

## **Step by Step Guide**

### **Manually Changing a Welfare Transition Case Status to Mandatory**

#### **I. Background**

The One-Stop Service Tracking (OSST) system is the data entry system for Welfare Transition (WT) and Food Stamp Employment and Training (FSET) programs. Program engagement information is recorded and retained in the OSST system. OSST notifies the Regional Workforce Boards (RWBs) that a cash assistance applicant or recipient is receiving cash assistance and must be engaged in the WT program. An alert, or a “To-Do”, is generated in the OSST system to notify regional staff to begin working with a particular person.

An engagement To-Do is generated by the OSST system automatically when the WT case is made “mandatory” via the OSST to Florida On-line Recipient Integrated Data Access (FLORIDA) system. Sometimes, a case’s status does not change to “mandatory” automatically because the FLORIDA to OSST interface is not working properly. Other times, RWB staff change the OSST case status from mandatory to another status (applicant or transitional) by mistake. As a result, the case status needs to be changed to “mandatory” manually so that the RWB can enter hours of participation and other information related to WT program engagement.

**Frequently Asked Question:** *Can a FSET case’s status be changed to “mandatory” manually? No. The FSET program is currently a volunteer program, so there is no need to change a FSET case to “mandatory.”*

Currently, if the OSST case status needs to be changed to “mandatory” because of a data entry error or an interface error, the RWB must send a request to the Agency for Workforce Innovation (AWI). Staff at AWI researches the case to validate that the OSST case status should be changed to mandatory. If the WT case meets the requirements associated with making a WT case mandatory, the AWI changes the OSST case status manually.

The RWBs have requested to have this capability at the regional level. To meet the needs of the RWBs, OSST will be updated to allow Regional Security Officers (RSO) to change a WT case status to “mandatory”. The change will be implemented on June 24, 2010. The change will be visible in the OSST production site on June 25, 2010.

**Frequently Asked Question:** *What is a RSO? Each RWB designates certain staff members to have a security officer profile in the data entry systems, including OSST. Individuals with a security officer profile through OSST’s Security Maintenance screen will be able to change the WT case status to “mandatory” if the case meets all the requirements. Program staff who do not have a security officer profile will have to submit the request to change a WT case status to “mandatory” according to the region’s local operating procedures.*

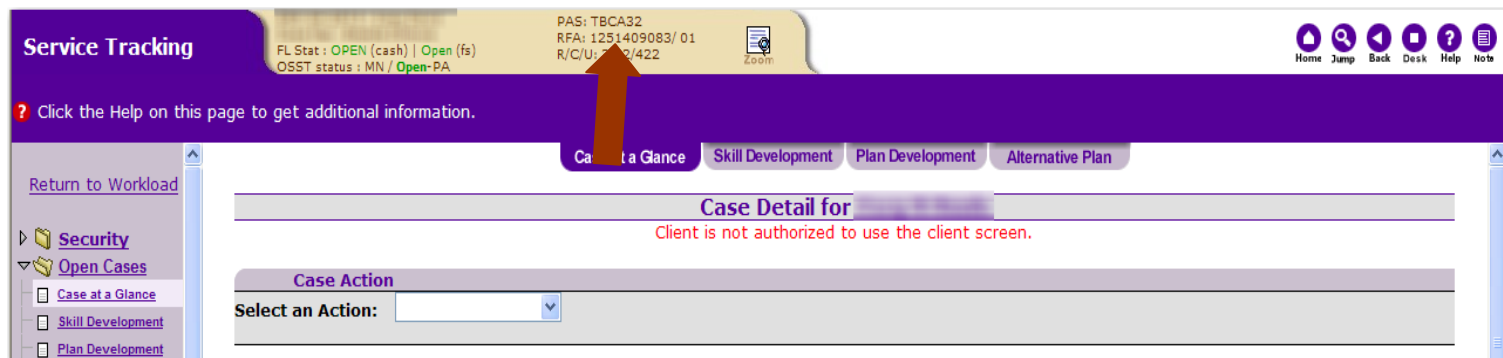
This document outlines

- The requirements for changing the status of a WT case to “mandatory” and
- The process of changing the status of a WT case to “mandatory.”

## II. Requirements for changing the status of a WT case to “mandatory” in the OSST system

**Step 1:** Verify that OSST case has received a benefit record from FLORIDA. A case status cannot be changed to “mandatory” manually unless the case has a PIN number assigned by the Department of Children and Families (DCF). The PIN number is received from FLORIDA via the FLORIDA to OSST interface. The PIN is not displayed on any of the OSST screens; however, there are other ways to determine if the OSST case has a benefit record.

- The system displays the FLORIDA case number or Request for Assistance (RFA) number. If the OSST case has the FLORIDA case number posted on the manila tab, the OSST system has received information about a public assistance benefit through the OSST to FLORIDA interface. The RSO can determine that a case has a benefit record associated with it by reviewing the OSST screens.
  - If the case has a FLORIDA case number posted on the manila tab of the Case at a Glance screen, the OSST system has received a public assistance benefit record. See below.



- The existence of a FLORIDA case number does not mean that record included information about a cash benefit from DCF. The RSO should go to the Benefit Information screen to verify if the OSST system received a cash benefit record.
  1. The Benefit Information screen contains the latest cash and food stamp information posted for OSST users to review. If the OSST case has information associated with cash benefits on the Benefit Information screen, the OSST system has received a cash assistance benefit record from the FLORIDA system.

- a. An example of a Benefit Information screen with a cash assistance record received via the FLORIDA to OSST interface is provided below. As seen below, the customer's case has information related to Temporary Cash Assistance (TCA) receipt. This information is under the section titled "Temporary Cash Information."

Current Benefit Information	
Last Case Update:	10/10/2009
Last FLORIDA Update:	10/10/2009
Last FLORIDA Registration Status:	03 - MN-Head of Household (AFDC,FSET)
FLORIDA Site Code:	32 401

Temporary Cash Information	
Category:	ADCR
Sequence Number:	01
Category Status:	Open(O)
Eligibility Status:	Pass(P)
Individual Status:	Eligible or Potentially Eligible Adult(EA)
Recurring Benefit Date	11/01/2009
Eligibility End Date:	
Recurring Benefit Amount:	\$241.00
Earned Income Amount:	\$0.00
Unearned Income Amount:	\$0.00
Community Service:	The max hours a family can be assigned each month = (Cash Benefit + FS Benefit) / the higher of the State or Federal minimum wage
Work Experience:	The max hours a family can be assigned each month = (Cash Benefit + FS Benefit) / the higher of the State or Federal minimum wage

Access FLA cash benefit: between  and 10/19/2009

Families receive TCA for a block of time. For example, the family will be approved to get cash for six months. At the end of the six-month period of time, the parent(s) must check in with the DCF, provide any updated information and sometimes resubmit information through the on-line application. In the example below, the family was recently approved to receive benefits in November of 2009.

