



Iowa Department of Human Services

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December 2, 2011

GENERAL LETTER NO. 14-O-3

ISSUED BY: Division of Field Operations

SUBJECT: Employees' Manual, Title 14, Chapter O, **PJCASE SYSTEM**, Title page, revised; Contents (page 2), revised; and pages 3, 16, 17, 19, 20, 23 through 26, 26a, 27, 28, 44, 61, 62, 85 through 101, 103, 106, 108, 109, 110, 112, 115, 116, 121 through 126, 126a through 126d, and 127, revised.

Summary

Chapter 14-O is revised to:

- ◆ Update system access information.
- ◆ Change references to "Process Pre-FIP" to "Pre-FIP."
- ◆ Replace all references for the "Process Pre-FIP" button to "FIA Menu" button.
- ◆ Correct minor typographical and format errors.
- ◆ Update information on refreshing entries.
- ◆ Remove PROMISE JOBS codes "7," "8," "K," and "L" as a cause for Error 6000 for the FIA SIGN DATE field.
- ◆ Replace all screen shots for the following screens with a current version:
 - PJCase Person
 - FIA Menu
 - FIA Signed Confirmation
 - FIA Not Signed Confirmation
- ◆ Update PJCase Person screen fields to:
 - Update REFERRAL STATUS, FIP STATUS, ACTIVE FIA DATE AND INVOICE RETURN.
 - Add CASE INFORMATION DATE, EFFECTIVE DATE.
- ◆ Update PJCase button descriptions to:
 - Remove PRE-FIP.
 - Add FIA MENU.
- ◆ Update FIA Menu screen ACTIVE FIA DATE field description.
- ◆ Add FIA Menu screen CHANGE ACTIVE FIA DATE button description.

- ◆ Update Expense Request screen field descriptions to reflect changes due to the implementation of KinderTrack as follows:
 - ALLOWANCE TYPE: remove codes "J," "K," and "U."
 - PAY TO PROVIDER: remove codes "J" and "K."
- ◆ Change descriptions for the following Expense Request screen fields to "Inactive field" due to implementation of KinderTrack:
 - DATE CHILD CARE INVOICE RECEIVED
 - OVERDUE RSN
 - DEPENDENT TYPE
 - DAY CARE PROVIDER TYPE
 - DAYCARE REASON
- ◆ Add the section, "Changing an Active FIA Date," under PROMISE JOBS functions. This includes a screen shot for the new Change FIA Date Confirmation screen.
- ◆ Update the step-action chart, "Issuing Payment Directly to a Provider," under PROMISE JOBS functions to remove references to allowance codes "J" and "K" and to the DEPENDENT TYPE, DAY CARE PROVIDER TYPE, and DAYCARE REASON fields and the Expense Dependents screen.
- ◆ Update the LBP TYPE field description for the LBP Start Key Entry screen.
- ◆ Change step-action chart, "Returning a Child Care Invoice," for the Child Care Invoice Return Screen. PROMISE JOBS staff no longer use this screen but it is still accessible in PJCase.
- ◆ Removed the step-action chart, "Recording the Return of an Incomplete Invoice."

Effective Date

Upon receipt.

Material Superseded

This material replaces the following pages from Employees' Manual, Title 14, Chapter O:

<u>Page</u>	<u>Date</u>
Title page	May 18, 2007
Contents (page 2)	August 14, 2009
3, 16	May 18, 2007
17	August 14, 2009
19	May 18, 2007
20, 23-26, 26a, 27, 28, 44, 61, 62, 85	August 14, 2009
86-89	May 18, 2007
90-92	August 14, 2009
93-96	May 18, 2007
97-101, 103, 106, 108	August 14, 2009
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112	August 14, 2009

115, 116	May 18, 2007
120a	August 14, 2009
121	May 18, 2007
122	August 14, 2009
123, 124	May 18, 2007
125, 126, 126a-126e, 127	August 14, 2009

Additional Information

Refer questions about this general letter to your area income maintenance administrator.

Revised December 2, 2011

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Title 14
Chapter 0

PJCASE SYSTEM



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Functions Used by Both IM and PJ Staff

This section contains information that both income maintenance and PROMISE JOBS workers need to know in order to use the PJCase system effectively.

Accessing the System for the First Time

IM staff who are authorized to update in the ABC system are also authorized to use the PJCase system. To get PJCase access and ABC update authorization for DHS IM staff, the IM supervisor completes *Electronic Security Information*, form 470-2078, and selects "ABC Update" in the CICST001 field on page 2.

To get PJCase authorization for a DHS employee who has view-only access to ABC, the supervisor completes form 470-2078, writing "PJCase" in the "Check Requests" section and selects "IABC View" in the CICST001 field on page 2.

To get PJCase authorization for PROMISE JOBS staff, the PJ supervisor completes and sends IWD's electronic *Access Request* for the employee. An IWD PROMISE JOBS coordinator completes and returns the *Access Request* to the PJ supervisor once the employee's access has been authorized or denied.

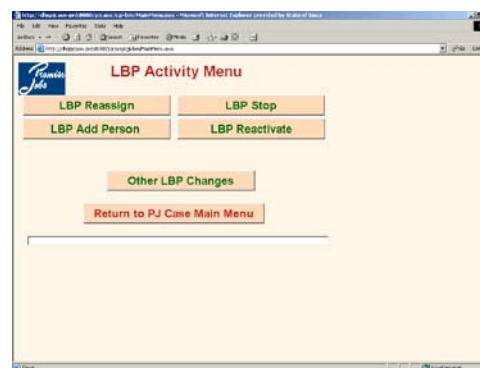
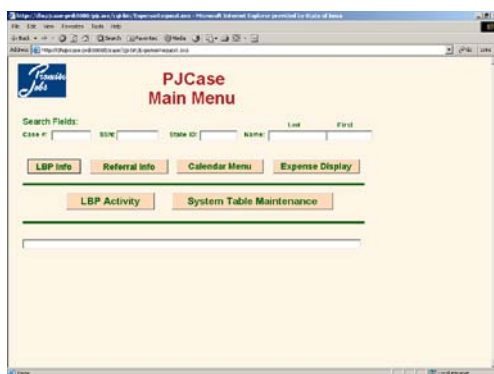
To log in to PJCase for the first time, follow these steps:

Step	Action
1	<p>Access the PJCase system by clicking on the link provided by the DHS Division of Data Management.</p> <ul style="list-style-type: none">◆ For IM workers, a link is located on the DHS Field IM Staff SharePoint site.◆ For PROMISE JOBS workers, a link is available in the PJCase folder located in the PJ Library. Once you have accessed the Welcome-PJCase Login screen, you should bookmark the link in the "Favorites" folder in the Internet Explorer tool bar.

Changing or Canceling an Entry

If you are still on the screen in which you made entries, make any necessary changes before clicking on the button that submits the entries. Clicking on CANCEL at any time before you submit your entries will erase your entries and return you to the PJCase Main Menu or the LBP Activity Menu.

Once you have clicked on a button to submit your entries, a confirmation page will display. You have the opportunity to either confirm your entries or click CANCEL to return to the PJCase Main Menu or the LBP Activity Menu.



Changing or Canceling an LBP Entry

If you have confirmed any LBP entry (LBP Start, LBP Stop, LBP Reassign), you may change or delete the entry **on the same day** that you made the entry, after you “refresh” the entry. See [Refreshing an Entry](#).

Refreshing an Entry

Since PJCase processes and updates these transactions in real time, a “refresh” function is needed to allow IM and PROMISE JOBS staff to correct an entry made on the same day.

The “refresh” function applies to LBP transactions made in the Pre-FIP section of the FIA Menu in PJCase. The “refresh” function does not apply to PROMISE JOBS expense allowances and the function does not interfere with any ABC transactions made by IM in the same day.

When entry is made to refresh an LBP transaction from an LBP Display screen, the refresh function erases all transactions made on any LBP on the case.

When entry is made to refresh a Pre-FIP entry from a person's FIA Menu screen, the "refresh" function erases only the FIA entries made on that person.

Refreshing an entry resets the individual information in the systems (PJCase and ABC) to the way that they existed after the previous ABC nightly batch processing. It also generates an email to the opposite worker (i.e., if PROMISE JOBS refreshes transactions, the IM worker gets an email and vice versa) except when the worker of record is the worker making the refresh entry.

The email is needed to alert the other worker because:

- ◆ The other worker may also have made transactions in PJCase that would be affected by the "refresh," or
- ◆ The IM worker may have made entries in ABC that may be affected by the "refresh." Even though the refresh function does not affect IM transactions in ABC, the IM worker may have made the ABC transaction after "real time" updates from the refreshed transactions.

When ABC generates a *Notice of Decision* (NOD) and benefits as a result of IM's entry, this may conflict with the refreshed FIP and LBP status. The IM worker may need to take additional actions in ABC as the result of the PJCase refresh entry.

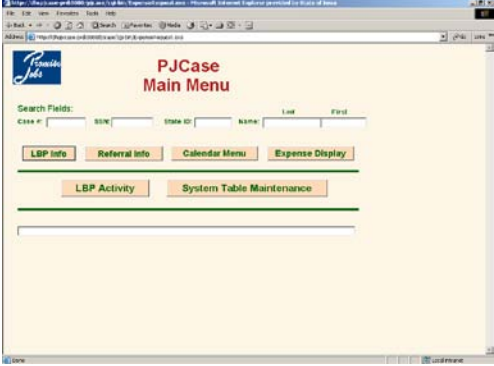
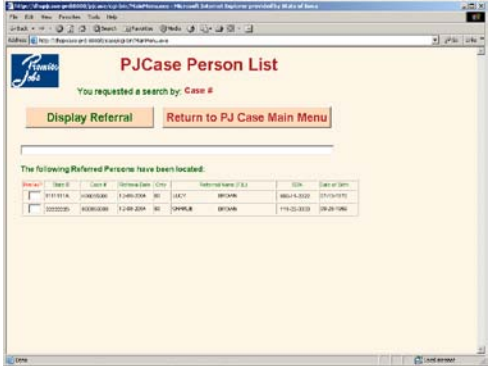
In the morning, a PJ worker makes entries to stop an LBP due to reason code "R." PJCase deactivates the LBP, changes the FIP status code to "N," and sends the IM worker an email. The IM worker makes entries in ABC to approve the pending FIP application.

