Document Format), appearing exactly as it looked when printed.

Alerts/Correspondence/Reports
None.

Finding EDG Information

Overview

Use this process to find summary information for an Eligibility Determination Group (EDG), including Pending and undisposed EDGs.

Activity

Use the EDG function, located in the Inquiry area of the Left Navigation Bar. This displays the EDG - Search/Summary page. Record the appropriate search criteria (case and/or EDG number) and click the Search button.

The page displays summary information for the selected EDG. It also lists individuals currently associated with the EDG.

Clicking the EDG # hyperlink takes you to the Electronic Case File - Details page. If there is ECF information for the EDG, it appears here.

Clicking the Case # hyperlink takes you to the Case - Search/Summary page and displays information for the case containing that EDG.

Notes/Warnings/Tips

The page displays the employee number of the staff member who owns the EDG. It also displays the employee number of the staff member who last disposed the EDG.

The EDG # field in the EDG Search Criteria field requires a nine-digit number. EDGs converted from legacy systems have less than nine digits. You must add 0's to the beginning of the number to create a nine-digit number. For example, if the number for the converted EDG is 12345, you must record 00012345 in the field. Otherwise, TIERS does not recognize the number and gives an error message.

Clicking any of the listed individuals takes you to the Inquiry Individual Summary page for that individual.

The EDG Mailing Address field displays any temporary benefit mailing address for the EDG. This information comes from the Issuance Details unit in Data Collection.

Outcomes

The page displays EDG and individual information.

Alerts/Correspondence/Reports

None.

Finding Eligibility Information

Overview
Use this process to view existing budget and eligibility determination results for an Eligibility Determination Group (EDG) or Certification Group (CG).

Activity
Use the Eligibility Search function, located in the Eligibility area of the Left Navigation Bar. This displays the Eligibility Search page. Record the case and/or EDG number and the date range for which you want to view historical eligibility. Selecting the Show Cancelled check box displays all eligibility results for an EDG and month, including those that were overwritten by later running of EDBC. Click the Submit button.

TIERS displays the Eligibility Summary page. It displays all EDGs disposed within the specified time period. The page displays the EDG information, listed by benefit month.

Clicking an EDG/month hyperlink takes you to the EDG Summary unit. The unit contains other pages, for example, Notice Reasons, Income, Resources, etc. You can further navigate to individual information and specific budgets. You can then return to the Eligibility Summary page and select another benefit month.

Notes/Warnings/Tips
If there is no eligibility history for the period in question, TIERS displays an error message.

Outcomes
TIERS retrieves and displays month-by-month eligibility information for the specified period.

Alerts/Correspondence/Reports
None.

Finding Hearing Information

Overview

Use this process to find summary information for an existing hearing.

Activity

Use the Search/Maintain Appeal function, located in the Hearing area of the Left Navigation Bar. This displays the Search Appeal page. Record the appropriate search criteria and click the Search button.

Choose the desired appeal by clicking the check box beside the listing. Click the Update button.

If the Form 4800 has not yet been generated, TIERS takes you to the Add/Update Appeal logical unit of work. You can view the other pages that are part of that unit.

If the Form 4800 has been generated, TIERS takes you to the Maintain Appeal logical unit of work. Pages appear in view only mode. Use the Next button to move through pages.

Notes/Warnings/Tips

If you are not the staff member for the EDG or a Hearing Officer, information appears in view-only mode.

Outcomes

TIERS displays either the Add Appeal or Maintain Appeal logical unit of work.

Alerts/Correspondence/Reports

None.

Finding Individual Information

Overview

Use this process to find summary information for a certified or denied individual in TIERS.

Activity

Use the Individual function, located in the Inquiry area of the Left Navigation Bar. This displays the Individual - Search page.

Record the individual's SSN, name or other criteria and click the Search button. You can record a partial last name or even a single letter in the Last name field. Matching individuals appear in the Search Results area. For each matching individual, the displayed record includes the case number.

Clicking an individual name hyperlink takes you to the Individual Summary page, which shows individual detail. It also lists EDGs containing the individual. Clicking an EDG hyperlink takes you to the EDG Summary page.

Clicking a case number hyperlink takes you to the Case Summary page.

