



This job aid is designed to help you understand the steps required to process early, timely and late redeterminations in IES for DHS.

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IES Redetermination Features

In IES redeterminations are processed in one of two ways, automatically via the auto-redetermination process or manually by workers.

For cases that receive medical benefits, IES runs clearances and makes a determination based on the case information and circumstances as to whether the medical EDGs can be auto-redetermined. Auto-redetermination only occurs for medical EDGs. There is no auto-redetermination process for SNAP or Cash EDGs. Workers process redeterminations in IES for cases that do not qualify for auto-processing, or when customers return redetermination information via paper or ABE.



IES Tip: Before processing the redetermination, determine if the case is a potential Merge Case by reviewing the **Conversion Summary Information** section of the **Case Search/Summary** page. If there is a Y in the **Potential Merge Case** field, conduct a case merge prior to processing the redetermination.

Refer to the **Perform a Case Merge** wizard in IES for specific steps regarding how to merge cases.

Process an Early Redetermination

Most early Redes can be certified prior to cutoff. When processing a redetermination early, prior to 45 days, but after 75 days from the certification end date, IES applies a special logic when running eligibility to determine the new certification period and avoid overlapping. IES will set the new certification period to begin the first of the month after the end of the existing certification period.

For example, if a redetermination is mailed during the month of May 2018 and the worker processes the response prior to June 15, 2018 (cutoff/terminal entry), the current effective month is July 2018, which causes an overlap in the certification periods. To avoid this, when running eligibility, IES calculates the new certification period to start from 8/1/18 and continue through 7/31/19. All changes that are reported as part of the redetermination would become effective as of 7/1/18.

Medical redeterminations that are processed prior to day 75 will not calculate a new certification period unless there is a SNAP EDG or another medical EDG that is due for redetermination. If there is another EDG due for redetermination, the certification period for the medical EDG will be aligned with the new certification of the SNAP or medical EDG that is due for redetermination.



IES Tip: If a redetermination is processed prior to 45 days from the certification end date and a verification is pending, IES generates a verification checklist after running eligibility. When the verification is returned, process the rede.

Process early redeterminations following the steps listed in the timely redetermination section, and ensure to record any changes reported and update any conversion activities on the case (income, relationships, education and verifications).

Redes with any of the following four EDGs, cannot be certified prior to cutoff:

- Medical EDG for a child
- Pregnant woman
- TSNAP
- Medical Extension EDG

If a caseworker attempts to certify an EDG at rede under one of these scenarios, a hard stop message displays stating: *Early redetermination cannot be processed for one or more EDGs. Please process redetermination after cutoff in the month prior to the certification end date.*

When encountering this message, certify any EDGs that are eligible to be certified, and perform the following steps in order to create a manual task for follow-up at a later date:

1. Copy the case number (highlight the case number and type *Ctrl-C*, or right-click and select *Copy*)
2. Navigate to the **Upload Documents/Create EDM Tasks** page (**Left Navigation > EDM > Upload Documents/Create EDM Tasks**)
3. Complete the following fields:
 - **Requested Action:** *Create an IES Inbox Task - Do NOT Upload a Document*
 - **Case/Application #:** *Click the magnifying glass. In the pop-up page paste the case number in the Case/Application # field. Then click Search, select the case in the Action column and click Submit*
 - **Individual:** *May leave blank*
 - **Document Category:** *Task-Manual*
 - **Document Task/Title:** *Other Follow-up*
 - **Received Date:** *Enter today's date*
 - **Route to Queue:** *Ready to certify*
 - **Comments:** *May leave blank*
4. Click **Submit**.
5. You have successfully created a manual task in the *Ready to Certify* queue in the **EDM Inbox**. After entering a case comment, you may move on to your next task or customer. A worker who is processing tasks in the *Ready to Certify* queue in the **EDM Inbox** will search for this task title after cutoff in order to complete the *Redetermination* case action.

BPR Tip: For EDGS that cannot be certified early, workers should search for manual tasks created to process the rede at a later date each month immediately after cut-off to complete.

