



# Application Registration



## Module Learning Objectives:

**After completing this module, you will be able to:**

- Register applications in IES
- Record general household and client demographic information
- Perform File Clearance to determine if customers already have an active or inactive case in IES
- View and understand Clearances Results in IES
- Record the programs that customers have requested on an application
- Screen customers to determine if they are entitled to expedited service for SNAP
- Maintain existing applications that have been registered
- Withdraw/Deny applications that were created in error
- Understand how to schedule an appointment as part of Application Registration



# What's Different About Application Registration in IES?



- One system will be used to register applications: IES
- IES uses “plain English” instead of codes
- Customers can apply online using the ABE self-service portal
- IES displays all clearances on one page when the SSN is entered during Application Registration.
- After Application Registration is complete, IES automatically assigns ABE applications to the Intake Virtual Worker and routes them to the appropriate Data Collection queue depending on the programs requested and household circumstances
- For Manual/Paper applications, workers must upload the application and other documents received from the customer and manually route them to the appropriate Data Collection queue



# Key Concepts and Terms



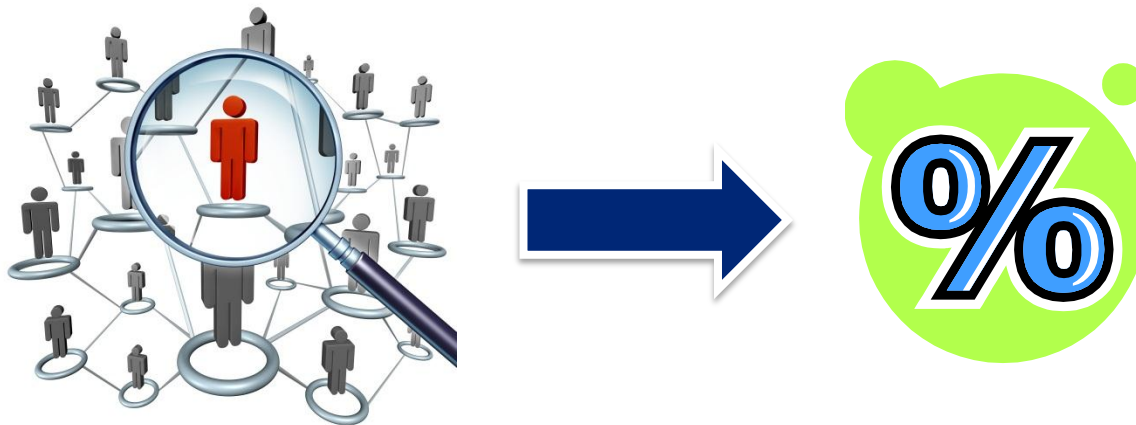
- Application Number
- Individual Number
- Head of Household
- Master Client Index (MCI)
- Withdraw



# Automated File Clearance



After you enter demographic information for an applicant into IES, the **File Clearance** process automatically runs to compare the applicant's information with existing client records in the MCI.

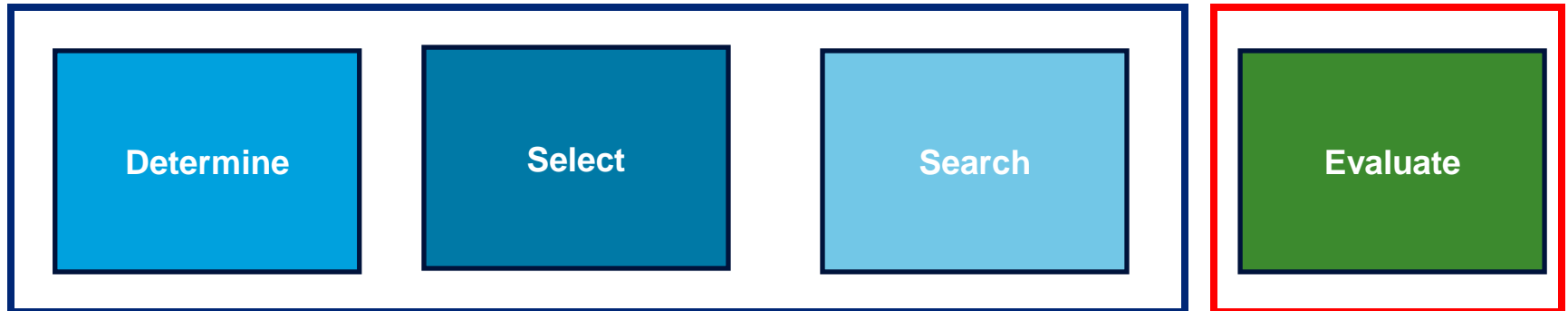


*\*IES returns a probability percentage for each match.*

# File Clearance is Automated Inquiry



**Inquiry Steps 1-3 have been automated.**  
**IES** automatically searches the MCI to find matching clients.



**You are responsible for Step 4.**  
**You** must evaluate the search results to determine if a new applicant has a matching record in the MCI.