The Individual # field, in the upper left corner of the page, allows you to navigate to other individual pages. Though the field is display only, it opens a drop-down list when you place your cursor over the field. This drop-down list contains choices for individual medical summaries that you can access.

Clicking the appropriate selection takes you to the corresponding page. On that page, you can again hover the cursor over the Individual # and select another page from the drop-down menu.

Notes/Warnings/Tips

If the Data Control Unit (DCU) has merged or separated this individual record, that information is indicated here.

Pended application information for an individual is not displayed through the Inquiry area of the Left Navigation Bar. Refer to Application Registration for information on pended applications.

Outcomes

The page displays individual summary information, including associated EDGs.

Alerts/Correspondence/Reports

None.

Managed Care

Overview
Authorized staff use this process to view and update individual managed care information. This includes STAR, NorthSTAR and STAR+PLUS information. These are only available if the individual lives in the catchment area for those programs.

An interface with the appropriate system provides TIERS with individual managed care information. TIERS displays the individual information for staff to view and update. Staff determine and verify Managed Care time frames, plan enrolled and PCP assignment. STAR+PLUS staff can also modify Managed Care time frames.

Activity
You access Managed Care from the pop up menu that appears on the Individual - Summary page (from the Left Navigation Bar, choose Inquiry - Individual). This menu appears when you "hover" the cursor over the Individual # field on that page. Clicking the Managed Care option on the menu takes you to the Managed Care - Summary page. Selecting a record and clicking its Edit icon takes you to the Individual - Managed Care page.

Updating Records

On the Individual - Managed Care, click the Edit icon for the record you want. This takes you to the appropriate Detail page. Update the page as appropriate and click Submit to save the updates.

Notes/Warnings/Tips
None.

Outcomes
TIERS displays the managed care details. Authorized staff can update information.

Alerts/Correspondence/Reports
None.

Management Alert Summary

Overview
Authorized staff use this process to view a summary of outstanding alerts for an office, unit or employee.

Activity
Choose Management Alert from the Inquiry Functional Area on the Left Navigation Bar. The Inquiry - Management Alerts page appears.

Record the desired search criteria. Unit and Office are required. Authorized staff can search by employee name, unit, office, alert type or any combination of those criteria. After recording criteria, click Search.

The Search Results area displays the number of alerts by type, employee, unit and office. The total number of outstanding alerts appears at the bottom of the Count column.

Notes/Warnings/Tips
This page only displays the number of outstanding alerts. Authorized staff view the actual alerts on the Outstanding Alerts page (see Searching and Viewing Alerts).

Outcomes
The page displays the number of outstanding alerts, listed by alert type, employee, unit and office.

Alerts/Correspondence/Reports
None.

Management Eligibility Summary

Overview

Authorized staff use this process to view a summary of EDGs for an office, unit or employee.

Activity

Choose Management Eligibility from the Inquiry Functional Area on the Left Navigation Bar. The Inquiry - Summarized Eligibility page appears.

Record the desired search criteria. Office, Unit, Office, and EDG Status are required. After recording criteria, click Search.

The Search Results area displays the number of EDGs, listed by EDG status, employee, unit and office. A total number appears at the bottom of the Count column.

Notes/Warnings/Tips

EDG Status can be Approved, Denied (denied in initial month), Denied Ongoing (denied in an ongoing month) or Pend (awaiting verifications).

Outcomes

The page displays the number of EDGs by EDG status, employee, unit and office, along with a total count.

Alerts/Correspondence/Reports

None

Viewing EDG Composition

Overview

Use this process to view the EDG composition determined by EDBC (Eligibility Determination Benefit Calculation).

Activity

Eligibility results normally appear when you run EDBC for a case. You can also view past historical EDG composition by completing the Eligibility Search page, specifying the period for which you want to view results.

The Eligibility Summary page appears first, and lists all EDGs within the case.

You can select an EDG and go to the EDG Summary page.

Eligibility Summary Page

The Eligibility Summary page contains a tab for each major program of assistance. The page lists the EDG(s) for that program, month by month. It displays the non-financial, resource and financial results for the EDG for that month. Clicking on an EDG takes you to the EDG Summary page for the selected EDG.

