

In this Job Aid, we've provided answers to frequently asked questions about File Clearance in IES.

Question	Answer
<p><b>1) What does it mean when I get a 100% match in file clearance?</b></p>	<p>If you entered an SSN for the applicant, it means that their SSN exactly matches the SSN of a client with a record in the Master Client Index (MCI). If you didn't enter an SSN for the applicant, IES returns a 100% match if the applicant's name matches the name of a client with a record in the MCI.</p> <p><b>NOTE:</b> If you get a 100% SSN match, IES will not allow you to establish a new Individual # for the applicant. It assumes that they already have a record in the MCI. Review the matching record to confirm that the applicant and existing client are the same person.</p>
<p><b>2) What should I do if I get a 100% SSN match and the matching individual isn't the same person as the applicant?</b></p>	<p>Delete the SSN of the applicant and enter it into the Reported SSN field. This allows you to establish a new Individual # for the client and continue registering the application. To do this:</p> <p>On the <b>File Clearance – Results</b> page:</p> <ul style="list-style-type: none"> <li>• Click <b>[Previous]</b>.</li> <li>• Click the <b>Edit</b>  icon next to the applicant's record to return to the <b>Register Individual – Individual</b> page.</li> <li>• Delete the <b>SSN</b> and enter it in the <b>Reported SSN</b> field.</li> </ul> <p>Workers should review the Understanding SSNs in IES Job Aid for additional actions which must be taken regarding 100% SSN matches.</p>
<p><b>3) How can I reuse the Case Number of a customer who submits a new application?</b></p>	<p>You can <b>associate</b> the new application to the existing case so that the household keeps the original Case Number. Refer to the next page for tips on associating cases.</p> <p><b>NOTE:</b> If you are registering a new application and the case you want to associate it with is assigned to a different office, you will not be able to associate until the case is transferred to your own office.</p>
<p><b>4) What should I do if I accidentally assign a duplicate Individual # to a client?</b></p>	<p>Contact your Manager. He or she will work with an IES expert to merge the new individual records into one.</p> <p><b>NEVER</b> delete the individual's record in Application Registration using the <b>Delete</b>  icon. <b>DO NOT</b> cancel the application. The individual's duplicate numbers remain in the MCI, even if you do this.</p>
<p><b>5) What should I do if I accidentally associate an application to the wrong case?</b></p>	<p>Contact your Manager. He or she will work with an IES Expert to detach the application from the case.</p>

## How Do I Know Which Case to Associate?

When you need to associate a new application to an existing case, you may find that the household has more than one existing case number.

Consider these factors when deciding which case number to associate:

- Which case contains all or most of the members listed on the new application?
- Was any case previously active for the requested program?
- Which case contains the most recent opening or closure?
- Is the Head of Household (HOH) on the application the same as the HOH on the existing case?

## Cases That You Can't Associate

- Adoption Subsidy Medicaid
- Foster Care Medicaid
- Plan First Medicaid
- AABD
- Department on Aging
- Separate Families in one household

## Pending and Approved Cases That You Cannot Associate

You cannot associate a new application to a *Pending* or *Approved* case if that case is assigned to a different office. If the client now resides in your county/district, you should contact the previous office and request a case transfer. After the case is transferred, you will be able to register the application and associate it to the existing case.



**Tip:** In this situation, if the customer does not reside in your county/district, follow current procedures to notify the existing office of the new program request.



**Tip:** If you associate a new application to a Denied or Closed case that was previously assigned to a different office, the Denied/Closed case is automatically transferred to your office and assigned to the Virtual Worker.



### Helpful Wizards:

- File Clearance Results
- Use an Existing Individual Number
- Associate a New Application to an Existing Case