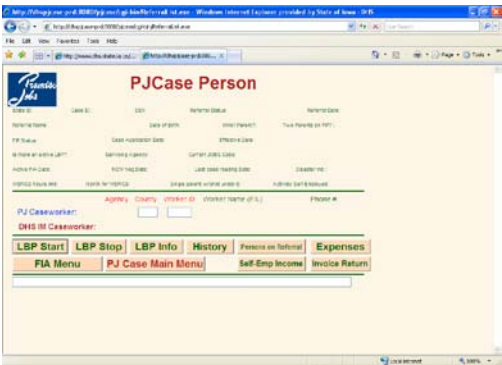

In the afternoon, the PJ worker realizes the stop entry was incorrect and uses the "refresh" function. Processing of the "refresh" entry reactivates the LBP, changes the FIP status code back to "I," and sends an email to the IM worker. Since ABC processes in real time, ABC will generate an NOD and FIP benefits based on IM's approval entry even though the LBP is active again.

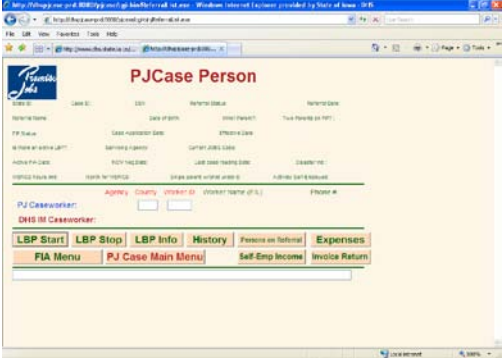
The IM worker must make an entry in ABC to generate an NOD that says FIP is canceled due to the LBP. FIP issued as a result of the approval is subject to recoupment.

To "refresh" an LBP entry made on the current day, follow these steps:

To “refresh” a Pre-FIP entry made on the current day, follow these steps:

Step	Action
1	 <p>On the PJCase Main Menu screen, enter the person’s case number, social security number, state identification number, or name in the applicable SEARCH field. Select REFERRAL INFO.</p> <p>If there is more than one referred person on the case, the PJCase Person List screen will be displayed. Go to Step 2.</p> <p>If there is only one referred person on the case, the PJCase Person screen will be displayed. Go to Step 3.</p>
2	 <p>On the PJCase Person List screen, enter an “X” in the DISPLAY? column next to the name of the person who chose the LBP. Select DISPLAY REFERRAL. The system displays the PJCase Person screen.</p>

Step	Action
3	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ FIA MENU, to access the FIA Menu (go to Step 4), or ◆ RETURN TO PJCASE MAIN MENU, to cancel your entry.
4	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ REFRESH REFERRAL, to display the Refresh PJCase Person Confirm screen, or ◆ RETURN TO PJCASE PERSON, to stop the system from “refreshing” the FIA entries you made earlier in the day.

Step	Action
	<p>On the PJCase Person List screen, enter an "X" in the DISPLAY? column next to the name of the person who chose the LBP. Select DISPLAY REFERRAL. The system displays the PJCase Person screen.</p> 

The PJCase Person screen contains the following fields:

- ◆ **STATE ID:** Displays the referred person's state identification number (SID.)
- ◆ **CASE ID:** Displays the referred person's ABC case number.
- ◆ **SSN:** Displays the referred person's social security number.
- ◆ **REFERRAL STATUS:** Displays the person's status. Valid statuses are:

Exempt	Person is exempt from PROMISE JOBS. Current JOBS code is "1."
Inactive	Person is not actively referred to PROMISE JOBS. Current JOBS code is "X" or "Y."
Applicant	Person is applying for FIP. Current JOBS code is "3" or "A."
Hardship applicant	Person has used 60 months of FIP and is applying for a six-month hardship exemption period. Current JOBS code is "4" or "B."
Applicant with LBP	Person has an active LBP and is applying for FIP. Current JOBS code is "U" or "V."
Hardship applicant with LBP	Person has an active LBP, has used 60 months of FIP, and is applying for a six-month hardship exemption period. Current JOBS code is "W" or "T."

Participant	Person is receiving FIP, or is a parent receiving for children in the home. with JOBS code is "8" or "L." FIP status is "A," "B," "C" or status code is "F" or "I" with an "in-home" indicator of "Y."
Participant/hardship	Person has used 60 months of FIP and is eligible for a six-month hardship exemption period. Current JOBS code is "7" or "K." FIP status is "A," "B," "C" or status is "F" or "I" with an "in-home" indicator of "Y."

- ◆ **REFERRAL DATE:** Displays the date of the most recent "original" referral or "re-referral."

- ◆ **REFERRAL NAME:** Displays the name of the referred person.

- ◆ **DATE OF BIRTH:** Birth date of the referred person.

- ◆ **MINOR PARENT?:** Indicates whether the person's minor parent situation status code in the MINOR field on the ABC TD03 screen is a "4."

Yes Person is coded "4" in ABC, indicating that the person is living in a three-generation FIP household.

No Person is not coded "4" in ABC, indicating the person either is:

- ◆ Not a minor parent, or
- ◆ A minor parent who is living independently or with self-supporting parents, a legal guardian or a nonparental relative or who has been married).

- ◆ **TWO PARENTS ON FIP?:** Indicates if both parents are on FIP.

Yes Case aid type is "35-0" on the ABC TD01 screen.

No Case aid type is not "35-0."

- ◆ **FIP STATUS:** Displays the current FIP status of the referred person and is updated in real time. When an IM worker makes entries to activate FIP on a closed case, the FIP STATUS field will immediately show ACTIVE on the PJCase Person screen.

- ◆ **CASE APPLICATION DATE:** Displays the date of the most recent FIP application if the person has an active individual FIP status.

NOTE: When an IM worker makes entries to activate FIP on a closed case, the FIP STATUS will immediately show ACTIVE on the PJCase Person screen. However, the CASE APPLICATION DATE field will not display the date until after the next nightly batch processing.

- ◆ **EFFECTIVE DATE:** Displays the effective date if the person has an active individual FIP status following the nightly ABC update.

NOTE: When an IM worker makes entries to activate FIP on a closed case, the FIP STATUS will immediately show ACTIVE on the PJCase Person screen. However, the EFFECTIVE DATE field will not display the date until after the next nightly batch processing.

- ◆ **IS THERE AN ACTIVE LBP?:** Indicates whether this person is the one who chose the active LBP.

Yes This person chose the active LBP.

No This person did not choose the active LBP. The person is active on another person's LBP, but is not the person who chose the LBP.

- ◆ **SERVICING AGENCY:** Identifies the agency providing PROMISE JOBS services.

IWD Iowa Workforce Development

BRS Bureau of Refugee Services

- ◆ **CURRENT JOBS CODE:** Displays the person's current JOBS referral code. Separate referral codes are used for Iowa Workforce Development (IWD) or Bureau of Refugee Services (BRS). Valid referral codes are:

IWD	BRS	Description
1	1	Exempt
3	A	Mandatory applicant
4	B	Mandatory, hardship applicant
U	V	Mandatory applicant with an LBP
W	T	Mandatory hardship applicant with an LBP
8	L	Mandatory participant
7	K	Mandatory participant with a hardship
X	Y	Unknown or not active

- ◆ **ACTIVE FIA DATE:** Displays the date that the person signed a family investment agreement (FIA). PROMISE JOBS enters this date using options in the FIA MENU. The date remains entered as long as FIP remains active and the person's referral status remains mandatory.

The system removes the date if:

- FIP is canceled or denied; or
- The person's referral status is changed from "mandatory" to "exempt" or to "not active."

If FIP is canceled for failure to return a complete *Review/Recertification Eligibility Document (RRED)*, the system will not remove the date when the cancellation occurs. If FIP is not reinstated by the second day of the next month, the system will remove the active FIA date at that time.

If FIP is canceled and is later reinstated or reopened without an application, the system will return the previous active FIA date to the field.

When a FIP application was denied but is later approved, the system will use the previously stored active FIA date except when the case was previously pended and is being re-pended.

NOTE: If an FIA is renegotiated and there has been no break in assistance, PROMISE JOBS does not update this field with the new date. The original active FIA date still applies.

If there has been a break in assistance of one month or less and the FIA is reinstated, PROMISE JOBS sends form 470-3300, *Your Family Investment Agreement Reminder*, and a copy of the existing FIA to the applicant to "reinstatement" the existing FIA. The FIA is not changed or resigned. PROMISE JOBS should re-enter the original start date of the existing FIA.

If there has been a break in assistance of one month or less, and the existing FIA is amended or a new FIA is signed, PROMISE JOBS enters the date that the new or amended FIA is signed.

If there has been a break in assistance of more than one month, PROMISE JOBS updates the ACTIVE FIA DATE field using the FIA MENU with the new date the FIA is signed.

- ◆ **INDV NEG DATE:** Displays the last day of FIP eligibility from the TD03 FIP DATE field in ABC when the person is inactive for FIP.
- ◆ **LAST CASE READING DATE:** Displays the date the case was pulled for the random sample PJCase reading tool. Date is displayed in MM-DD-CCYY format only when the case has been pulled.
- ◆ **DISASTER IND:** Coding indicates if the person is a victim of a Department-declared disaster. Currently the field is used only for two hurricane disasters.

Blank	No
K	Katrina victim
R	Rita victim
- ◆ **WEP/CS HOURS LIMIT:** Displays the maximum monthly number of hours of participation in work experience or community service for all FIA-responsible persons in the family.

- ◆ **MONTH FOR WEP/CS:** Displays the month and year for which the WEP/CS HOURS LIMIT applies.
- ◆ **SINGLE PARENT W/CHILD UNDER 6:** Displays:
 - Y When the referred person is a single parent with a child under the age of 6.
 - N or blank When the referred person does not have a child under the age of 6 or is not a single parent household.
- ◆ **ACTIVELY SELF-EMPLOYED:** Indicates whether or not there is self-employment income on the person's ABC-BCW2 screen. Valid values are:
 - Y Self-employment income is present on the person's ABC-BCW2 screen.
 - N or blank Self-employment income is **NOT** present on the person's ABC-BCW2 screen.
- ◆ **PJOBS CASEWORKER:** Identifies the PROMISE JOBS worker by:
 - **AGENCY.**
 - 1 IWD – Iowa Workforce Development
 - 2 BRS – Bureau of Refugee Services
 - **COUNTY.** This field displays either the client's county of residence or the county of the PROMISE JOBS worker.

