



# Troubleshooting Guide for External IES Users



The purpose of this document is to define a uniform process for troubleshooting problems that external entity partners may encounter when using IES.

## Table of Contents

IES Troubleshooting Process Overview .....	Page 1
Troubleshooting and Next Steps .....	Page 2
Caution: Personally Identifiable Information .....	Page 4

## INTEGRATED ELIGIBILITY SYSTEM

The Integrated Eligibility System (IES) is a new public benefits eligibility and case management system. The IES implementation is a joint initiative by the Illinois Department of Healthcare and Family Services (HFS) and Illinois Department of Human Services (DHS). This process document is a resource for other state agencies, contractual and partner staff, and external agencies that will be using IES in an Inquiry or Update capacity to help DHS/HFS shared clients.

## IES SUPPORT

This document covers four broad categories of potential user issues: Active Directory ID and password support; Multi Factor Authentication support, IES functionality questions, and IES error messages. The table below outlines the various entities that handle problems in these categories. Please follow the specified course of action for the type of issue you are experiencing.

Each Agency should have a designated Agency Security Administrator (ASA); this will be your first resource for assistance when encountering problems in IES. If your ASA cannot resolve your problem, they will take the next steps necessary to escalate you problem.

## RESOURCES

**IES Transition Center** – Contains Computer Based Tutorials (CBTs) that review access, functionality and terminology in IES, and Job Aides that will help you to use your screens, understand Multi-Factor Authentication (MFA), and log in to IES. <http://www.dhs.state.il.us/page.aspx?item=76484>

Email Support for other User groups: [HFS.PacisTransition@illinois.gov](mailto:HFS.PacisTransition@illinois.gov)

### User Troubleshooting Steps:

1<sup>st</sup> Step – Refer to Common Problems table and tips

2<sup>nd</sup> Step – Notify your Agency Security Administrator

3<sup>rd</sup> Step – The ASA will forward problem report as required dependent on type of problem.



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## COMMON PROBLEMS WITH TROUBLESHOOTING TIPS AND NEXT STEPS

### Obtaining External ID (Username)

Issue	Troubleshooting	Next Steps
Problem Obtaining Active Directory ID	There is a Job Aid for this process-check it out on PACIS Transition page! Make sure you enter data exactly as it appears on your Driver's License – if the information does not match exactly, you will not be verified and authenticated. If still not authenticating – move to Next Steps	Notify your ASA. If they cannot resolve your problem they will complete next steps.  Do Not Contact CMS directly!
Active Directory ID – State employment record name does not match Driver's License.	If you are a state employee and your state employment record does not match your Driver's License, you will not be authenticated.	Notify your designated ASA, they will complete necessary next steps.  Do Not Contact CMS directly!
You do not have an Illinois Driver's License. Neither a state ID nor out-of-state DL can be used.	You will not be able to complete the online process – contact your ASA.	ASA will complete next steps
You have completed the process of obtaining your Active Directory ID, but you do not know your Username and/or Password so that you can log-In to IES.	Return to <a href="http://id.illinois.gov">http://id.illinois.gov</a> site and click on the second option down, 'Reset your Password or Unlock your Account' If you are a state employee, select your agency, if your agency is not listed you will choose, Other Employee [SPS]. If you are not a state employee you will choose General Public. If you are not sure of your username, try your firstsname.lastname, for example John.Smith . If this does not work, proceed to Next Steps.	If you are unsuccessful with the self-service reset function, your password will need to be reset administratively. Only the CMS Help Desk can reset your Active Directory (firstname.lastname) password. You can reach the <b>CMS Help Desk at 800-366-8768</b> . Or <a href="http://www.illinois.gov/bccs/support/Pages/ReportAProblem.aspx">http://www.illinois.gov/bccs/support/Pages/ReportAProblem.aspx</a>



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### Logging in to IES & MFA

Issue	Troubleshooting	Next Steps
Entered known Username & Password but receive an error message and cannot get in to IES	After 3 incorrect login attempts, users will be locked out of IES and their password will need to be reset. First try the self-service process as described above. If you are not successful proceed to Next Steps.	If you are unsuccessful with the self-service password reset function, your password will need to be reset administratively. Only the CMS Help Desk can reset your Active Directory (firstname.lastname) password. You can reach the <b>CMS Help Desk at 800-366-8768.</b>
Problem with MFA process - Did not receive an emailed Access Code	Sometimes there is a lag in receiving the email with the code – wait 10 minutes before asking that a new code be resent. If you still do not receive the access code within 10 minutes, proceed to Next Steps.	Your name or email may be recorded incorrectly in the IES database, contact your ASA, who will assess the problem and contact their HFS or DHS Liaison to have your information corrected in IES if necessary.
MFA – you receive an error message that the Access Code entered is incorrect	Check to see that you entered the number correctly. The access code is only valid for 10 minutes. If it has been longer than 10 minutes since receipt of the code, click on Resend Access Code for a new code. If this does not work proceed to Next Steps	Contact your ASA, who will contact their HFS or DHS Liaison if the problem cannot be identified.
You receive an error message saying your account has been locked and you cannot log in to IES	Your account can be locked for a variety of reasons including expiration of password, incorrectly entering access code, or incorrect log-in information. Try to establish the reason you have been 'locked' out, as there are different steps to follow depending on the reason. Take a screen shot of the error message if possible. If you cannot establish a reason or solution, proceed to Next Steps	Contact your ASA, who will contact their HFS or DHS Liaison if the problem cannot be identified.



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### Navigation and Understanding Information in IES

Issue	Troubleshooting	Next Steps
Do not understand the client information in IES	First refer to CBTs and Job Aids, Case Structure CBT should help to understand how information is presented, while other tools will help you to find needed information. If you still cannot understand information proceed to Next Steps	Consult with your ASA, who can check with your HFS or DHS Liaison and/or email PACIS transition mailbox with questions.
Cannot find client but they tell me they have a benefit	Utilize all search functionality that you have access to. Sometimes an address search will find clients when a name or birthdate may be incorrect. Using address you can obtain Case or EDG Number for an eligibility search. Still cannot find client? Proceed to next steps	Contact ASA.  Remember not to include PII! Black out this information on screenshots
Technical Issue in viewing pages in IES. Some examples could include screens freezing, getting 'kicked out', or information not displaying correctly.	Report problem to your ASA with as much information as possible.	ASA should make sure report is complete and forward as required

### Caution: Personally Identifiable Information (PII)

When reporting ABE problems, users should NEVER include a client's personally identifiable information, for example first and last name in combination with a birthdate or social security number. Be especially careful of screenshots with PII. Anytime a SSN is included in a screenshot, the screenshot should be encrypted. If the user cannot encrypt, make sure to block out the number - this can be done using a text box if necessary. T-Numbers or case numbers are not PII.