What am I doing?	Where do I find the work?	Task/Title	Additional Details
Certifying pending redes that cannot be certified prior to cut-off	Ready to Certify EDM Queue	Other Follow-up	These tasks should be searched for each month immediately after cut-off to be certified.

Process a Timely Redetermination



IES Tip: It is imperative that timely Redes be processed on time to prevent IES from taking action on the EDG(s) if the Rede has not been processed. When a Rede is received timely (and a timely **Rede Received Date** is populated in IES), but it is not processed until after the month it is due, IES takes the following actions, impacting benefits:


- SNAP EDG: IES closes the EDG, regardless of the **Rede Received Date**, if the Rede has not been processed and stops issuing benefits
- CASH EDG: IES skips the EDG closure if the **Rede Received Date** is populated, but it does not issue benefits until the Rede has been processed

Below are the steps to process a timely Redetermination submitted via ABE or paper:

1. Navigate to the **EDM Inbox** and search for rede tasks in the *Interview Required-Initiate Rede* queue (**Left Navigation > EDM > Inbox**).
2. Before starting the task, review the redetermination information submitted by the customer by clicking the *rede* or *View HTML* hyperlinks. Additionally, review the **Case Search/Summary** page by clicking the **Case Number** hyperlink.
3. Start the task and initiate Data Collection using the *Redetermination* case action. Navigate to the **Initiate Interview – Initiate Review** page and review or complete the following:
 - **Program Checkboxes:** *Selecting the checkboxes tells IES which programs you want to redetermine. Select the checkbox next to each program that needs to be redetermined*




Policy Tip: Reference policy [MR #16.12: Certification Periods for Medical Programs](#) for how and when to align program redetermination dates.

- **Rede Received Date:** *Entering the Rede Received Date in IES is how the system knows that a customer has submitted their rede. Additionally, it is how IES determines whether the rede was received timely. It is a very important field. Redeterminations submitted online via ABE have the Rede Received Date automatically populated. Similarly, mailed in or dropped off Redeterminations that are scanned via Datacap have the Rede Received Date automatically populated. If there is no Rede Received Date populated or it needs to be updated, click the Edit  icon to the right of each EDG eligible for redetermination and enter the correct date*
 - **Source:** *Selecting the source tells IES how the office received the rede. Redeterminations submitted online via ABE have the Source automatically populated with ABE. For all other redes, select the appropriate source for how the Redetermination was received to the office*
4. On the **Redetermination Review Summary** page, review all drop-downs. Confirm that any which are pre-selected due to ABE submission are correct and complete any fields that are blank. Selecting YES or NO tells IES which pages to add to the driver flow. IES skips over sections with NO selected.
 - For any fields in which the customer reported changes, select YES
 - For any fields in which the customer reported no changes, select NO so that IES skips over them
 5. Click **[Next]** until you get to the first page with changes the customer reported. If an income change was reported, edit the existing record and update the dates and income information on the Employment pages or Unearned Income pages, depending on the income type. If there is new income, create an entirely new income record.

IES Tip: Review the changes submitted by the customer depending on how the



rede was received:

- If submitted via ABE: IES displays a message indicating there is conflicting data received from ABE. Click the **Resolve Conflict** hyperlink or the **Resolve Conflict**  icon to open a pop-up window and review the conflicting information between the current case information and what the customer reported in ABE. Once the changes are complete, click the **Conflict Resolved** checkbox
- If submitted via paper: verify the information on the rede form while updating the information

Earned Income key pages and fields:

- **Employment – Employer** page:
 - **CSCD:** *Enter the date the first paycheck for new income was received*



IES Tip: When entering or updating earned income information, enter the date the customer received the payment/pay raise/final pay as the **Circumstances Start/Change Date**.