Clicking the Re-Build EDG button causes the EDG portion of EDBC to rerun and attempt to reconfigure EDG composition, within program rules. TIERS allows you to do this in certain situations where policy allows some reconfiguration of the EDG when the initial configuration caused the EDG to be ineligible. If this option is available, the button is enabled; otherwise it is disabled. EDBC attempts to rebuild the EDG, and displays the results on the Eligibility Summary and EDG Summary pages.

If financial eligibility has not yet been run, the Run EDBC button and the Dispose button are disabled.

EDG Summary Page

The EDG Summary page displays the composition of a specific EDG. It lists all individuals in the EDG and their participation statuses (eligible adult, ineligible child, and so on). It lists included and excluded members.

A series of indicators appear just above the EDG member listing, and below the page header. They are labeled, EDG, Non Financial, Resource and Financial, respectively. These indicate which portion(s) of EDBC have been run for this EDG. A portion that has been run displays in a dark background. A portion that has not yet been run displays in a light background.

Within the logical unit of work are pages for viewing EDG-level Denial/Non-Certification, Resources, Gross Income and Net Income. Clicking the appropriate tab displays the related page.

Clicking on an individual's name takes you to the Individual Summary logical unit of work and displays the Individual Denial/Non-Certification Reasons page for that individual. You can also view individual Resource, Income and Disqualifications/Penalties pages by clicking the appropriate tab within the group.

Individual and EDG-level resource and income pages are not accessible if those portions of EDBC have not yet been run.

Long Term Care – Inquiry

Viewing Individual Medical Summaries

Overview
Use this process to view summary medical information for an individual. There are various summaries, all accessible from a menu on the Individual Summary page. You reach this information through the Individual Search process.

Many of these summaries allow authorized staff to further reach individual detail pages.

Activity
Use the Individual function to start this process. It is located in the Inquiry area of the Left Navigation Bar.

When the Individual Search page appears, enter the appropriate criteria and click the Search button. Matching records display in the Search Results area. Click the name hyperlink for the desired listing.

The Individual Summary page appears and displays general information for the selected individual. To access the medical pages, place the cursor over the Individual # field (this is known as "hovering" the cursor over the field). A list drops down and displays the available options. Move the cursor to the desired listing and click on it. The respective summary page appears.

You can access these summary pages:

- Exemptions
- Lock-In Enrollment
- Lock-In Utilization
- Medicaid History
- Third Party Resource
- Disqualification
- Managed Care
- Behavioral Managed Care
- Health Steps/Health Care Orientation
- Time Limit
- Hospice Recipient
- Hospice Physician
- Hospice Medicare Pay
- Authorizing Agent
- Delivered Services
- Medical Necessity

- Service Authorization
- Medicare
- Medicaid Summary
- Diagnosis
- Service Plan
- Service Level
- Service Request
- Service Item
- Enrollment
- Copay

If there are no records for that type of item, TIERS displays an error message that no information is available.

Each summary page displays individual information in the upper portion of the page and lists records in the lower portion of the page. In most cases, you can select a record by clicking its Edit icon. If the record was created in TIERS, you go to the corresponding detail page in TIERS. If the record was created in the previous system, you go to a historical detail page. Authorized staff can update or add records when they reach the detail page. Other staff can view the information in read only mode. These detail pages have an icon (🔴)in the upper right that you can click to return to the Individual - Summary page.

To view another medical detail page, hover the cursor over the Individual # field on the appropriate Inquiry page and select another page from the list.

Notes/Warnings/Tips
None.

Outcomes
TIERS displays the selected detail page.

Alerts/Correspondence/Reports
None.

Viewing Provider Information

Overview
Use this function to view a list of service providers.

Activity
Use the Provider function to navigate directly to the logical unit of work. It is located in the Inquiry area of the Left Navigation Bar.

On the Provider - Search/Summary page, enter appropriate search criteria and click Search. Matching records appear in the Providers area. For each provider listing, the page displays provider name and #, service provided, and county in which the provider operates.

Notes/Warnings/Tips
None.

Outcomes
The page displays providers matching the search criteria.

Alerts/Correspondence/Reports
None.