# View Clearance Results

After you register all individuals on the Application and conducted **File Clearance**, IES has the ability to run clearances for each individual registered on the application that provided an SSN. The clearances consist of :

- 1.Federal Data Services (SSA)
- 2.Accounts Receivable System (ARS)
- 3.Disqualified Recipients (DRS)
- 4.IL Residency Verification (IL SoS)
- 5.Key Information Delivery System (KIDS)
- 6.State Online Query (SOLQ)
- 7.Third Party Liability Verification (TPLV)
- 8.Wage Verification (AWVS)
- 9.Work Number Verification (TWN)

## What hasn't changed with IES?

- VIS will continue to be used for walk-ins and Service Coordination appointments until Phase 2
- Service Coordination also will not change until Phase 2

## What has changed in IES?

- Registered applications are assigned to the Intake Virtual Worker instead of actual workers
- IES automatically routes ABE Applications while workers must upload paper applications and manually route to one of three Data Collection queues, depending on the programs requested and household circumstances:
  - Expedited Queue: Expedited SNAP applications
  - No Interview Required- Data Collection: Medical Only applications
  - Interview Required- Data Collection Queue: SNAP/Cash & Medical applications
- Intake appointments are now scheduled in IES at the end of Application Registration (if applicable)
- Expedited applications require at least 2 cold call attempts before scheduling an interview







## Case Data Sheets

Refer to your Case Data Sheet Handout.

This handout lists:

- **A 4-digit number:** Use this as the last 4-digits of the SSN for each applicant you register

Example: XXX-XX-1234

# Scheduling in Application Registration

# Scheduling Appointments in IES Features




- Workers can schedule new appointments and reschedule/edit existing appointments
- Workers review the **Office Schedule** on the Intake Virtual Worker's calendar for a given day to determine available **Time Slots** before scheduling an appointment
- There are two **Appointment Types** for scheduling appointments: *Application* and *Other*. Most often, the **Appointment Type** will be *Application*
- Only one *Application* **Appointment Type** can be scheduled per application or case
- All appointments must be associated with an IES application or case
- IES automatically assigns appointments to the Intake Virtual Worker
- Multiple staff can schedule appointments simultaneously from the **Office Schedule**



# Scheduling - Overview



## Scheduling Interviews in IES Process

Scheduling Interviews Process Steps	IES Navigation
 <p><b>Step 1: Register the Application</b></p> <p>Register the application. The Scheduling process begins on the <b>Application Registration – Summary</b> page</p>	<p>Application Registration &gt; Register an Application</p>
 <p><b>Step 2: Assign &amp; Submit the Application</b></p> <p>Indicate an appointment needs to be scheduled, assign the application to the Intake Virtual Worker, and submit the application</p>	<p>Occurs within Application Registration</p>
 <p><b>Step 3: Review the Office Schedule</b></p> <p>Select a date and <b>Time Slot</b> to schedule the appointment on the <b>Office Schedule</b></p>	<p>Occurs within Application Registration</p>
 <p><b>Step 4: Schedule the Appointment</b></p> <p>Enter the appointment details and schedule the appointment</p>	<p>Occurs within Application Registration</p>

# Intake Virtual Worker's Calendar

To accommodate the task-based process...

- Appointments in IES are scheduled on the Intake Virtual Worker's calendar, which is called the **Office Schedule**
- Rather than schedule appointments on an actual Worker's calendar, all appointments are scheduled on the Intake Virtual Worker's calendar
- Actual Workers claim appointments in IES on the scheduled day



# Office Schedule Page



Office Schedule

Office Schedule ? + - Q

4 AUG 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointments for: 8/29/2014 [Refresh](#) [Schedule Appointment](#)