The family may have also received TCA during the past several months, which can be determined using the feature "Access FLA cash benefits", which is shown on the screen shot on the previous page. The OSST user can enter a date range in the text boxes and click "Submit." The system will then display the most recent 12 months of cash assistance. An example is seen below.

FLORIDA Cash Benefit			
Maximum of 12 periods shown			
Service Site: 32078			
Date	Warrant Amt.	Benefit Amt.	Period
10/10/2009	175.00	175.00	10/00/2009

- b. In the example below, this case has an old cash benefit record. The OSST case is currently in “applicant” status. If the RSO needed to, (s)he could change the status to “mandatory” manually.

**Service Tracking** FL Stat: Closed (cash) | OPEN (fs) OSST status: Applicant / Open-PA RFA: 1154070344/ 01 R/C/U: 3/32/422

Click the Help on this page to get additional information.

**Current Benefit Information**

Last Case Update:	03/17/2005
Last FLORIDA Update:	03/17/2005
Last FLORIDA Registration Status:	03 - MN-Head of Household (Adoptive FSET)
FLORIDA SSI Code:	32 403

**Temporary Cash Information**

Category:	ADCR
Sequence Number:	01
Category Status:	Closed(C)
Eligibility Status:	Fail(F)
Individual Status:	Failed Adult(FA)
Recurring Benefit Date:	03/31/2005
Eligibility End Date:	03/31/2005
Recurring Benefit Amount:	\$303.00
Earned Income Amount:	\$134.38
Unearned Income Amount:	\$0.00
Community Service:	The max hours a family can be assigned each month = (Cash Benefit + FS Benefit) / the higher of the State or Federal minimum wage
Work Experience:	The max hours a family can be assigned each month = (Cash Benefit + FS Benefit) / the higher of the State or Federal minimum wage

Access FLA cash benefit: between [ ] and 10/19/2009 Submit

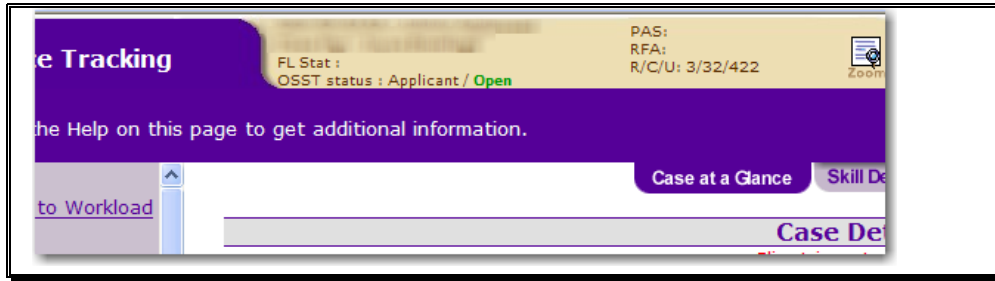
**Frequently Asked Questions:** Can you provide an example of a manila tab that shows the OSST system only received a FSET benefit record? Yes, as you can see in the example below, the “cash” status is “unknown” instead of “open” or “closed”. This means that the system has never received information indicating the individual has received cash assistance. The WT case status cannot be changed to “mandatory” because the OSST case does not have a cash benefit record associated with the case.

**Service Tracking** Case Mgr: Unit: 517 Assignment PAS: TBFT32 RFA: 1306522161 R/C/U: 3/32/517 FL Stat: Unknown (cash) | OPEN (fs) OSST status: EV / Open-FS

Click the Help on this page to get additional information.

Return to Workload Case at a Glance

If the case was created in OSST by a WT staff member through the work registration process and a cash benefit record was never received from the FLORIDA system, can the case status be changed to “mandatory” manually? No, the case does not have a cash benefit record. The manila tab of an applicant case created by a workforce staff member shows that the FL Stat is completely blank. See below.



2. Validate that the customer is **both** receiving cash assistance and referred to the WT program. The RSO will have to log into the FLORIDA system to verify this information. If the RSO or designated staff does not have access to FLORIDA, (s)he should contact the district's DCF contact and ask how to secure access to the FLORIDA system. The RSO or designated staff will have to complete a form, complete security training via the Internet and secure a user identification and password.

**Frequently Asked Question:** *Can the RSO change a case status to “mandatory” without accessing the FLORIDA system? No, the RSO must verify the individual is getting both cash assistance and referred to the WT program. Additionally, information secured from the FLORIDA system must be entered in OSST during the status change process.*

- a. To navigate to a screen in FLORIDA, the user must type in the screen acronym in the “NEXT TRAN” (Next Transaction) field and the case number (the case that he/she wants to look up) in the “PARMS” (Parameters) field. This is FLORIDA’s basic navigation process.
- b. In the example below, we typed AWAA in the NEXT TRAN field. AWAA is the benefit authorization screen. We typed the case number of the case we wanted to review in the PARMS field.

```

MNMS                                WELCOME TO THE FLORIDA SYSTEM          09/04/2009 10:52
                                PA SYSTEM SELECTION MENU          P31679 T DICKEY

NO.  SYSTEM MENU DESCRIPTION      TRAN  NO.  SYSTEM MENU DESCRIPTION      TRAN

1 - CLIENT REGISTRATION           (MNCR) 11 - ARCHIVE MAINTENANCE          (MNAR)
2 - BENEFIT ISSUANCE              (MNBI) 12 - PERIODIC REPORTING           (MNPR)
3 - BENEFIT RECOVERY              (MNBV) 13 - SECURITY MAINTENANCE          (MNSM)
4 - CASELOAD MANAGEMENT           (MNCL) 14 - SUPPORT FUNCTIONS            (MNSF)
5 - CLIENT NOTICES                (MNCN) 15 - SYSTEMS REFERENCE TABLES    (MNRF)
6 - COMPREHENSIVE SCHEDULING       (MNCS) 16 - ONLINE MANUALS               (MNOM)
7 - DATA EXCHANGE                (MNDE) 17 - CSE SYSTEM SELECTION MENU     (MNMM)
8 - APPLICATION ENTRY             (MNAE) 18 - PA INQUIRY MENU              (MNIQ)
9 - QUALITY ASSURANCE             (MNQA) 19 - REPORT DISTRIBUTION MENU      (MNRP)
10 - MAINTAIN ADMIN/SUPV UNITS     (MNUN) 20 - REPORTED CHANGES MENU       (MNCH)

*** USE SMSF OR PF13 TO SIGNOFF ***
*** PLEASE ENTER THE NUMBER OF THE DESIRED MENU ____

NEXT TRAN: awaa____ PARMS: 1236881834____

