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GENERAL LETTER NO. 14-O-6

ISSUED BY: Bureau of Financial, Health and Work Supports
Division of Adult, Children and Family Services

SUBJECT: Employees' Manual, Title 14, Chapter O, **PJCASE System**, pages 32, 33, 34, 37 through 41, 47, 48, 66, 68, 72, 74, 76, 80, 101, 102, and 106 through 109, revised.

Summary

Chapter 14-O is revised to:

- ◆ Add policy that an LBP must be stopped in PJCASE pending the outcome of an appeal when the appeal is filed:
 - Before the effective date of the intended action on the *Notice of Decision* establishing the beginning date of the limited benefit plan, or
 - Within 10 days from the date the participant receives the notice establishing the beginning date of the limited benefit plan. The date on which the notice is received is considered to be five days after the date on the notice, unless the participant shows that the participant did not receive the notice within the five-day period.
- ◆ Change the description of LBP Stop reason A from "Timely Appeal" to "Appeal."
- ◆ Remove the reference to the NOD DATE field on the LBP Stop Screen.
- ◆ Add policy that when IM reactivates an LBP that has been stopped using reason A – Appeal, the system will apply a new LBP start date.
- ◆ Update the instructions for issuing a PROMISE JOBS expense allowance directly to a provider.

Effective Date

Immediately.

Material Superseded

This material replaces the following pages from Employees' Manual, Title 14, Chapter O:

<u>Page</u>	<u>Date</u>
32	February 28, 2014
33, 34	May 18, 2007
37	February 28, 2014
38-41	May 18, 2007
47	August 14, 2009
48	August 8, 2014
66	August 14, 2009
68	February 28, 2014
72	August 14, 2009
74	May 18, 2007
76, 80	August 14, 2009
101	December 2, 2011
102	August 14, 2009
106	December 2, 2011
107	August 14, 2009
108, 109	December 2, 2011

Additional Information

Refer questions about this general letter to your area income maintenance administrator.

- ◆ **CHOICE DATE:** Displays the date that PROMISE JOBS determined that the person chose the LBP.
- ◆ **RECONSIDERATION PENDING SINCE:** When a person in an active LBP is in the process of reconsidering the LBP, this field displays the date that the IM worker changed the person's JOBS code to "U," "V," "W," or "T."
- ◆ **PROCESS DATE:** Displays the date the PROMISE JOBS worker made entries to start the LBP.
- ◆ **FAILURE REASON:** Displays the code relating to the failure reason. Current codes are:
 - A Did not make appointment.
 - B Did not keep appointment.
 - C Did not complete orientation.
 - D Did not complete assessment.
 - E Did not sign an FIA.
 - F Abandoned the FIA.
 - G Did not verify work hours.
 - H Did not renegotiate an FIA after previous FIA ended.
 - I Did not participate in FIA progress review.
 - K Did not verify hours of participation in activities other than work.
- ◆ **FIA EXISTED BEFORE LBP CHOICE:** Displays either a "Y" for yes or an "N" for no.
- ◆ **DATE FIA SIGNED TO RECONSIDER:** If a date is present, it is the date the person signed an FIA to reconsider the LBP.
- ◆ **STOP INFORMATION:**
 - **STOP DATE.** Displays the date that the LBP was stopped or is blank.
 - If there is a date in this field, the LBP is stopped on this date.
 - If the field is blank, the LBP is active. EXCEPTION: If the STOP REASON field contains an "E" and the LBP STATUS field displays "inactive," the LBP expired under a policy that existed before 06-01-1999. Consider the LBP as not active.
 - **STOP REASON.** This field will contain an entry if the LBP is not active. The stop reason codes are:
 - A Appeal (IM only)
 - B Child left the home (IM only)
 - C LBP in error (PROMISE JOBS and IM)

- D Person who chose the LBP left the home (IM only)
- E LBP expired under former policy, or stopped under former policy as the person who chose moved to a control county/case
- I Administrative stop for individuals (IM only)
- R Person who chose the LBP completed significant contact (PROMISE JOBS only)
- W Administrative stop for entire LBP (IM only)
- Z System-entered. LBP was initially stopped pending appeal and was later reactivated with a new effective date.