PJCase automatically populates this field with the residence county from the TD01 CO RES FIELD of the person's ABC case and updates the entry when an IM worker changes the entry in ABC.

The system allows the PROMISE JOBS worker to assign the PJCase Person records of referred persons to the worker's own county and worker ID.
 - **WORKER ID.** PJ SDR Mailbox or PROMISE JOBS Worker ID. (This field allows PROMISE JOBS staff to make an entry.)

PJCase populates this field with the four-character identifier designated for the SDR Mailbox of the person's county of residence. Regional mailbox IDs begin with "MB" and end with two-digits to define the SDR number. For example, the mailbox ID for SDR 01 = MB01.

Once a referred person is assigned to a PROMISE JOBS worker, the worker updates the PJCase Person records to the correct worker ID (STDK ID) and county.

- **WORKER NAME (F/L).** The information displayed in this field is determined by the following:
 - If COUNTY and WORKER ID entries are system-determined, the county name appears twice in this field.
 - If PROMISE JOBS staff enter the COUNTY and WORKER ID, the name of the assigned PROMISE JOBS worker is displayed in this field.
- **PHONE #.** The phone number displayed is determined by the following:
 - If COUNTY and WORKER ID entries are system-determined, the phone number for the designated IWD county office appears in this field.
 - If PROMISE JOBS staff enter the COUNTY and WORKER ID, the phone number of the worker is displayed in this field.
- ◆ **DHS IM CASEWORKER:** Identifies the IM worker.

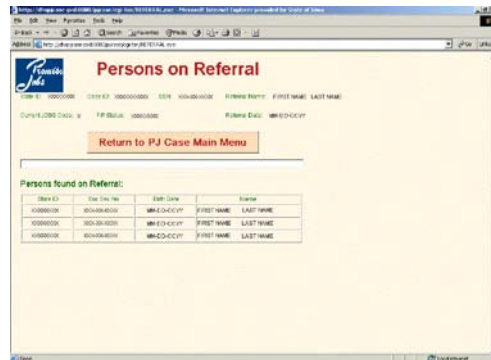
AGENCY	4
COUNTY	Displays county number from the co/wkr field on the ABC TD01 screen.
WORKER ID	Displays the four-character worker number of the IM worker assigned to the case, as indicated in the co/wkr field on the ABC TD01 screen.
WORKER NAME	Displays the name of the IM worker
PHONE #	Displays the phone number of the IM worker.

The PJCase person screen contains the following action buttons:

- ◆ **UPDATE PJ WORKER:** This button is visible only for PROMISE JOBS workers. The button is used to update the PJCase person screen with the worker's ID (STDK ID), once the case is assigned to an ongoing PROMISE JOBS caseworker.
- ◆ **LBP START:** Select to start an LBP for the referred person. This action is available to PROMISE JOBS staff only.
- ◆ **LBP STOP:** Select to stop an active LBP chosen by the PJCase person. This action is available to both IM and PROMISE JOBS staff.
- ◆ **LBP INFO:** Select to view status and information regarding an active or inactive LBP **chosen by** the PJCase person. This action is available to both IM and PROMISE JOBS staff.

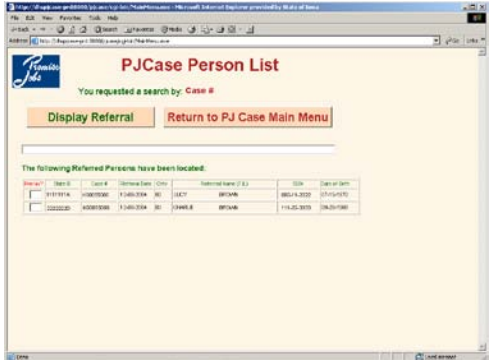

To view an LBP that includes the referred person but was chosen by another person, access LBP INFO from the PJCase Main Menu instead of the PJCase Person screen.

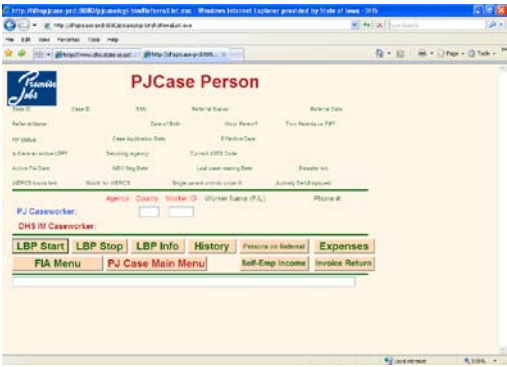
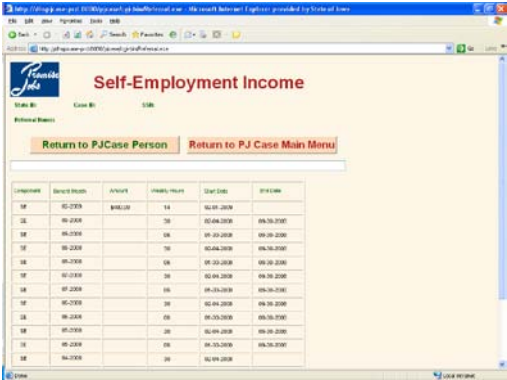
- ◆ **HISTORY:** Select this action to view a history of referral changes for the person. This action is available to both IM and PROMISE JOBS staff.
- ◆ **PERSONS ON REFERRAL:** Select this action to view the Persons on Referral screen. This action is available to both IM and PJ staff.



The Persons on Referral screen lists the referred person and that person's dependents. It may also incorrectly display the following people:

- The referred person's spouse, if there is an LBP, or
 - Dependents that have dropped off FIP since the referral was made, or
 - Persons who have social security numbers of all nines or zeros if PROMISE JOBS has added them in order to pay an expense.
- ◆ **EXPENSES:** Select to issue expense allowance payments for the referred person. Available to PROMISE JOBS staff only.
 - ◆ **FIA MENU:** Select to access the FIA Menu screen to record a mandatory FIP applicant's completion or failure in signing a Family Investment Agreement when the applicant has **not** chosen an active LBP. Available to PROMISE JOBS and Central Office staff.
 - ◆ **PJCASE MAIN MENU:** Select to return to the PJCase Main Menu. Available to both IM and PROMISE JOBS staff.
 - ◆ **SELF-EMP INCOME:** Select to view the Self-Employment Income screen, which displays up to an 18-month history of self-employment by benefit month. If the person doesn't have self-employment, error message 5012, "No self-employment income information found for this referral," is displayed.
 - ◆ **INVOICE RETURN:** Obsolete button.

Step	Action
2	 <p>On the PJCase Person List screen, enter an "X" in the DISPLAY? column next to the name of the person who chose the LBP. Select DISPLAY REFERRAL. The system displays the PJCase Person screen.</p>
3	 <p>On the PJCase Person screen, click on the LBP STOP button. The system displays the LBP - Stop screen. Follow the instructions in the table under the heading, Completing Stop LBP Function From the LBP – Stop Screen, to complete the Stop LBP function.</p>

Step	Action
3	 <p>On the PJCase Person screen, select SELF-EMP INCOME to move to the Self-Employment Income screen.</p>
4	 <p>When finished viewing the self-employment income, select either:</p> <ul style="list-style-type: none"> ◆ RETURN TO THE PJCASE PERSON, to return to the PJCase Person Screen, or ◆ RETURN TO PJ CASE MAIN MENU, to return to the PJCase Main Menu screen.

Income Maintenance Functions

This section provides specific instructions for functions in PJCase used by income maintenance staff.

Adding a Person to an LBP

Use the LBP Add Person function to add children and parents to an active limited benefit plan (LBP) when the person was not previously included in the LBP and the child or parent lives with the person who chose the LBP. When the person to be added is a child on a case with two parents and both of them have an active LBP, you must make separate entries to add the child to each parent's LBP.

If the child or parent is listed on the LBP Display screen of the LBP with a stop reason and stop date, use the LBP Reactivate function to reactivate the LBP for the child or parent.

Before you can use PJCase to add a person to an active LBP, the person:

- ◆ Must have a state identification number;
- ◆ Must be attached to the ABC case with the LBP (listed on the ABC TD07 screen);
- ◆ Cannot be active for FIP (status code "A," "B," "C," or "D") on any other case;
- ◆ Cannot be active in an LBP on any other case.

NOTE: If the person is not attached to the case, make the following entries on the ABC TD03 screen to attach them:

- ◆ If the person already has TD03 information in ABC, use an entry reason of "C." If not, use entry reason "A."
- ◆ Enter or update all applicable demographic information for the person. Enter deprivation and paternity coding only when approving FIP or Medicaid.
- ◆ Do not enter a status code for the person unless the person is to be pended or activated for a program.

- I Update and confirm the ABC entries before using the LBP Add Person function to add the person to the LBP.

PROMISE JOBS Functions

This section provides instructions for the PJCase functions used by PROMISE JOBS staff.


Assigning PJCase Person to PROMISE JOBS Caseworker

Each person who is currently referred to PROMISE JOBS has a PJCase Person screen in PJCase. The PJCase Person screen has a PJ Caseworker section that includes a field for the AGENCY, COUNTY, WORKER ID, WORKER NAME, and PHONE #.

PJCase will assign the PJCase Regional Mailbox to each referred person's PJCase Person screen as a "default" PJ caseworker for the purpose of sending informational emails intended for PROMISE JOBS staff.

Once the case is assigned to an ongoing PROMISE JOBS caseworker, the worker updates the PJCase Person screen with the WORKER ID (STDK ID).

