Quick Tips

Navigation Tips

- Use the tab button to quickly navigate through each field on a form.
- Columns can be sorted by clicking on the up/down arrow head in the column heading.
- Filter all columns – when searching for data, the results can be narrowed down by filtering the data using the tool at the bottom right of the search pages.
- If you are using the calendar, you can open the calendar, click on the top, month and year, and the full year will open, if you click again, a decade will open to allow you to easily switch months and years.

Highlighted New Features

- Client Profile – unique client information is now stored in the client profile including: address (including county/jurisdiction), phone numbers, Medicaid numbers, date of birth, SSN representatives, and advanced directives. To use this information elsewhere in the system it must be added in the client profile. For example if you want to add the address to receive services in the POS/POC, the address must first be added to the client profile.
    - Note: Check the “current” check box for MA number, address, and phone number for it to be displayed in the client summary on the left side navigation bar.

- Program Cases – contain all of the forms and decisions associated with an application and enrollment period for the specific waiver or program as indicated in the Program Case Summary Panel Bar Header.
    - Open a new program case for new applications and for redeterminations.
    - Close a program case after disenrollment or denial. Prior to closing the program case, case managers need to enter all case activities!
- Tasks – to get to the case forms and work items, click on the task link on the Program Case Summary Panel Bar Header.
- Show Me Lists are now called My Lists – they can be found on the Top Level Navigation Menu.
- Feedback – the error reporting tool has been renamed to Feedback. You can submit errors and other feedback by accessing this feature in the Global Menu.

Troubleshooting

I’m not able to view a form

- Do you have permission to view the form?
    - Your agency administrator may need to update your role.
- Did you receive an alert from the form creator indicating the form has been submitted or completed?

I’m not able to complete the next section of a form or complete the step in the process

- Was the submit button clicked?
    - Most forms are required to have a submitted status before you (or the next agency) can complete the next step in the process.
      Note: After the form has been submitted, you are no longer allowed to make changes to the form.

Unable to access your client?

- Have you been assigned the correct user role(s)? Your agency administrator may need to update your user role. You can check your user role(s) in your user profile.
- Is the client in your jurisdiction? It is possible that the client was assigned to a jurisdiction that is not yours. You can check this by looking at the client information in the Client Summary "Drop Down" in the left navigation bar.

Unable to complete a task?

- Ask your agency administrator to check your user role.
- Make sure you have submitted (not just saved) earlier forms.