```

After entering the required information, we pressed the “Enter” key and the system displayed the benefit authorization screen associated with the case.

```

AWAA                                ASSISTANCE GROUP AUTHORIZATION    09/04/2009 10:38
CASE: 1236881834    WORKER: TBJF01
EFFECTIVE BEGIN DATE: 06/12/2009 STATUS: OPEN
ELIGIBILITY REVIEW DATE: 10312009    SUPERVISOR: _____ DATE: _____ SR: Y

CAT SEQ AG NAME  ELIG  MONTH  AG  REASON  BUDGET  BUDGET  SUPPRESS
      01  L      STAT  AMT  C  STAT  CODES  DATE    END    CR CN
ADCR 01  L      PASS  303.00 OP 040  _____ 07012009 S Y S83396
ADCU 01  L      PASS  364.00 CL 227 346 _____ 06302009 S N Z11354
FS   01  L      PASS  526.00 OP 040  _____ 07012009 S Y S83396
FS   02  C      FAIL   .00 DE 244  _____ 04162007 S N S08838
FS   02  C      FAIL   .00 DE 244  _____ 04162007 S N S08838
FS   02  C      FAIL   .00 DE 244  _____ 04162007 S Y S08838
FS   02  C      FAIL   .00 DE 244  _____ 04162007 S Y S08838
FS   03  L      FAIL  176.00 DE 384  _____ 10072008 S Y P30611
FS   03  L      FAIL  140.00 DE 384  _____ 10072008 S Y P30611
MA R 01  L      PASS   .00 OP 040  _____ 07012009 W Y S83396
MA U 01  L      PASS   .00 CL 227  _____ 06302009 S Y Z11354
ME I 01  L      PASS   .00 CL 520 249 _____ 01312008 S N P00626
MM I 01  L      FAIL   .00 DE 249 374 _____ 11152006 S Y S88164
MM I 01  L      FAIL   .00 DE 249 374 _____ 11152006 S Y S88164

```

The AWAA screen includes several key indicators. In the above example, the most recent benefit approved by the DCF was labeled as “ADCR” with a sequence number “01”. The family was approved to receive \$303. We know the family was eligible for benefits because the word “PASS” is displayed under the ELIG STAT column

(eligibility status), and the letters “OP” or open in the AG STAT column. **The AWAA screen must be printed and included in the WT case file if the OSST case status is changed to mandatory manually by the RSO.**

- c. Program staff must verify the customer is included in the “family”.  
**Why?** The family may be getting cash assistance but if the customer being engaged by the WT program is not actually listed by DCF as a part of the family, the customer is not included in the assistance group (AG). Therefore, the customer is not actually getting benefits. It would not be appropriate then for the WT staff member to change the OSST case status to “mandatory” for on-going engagement and support services.

In the example below, we entered “AIID” in the NEXT TRAN field and the case number in the PARMS field. The customer being engaged as an applicant is “Latoya.” For the security of the individual, all other information has been removed. The screen below demonstrates that Latoya is included in the case as a household member.

SESSION1 - EXTRA! Enterprise

File Edit View Tools Session Options Help

AIID

INDIVIDUAL DEMOGRAPHICS

10/19/2009 13:35

CASE: 1230001034 WORKER: Z11354

P71298 E MOTT

EFFECTIVE BEGIN DATE: 06/12/2009 STATUS: OPEN

DC	NBR	FIRST	MT	LAST	SUF	SSN	VR	DOB	VR	S	R	N/S	B
---	7	---	---	---	---	---	---	---	RC	T	U	N	U
---	6	---	---	---	---	---	---	---	RC	M	B	Y	---
---	2	---	---	---	---	---	---	---	SC	F	B	Y	---
---	1	LATOYA	D	---	---	---	---	---	CS	F	B	Y	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---
---	---	---	---	---	---	---	---	---	---	---	---	---	---

The AIID screen contains information about each individual included in the household. The first and last names are displayed along with the social security numbers (SSN), and date of births (DOB).

Next, the RSO will review the AGPI screen. DCF uses the AGPI screen to refer appropriate individuals to either the WT or FSET programs.

AGPI		WORK PROGRAMS								01/21/2010 12:18			
		CASE: [REDACTED]				WORKER: TB3112							
EFFECTIVE BEGIN DATE: 01/21/2010		STATUS: OPEN				REFERRAL SITE 33401							
NBR	NAME	AGE	CAT	SEQ	AG STAT	PART STAT	VUL AWD	REF TO	REF DATE	GOOD DATE/REASON	CAUSE	WK	
04	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	0	12	-	-	-	-	-	-	
03	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	0	12	-	-	-	-	-	-	
01	LATOY	[REDACTED]	ADCR	01	0	03	-	WT	12212009	-	-	Y	

- d. Once program staff has confirmed the workforce customer is in the AG, (s)he must confirm the family is getting cash assistance during the month in question. Program staff must ensure the customer is referred to the WT program as well.

The IQCH screen shows if the customer is getting cash during the month in question. The IQCH lists the cash history for the case and its applicable AG. The cash designation and sequence are needed to access the IQCH screen. This information was displayed on the AWAA screen. For this family, the cash designation is “ADCR” and the sequence number is “01”. To access the cash history, we entered “IQCH” in the NEXT TRAN field. Then we entered the case number, cash designation and sequence in the PARMS field. See the example below.