Use the following steps to update the PJ Caseworker fields:

Step	Action
1	Access the person's PJCase Person screen.
2	 <p data-bbox="378 1507 943 1539">Enter information in the following fields:</p> <ul style="list-style-type: none"> <li data-bbox="378 1560 529 1587">◆ COUNTY <li data-bbox="378 1591 699 1619">◆ WORKER ID (STDK ID)


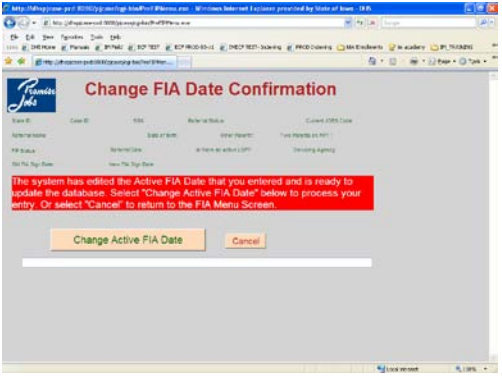
Step	Action
	<p>Click the UPDATE PJ WORKER button.</p> <p>The PJCase Person screen will immediately reflect your Agency, County, Worker ID, Worker Name and Phone #. Any PJCase generated emails regarding the referred person will be sent directly to you.</p> <p>The IM worker can use the PJCase Person screen to identify you as the PJ worker working with the referred person.</p>

NOTE: When the IM worker changes the person's county of residence in the ABC system, PJCase will assign the PJ Caseworker fields to the PJCase Regional Mailbox of the newly entered county of residence.

Changing an Active FIA Date

Follow the steps below to make PJCase entries to change an active FIA date:

Step	Action
1	Access the person's PJCase Person screen.
2	<div data-bbox="378 1087 857 1430" data-label="Image"> <p>The screenshot shows a web browser window with the title 'PJCase Person'. The page contains several fields for personal information such as Case ID, SSN, Date of Birth, and Agency. At the bottom of the page, there is a menu with several buttons: 'LBP Start', 'LBP Stop', 'LBP Info', 'History', 'FIA Menu', 'PJ Case Main Menu', 'Self-Emp Income', and 'Invoice Return'. The 'FIA Menu' button is highlighted in red.</p> </div> <p>On the PJCase Person screen, select the FIA MENU button. This will display the FIA Menu screen.</p>

Step	Action
3	 <p>Enter the current FIA date in the ACTIVE FIA DATE field then press the CHANGE ACTIVE FIA DATE button.</p> <p>NOTE: The system does not issue an email to the IM worker when this field is used to update the FIA date. A PROMISE JOBS worker who uses this process to record a new FIA Signed Date because PJCase is already displaying an Active FIA date must send an email to the IM worker notifying the worker that the FIA has been signed.</p>
4	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ CHANGE ACTIVE FIA DATE, to update the FIA date, or ◆ CANCEL, to return to the FIA Menu screen.
5	<p>Successful processing of FIA SIGNED entries records the Active FIA Date in the PJCase system.</p>

Pre-FIP Entries: Applicant Did Not Choose LBP

PROMISE JOBS staff use the PJCase Person screen's FIA MENU function to access the FIA Menu screen to record a mandatory FIP applicant's completion or failure in signing a Family Investment Agreement (FIA) when the applicant has **not** chosen an active LBP. The FIA MENU function is available to only PROMISE JOBS and DHS central office staff.

PROMISE JOBS staff shall make entries within one working day after the referred person signs or fails to sign the FIA. If the applicant chose an active LBP, use the instructions in [Pre-FIP Entries: Applicant Chose LBP](#).

For **applicants**, the FIA must be signed before FIP approval.

- ◆ If a parent (or either parent in a two-parent household) fails to sign an FIA, the entire family is ineligible for FIP.
- ◆ If a mandatory person who is not a parent fails to sign an FIA, only that person is ineligible.

Use the Pre-FIP function to record the applicant's completion of or failure to sign an FIA for an applicant in an active LBP who must sign an FIA before FIP approval when the applicant is not the person who chose the LBP. For the person who chose the LBP, refer to [Pre-FIP Entries: Applicant Chose LBP](#) for instructions to record the completion of or failure to sign an FIA.

The screenshot shows a web browser window displaying the 'FIA Menu' application. The browser's address bar shows the URL: `http://dhspjcase-prd:8080/pjcase/cgi-bin/Referral.exe`. The application interface includes a header with the 'Promise Jobs' logo and the title 'FIA Menu'. Below the header, there are several input fields for user information: State ID, Case ID, SSN, Referral Status, Current JOBS Code, Referral Name, Date of Birth, Minor Parent?, Two Parents on FIP?, FIP Status, Referral Date, Is there an active LBP?, and Servicing Agency. The main content area is divided into sections. The 'Pre-FIP' section contains two buttons: 'FIA Signed' and 'FIA Not Signed', followed by a text input field for 'FIA Sign Date'. The 'Active FIP' section contains a button labeled 'Change Active FIA Date' and a text input field for 'Active FIA Date'. At the bottom of the form, there are two buttons: 'Refresh Referral' and 'Return to PJCase Person', with a text input field below them. The browser's status bar at the bottom indicates 'Local intranet' and '100%' zoom.

The FIA Menu screen contains the following fields:

- ◆ **STATE ID:** Displays the referred person's state identification number (SID).
- ◆ **CASE ID:** Displays the referred person's ABC system case number.
- ◆ **SSN:** Displays the referred person's social security number.
- ◆ **REFERRAL STATUS:** Displays the person's referral status. Valid statuses are:

Applicant	Person is applying for FIP and current JOBS code is "3" or "A."
Hardship applicant	Person has used 60 months of FIP and is applying for a six-month hardship exemption period. Current JOBS code is "4" or "B."
Applicant with LBP	Person has an active LBP and is applying for FIP. Current JOBS code is "U" or "V."
Hardship applicant w/LBP	Person has an active LBP, has used 60 months of FIP, and is applying for a six-month hardship exemption period. Current JOBS code is "W" or "T."
Participant	Person is receiving FIP, or is a parent receiving for children in the home, and current JOBS code is "8" or "L." (FIP status is "A," "B," "C" or status code is "F" or "I" with an "in-home" indicator of "Y.")
Participant/hardship	Person has used 60 months of FIP and is eligible for a six-month hardship exemption period and current JOBS code is "7" or "K." FIP status is "A," "B," "C" or "E," or status is "F" or "I" with an "in-home" indicator of "Y."
- ◆ **CURRENT JOBS CODE:** Displays the person's current JOBS referral code. There are separate referral codes for Iowa Workforce Development (IWD) and Bureau of Refugee Services (BRS), as follows:

IWD	BRS	Description
1	1	Exempt
3	A	Mandatory applicant
4	B	Mandatory, hardship applicant
U	V	Mandatory applicant w/LBP
W	T	Mandatory hardship applicant w/LBP
8	L	Mandatory participant
7	K	Mandatory participant w/hardship
X	Y	Unknown or not active

- ◆ **REFERRAL NAME:** Displays the name of the referred person.
- ◆ **DATE OF BIRTH:** Birth date of the referred person.
- ◆ **MINOR PARENT?:** Indicates whether the person's minor parent status is coded "4" in the MINOR field on the ABC TD03 screen.
 - Yes Person's status is "4," indicating that the person is living in a three-generation FIP household.
 - No Person is not coded "4," indicating the person either:
 - ◆ Is not a minor parent, or
 - ◆ Is a minor parent but is living independently or with self-supporting parents, a legal guardian, or a nonparental relative or has been married.
- ◆ **TWO PARENTS ON FIP?:** Indicates if both parents are on FIP.
 - Yes Case aid-type is "35-0" on TD01 of ABC.
 - No Case aid-type is not "35-0."
- ◆ **FIP STATUS:** Displays the current FIP status of the referred person.
- ◆ **REFERRAL DATE:** Displays the date of the most recent "original" referral or "re-referral."
- ◆ **IS THERE AN ACTIVE LBP?:** Indicates whether the person is the chooser of an active LBP.
 - Yes The person has chosen an active LBP.
 - No The person did not choose the active LBP. The person is active on another person's LBP, but is not the person who chose the LBP.
- ◆ **SERVICING AGENCY:** Identifies the agency providing PROMISE JOBS services.
 - IWD Iowa Workforce Development
 - BRS Bureau of Refugee Services
- ◆ **ACTIVE FIA DATE:** This field is blank for FIP applicants. The Pre-FIP function is intended to record a FIP applicant's completion of or failure to sign an FIA. Once the applicant's FIA date is entered, the FIA SIGN DATE field will display the date.

If there is a date in this field, PJCase will not allow you to use the Pre-FIP function. Enter the current FIA date in the ACTIVE FIA DATE field of the ACTIVE FIP section. See [Changing an Active FIA Date](#) for more information.

NOTE: There is also an ACTIVE FIA DATE field in the ACTIVE FIP section of this screen.

The FIA MENU screen contains the following sections with their respective fields and action buttons:

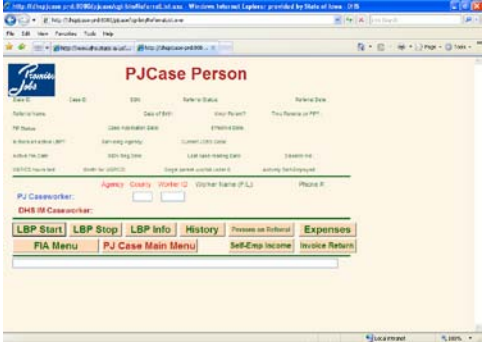
- ◆ PRE-FIP:
 - **FIA SIGNED:** Select to record referred person’s signing of an FIA.
 - **FIA NOT SIGNED:** Select to record the referred person’s failure to attend an interview or failure to sign a FIA.
 - **FIA SIGN DATE:** Displays the date that the applicant signed an FIA.
- ◆ ACTIVE FIP:
 - **CHANGE ACTIVE FIA DATE:** Select to record a different FIA date.
 - **ACTIVE FIA DATE:** Used to enter the date the FIA was signed.


The FIA MENU screen also contains these action buttons:


- ◆ **REFRESH REFERRAL:** Select to refresh all transactions made on the referral on the current day. See [Refreshing an Entry](#) for more information.
- ◆ **RETURN TO PJCASE PERSON:** Select to return to the PJCase Person screen.

