



Entering Dates at Intake



Entering Dates in IES at Intake



State of Illinois Integrated Eligibility System

USER ID: systuser120 | Calhoun County DHS | Search By: APPLICATION

Navigation: History, Case info, Navigation, Organizer

Summary | Citizen/Residency | Migrant/Seasonal Farm Worker

Individual Demographics - Citizen/Residency

Case Name: Smith, Mary | Case #: 111016876 | Case Action: Intake | Case Status: Pending

Buttons: Reset, + Previous, Next

Individual Information

Name: Smith, Mary 33F | Individual #: 1000252331

Individual Demographics Dates

* Circumstances Start / Change Date:	02 01 2013	End Date:	mm dd yyyy
* Reported On:	05 16 2013	* Date Client Became Aware:	05 16 2013
* Verification Received On:	05 16 2013		

Individual Demographic Information

State: Illinois | * ID Verification: [dropdown]

Marital Status: [dropdown] | Is the individual planning to file taxes this year? [dropdown]

Citizen

SSA U.S. Citizen Validation: Not Verified

* US Citizen: [dropdown]

Citizen Verification: [dropdown]

Liquid Asset - Details ? ★ 📄 👤 🔍 🏠 ECR 🇺🇸 🗣️

Case Name: Smith, Mary Case #: 111017288 Case Action: Intake Case Status: Pending

⚠️ TAX SENSITIVE INFORMATION

Reset Cancel + Add Liquid Asset + Previous + Continue

Individual Information

Name: [dropdown]

Individual #:

Liquid Asset Dates

* Circumstances Start / Change Date:	[mm] [dd] [yyyy]	End Date:	[mm] [dd] [yyyy]
* Reported On:	05 26 2013	* Date Client Became Aware:	05 26 2013
* Verification Received On:	05 26 2013		

Liquid Asset Details

* Liquid Asset Type: [dropdown]

Five dates are usually listed on the first page of each Logical Unit of Work in Data Collection. You must enter these dates so IES can accurately determine eligibility for a case.

Why do I have to enter so many dates in IES?

- Data Collection is a tool for *raw data entry*.
- You must tell Data Collection *Who, What, and **When*** so that IES can correctly determine eligibility based on these circumstances.



WHO is in the household?



WHAT are the household's circumstances (assets, income, expenses, etc.)?



WHEN did the household's circumstances take effect?

Important Things to Know About Dates in IES

- An entire case history is stored online – this includes eligibility results
- IES can determine eligibility for up to 12 months in the past (which can automatically change a case's historical results)
- IES uses the **Dates** you enter to make sure it counts the right information at the right time



Let's Review! IES Dates Job Aid-Intake



Refer to [IES Dates Job Aid – Intake](#)

This handout:

- Provides definitions for each of the primary dates in Data Collection
- Will help you learn how these dates work at intake

Key Concepts:

- IES defaults many dates at intake to save you time
- In other situations, the values are left blank so that you can enter completely new values

CSCD Default Dates – 1st of the Month 3 Months Prior to the Application Date



IES Dates Job Aid – Intake		IES
How to Enter the Circumstances Start/Change Date (CSCD) at Intake		
Data Collection Pages	Tips for Intake	
CSCD = 1 st of the Month, 3 Months Prior to Application Date	Household Address	<ul style="list-style-type: none"> • IES defaults the CSCD to the first of the month 3 months prior to the Application Date. • The only time you should change the default date is if the client moved between the default date and the Application Date.
	Individual Household Status	<ul style="list-style-type: none"> • IES defaults the CSCD to the first of the month 3 months prior to the Application Date. • The only time you should change the default date is when a person's household status became true <i>later</i> than this date. Example: If a person moved into the home the month before the Application Date.
	Mandatory Individual Information Pages <ul style="list-style-type: none"> • Relationships • Education • Living Arrangement/Domicile • Individual Demographics 	<ul style="list-style-type: none"> • IES defaults the CSCD on the mandatory Individual Information pages to the CSCD you entered on the Individual Household Status page. • If you change the Individual Household Status CSCD for a person, IES will default the CSCD on all mandatory Individual Information pages to this date.
	Assets	<ul style="list-style-type: none"> • IES defaults the CSCD to the first of the month 3 months prior to the Application Date. • The only time you should change the default date is if the customer obtained the asset between the default date and the Application Date.
	Income	<ul style="list-style-type: none"> • IES defaults the CSCD to the first of the month 3 months prior to the Application Date. • The only time you should change the default date is if the customer starting receiving the income between the default date and the Application Date.
	Expenses	<ul style="list-style-type: none"> • IES defaults the CSCD to the first of the month 3 months prior to the Application Date. • The only time you should change the default date is if the expense started between the default date and the Application Date.