MNMS		WELCOME TO THE FLORIDA SYSTEM PA SYSTEM SELECTION MENU		09/04/2009 11:30 P31679 T DICKEY	
NO.	SYSTEM MENU DESCRIPTION	TRAN	NO.	SYSTEM MENU DESCRIPTION	TRAN
1	CLIENT REGISTRATION	(MNCR)	11	ARCHIVE MAINTENANCE	(MNAR)
2	BENEFIT ISSUANCE	(MNBI)	12	PERIODIC REPORTING	(MNPR)
3	BENEFIT RECOVERY	(MNBV)	13	SECURITY MAINTENANCE	(MNSM)
4	CASELOAD MANAGEMENT	(MNCL)	14	SUPPORT FUNCTIONS	(MNSF)
5	CLIENT NOTICES	(MNCN)	15	SYSTEMS REFERENCE TABLES	(MNRf)
6	COMPREHENSIVE SCHEDULING	(MNCS)	16	ONLINE MANUALS	(MNOM)
7	DATA EXCHANGE	(MNDE)	17	CSE SYSTEM SELECTION MENU	(MNMM)
8	APPLICATION ENTRY	(MNAE)	18	PA INQUIRY MENU	(MNIQ)
9	QUALITY ASSURANCE	(MNQA)	19	REPORT DISTRIBUTION MENU	(MNRp)
10	MAINTAIN ADMIN/SUPV UNITS	(MNUN)	20	REPORTED CHANGES MENU	(MNCH)

\*\*\* USE SMSF OR PF13 TO SIGNOFF \*\*\*

\*\*\* PLEASE ENTER THE NUMBER OF THE DESIRED MENU \*\*\*

NEXT TRAN: iqch PARMS: 1236881834/adcr/01



Remember, “ADCR” is the cash designation and “01” is the benefit sequence. The cash designation and benefit sequence can be found on the AWAA screen. The family’s benefit history will display. Each month the family received TCA under the cash designation of ADCR, the sequence 01 will be listed. In the example provided below, the family received cash assistance for the month in question, September of 2009. An amount of \$303.00 was received by the family on September 2, 2009 (DATE column) for the September period (PERIOD column).

IQCH CASH ISSUANCE HISTORY										09/04/2009 11:34	
DIS	ICT	CASE	CAT	SEQ	CSLD	WORKER	UNIT	SERV-SITE	STATUS		
02		1236881834	ADCR	01	WF33	TBJF01	88510	33401	0		
-----BENEFIT-----					GROSS	RECOUP	NET	STATUS			
	DATE	PERIOD	NUMBER	RSN	AMOUNT	AMOUNT	ISSUANCE	IS DS	PAYEE	WORKER	
1	09022009	092009	5506475	000	303.00	0.00	303.00	EB		TBJF01	
2	08022009	082009	5430678	000	303.00	0.00	303.00	EB		TBJF01	
3	07022009	072009	5358182	000	303.00	0.00	303.00	EB		TBJF01	
4	11022008	112008	4787543	000	241.00	0.00	241.00	EB		TBFT33	
5	10082008	102008	4776084	935	161.00	0.00	161.00	EB		S63956	
6	09022008	092008	4651191	000	241.00	0.00	241.00	EB		TBFT33	
7	08022008	082008	4584552	000	241.00	0.00	241.00	EB		TBFT33	
8	07022008	072008	4520221	000	241.00	0.00	241.00	EB		TBFT33	
9	06102008	062008	4510174	040	175.00	0.00	175.00	EB		S77336	
10	04022007	042007	5516452	000	241.00	0.00	241.00	EB		TB3112	
11	02022007	022007	5392733	000	241.00	0.00	241.00	EB		TB3112	

**The IQCH screen must be printed and included in the WT case file if the OSST case status is changed to mandatory manually by the RSO.**

1. Once the RSO has verified that the individual is included in the family’s grant and that the family received cash assistance during the month in question, (s)he must verify that the customer is referred to the WT program. To do so, the RSO will enter “AGPI” in the NEXT TRAN field and the case number in the PARMS field.

The AGPI screen lists each family member included in the AG. After you have entered the correct parameters to display the AGPI screen, press the “Enter” key. The current AGPI or referral screen will display the AGPI screen. In the example below, the customer “Latoy” was referred to the WT program. This is indicated by the “WT” in the REF TO column. The individual was referred to the WT program on April 23, 2009 as indicated in the REF DATE. The screen also verifies that the individual is receiving assistance under category (CAT) ADCR and sequence (SEQ) 01.

**The AGPI screen must be printed and included in the WT case file if the OSST case status is changed to mandatory manually by the RSO.**

AGPI WORK PROGRAMS 10/19/2009 13:48  
P71298 E MOTT  
CASE: 11334 WORKER: Z11354  
EFFECTIVE BEGIN DATE: 10/19/2009 STATUS: OPEN REFERRAL SITE 37301

NBR	NAME	AGE	CAT	SEQ	AG STAT	PART STAT	VUL AWD	REF TO	REF DATE	GOOD DATE/REASON	CAUSE	WK
06	ADCR	01	0	12	-	-	-	-	-	-	-	-
02	ADCR	01	0	12	-	-	-	-	-	-	-	-
01	LATOY	01	0	03	-	WT	04232009	-	-	-	-	Y

NOTES: WORK PROGRAM WILL SCHEDULE ORIENTATION WHEN SYSTEM REFERRAL  
RECEIVED. GIVE INDIVIDUAL A WORK PROGRAM INFORMATION HANDOUT.  
NEXT TRAN: \_\_\_\_\_ PARMS: \_\_\_\_\_

41B :00.4 23/13  
Connected to host: fdles.state.fl.us [204.90.27.80] (AWIP5540) NUM 1:50 PM

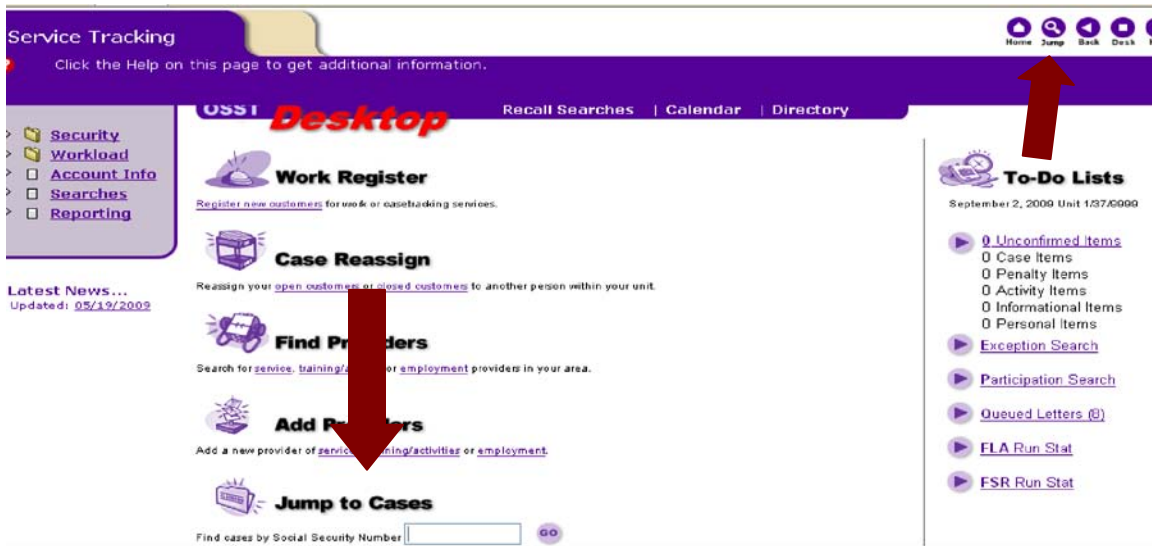
### III. Steps to change a WT case status to “mandatory”

The RSO can change the WT case status to “mandatory” once (s)he uses the FLORIDA system to verify that the customer is

- Included in the family (or AG) via the AIID screen;
- Receiving TCA for the month in question via the IQCH screen; and
- Referred to the WT program during the month in question via the AGPI screen.