FIA Signed

Follow the steps below to make PJCase entries when the FIP applicant has written and signed a FIA:

Step	Action
1	Access the person’s PJCase Person screen.
2	 <p data-bbox="451 1703 1391 1770">On the PJCase Person screen, select the FIA MENU button. This will display the FIA Menu screen.</p>



Step	Action
3	 <p>Enter the date the FIA was signed by the referred person in the FIA SIGN DATE field and select either:</p> <ul style="list-style-type: none"> ◆ FIA SIGNED, to display the FIA Signed Confirmation screen (see Step 4 for screen display), or ◆ RETURN TO PJCASE PERSON, to return to the PJCase Person screen without updating your entries. <p>NOTE: The system does not allow entry of a date in this field when:</p> <ul style="list-style-type: none"> ◆ The field already contains a date and returns the following error message: Error 6003: Invalid entry. FIA SIGNED DATE already exists." See Changing an Active FIA Date for information on updating the field with a new date. ◆ The applicant has chosen an active LBP and returns the following error message: "Error 6001: Invalid entry. Per JOBS code, active LBP. Access LBP Display instead." See Pre-FIP Entries: Applicant Chose LBP. ◆ The person's JOBS code is "1" and returns the following error message: "Error 6000: Invalid entry. Per JOBS code, person is not applying for FIP." Discontinue your entry.


Step	Action
4	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ COMPLETE FIA SIGNED, to update your referral entries, or ◆ CANCEL, to return to the FIA Menu screen.
5	<p>Successful processing of FIA SIGNED entries:</p> <ul style="list-style-type: none"> ◆ Sends an email to the IM worker, alerting the IM worker to proceed with the FIP eligibility determination. ◆ Records the Active FIA Date in the PJCase system. ◆ Changes the “applicant” JOBS code to a valid “participant” code, if the person is pended for FIP, or to the “unknown” status code, if the person is not pended. The IM worker will update the “unknown” code to a valid “participant” code if FIP is approved.

FIA Not Signed

Follow the steps below to make PJCase entries when the FIP applicant has failed to attend an interview or to write and sign a FIA:

Step	Action
1	Access the person’s PJCase Person screen.

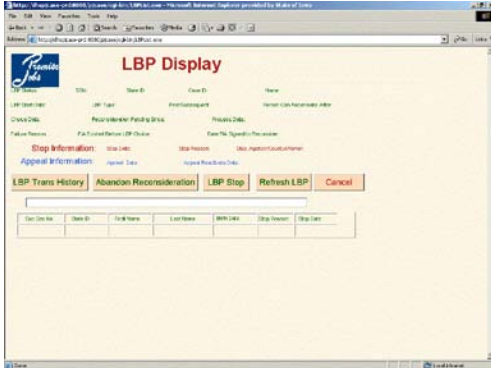
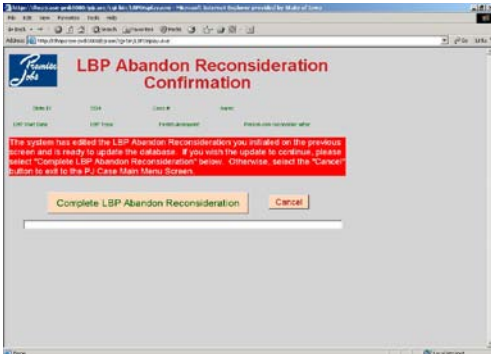
Step	Action
2	 <p>On the PJCase Person screen, select the FIA MENU button. This will display the FIA Menu screen.</p>
3	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ FIA Not Signed, to display the FIA Not Signed Confirmation screen, or ◆ Return To PJCase Person, to return to the PJCase Person screen without updating your entries.

Step	Action
4	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ COMPLETE FIA NOT SIGNED, to update your referral entries, or ◆ CANCEL, to return to the FIA MENU screen.
5	<p>When FIA NOT SIGNED entries are successfully processed, PJCase:</p> <ul style="list-style-type: none"> ◆ Denies the application in ABC and sends a <i>Notice of Decision</i> when the person is a FIP parent and the IM worker has pended the application in ABC. Otherwise, the IM worker must make ABC entries to deny the FIP application and send the notice. ◆ Sends an email to the IM worker to report whether the system denied the application or the IM worker needs to make ABC entries to deny the application. ◆ Changes the person's "applicant" JOBS code to the "unknown."

Pre-FIP Entries: Applicant Chose LBP

Using the Pre-FIP function is not appropriate for applicants that have chosen an LBP. Instead, access LBP Display to either:

- ◆ Stop the LBP when an applicant signs an FIA and, for a subsequent LBP, completes 20 hours of PROMISE JOBS activity. Follow the instructions found at [Functions Used by Both IM and PJ Staff: Stopping an LBP](#).
- ◆ Record that the applicant has abandoned the reconsideration attempt using the following steps.

Step	Action
1	Access the LBP Display screen for the active LBP.
2	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ ABANDON RECONSIDERATION, to proceed to the Abandon Reconsideration Confirmation screen, or ◆ CANCEL, to return to the PJCase Main Menu screen.
3	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ COMPLETE LBP ABANDON RECONSIDERATION, to update your entry, or ◆ CANCEL, to return to the PJCase Main Menu screen.

Step	Action
4	<p>When an LBP ABANDON RECONSIDERATION entry is successfully processed, PJCase:</p> <ul style="list-style-type: none">◆ Denies the application in ABC and sends a <i>Notice of Decision</i> when the person is a FIP parent and the IM worker has pended the application in ABC. Otherwise, the IM worker must make ABC entries to deny the FIP application and send the notice.◆ Sends an email to the IM worker to report if the system denied the application, or if the IM worker needs to make ABC entries to deny the application.◆ Changes the person's "applicant" JOBS code to "unknown."

Issuing Expense Allowance Payments

PROMISE JOBS workers use the Expense Request screen to issue expense allowance payments to providers and to the FIP persons who must participate in PROMISE JOBS activities.

For providers that are registered with the Department of Administrative Services for electronic funds transfer, allowance payments are deposited directly and appear on the Issuance Verification (ISSV) system as "DIR DEP." If electronic funds transfer is not established, the allowance payments are issued by a paper warrant.

For participants who have direct deposit established for their FIP payments, the allowance payments will also be direct deposited and will appear on ISSV as "DIR DEP." If direct deposit is not established, allowance payments will be issued by a paper warrant.

The screenshot shows a web browser window with the URL <http://dhspjcase-prd:8080/pjcase/cgi-bin/ExpenseRequest.exe>. The page title is "Expense Request" and features the "Promise Jobs" logo. The form contains the following fields and controls:

- Referral Name: [Text Field]
- State ID: [Text Field]
- Case ID: [Text Field]
- SSN#: [Text Field]
- Agency: [Text Field]
- Office Number: [Text Field]
- Station Desk: [Text Field]
- JOBS Ref Code: [Text Field]
- Allowance Type: [Dropdown Menu]
- Amount: [Text Field]
- Component Code: [Dropdown Menu]
- Time Period From: [Text Field]
- Thru: [Text Field]
- Date Child Care Invoice received: [Text Field]
- Overdue RSN: [Text Field]
- Dependent Type: [Dropdown Menu]
- Day Care Provider Type: [Dropdown Menu]
- DayCare Reason: [Dropdown Menu]
- Vendor Code: [Text Field]
- Get Provider: [Button]
- Pay To Provider: [Radio Button]
- Provider Vendor Location: [Text Field]
- Vendor Type: [Dropdown Menu]
- Vendor Code: [Text Field]
- Provider Name: [Text Field]
- Street: [Text Field]
- City: [Text Field]
- State: [Dropdown Menu]
- Zip Code (Zip + 4): [Text Field]
- Submit: [Button]
- Cancel: [Button]

The Expense Request screen contains the following fields:

- ◆ **AGENCY:** Displays the agency code of the worker who is logged-in:
 - 1 IWD, or
 - 2 BRS
- ◆ **OFFICE NUMBER:** Displays the four-digit office number of the worker who is logged-in.
- ◆ **REFERRAL NAME:** Displays the referred person's name.
- ◆ **STATION DESK:** Displays the three- or four-digit worker identification number of the worker who is logged-in.
- ◆ **STATE ID:** Displays the referred person's state identification number (SID).
- ◆ **CASE ID:** Displays the referred person's ABC case number.
- ◆ **SSN#:** Displays the referred person's social security number.

- ◆ **JOBS REF CODE:** Displays the person's current JOBS referral code. Separate referral codes are used for Iowa Workforce Development (IWD) and the Bureau of Refugee Services (BRS), as follows:

IWD	BRS	Description
1	1	Exempt
3	A	Mandatory applicant
4	B	Mandatory, hardship applicant
U	V	Mandatory applicant w/LBP
W	T	Mandatory hardship applicant w/LBP
8	L	Mandatory participant
7	K	Mandatory participant w/hardship
X	Y	Unknown or not active

- ◆ **ALLOWANCE TYPE:** Use the dropdown list is to choose the applicable expense allowance. The choices are:

A	Transportation, mileage or actual for PROMISE JOBS; one-time costs such as tires, repairs, etc., for FSSG
B	Tools, PROMISE JOBS and FSSG
C	Uniforms and safety equipment for PROMISE JOBS; uniforms and other clothing needs for FSSG
D	Tuition for PROMISE JOBS
E	Books for PROMISE JOBS
F	Education supplies for PROMISE JOBS
G	Fees, education-related, and birth certificate costs, PROMISE JOBS and FSSG
H	Licensing, certification and testing costs, including travel costs, PROMISE JOBS and FSSG
L	Transportation, handicapped, for PROMISE JOBS
M	Practicum living costs for PROMISE JOBS (up to \$10 per day)
N	Shelter for FSSG
P	Provider payment for PROMISE JOBS (for parenting classes and PROMISE JOBS family development only)
R	Relocation for FSSG
S	Social services for FSSG
T	Other for FSSG


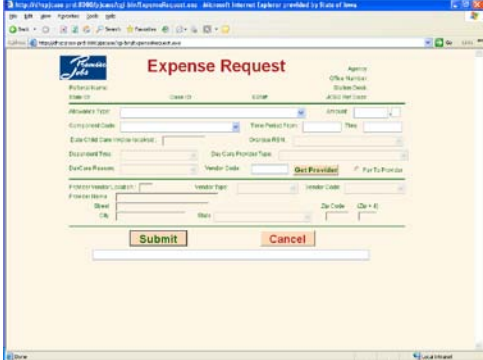
- ◆ **AMOUNT:** Enter the dollar amount of the expense request in the first section, use the TAB key to move to the second section and enter the amount of cents.