CSCD does not Default



<p>CSCD does not default. Choose the best data based on case circumstances.</p>	<p>Other Individual Information Pages</p> <ul style="list-style-type: none"> • Aged/Disability Benefits • Disability • Out of State Benefits • Pregnancy • Newborn • Room and Board • Facility • Medicare Claim • Pursuit of Benefits • Other In State Benefits • Minor Parent • Special Medicaid Approval 	<p>Enter the best date that reflects when the client's individual circumstances started or their circumstance changed.</p> <p>IES <i>does not</i> default this date for you.</p> <p>Examples: The date a disability began (onset date), the date a pregnancy began, the date a client began receiving Medicare, the date a client began living in a facility, etc.</p>
	<p>Non-Financial Information Pages</p>	<p>Enter the best date that reflects when the client's non-financial circumstance started or changed. The CSCD is not defaulted for non-financial information.</p>

Date Definitions – At Intake: CSCD



Date	Definition
Circumstances Start/Change Date (CSCD)	<p>The date when information you are entering in IES started or changed for a customer or household.</p> <p>Choose the date that reflects when the customer's circumstance started or changed, or a best estimate if the exact date is unknown.</p>
Example	<ul style="list-style-type: none">• Customer applies on August 1st• \$400 in savings account - last verification dated on July 15th• Verifies the account on August 8th <div data-bbox="772 1222 1936 1333" style="border: 2px solid green; padding: 10px; text-align: center;">July 15th is the CSCD</div>

Tips for Working With the CSCD at Intake

- Refer to Page 2 of the IES Dates Job Aid - Intake
- IES defaults the CSCD for you at intake, in many situations



Why does IES default the CSCD at intake?



IES Defaults the CSCD at Intake for Retroactive Medical

- **On some Data Collections pages, at intake**, IES defaults the CSCD to the first of the month, three months prior to the Application Date
- This allows you to capture information for customers who may eventually request retroactive Medical Assistance
- By completing this information, IES has the information it needs to determine eligibility for retroactive Medical for any household member

IES defaults the CSCD at intake to accommodate retroactive Medical *regardless of whether or not the household has requested Medical.*

Date Definitions – At Intake: End Date



Date	Definition
End Date	<p>The date the information you are entering in IES ended or was no longer applicable to the case.</p> <p>IES will not consider the information in eligibility determinations after the End Date.</p>
Example	<ul style="list-style-type: none">• Customer applies on June 15th• Closed a checking account on June 7th• Verifies the information on June 22nd <div data-bbox="499 1193 1936 1304" style="border: 2px solid green; padding: 10px; text-align: center;">June 7th is the End Date</div>

Date Definitions – At Intake: Reported On

Date	Definition
Reported On Date	<p>The date the system became aware of the information you entered in IES. It is used to determine if the information was reported timely.</p>
Example	<ul style="list-style-type: none"> • Customer applies on June 1st • On the application reports income that began on April 20th • Verifies the information on June 18th <div style="border: 2px solid green; padding: 10px; text-align: center; margin-top: 10px;"> <p>IES defaults the Date Reported On to June 1st – the Date of Application</p> </div>



You don't need to change the Reported On date at intake *unless the default date is wrong.*

Date Definitions – At Intake: Date Customer Became Aware



Date	Definition
Date Client Became Aware	The date the customer became aware of the information you are entering in IES. It is used to determine if the information was reported timely.
Example	<ul style="list-style-type: none">• Customer applies on June 1st• Reports income that began on April 20th• Verifies the information on June 18th <div data-bbox="520 997 1934 1279" style="border: 2px solid green; padding: 10px; text-align: center;">IES defaults the Date Client Became Aware to June 1st, Update manually to April 20th</div>



You should change the default date to the same date you chose as the CSCD – in this case April 20th.

Date Definitions – At Intake: Verification Received On



Date	Definition
Verification Received On	This is the date the system receives verification of the information you are entering into IES.
Example	<ul style="list-style-type: none">• Customer applies on August 1st• \$400 in savings account since July 15th• Verifies the account on August 8th <div data-bbox="533 1032 1934 1317" style="border: 2px solid green; padding: 10px; text-align: center;"><p>IES defaults the Verification Received On to August 1st. You can change it to August 8th</p></div>

Dates Activity

Entering Dates at Intake Activity

Intake Scenario: A customer requests assistance for herself and her son on **August 10, 2014**. Her application is processed the same day.

She also provides all required verifications.





Intake: Household Address Page

Application and Verification Date: August 10th 2014

The customer and her son began living at their current address on 11/15/2013.

Household Address Dates	Default Date	Correct Date
Circumstances Start/ Change Date	05/01/2014	05/01/2014. Could change to 11/15/2013
End Date	mm/dd/yyyy	mm/dd/yyyy
Reported On	08/10/2014	08/10/2014
Date Client Became Aware	08/10/2014	05/01/2014. Could change to 11/15/2013
Verification Received On	08/10/2014	08/10/2014

Intake: Individual Household Status Page



Application Date: August 10th 2014

The customer's son has been living with her since his birth on 03/10/1997.