The steps to change a WT case status to “mandatory” is provided below.

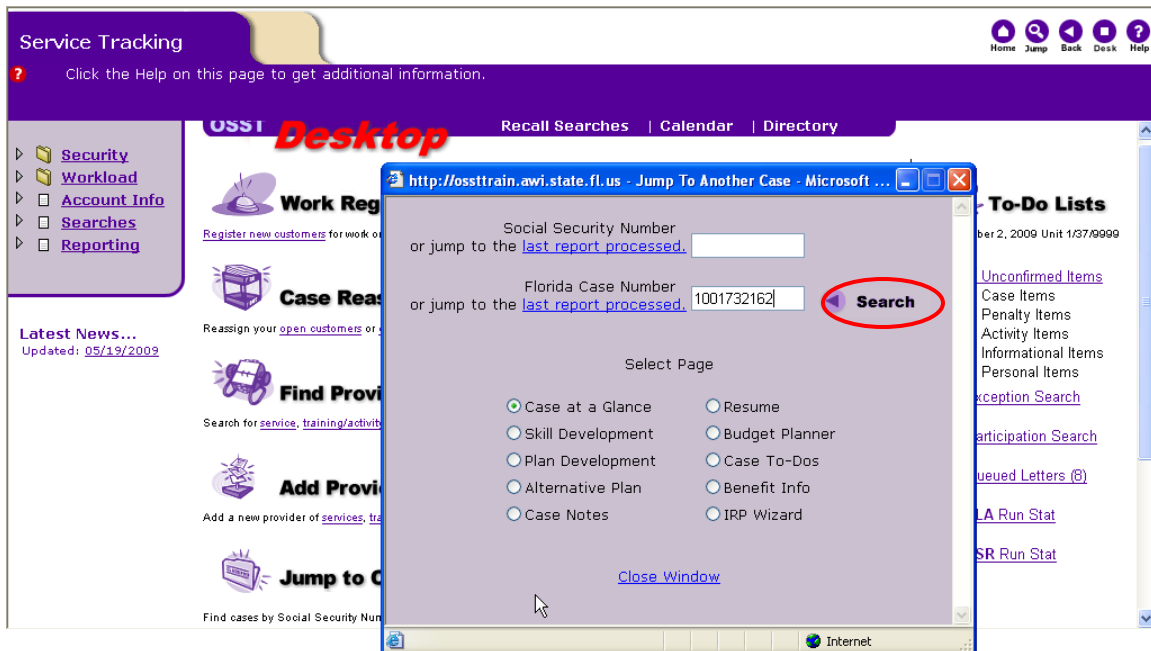
1. The RSO must log into the OSST system. The Desktop will display if the RSO successfully logs into OSST. From the Desktop, the RSO will navigate to the customer’s case. There are several features staff may use to navigate to a customer’s OSST case. Two are highlighted below: the *Jump to Cases* feature and the *Jump* icon on the top right of the screen.



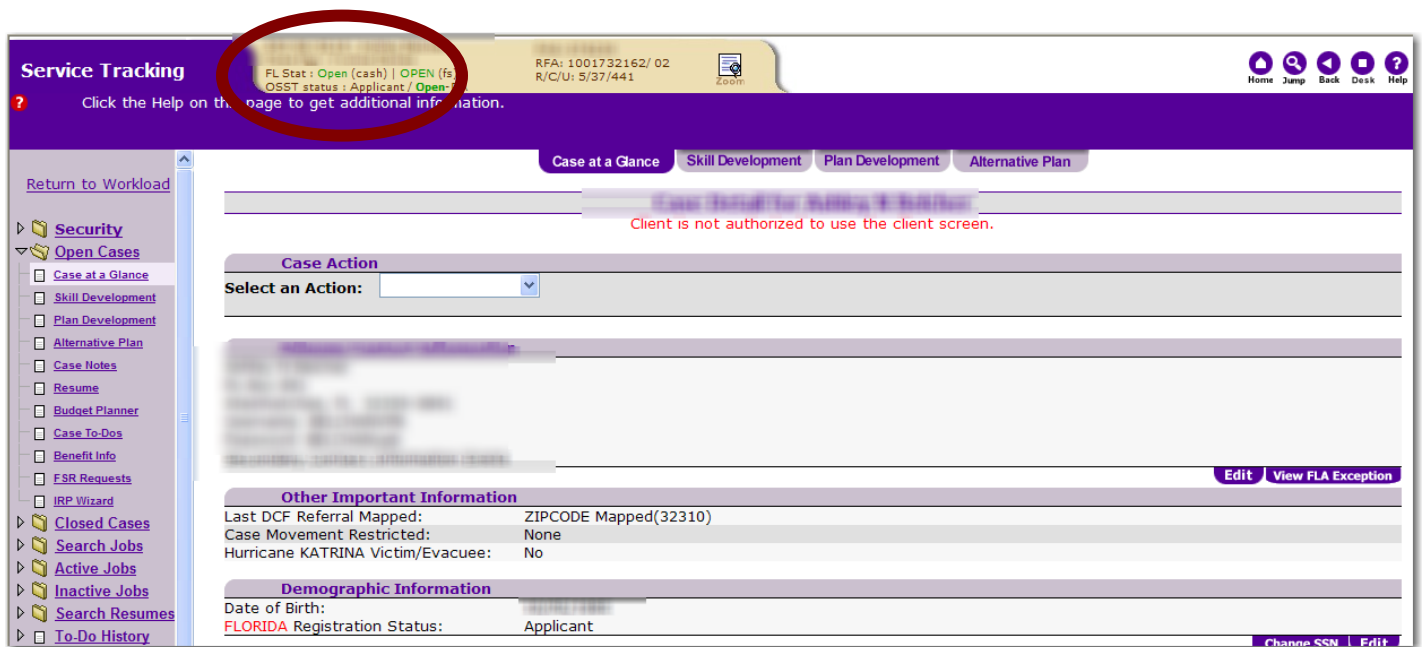
2. By clicking on the *Jump* feature located on the upper right hand side of the OSST Desktop, the user will get a pop-up box to enter either the SSN or the FLORIDA case number.