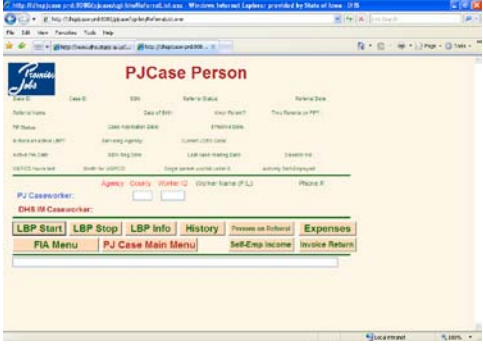
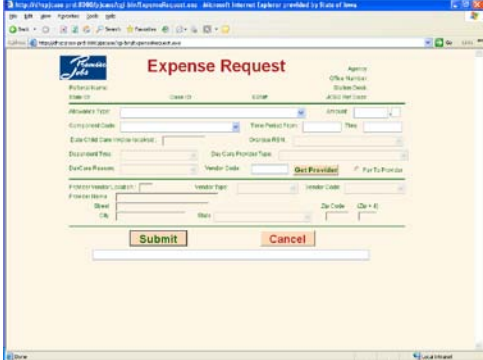
- ◆ **COMPONENT CODE:** Displays the applicable component code that allows for payment of expenses with PROMISE JOBS funds. The choices are:
 - AA Orientation
 - AB Assessment
 - BA Job-seeking skills (job readiness)
 - C Group job search
 - E High school completion
 - F GED
 - G Adult basic education
 - H English as a second language
 - L Work experience
 - MH Mental health treatment
 - N Unpaid community service
 - OR Other rehabilitation
 - PE Post-secondary classroom training (educational)
 - PV Post-secondary classroom training (vocational)
 - RA On-the-job training
 - SA Substance abuse treatment
 - TE Institutional skills training (educational)
 - TV Institutional skills training (vocational)
 - VE Short-term training (30 to 52 weeks)
 - VV Short-term training (less than 30 weeks)
 - WE Workplace essentials
 - 10 FSSG
 - 2B Individual job search
 - 6 Child care for employment
 - 7A Parenting classes (for 19 and younger)
 - 7B Parenting classes (for all others)
 - 8A Family development services (for parents age 17 or younger)
 - 8B Family development services (for all others)
- ◆ **TIME PERIOD FROM:** Use these fields to enter the beginning date of the period the allowance covers, in MM-DD-CCYY format.
- ◆ **THRU:** Use these fields to enter the ending date of the period the allowance covers, in MM-DD-CCYY format.
- ◆ **DATE CHILD CARE INVOICE RECEIVED:** Inactive field.
- ◆ **OVERDUE RSN:** Inactive field.
- ◆ **DEPENDENT TYPE:** Inactive field.
- ◆ **DAY CARE PROVIDER TYPE:** Inactive field.
- ◆ **DAYCARE REASON:** Inactive field.

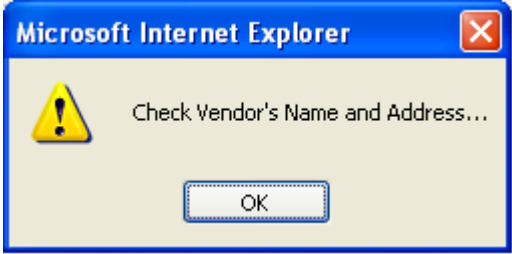
- ◆ **VENDOR CODE:** This field requires entry of the vendor's nine-digit federal tax identification or social security number.
- ◆ **GET PROVIDER:** This button is used to obtain provider name and address information when a provider number has been entered. Clicking the GET PROVIDER button enables the PAY PROVIDER button.

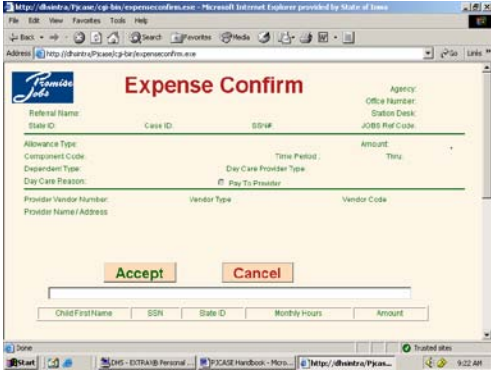
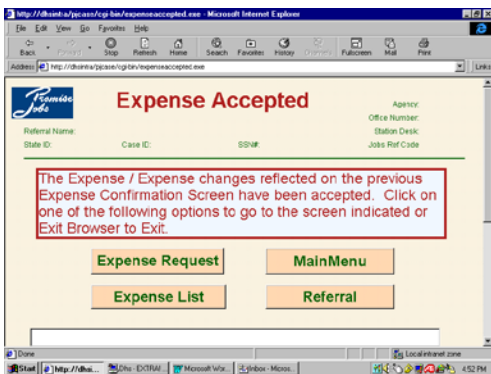
If information is available and there is only one provider location associated with the number, the system will populate the provider information fields. If there are multiple vendor locations associated with the number, a vendor list will be displayed so the correct location can be selected.

- ◆ **PAY TO PROVIDER:** This field allows you to indicate when the expense allowance payment is to be paid to the service provider rather than the PROMISE JOBS participant. This field must be completed when the allowance type is "P." To enable this button, enter the provider number and click on the GET PROVIDER button.
- ◆ **PROVIDER VENDOR LOCATION:** This field displays the two-digit identifier for the provider vendor location. The system populates this field when the vendor is selected from the vendor list.
- ◆ **VENDOR TYPE:** Use the dropdown list to select a vendor type when the PAY TO PROVIDER button is selected. The vendor types are:
 - C Corporation
 - G Government or nonprofit
 - P Partnership
 - S Sole proprietor
 - U Public service
 - I Individual
- ◆ **VENDOR CODE:** Select the applicable code when the PAY TO PROVIDER button is selected:
 - E Employer identification number
 - S Social security number
- ◆ **PROVIDER NAME:** This field requires entry of the provider's name when the PAY TO PROVIDER button is selected.
- ◆ **STREET:** This field requires entry of the provider's street address when the PAY TO PROVIDER button is selected.
- ◆ **CITY:** This field requires entry of the provider's city when the PAY TO PROVIDER button is selected.
- ◆ **STATE:** This field requires entry of the provider's state when the PAY TO PROVIDER button is selected.

Step	Action
3	 <p>Click on the EXPENSES button to display the Expense Request screen.</p>
4	 <p>Complete the following fields:</p> <ul style="list-style-type: none"> ◆ ALLOWANCE TYPE: ◆ AMOUNT: ◆ COMPONENT CODE: ◆ TIME PERIOD FROM: ◆ THRU: <p>If the payment is to be sent to the service provider, see Issuing Payment Directly to a Provider.</p> <p>Click on the SUBMIT button.</p> <p>If you receive error message 5160, "Person not on FIP. Submit pends for CO review or Cancel stops the entry," see Payment Pended for Central Office Review. If not, continue to Step 5.</p>

Step	Action
3	 <p>Click on the EXPENSES button to display the Expense Request screen.</p>
4	 <p>Complete the following fields:</p> <ul style="list-style-type: none"> ◆ ALLOWANCE TYPE: ◆ AMOUNT: ◆ COMPONENT CODE: ◆ TIME PERIOD FROM: ◆ THRU: ◆ VENDOR CODE: <p>Select GET PROVIDER button.</p>

Step	Action
	<p>Scroll through the vendor list addresses. Select the correct vendor location by clicking on the SELECT link.</p> <p>If the provider has a two-line address, you will return to the Expense Request screen with the vendor information fields completed.</p> <p>If the provider has a three-line address, the following dialog box will appear.</p>  <p>The dialog box states "Check Vendor's Name and Address." It is very important to review the vendor's address to ensure that it is correct. Once you have reviewed and found the displayed address to be correct, click on the OK button in the dialog box.</p> <p>If the address is not completely correct, click the OK button in the dialog box and make any necessary address corrections. Once changes are made, click on the SUBMIT button.</p> <p>If your entry is successful, the system displays the Expense Confirm screen.</p> <p>If your entry is not successful, the system displays an error message.</p> <p>If you receive error message 5160, "Person not on FIP. Submit pends for CO review or Cancel stops the entry," see Payment Pended for Central Office Review.</p> <p>If not, continue to Step 7.</p>

Step	Action
7	 <p>On the Expense Confirm screen, verify that the data is correct and select either:</p> <ul style="list-style-type: none"> ◆ ACCEPT, to process the entry and display the Expense Accepted screen, or ◆ CANCEL, to return to the Referral screen.
8	 <p>On the Expense Accepted screen, select:</p> <ul style="list-style-type: none"> ◆ EXPENSE REQUEST, to make entry to issue another expense allowance, ◆ EXPENSE LIST, to view all pending expense allowance entries for the person, ◆ REFERRAL, to return to the person's PJCase Person screen, or ◆ MAIN MENU, to return to the PJCase Main Menu screen.

Page 110 is reserved for future use.

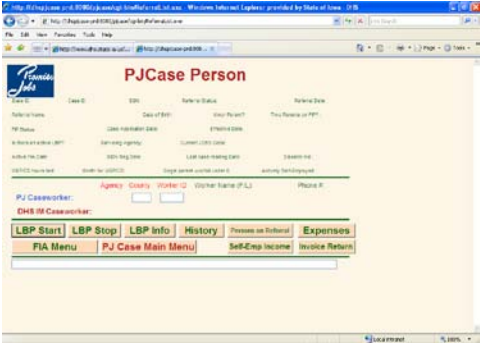
From March through May, a PROMISE JOBS person attends a short-term training of less than 30 weeks while receiving FIP. FIP is canceled effective May 31. In August, PROMISE JOBS receives the tuition bill from the training facility and makes entry to issue payment to the facility.

The system does not allow the entries to update because FIP has been canceled for more than two months. The worker receives error message 5160 and determines that the payment should be made since the payment is for a period when the person was on FIP.

The worker clicks on the SUBMIT button and sends an email to IWD's central office. IWD's central office will review the case and approve the payment, if appropriate.