- **Reported on Date:** *Enter the Rede Received date*
- **Date Client Became Aware:** *Enter date client became aware of the employment or employment related information*
- **Has individual lost employment or individual on strike?** *Select Yes or No from the drop-down list*



IES Tip: IES adds the **Loss of Employment** page to the driver flow when answering **Yes** to **Has individual lost employment or individual on strike?**, for the worker to document the changing income circumstances.

When documenting loss of employment, complete the following key fields:

- **Verification:** *Select the method used to verify loss of employment*
- **Verification Received Date:** *Enter the date DHS actually received the verification*
Note: If the verification source is *Client Statement* enter the date the customer reported the job loss as the verification received date
- **Date of Job Loss:** *Enter date employment ended*
- **Reason for Loss:** *Select the appropriate termination reason from the drop-down list*

Note: If the **Reason for Loss** selected is *Terminated* or *Voluntary Quit* for a work eligible customer, IES will create a non-cooperation record upon completing the **Loss of Employment** page. Workers will need to navigate to the **Non-Cooperation - Summary** page (**Left Navigation > Data Collection > Sanctions > Non-Cooperation**) to record the non-cooperation details.

- **Employment- Pay Details** page:
 - **Pay Report date:** *Enter the Rede Received Date*
 - **Pay Indicator:** *Select as appropriate:*
 - **Ongoing:** *The amount has changed, but the job has not changed*
 - **Hrs/Rate Change:** *This is a change to the hours or pay rate*
 - **Final:** *This is the final paycheck when employment ends*

- **Pay Verification Received Date:** Enter the date verification of change was received
- **Date Received/Expected:** Enter the date the customer received paycheck

Unearned Income key pages and fields:

- **Unearned Income -Details** page:
 - **CSCD:** Enter the date the new income was received
 - **Reported on Date:** Enter the Rede Received date
 - **Date Client Became Aware:** Enter date client became aware of the new income
 - **Pay Frequency:** Select the appropriate pay frequency for the new income
 - **Pay Verification Start Date:** First day of the new income period, that reflects the best estimate of future income
 - **Unearned Income Type:** Select the type of new unearned income
- **Unearned Income - Pay Details** page:
 - **Pay Report date:** Enter the Rede Received Date
 - **Pay Date:** Enter the date the customer received payment
 - **Pay Verification Received Date:** Enter the date verification of change was received
 - **Pay Indicator:** Select as appropriate:
 - **Ongoing:** The amount has changed, but the source has not changed
 - **Final:** This is the final payment when income ends



IES Tip: When performing case maintenance, IES displays the **Confirm Dates** pop-up page if the **Circumstances Start/Change Date** is more than three months old. The **Confirm Dates** pop-up page displays to confirm that dates were entered correctly in order to accurately calculate eligibility. If the dates are entered correctly, re-enter them in the **Correct Date** column and click **[Submit]** to continue processing the case.



IES Tip: Refer to the **Conduct Redeterminations** Wizards in IES for specific steps regarding how to update various Data Collection pages with changes reported at Redetermination.

6. After completing all the Logical Units of Work where changes were reported and updating any conversion activities on the case (income, relationships, education and verifications), click **[Next]** through the driver flow until the **Wrapup – Run Eligibility** page displays.
7. Run eligibility and certify the case.

Process a Late Redetermination

When processing a late redetermination, carefully review the Rede Received Date, as the steps to process a late Redetermination may vary depending on the when the rede was received. A late rede can be received within an acceptable timeframe or outside of it according to policy. The table below illustrates what Case Actions to use depending on when the late rede was received.



IES Tip: IES closes a program EDG if the rede hasn't been received and scanned via Datacap by cutoff (terminal entry) in the month the rede is due. The **Rede Due Date** is the date that the customer must return the redetermination packet. It is also the end of the certification period.