3. In the following example, we entered the FLORIDA case number in the *Florida Case Number* field to navigate to the customer's OSST case. Next, we clicked the "Search" button to initiate the search for the customer's OSST case.



4. After selecting the “Search” button, the system will display the customer’s case. The case must be open in the OSST system and in the appropriate region, which is displayed on the manila tab. In the following example, the OSST system shows that the case is open and in “applicant” status. This information is displayed after the terms “OSST status” on the manila tab associated with the case.



- If the case is open but in another region, the RSO cannot change the status to mandatory. The case is associated with another region. Users who have a security

profile allowing changes to cases associated with that region can make a change to the case.

- If the case is closed in a different region, the RSO must verify that the customer has notified DCF of an address change. The OSST case should be moved to the receiving region if the customer has moved or chooses to be served by the receiving region. The case can be moved to the receiving region through the work registration feature. If the OSST user work registers the case via the work registration feature on the Desktop, the case will be moved to the OSST user's caseload. The OSST user will then have to open the case prior to changing the OSST case status to "mandatory."

5. The RSO should review the FLORIDA Exception Report posted on the "View FLA Exception" button under the Primary Contact Information section of the Case at a Glance screen.

The report will show reasons why the OSST system may have received a record in the FLORIDA to OSST interface but did not update the case. In the example below, OSST has not received an update since 2008.

Florida Exception Error Records				
2 records found - up to 100 records can be displayed.				
Error Date	Error Field	Error Content	Error Message	FLsite
2008-12-24 04:31:37.0	ficcdprogfigregstatus	FS  20	Case processing skipped with partial update, Reason: Incoming referral (FS),came with EXempt status	38400
2008-11-26 17:19:56.0	ficafdceligstatuscd	F	Case processing skipped with partial update, Reason: Incoming referral (AFDC),came with Failed Individual status.	38400

Sometimes, the report shows that the record came over with a different SSN. The OSST system could not update the case with the new SSN because the SSN was

already in OSST associated with another case. The RSO must research the issue to resolve the conflict.

- i. For example, the program staff searched for the SSN when the cash assistance applicant came in to complete work registration. They could not find the SSN, so the staff created an applicant case. The customer, however, was already in the OSST system under a different SSN. So, when the record comes over to OSST via the interface to update and change the status to “mandatory,” the OSST system gets confused. OSST finds the first, last name, case number and PIN under a different SSN. It finds the SSN on another case with the same name.
  - ii. Making the case mandatory manually will not solve the issue. If the SSN conflict is resolved, future records received in the interface will update the case in OSST. The RSO must resolve the SSN conflict before changing the case status to “mandatory.”
6. When the OSST status must be changed from “applicant” or “transitional” to “mandatory” manually, the RSO must select the “Edit” button under the *Edit Demographic Information* section of the *Case at a Glance* screen.

The screenshot displays the 'Case at a Glance' screen. At the top, there are tabs for 'Case at a Glance', 'Skill Development', 'Plan Development', and 'Alternative Plan'. Below the tabs, the 'Case Detail for [Name]' is shown, with a red error message: 'Client is not authorized to view this case.' The 'Case Action' section has a 'Select an Action:' dropdown. The 'Primary Contact Information' section shows a name and a PIN. The 'Secondary Contact Information' section has a link to 'Edit' and a 'View FLA Exception' button. The 'Other Important Information' section lists 'Last DCF Referral Mapped: ZIPCODE Mapped(32310)', 'Case Movement Restricted: None', and 'Hurricane KATRINA Victim/Evacuee: No'. The 'Demographic Information' section shows 'Date of Birth: 10/05/1985' and 'FLORIDA Registration Status: Applicant'. The 'Household Members List' section has a 'Sort by:' dropdown set to 'Last Name' and a 'Sort' button. A red oval highlights the 'Change SSN' and 'Edit' buttons in the 'Demographic Information' section.

7. The *Edit Demographic Information* screen will display. The “current” OSST case status will display in the *Change OSST Registration Status*.

Additional Demographic/Other Information	
Date of New Referral	07/25/2006
Change OSST Registration Status	Applicant
Is Customer a Refugee?	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Veteran Type	Unknown
Due date of pregnant customer	
Apply Movement Restriction	<input type="radio"/> County level <input checked="" type="radio"/> None
Hurricane KATRINA Victim/Evacuee	<input type="radio"/> Alabama <input type="radio"/> Louisiana <input type="radio"/> Mississippi <input checked="" type="radio"/> No
<a href="#">View Time Limit</a>	

The RSO will see “Mandatory” as an option under the *Change OSST Registration Status* drop down feature. If the OSST user does not have a security officer profile, the user will not see “Mandatory” as an option in the drop down. The RSO will select the “Mandatory” option. When the RSO selects “Mandatory” in the drop down, the following screen will display.

Demographic Information	
Date of Birth:	
Race:	White
Gender:	Female
Registration Status:	
Date of First Refe	
Date of New Refe	
<div style="border: 1px solid black; padding: 5px;"> <p><b>Windows Internet Explorer</b></p> <p>1. Is this individual receiving cash assistance funded by TANF as indicated on the FLORIDA system?</p> <p>2. Does the FLORIDA system indicate the individual is a mandatory (MN) participant?</p> <p>3. Is the individual referred to the Welfare Transition program?</p> <p>If all three questions are answered with 'YES', click 'OK'. Otherwise, click 'Cancel'.</p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>	
<div> <div>Additional Dem</div> <div> Date of New Refer  Change OSST Reg  Is Customer a Ref  * Veteran Type  Due date of pregnant customer  Apply Movement Restriction  Hurricane KATRINA Victim/Evacuee </div> </div>	
<a href="#">View</a>	
Time Limit Information	


8. In the pop-up above, the user is being notified that (s)he will have to go to DCF's FLORIDA system to look up critical information. The information must be entered in the OSST system for the process to be completed. The RSO should print the OSST's system AIID screen, AGPI screen, IQAA screen and IQCH screen to show the program participant is
  - Included in the family;
  - Receiving cash assistance; and
  - Referred to the WT program by DCF.
9. By clicking “OK” in the pop-up above, the user will be taken to the screen where data associated with cash assistance receipt is in OSST.