Household Address Dates	Default Date	Correct Date
Circumstances Start/ Change Date	05/01/2014	05/01/2014. Could change to 03/10/1997
End Date	mm/dd/yyyy	mm/dd/yyyy
Reported On	08/10/2014	08/10/2014
Date Client Became Aware	08/10/2014	05/01/2014. Could change to 03/10/1997
Verification Received On	08/10/2014	08/10/2014



Intake: Individual Demographics Page

Application Date: August 10th 2014

The customer reported that her marital status changed on 6/10/2014, when her divorce became final.

Household Address Dates	Default Date	Correct Date
Circumstances Start/ Change Date	05/01/2014	06/10/2014
End Date	mm/dd/yyyy	mm/dd/yyyy
Reported On	08/10/2014	08/10/2014
Date Client Became Aware	08/10/2014	06/10/2014
Verification Received On	08/10/2014	08/10/2014



Intake: Other Individual Information Pages

Application Date: August 10th 2014

The customer's son is disabled. His disability onset date is listed on SOLQ as 04/05/1999.

Household Address Dates	Default Date	Correct Date
Circumstances Start/ Change Date	05/01/2014	04/05/1999
End Date	mm/dd/yyyy	mm/dd/yyyy
Reported On	08/10/2014	08/10/2014
Date Client Became Aware	08/10/2014	04/05/1999
Verification Received On	08/10/2014	08/10/2014



Intake: Shelter Expense

Application Date: August 10th 2014

The customer has been paying \$300 in monthly rent since she moved into her apartment on 11/15/2013.

Household Address Dates	Default Date	Correct Date
Circumstances Start/ Change Date	05/01/2014	11/15/2013
End Date	mm/dd/yyyy	mm/dd/yyyy
Reported On	08/10/2014	08/10/2014
Date Client Became Aware	08/10/2014	11/15/2013
Verification Received On	08/10/2014	08/10/2014

Mary Smith's Individual Household Status Pages

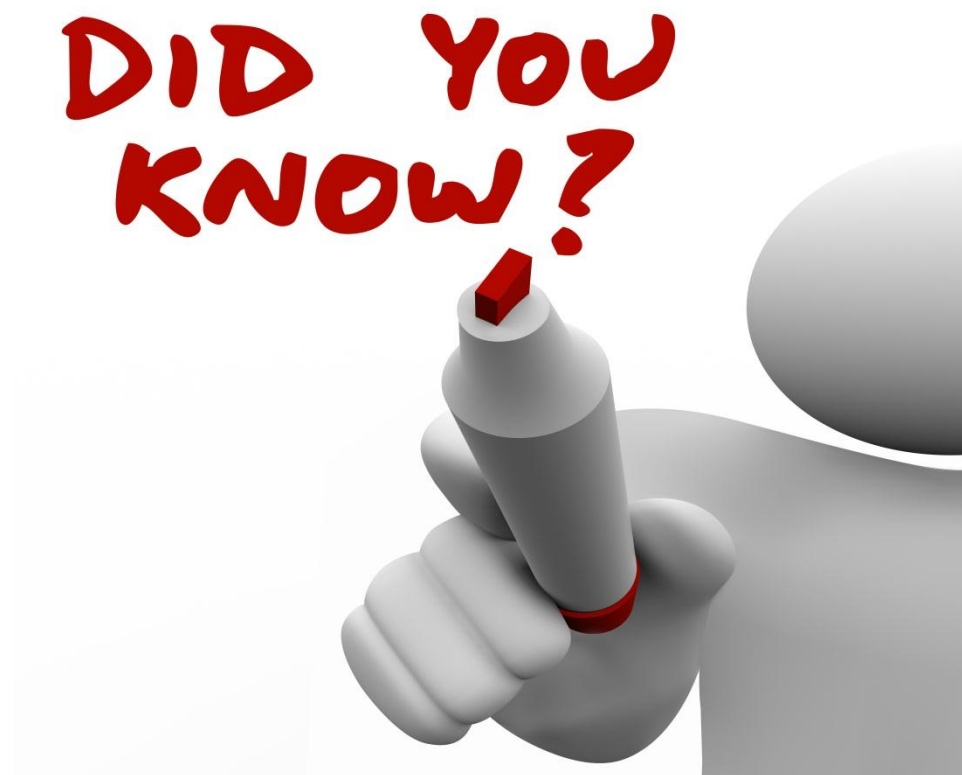


Application Date: _____

Household Status Dates	Correct Date
Circumstances Start/ Change Date	
End Date	
Reported On	
Date Client Became Aware	
Verification Received On	

Dates - Summary

- IES defaults many dates at intake to save you time and to accommodate retroactive medical.
- If the customer's circumstance did not change after the default date, you may leave that date.



NEXT STOP