Changing or Canceling an Expense Allowance Entry

PROMISE JOBS workers who have “confirmed” an expense allowance entry can delete or change the entry **on the same day** by following these steps:

Step	Action
1	Access the person's PJCase Person screen.
2	 <p>Select the EXPENSES button. The system displays the Expenses Entered Not Yet Processed screen.</p>
3	Select either: <ul style="list-style-type: none"> ◆ EDIT FROM LIST, to make changes to an allowance entry, or ◆ DELETE FROM LIST, to delete the entry entirely.

LBP Start Key Entry Screen

http://dhspjcase-prd:8080/pjcase/cgi-bin/REFERRAL.exe - Microsoft Internet Explorer provided by State of Iowa

File Edit View Favorites Tools Help

Address http://dhspjcase-prd:8080/pjcase/cgi-bin/REFERRAL.exe

Promise Jobs

LBP Start Key Entry

Chooser Name: BUSTER BROWN Chooser SSN: 676-33-6767
Chooser State ID: 3535353F Case #: P000001102

LBP Type: Normal Partial Individual

LBP Choice Date:

Enter the other parent's Social Security Number when two parents are in the home with a common child on FIP:

Start LBP **Cancel**

This is the first screen used to start an LBP. The screen contains the following fields.

- ◆ **CHOOSE NAME:** Displays the name of the person who chose the LBP.
- ◆ **CHOOSE SSN:** Displays the social security number of the person who chose the LBP.
- ◆ **CHOOSE STATE ID:** Displays the state identification of the person who chose the LBP.
- ◆ **CASE NUMBER:** Displays the ABC case number of the person who chose the LBP.
- ◆ **LBP TYPE:** This field allows you to choose one of the following LBP types by clicking in the circle next to the type name:
 - Normal. Select “normal” when the person who chose the LBP is:
 - The parent in a one-parent household, or
 - Either parent in a two-parent household when there is at least one common child on FIP.

NOTE: If a "normal" LBP is selected on a FIP case in the 30-4 aid type case, the system generates error message 5062, "For caretaker or minor use INDIVIDUAL LBP. For minor parent use PARTIAL LBP."

NOTE: The system generates error message 5025, "Invalid LBP type. Enter individual LBP type when child with no children chooses," when a "normal" LBP type is selected on a person who is under age 18 and is not coded as a minor parent in ABC.

If you receive this error when attempting to start a "normal" LBP on a minor parent who receives FIP with the minor's adult parent, contact the IM worker to enter the MINOR code in the minor parent's TD03 screen. Once the MINOR code is updated in ABC, you can start the "normal" LBP.

- Partial. Select "partial" when the person who chose the LBP is:
 - A minor parent receiving FIP with the minor's adult parent or relative, or
 - A parent in a household that contains two married parents with no common child on FIP.

NOTE: The system generates error message 5025, "Invalid LBP type. Enter individual LBP type when child with no children chooses," when a "partial" LBP type is selected on a person who is under age 18 and not coded as a minor parent in ABC.

If you receive this error when attempting to start a "partial" LBP on a minor parent who receives FIP with the minor's adult parent, contact the IM worker to enter the MINOR code in the minor parent's TD03 screen. Once the MINOR code is updated in ABC, you can start the "partial" LBP.

- Individual. Select "individual" when the person who chose the LBP is:
 - A child who is not attending school full time, or
 - An incapacitated stepparent, or
 - A needy relative.

Contact the IM worker if you need help determining the relationship of persons in the household.

- ◆ **LBP CHOICE DATE:** Enter the date that the person chose the LBP, in MM-DD-CCYY format. The "choice date" is the date that the PROMISE JOBS worker submits the case for local or state-level review.

PJCase will not accept an LBP start entry when the LBP start date will be the same as an existing LBP record chosen by the same person, even if the existing LBP has been stopped.

If you try to start an LBP in this situation, PJCase will give you the following error message: "5304: An LBP exists with the same start date. See your manual." If you receive this error, determine which of the following applies:

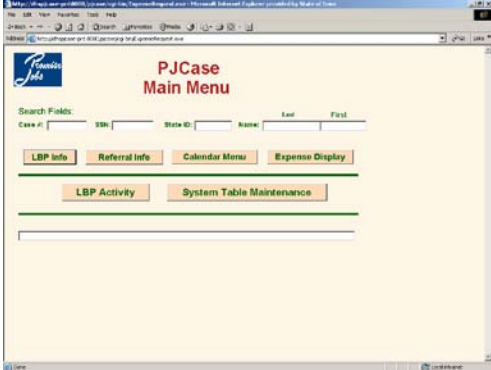
- ◆ Your entry to start a new LBP is not needed if the existing LBP is active. Stop attempts to start another LBP.
- ◆ If the existing LBP is stopped and the person has chosen another LBP with a new failure, make the LBP start entry after the next timely notice day. As a result, the LBP start date for the new LBP will be at least one month later than the existing LBP.

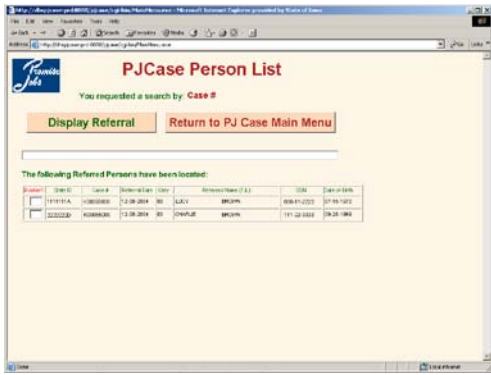
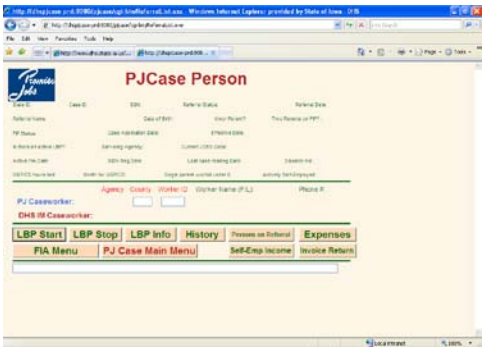
Ms. A chooses a first LBP for failure to attend an FIA activity twice after receiving a written reminder. On April 22, PROMISE JOBS starts the LBP effective June 1. Ms. A reconsiders the first LBP by signing an FIA on April 24. Ms. A is scheduled to attend the same FIA activity again on May 4.

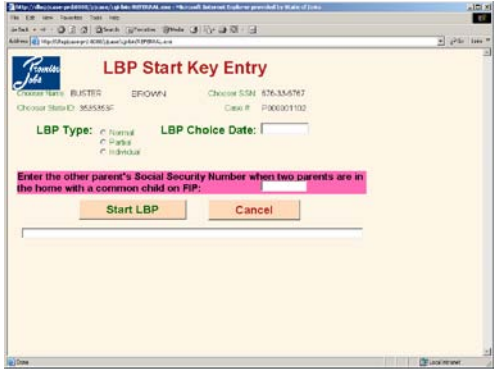
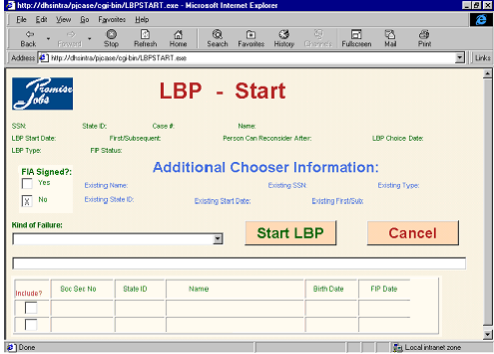
Ms. A fails to attend and is sent a written reminder. She is scheduled to attend the same activity again on May 11 and chooses a subsequent LBP. PROMISE JOBS must wait until after May timely notice to start the new LBP. The LBP will be effective no earlier than July 1.

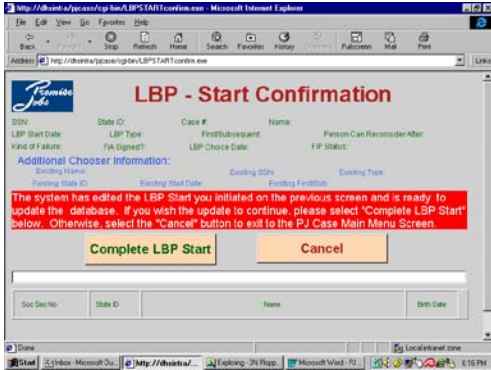
- ◆ Contact the IM worker to reactivate the existing LBP when the LBP is stopped and should be active, such as when the LBP was affirmed by the final decision of an appeal or the LBP was incorrectly stopped.
- ◆ **Do not** contact IM to reactivate the existing LBP when the existing LBP was stopped appropriately and the person has chosen another LBP (with a new LBP choice date and a new failure.)

Follow these steps to start an LBP:

Step	Action
1	 <p>The screenshot shows the PJCase Main Menu interface. At the top, there is a search section with the following fields: Case #, SSN, State ID, Name, Last, and First. Below the search fields are several menu buttons: LBP Info, Referral Info, Calendar Menu, Expense Display, LBP Activity, and System Table Maintenance. The Referral Info button is highlighted in orange.</p> <p>On the PJCase Main Menu screen, enter the person's case number, social security number, state identification number, or name in the applicable SEARCH field. Select REFERRAL INFO.</p> <p>If there is more than one referred person on the case, the PJCase Person List screen will be displayed. Go to Step 2.</p> <p>If there is only one referred person on the case, the PJCase Person screen will be displayed. Go to Step 3.</p> <p>NOTE: When you need to start an LBP for more than one person in a household, make separate entries for each person. See When More Than One Household Member Chooses an LBP section.</p> <p>NOTE: When you are starting an individual or partial LBP on a case with an existing active partial LBP, and the person who chose the new individual or partial LBP is included on the existing partial LBP, contact DHS central office for assistance.</p>

Step	Action
2	 <p>On the PJCase Person List screen, enter "X" in the DISPLAY? field in the row containing the person's information. Click on the DISPLAY REFERRAL button to display the PJCase Person screen.</p>
3	 <p>On the PJCase Person screen, select LBP START TO DISPLAY the LBP Start Key Entry screen.</p>

Step	Action
4	 <p>On the LBP Start Key Entry screen:</p> <ul style="list-style-type: none"> ◆ Select the applicable LBP type. (Contact the IM worker if you are unsure of the correct type.) ◆ Enter the LBP CHOICE DATE: ◆ If there is another parent in the home, enter the other parent's social security number. <p>Select the START LBP button. (See LBP Start Key Entry Screen for more information on these entries.)</p>
5	 <p>In the LBP - START screen:</p> <ul style="list-style-type: none"> ◆ Review the "Yes" and "No" boxes in the FIA SIGNED? field. If the box that is populated does not reflect the current FIA status, delete the "X" and re-enter "X" in the correct field. ◆ Use the dropdown box in the KIND OF FAILURE: field to select the reason the LBP is being started.