- a. The information required to complete this data entry portion of the process is found on the AGPI screen in the FLORIDA system.
- The RSO ensured that the individual being referred to the WT program via the FLORIDA system is included in the family. This is demonstrated below by the name: the name in OSST matches the name in the NAME column below.
  - The FLORIDA screen shows that this person is referred to the WT program as indicated by the “WT” in the *REF TO* program.
  - The *PART STAT* is 03. This is a referral code. The code “03” means the individual is mandatory and is the head-of-household.


EFFECTIVE BEGIN DATE: 11/04/2009					CASE: 11/04/2009 STATUS: OPEN					WORKER: 11/04/2009 REFERRAL SITE 01400			
NBR	NAME	AGE	CAT	SEQ	AG STAT	PART STAT	VUL AWD	REF TO	REF DATE	GOOD DATE/REASON	CAUSE	WK	
07	ADCR	A	ADCR	01	O	12	-	-	-	-	-	-	
06	ADCR	A	ADCR	01	O	12	-	-	-	-	-	-	
02	ADCR	R	ADCR	01	O	12	-	-	-	-	-	-	
01	ADCR	A	ADCR	01	O	03	-	WT	10092009	-	-	Y	

- b. The participant’s referral code is entered in the *AGPI Part Stat* box below.




Checks for Making a Case Mandatory	
* AGPI Part Stat:	03
* AG Cat / Seq #:	/
* AGPI Referral to:	
* AGPI Referral (AWAA Driver) Date:	
<div>Continue ? Clear Changes ? Cancel ?</div>	

- c. The category of benefits is entered in the “AG Cat/Seq #” boxes. This is found on the AGPI screen under the *CAT* and *SEQ* columns. The information is entered in the OSST system below.

Checks for Making a Case Mandatory	
* AGPI Part Stat:	03
* AG Cat / Seq #:	adcr / 01
* AGPI Referral to:	
* AGPI Referral (AWAA Driver) Date:	
<div>Continue ? Clear Changes ? Cancel ?</div>	

- d. “AGPI Referral to” identifies the program to which that individual has been referred. For example, the cash assistance recipient below has been referred to the WT program by DCF.

EFFECTIVE BEGIN DATE: 11/04/2009						CASE: 11/04/2009 STATUS: OPEN			WORKER: 11/04/2009 REFERRAL SITE 01400			
NBR	NAME	AGE	CAT	SEQ	AG STAT	PART STAT	VUL AWD	REF TO	REF DATE	GOOD DATE/REASON	CAUSE	WK
07	adcr	A	ADCR	01	O	12	-	-	-	-	-	-
06	adcr	A	ADCR	01	O	12	-	-	-	-	-	-
02	adcr	R	ADCR	01	O	12	-	-	-	-	-	-
01	adcr	A	ADCR	01	O	03	-	WT	10092009	-	-	Y

Checks for Making a Case Mandatory			
* AGPI Part Stat:	03		
* AG Cat / Seq #:	adcr	/	01
* AGPI Referral to:	wt		
* AGPI Referral (AWAA Driver) Date:	<input type="text"/> 		
<div> Continue ? Clear Changes ? Cancel ? </div>			

- e. The RSO must enter the date the participant was required to start cooperating with the WT program. This is when the participant was both referred to the program and getting cash assistance. Usually, it is the same date as the AGPI referral date, found in the column titled REF Date. The RSO, however, must verify the individual received cash during the same month the individual was referred to the program. As demonstrated below, the individual started receiving cash during November 2009.

IQCH		CASH ISSUANCE HISTORY						11/04/2009 15:59		
DISTRICT	CASE	CAT	SEQ	CSLD	WORKER	UNIT	SERV-SITE	STATUS		
03	1174242647	ADCR	01	3TCA			01400	O		
-----BENEFIT-----				GROSS	RECOUP	NET	STATUS		PAYEE	WORKER
DATE	PERIOD	NUMBER	RSN	AMOUNT	AMOUNT	ISSUANCE	IS	DS		
1 11032009	112009	5723851	040	353.00	0.00	353.00	EB			
2 06062009	062009	5346910	241	1000.00	0.00	1000.00	EB			
3 04022008	042008	4335607	000	364.00	0.00	364.00	EB			
4 03072008	032008	4318685	040	302.00	0.00	302.00	EB			
5 10022007	102007	5897078	000	364.00	0.00	364.00	EB			
6 09022007	092007	5833302	000	364.00	0.00	364.00	EB			
7 08102007	082007	5817390	938	166.00	0.00	574.00	EB			
8	072007		938	228.00						
9	062007		938	180.00						
10 08022007	082007	5770506	000	198.00	0.00	198.00	EB			
11 07022007	072007	5707208	000	136.00	0.00	136.00	EB			
ENTER SELECTION NUMBER: _____										
PFKEYS: 15=IQCP, 16=IQAP, 17=IQAM, 18=ABAB, 19=ABSB										
NEXT TRAN: _____ PARMS: _____ MORE...										

The month the family started receiving cash is not the same month of referral as indicated on the AGPI screen.

EFFECTIVE BEGIN DATE: 11/04/2009						CASE: 11111111 STATUS: OPEN			WORKER: 11111111 REFERRAL SITE 01400			
NBR	NAME	AGE	CAT	SEQ	AG STAT	PART STAT	VUL AWD	REF TO	REF DATE	GOOD DATE/REASON	CAUSE	WK
07	11111111	A	ADCR	01	0	12	-	-	-	-	-	-
06	11111111	A	ADCR	01	0	12	-	-	-	-	-	-
02	11111111	R	ADCR	01	0	12	-	-	-	-	-	-
01	11111111	A	ADCR	01	0	03	-	WT	10092009	-	-	Y

Why is the referral a month earlier? The participant was referred to the WT program as an applicant in October 2009. Most program participants are referred to the program to complete the WT work registration process. Sometimes the date on the APGI screen is updated. In this case, it was not. What is the appropriate date to place on the OSST screen as the AGPI Referral Date? November 3, 2009 is the date the cash posted to the participant's case; therefore, this is the date that should be placed on the screen.