	15 mins		30 mins		45 mins		1 hour		Phone(2 hours)		
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
08:00-08:15	0	0(0)	1	2(0)	0	0(0)					08:00-08:15
08:15-08:30	0	0(0)					5	0(0)			08:15-08:30
08:30-08:45	0	0(0)	5	3(0)					10	0(0)	08:30-08:45
08:45-09:00	0	0(0)									08:45-09:00
09:00-09:15	0	0(0)	3	3(0)	0	0(0)					09:00-09:15
09:15-09:30	0	0(0)					0	0(0)			09:15-09:30
09:30-09:45	0	0(0)	1	0(0)							09:30-09:45
09:45-10:00	0	0(0)			0	0(0)					09:45-10:00
10:00-10:15	0	0(0)	5	0(0)					10	0(0)	10:00-10:15
10:15-10:30	0	0(0)					0	0(0)			10:15-10:30
10:30-10:45	0	0(0)	5	0(0)	0	0(0)					10:30-10:45
10:45-11:00	0	0(0)							10	0(0)	10:45-11:00
11:00-11:15	0	0(0)	5	0(0)							11:00-11:15
11:15-11:30	0	0(0)			0	0(0)	0	0(0)			11:15-11:30
11:30-11:45	0	0(0)	5	0(0)							11:30-11:45
11:45-12:00	0	0(0)									11:45-12:00
12:00-12:15	0	0(0)	0	0(0)	0	0(0)					12:00-12:15
12:15-12:30	0	0(0)					0	0(0)			12:15-12:30
12:30-12:45	0	0(0)									12:30-12:45
12:45-01:00	0	0(0)	0	0(0)	2	0(0)					12:45-01:00
01:00-01:15	0	0(0)	0	0(0)							01:00-01:15
01:15-01:30	0	0(0)			2	0(0)	0	0(0)			01:15-01:30
01:30-01:45	0	0(0)							10	0(0)	01:30-01:45
01:45-02:00	0	0(0)	0	0(0)							01:45-02:00
02:00-02:15	0	0(0)	0	0(0)	2	0(0)					02:00-02:15
02:15-02:30	0	0(0)					0	0(0)			02:15-02:30
02:30-02:45	0	0(0)	0	0(0)							02:30-02:45
02:45-03:00	0	0(0)									02:45-03:00
03:00-03:15	0	0(0)			2	0(0)					03:00-03:15
03:15-03:30	0	0(0)	0	0(0)			0	0(0)			03:15-03:30
03:30-03:45	0	0(0)	0	0(0)							03:30-03:45
03:45-04:00	0	0(0)			2	0(0)			10	0(0)	03:45-04:00
04:00-04:15	0	0(0)									04:00-04:15
04:15-04:30	0	0(0)	0	0(0)			0	0(0)			04:15-04:30
04:30-04:45	0	0(0)	0	0(0)	2	0(0)					04:30-04:45
04:45-05:00	0	0(0)									04:45-05:00
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
Total	0	0(0)	30	8(0)	12	0(0)	5	0(0)	40	0(0)	Total
Day Total	87		8(0)								

[Refresh](#) [Schedule Appointment](#)

# Office Schedule Page



Office Schedule

Office Schedule ? ☆ 📄 🔍 🗑️

◀◀ AUG 2014 ▶▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointments for: 8/29/2014

Refresh
Schedule Appointment

	15 mins		30 mins		45 mins		1 hour		Phone(2 hours)		
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
08:00-08:15	0	0(0)	1	2(0)	0	0(0)		0(0)		0(0)	08:00-08:15
08:15-08:30	0	0(0)					5	0(0)		0(0)	08:15-08:30
08:30-08:45	0	0(0)	5	3(0)					10	0(0)	08:30-08:45
08:45-09:00	0	0(0)								0(0)	08:45-09:00
09:00-09:15	0	0(0)	3	3(0)	0	0(0)				0(0)	09:00-09:15
09:15-09:30	0	0(0)								0(0)	09:15-09:30
09:30-09:45	0	0(0)	1	0(0)			0	0(0)		0(0)	09:30-09:45
09:45-10:00	0	0(0)			0	0(0)				0(0)	09:45-10:00
10:00-10:15	0	0(0)	5	0(0)						0(0)	10:00-10:15
10:15-10:30	0	0(0)								0(0)	10:15-10:30
10:30-10:45	0	0(0)	5	0(0)	0	0(0)				0(0)	10:30-10:45
10:45-11:00	0	0(0)							10	0(0)	10:45-11:00
11:00-11:15	0	0(0)	5	0(0)						0(0)	11:00-11:15
11:15-11:30	0	0(0)			0	0(0)				0(0)	11:15-11:30
11:30-11:45	0	0(0)					0	0(0)		0(0)	11:30-11:45
11:45-12:00	0	0(0)	5	0(0)						0(0)	11:45-12:00

# Office Schedule Page



03:30-03:45	0	0(0)									03:30-03:45
03:45-04:00	0	0(0)	0	0(0)	2	0(0)			10	0(0)	03:45-04:00
04:00-04:15	0	0(0)									04:00-04:15
04:15-04:30	0	0(0)	0	0(0)							04:15-04:30
04:30-04:45	0	0(0)			2	0(0)	0	0(0)			04:30-04:45
04:45-05:00	0	0(0)	0	0(0)							04:45-05:00
	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	Maximum	Scheduled	
<b>Total</b>	0	0(0)	30	8(0)	12	0(0)	5	0(0)	40	0(0)	<b>Total</b>
<b>Day Total</b>	<b>87</b>		<b>8(0)</b>								



# Appointment Lengths and Program Types



Appointment Length	What type of programs should this Appointment Length be used for?
15 minutes	None - not recommended to be used at this time. This may be used for certain types of service coordination appointments in IES Phase 2
30 minutes	All SNAP-only applications
45 minutes	All SNAP + Medical appointments as well as ineligible TANF requests
1 hour	Potential TANF cash applications (which include children and/or pregnant woman) For example, if a customer requests Cash but does not have children or is not pregnant, they should not be scheduled for the 1 hour Time Slot.
Phone (2 hours)	Option of using this for phone interviews (Note: only phone interviews can be scheduled in this slot)

# NEXT STOP