Step	Action
	<p>(See LBP – Start Screen for more information on these entries.)</p> <p>Select either:</p> <ul style="list-style-type: none"> ◆ START LBP to display the LBP Start Confirmation screen, or ◆ CANCEL to return to the PJCase Person screen.
6	 <p>In the LBP Start Confirmation screen, check the data. If it is correct, select the COMPLETE LBP START button to process your entry.</p> <p>If the data is incorrect, select either:</p> <ul style="list-style-type: none"> ◆ The BACK button on your browser to return to the LBP-Start screen and make corrections, or ◆ CANCEL to stop your entries from processing and return to the PJCase Person screen.

NOTE: When the system processes a start entry for a normal LBP on a case with a child or minor parent who has an active individual or partial LBP, the system will include the child or minor parent in the normal LBP.

However, the system will display the persons in the partial or individual LBP with stop season code "I" and the current date for a stop date. This also occurs when the partial or individual LBP is started first and then the normal LBP is started.

Results of Starting an LBP

When an LBP start entry is confirmed in the LBP Start Confirmation screen, the following immediately occurs:

- ◆ The LBP Display screen displays the active LBP.
- ◆ The system sends an email to the IM worker for the case.
- ◆ The ABC system displays the following LBP data for each person in the person's TD03 screen:
 - The last month of FIP eligibility is displayed in the FIP LIMIT field.
 - The LBP field displays the LBP Start Date and "1" for a first LBP and "Sub" for a subsequent LBP.
- ◆ The start transaction is recorded in the LBP Transaction History screen.

When an LBP start entry is confirmed on an active FIP case, the ABC system recalculates FIP benefits as follows:

- ◆ For a normal LBP, FIP will be canceled.
- ◆ For a partial or individual LBP, the FIP benefits will change. The benefits will be canceled if the persons in the partial or individual LBP were the only persons on FIP before the LBP was imposed.
- ◆ The system issues a *Notice of Decision* to the household on the next working day. EXCEPTION: When both parents in a two-parent household choose a normal LBP, the system does not send an additional *Notice of Decision* when the second LBP is processed.

In the ABC system, the appropriate FIP status code for a person in an active LBP is "I." When an LBP is started in the PJCase system, the "I" FIP status code will be assigned at the next ABC system cutoff day.

During the nightly system processing that occurs on ABC cutoff day, the system will assign the "I" FIP status code to each person in an active LBP, regardless of the person's FIP status code on this day. This gives the IM worker some flexibility to continue to make needed adjustments to FIP benefits for the months before the LBP effective date.

When More Than One Household Member Chooses an LBP

When more than one person in a household chooses an LBP, make separate entries to start each person's LBP by accessing the LBP start entry screens from the PJCase Person screen for each person. The entry to start each person's LBP can be made in the same day.

When making entries to start an LBP on a person who is active on an LBP that was chosen by another person in the home, the entered choice date must be a date that is before the effective date of the existing LBP, which is also the effective date of FIP cancellation.

When two parents are in the home and both choose a "normal" LBP, the system creates the transaction that will send a *Notice of Decision* when processing the LBP that is entered first. When the second parent's LBP is started, another *Notice of Decision* is not needed and is not sent.

For this reason, the start function will accept the PROMISE JOBS worker's entry to start the second parent's entry at any time, even after the effective date of the LBP, so long as the second parent's choice date is before the effective date of active LBP.

Mr. and Mrs. A receive FIP for their two children. On October 3, both choose an LBP. To start Mr. A's LBP, the PROMISE JOBS worker accesses Mr. A's PJCase Person screen and selects LBP START to make entries to start Mr. A's LBP.

The PROMISE JOBS worker enters Mrs. A's social security number in the LBP Start Key Entry screen so that the system counts any previous LBPs chosen by Mr. or Mrs. A when deciding if the LBP will be a first or subsequent LBP. The LBP is started effective November 1 when the PROMISE JOBS worker confirms the entry.

To start Mrs. A's LBP, the PROMISE JOBS worker accesses her PJCase Person screen and selects LBP start. The PROMISE JOBS worker enters Mr. A's social security number in the LBP Start Key Entry screen.

The system will accept the PROMISE JOBS worker's entry so long as Mrs. A's choice date is before November 1, even if the start LBP entry is made after November 1.

When the system processes a start entry for a normal LBP on a case with a child or minor parent who has an active individual or partial LBP, the system includes the child or minor parent in the normal LBP.

However, the system will display the persons in the partial or individual LBP with stop reason code "1" and the current date for a stop date. This also occurs when the partial or individual LBP is started first, and then the normal LBP is started.

Make entries to start an LBP as soon as you (PROMISE JOBS) realize that the person has chosen the LBP and any needed review process confirms the LBP choice.

This is even more important when more than one person in the home has chosen an LBP and a *Notice of Decision* is needed for both LBPs. (A *Notice of Decision* is needed for both LBPs when an individual or partial LBP is started on a case with an active normal LBP.)

The system will not accept an individual or partial start entries made on a person who is active on a normal LBP chosen by another person in the home when the system cannot issue a *Notice of Decision* before the date benefits would have been issued. This means that the system will not accept such an entry when made on a day that is before the Start Date of the existing LBP.

The limitation for entry in this situation fluctuates each month due to weekends and holidays. The system knows when a *Notice of Decision* cannot be sent before the date that benefits would have been issued. So, in some months, the system will not accept an entry to start such an LBP even when the entry is made before the LBP Start Date.

When the system cannot accept your entry, the system will display the following message: "Invalid entry. This person is no longer on FIP due to another person's LBP." In this situation, you will not be able to start the individual or partial LBP.

NOTE: When starting an individual or partial LBP on a case with an existing active partial LBP, and the person who chose the new individual or partial LBP is included on the existing partial LBP, contact central office for assistance.

Child Care Invoice Return Screen

The Child Care Invoice Return screen is an obsolete screen that was used by PROMISE JOBS workers. Since the screen is still available in PJCase, the screen information remains published. However, the screen is not to be used.

The screenshot shows a web browser window with the following content:

- Browser title: **Child Care Invoice Return Screen**
- Logo: **Promise Jobs**
- Form fields:
 - Referral Name: _____
 - Agency: _____
 - Office Number: _____
 - Station Desk: _____
 - Referral State ID: _____
 - Case ID: _____
 - SSN#: _____
 - Current JOBS Code: _____
 - Date Invoice received:
 - Date Invoice Returned:
 - Invoice Return RSN:
 - Vendor Code: **Get Provider** Provider Name:
- Table:

<input type="checkbox"/>	1634684C	ALEX	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		1992-08-02	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
- Buttons: **Submit** **Cancel**

The Child Care Invoice Return screen contains the following fields:

- ◆ **AGENCY:** Displays the agency code of the worker who was logged in: "1" for IWD or "2" for BRS.
- ◆ **OFFICE NUMBER:** Displays the four-digit office number of the worker who was logged in.
- ◆ **REFERRAL NAME:** Displays the referred person's name.
- ◆ **SSN#:** Displays the referred person's social security number.

- ◆ **STATION DESK:** Displays the three- or four-digit identification number of the worker who was logged-in.
- ◆ **REFERRAL STATE ID:** Displays the referred person's state identification number.
- ◆ **CASE ID:** Displays the referred person's ABC case number.
- ◆ **CURRENT JOBS CODE:** Displays the person's current JOBS referral code. Iowa Workforce Development (IWD) and the Bureau of Refugee Services (BRS) have separate referral codes, as follows:

IWD	BRS	Description
1	1	Exempt
3	A	Mandatory applicant
4	B	Mandatory, hardship applicant
U	V	Mandatory applicant w/LBP
W	T	Mandatory hardship applicant w/LBP
8	L	Mandatory participant
7	K	Mandatory participant w/hardship
X	Y	Unknown or not active

- ◆ **DATE INVOICE RECEIVED:** Displays the date the incomplete child care invoice was received in the local office.
- ◆ **DATE INVOICE RETURNED:** Displays the date the incomplete child care invoice was returned to the provider.

- ◆ **INVOICE RETURN RSN:** Displays the reason why the invoice was returned. Options are:
 - Provider did not sign invoice or invoice not in ink.
 - Child not listed on invoice or name not correct.
 - Billing period or times of attendance not complete or not correct.
 - Name of parent or relative not complete.
 - Parent or relative did not sign invoice.
 - Other.
- ◆ **VENDOR CODE:** Displays the provider's nine-digit federal tax identification or social security number.
- ◆ **PROVIDER NAME:** Displays the provider name associated with the VENDOR CODE entry.

This screen also has a Child List section, which displays all persons under the age of 19 years of included on this case in ABC. The section is automatically populated by the system and includes the following fields for up to 15 persons:

- ◆ **CHECK BOX:** Indicates if the child care payment is for this child.
- ◆ **CHILD'S SID:** Populated by PJCase.
- ◆ **CHILD'S FIRST NAME:** Populated by PJCase.
- ◆ **CHILD'S BIRTHDATE:** Populated by PJCase.

The Child Care Invoice Return Screen contains the following buttons:

- ◆ **GET PROVIDER:** Checks a provider if a provider number is entered before clicking this button.
- ◆ **SUBMIT:** Approves and records entries in PJCase.
- ◆ **CANCEL:** Cancels any entries made and to return to the PJCase Person screen.

Calendar Functions

All FIP applicants must sign a family investment agreement (FIA) before FIP can be approved unless they are exempt. Calendar is the tool in the PJCase on-line system designed to aid PROMISE JOBS and IM staff with scheduling appointments for clients being referred to the PROMISE JOBS program.

PROMISE JOBS staff allocate on the calendar the time slots they have available for appointments. The IM worker views available appointment times for each office and schedules clients for an appointment to meet with PROMISE JOBS to complete orientation and to write and sign an FIA.