Checks for Making a Case Mandatory	
* AGPI Part Stat:	03
* AG Cat / Seq #:	adcr / 01
* AGPI Referral to:	wt
* AGPI Referral (AWAA Driver) Date:	11/03/2009
<div> Continue ? Clear Changes ? Cancel ? </div>	

- The RSO will then click the "Continue" button. OSST will return to the screen below. To ensure the OSST status is changed to mandatory, the RSO must click the "Save" button on the bottom of the screen.

Additional Demographic/Other Information	
Date of New Referral	10/07/2008
Change OSST Registration Status	Mandatory
Is Customer a Refugee?	<input type="radio"/> Yes <input checked="" type="radio"/> No
* Veteran Type	Non-Veteran
Due date of pregnant customer	
Apply Movement Restriction	<input type="radio"/> County level <input checked="" type="radio"/> None
Hurricane KATRINA Victim/Evacuee	<input type="radio"/> Alabama <input type="radio"/> Louisiana <input type="radio"/> Mississippi <input checked="" type="radio"/> No
<a href="#">View Time Limit</a>	
Time Limit Information	
Date ARCA was updated	
Time Limit	<input type="radio"/> 24/60 <input type="radio"/> 36/72 <input type="radio"/> Other <input type="text"/> / <input type="text"/>
Number of Months Used	<input type="text"/>
Through Date	
<div> Save ? Clear Changes ? Cancel ? </div>	

11. The OSST case will update.

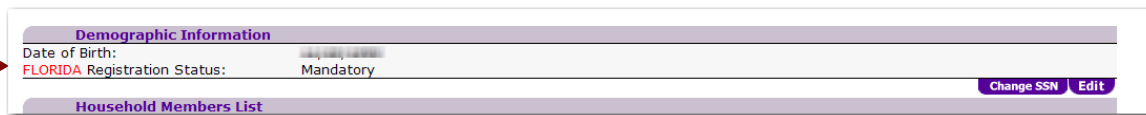
- i. The updated status will display on the top of the manila tab and on the *Case at a Glance* screen under the *Demographic Information* section of the screen.



Case Mgr: [redacted] Am [redacted] PAS: [redacted]  
 FL Stat: Open (cash) | OPEN (fs) RFA: 1174242647 / 01  
 OSST status: MN / Open-PA R/C/U: 9/1/470

Home Jump Back Desk Help Note

Case at a Glance Skill Development Plan Development Alternative Plan



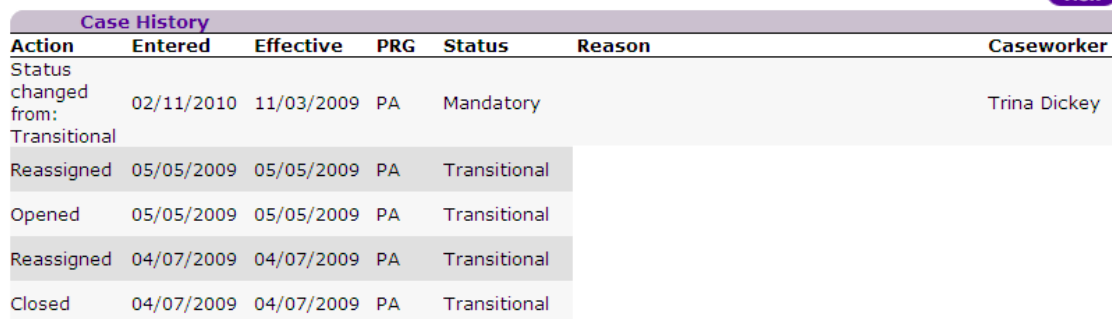
Demographic Information

Date of Birth: [redacted]  
 FLORIDA Registration Status: Mandatory

Change SSN Edit

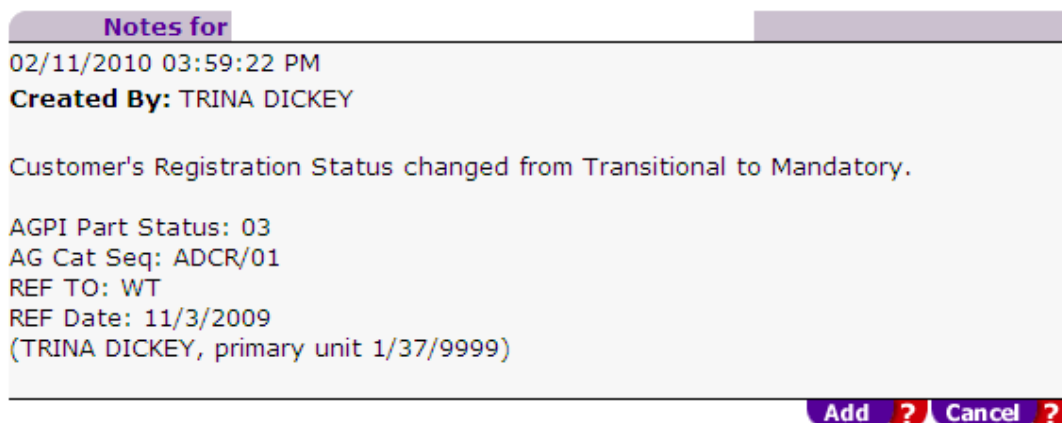
Household Members List

- ii. The *Case History* on the *Case at a Glance* screen documents that the user changed the OSST status to “mandatory” using the status change feature.



Action	Entered	Effective	PRG	Status	Reason	Caseworker
Status changed from: Transitional	02/11/2010	11/03/2009	PA	Mandatory		Trina Dickey
Reassigned	05/05/2009	05/05/2009	PA	Transitional		
Opened	05/05/2009	05/05/2009	PA	Transitional		
Reassigned	04/07/2009	04/07/2009	PA	Transitional		
Closed	04/07/2009	04/07/2009	PA	Transitional		

- iii. The case notes will be updated with the information entered on the system.



Notes for

02/11/2010 03:59:22 PM  
**Created By:** TRINA DICKEY

Customer's Registration Status changed from Transitional to Mandatory.

AGPI Part Status: 03  
 AG Cat Seq: ADCR/01  
 REF TO: WT  
 REF Date: 11/3/2009  
 (TRINA DICKEY, primary unit 1/37/9999)

Add ? Cancel ?

***Frequently Asked Question:*** *What if program staff accidentally changes the OSST case status to “transitional” or “applicant” after the FLORIDA to OSST interface has sent the case over as “mandatory?”*

The RSO will follow the steps to research and review the case in FLORIDA to ensure that the individual meets the validations. The RSO will then review the OSST case to see when the alert came and change the case status back to mandatory effective the date it was accidentally changed to transitional or applicant.