Rede Received Date timeframe	Program	Use Case Action
Timely after cutoff/terminal entry (after cutoff/terminal entry but within cancellation month)	All	Redetermination
Late but within grace period per policy	All	Redetermination
Late outside of grace period per policy	<ul style="list-style-type: none"> SNAP only or Medical only (case is in <i>Closed</i> status) 	Intake – Treat late rede as new application
	<ul style="list-style-type: none"> One or more programs are closed due to late rede but other active programs/EDGs remain (case is in <i>Approved</i> status) 	Case Change



BPR Tip: When a late rede was registered in legacy prior to Go Live, data conversion created a new program request in the *Changes* queue. Before processing these *Program Add* tasks, carefully review the **Case – Search/Summary** and **Eligibility Summary** pages.

If there is a *Closed* SNAP EDG on the case and benefits were received for October, process the task in *Redetermination* Case Action from the **Initiate Data Collection** page. Make sure the **Redetermination Received Date** is populated correctly in IES, but do not edit the program request information.

Redes Received Timely but after Cutoff in the Month Due:

If a customer has not submitted their redetermination by cutoff (15th of the month or next business day) in the month it is due, IES automatically takes negative action and closes the EDG(s) in question even though the **Rede Due Date** is not until the end of the month. Though negative action is taken by IES at cutoff, the redetermination is still considered timely as long as it is received at the office by the end of the month (i.e. prior to the **Rede Due Date**).

- If you are processing a timely rede that was returned prior to the **Rede Due Date** but was closed because it was received between cutoff and the last day of the month in which it was due, process the rede in *Redetermination* Case Action. The rede should be processed the exact same way that a timely rede would be processed (since it is technically a timely rede), including updating any conversion activities on the case (income, relationships, education and verifications)
- Do NOT make any changes to the **Program Request Summary** or edit the **Application Date** or **Program Status** from *Closed* to *Requested* on the **Program Request - Details** page. The reinstatement details do not need to be completed in the *Redetermination* case action.

- IES automatically updates the program status to **Approved** after certification
- To process a rede in this scenario, follow the steps listed in the **Process a Timely Redetermination** section in this job aid

Late Redes Received within Acceptable Timeframe:

If a customer fails to complete a redetermination by the **Rede Due Date**, the rede is considered “late”. IES automatically takes negative action on EDG(s) in question for late redes at cutoff in the month they are due. Depending on the programs, determine whether the rede has been received within the allowable timeframe per policy. If the rede has been received within the allowable timeframe, follow the below guidelines when processing:

- If you are processing a late SNAP rede where the SNAP EDG is closed, but the rede response is within acceptable timeframe per policy, always process the rede in the *Redetermination Case Action* - even if the task is found in the *Changes* queue
- Do NOT make any changes to the **Program Request Summary** or edit the **Application Date** or **Program Status** from *Closed* to *Requested* on the **Program Request - Details** page. The reinstatement details do not need to be completed in the *Redetermination* case action.
- IES automatically updates the program status to **Approved** after certification
- Process a late rede received within the acceptable timeframe following the steps listed in the **Process a Timely Redetermination** section in this job aid

Late Redes Received outside Acceptable Timeframe:

If a customer returns a redetermination late (after the **Rede Due Date**) and per policy, the **Rede Received Date** is outside of the allowable timeframe, follow the below guidelines when processing:

- SNAP only (Closed): If you are processing a late SNAP rede where the SNAP EDG is closed, and the rede response is outside of the acceptable timeframe per policy, the closed SNAP EDG cannot be reopened
 - Treat the rede form as a new application
 - Use the *Intake* case action to process the rede form as a new application through Application Registration. A new case will be created
 - Record the information in Data Collection, run eligibility and certify the case
- Medical/Cash (Active) with SNAP (Closed): If you are processing a late SNAP rede where the Medical/Cash EDG is active, but the SNAP EDG is closed, and the rede response is outside of the acceptable timeframe per policy, process the late SNAP rede as follows:
 - Use the *Case Change* case action
 - On the **Program Request - Details** page, change the **Program Status** from *Closed* to *Request* and enter the new application date
 - Record the reported information in Data Collection, run eligibility and certify the case



IES Tip: If a customer fails to complete a required redetermination, IES automatically cancels the EDGs and, if there are no other approved EDGs, closes the case for failure to complete a redetermination.