



Case Changes during Intake



Module Learning Objectives:

After completing this module, you will be able to:

- Change an address during intake
- Add or remove a person to/from a case during intake
- Understand the importance of re-running eligibility
- Certify a case to issue benefits to the applicants



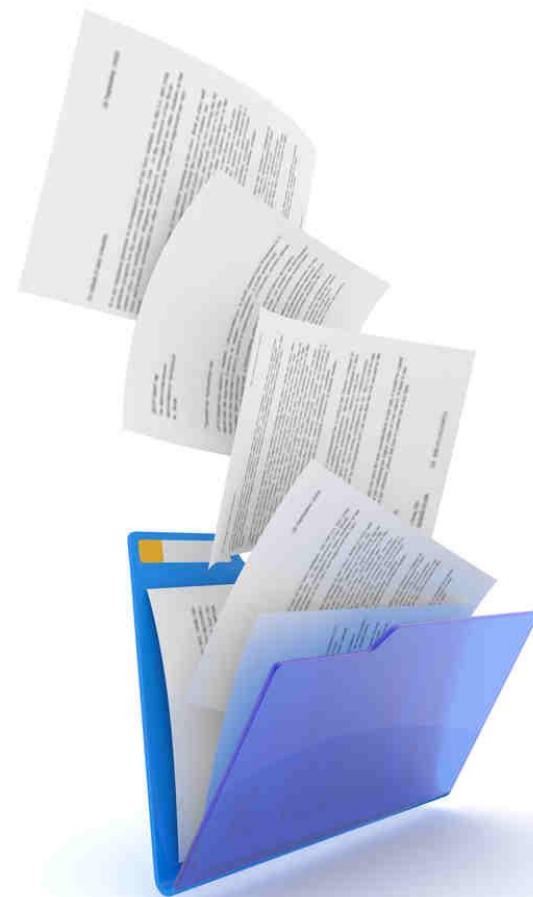
Case Change

What is a case change?

- A case change is when a customer reports an update, change or new information about their case
- Some examples of case changes include:
 - Address change
 - Family member added/leaving the household
 - New program request
 - Change in income

When do I make changes to a case?

- Make changes to a case as soon as the customer reports the change



Case Changes in October 2013 vs. September 2015

Case Changes in October 2013 (Phase 1):

- Changes to cases can **only** be made during intake in IES - once a case is certified, changes **cannot** be made in IES
- After a case is certified, it will be sent to CDB for ongoing maintenance until Phase 2
- Any changes that need to be made after certification will happen in ACM/IPACS system

Case Changes after September 2015 (Phase 2):

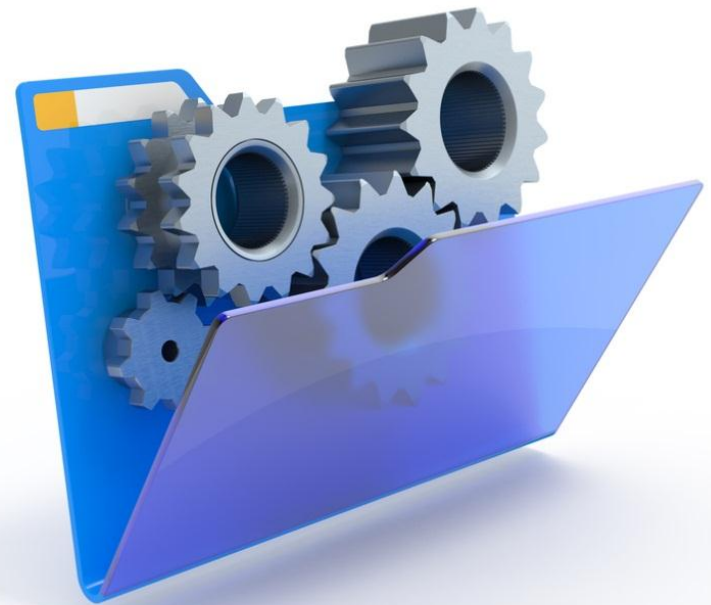
- All case change situations (during intake and after certification) can be made in IES
- The cases will no longer be updated in ACM or IPACS



Importance of Re-Running Eligibility and Certifying the Case



- Once all changes have been made to the case, eligibility must be re-run for the benefits to reflect the changes
- Eligibility does **not** re-run automatically when a change is made to a case
- Once all changes are final, eligibility has been run again and there are no pending EDGs, you can certify the case



NEXT STOP