- **STOP AGENCY/COUNTY/WORKER.** Indicates who stopped the LBP.
- ◆ **APPEAL INFORMATION:** If both of the fields are blank, the LBP has not been stopped pending an appeal.
- **APPEAL DATE.** If the LBP is stopped for reason code "A" (pending an appeal), this field displays the date that the appeal was filed as entered by the IM when the LBP was stopped.
- **APPEAL REACTIVATE DATE.** System-determined. When an LBP is stopped pending an appeal, PJCase determines the APPEAL REACTIVATE DATE will be a new LBP effective date when or if the LBP is reactivated. The field will display "New."

The following action buttons are available on the LBP Display screen.

- ◆ **LBP TRANS HISTORY:** Select this action to view a history of all actions taken by PROMISE JOBS or IM staff on the LBP. This action is available to both IM and PROMISE JOBS staff.
- ◆ **ABANDON RECONSIDERATION:** Select this action to record that a person has abandoned reconsideration of the LBP. This action is available only to PROMISE JOBS staff. This choice is visible on the screen only if the user logged in under agency code "1" or "2," so IM staff will not see it.
- ◆ **LBP STOP:** Select this action to make entries to stop an LBP. This action is available to both IM and PROMISE JOBS staff.
- ◆ **REFRESH LBP:** Select this action to make entries to refresh all transactions made on the LBP on the current day. See [Refreshing an Entry](#) for more information. This action is available to both IM and PROMISE JOBS staff.
- ◆ **CANCEL:** Select this action to cancel your entry to return to the Main Menu. This action is available to both IM and PROMISE JOBS staff.

The bottom of the page displays each person included in the LBP at the time it was started. If the LBP is not active for the person, a STOP REASON and STOP DATE will display.

If a person was included in an LBP at the time the LBP was started, and the person is no longer attached to the ABC case that the LBP is assigned to, only the person's state ID will display. The display will say "Person not on case" in the name field. The LBP should be stopped for a person who is no longer attached to the case when the person is no longer in the home.

Stopping an LBP

Stopping an LBP is the responsibility of either the IM worker or the PROMISE JOBS worker, depending on the situation. The IM worker is responsible for stopping the LBP in the following situations:

- ◆ An appeal is filed:
 - Before the effective date of the intended action on the *Notice of Decision* establishing the beginning date of the limited benefit plan, or
 - Within 10 days from the date the participant receives the notice establishing the beginning date of the limited benefit plan. The date on which the notice is received is considered to be five days after the date on the notice, unless the participant shows that the participant did not receive the notice within the five-day period.
- ◆ A child in an LBP chosen by a parent or caretaker leaves the home.
- ◆ The person who chose the LBP was referred to PROMISE JOBS in error because the person was exempt due to the receipt of SSI, school attendance or alien status.
- ◆ The final appeal decision reverses the LBP.
- ◆ A parent in a two-parent household chose the LBP and leaves the household.
- ◆ Other administrative reasons.

- ◆ **STOP REASON:** Dropdown box containing the possible reasons the LBP is being stopped. PROMISE JOBS workers can use only reason code "C" or "R." IM workers cannot use reason code "R." The options displayed are:

A Appeal. Entered by **IM** only. Use code "A" to stop the entire LBP when an appeal is filed:

- ◆ Before the effective date of the intended action on the *Notice of Decision* establishing the beginning date of the limited benefit plan, or
- ◆ Within 10 days from the date the participant receives the notice establishing the beginning date of the limited benefit plan. The date on which the notice is received is considered to be five days after the date on the notice, unless the participant shows that the participant did not receive the notice within the five-day period.

See [4-J, When an Appeal of a Limited Benefit Plan Is Filed](#), for more information.

B Child left the home. Entered by **IM** only. Use code "B" to stop the LBP for a child when the child in an LBP chosen by a parent or needy relative leaves the home. The LBP remains in place for the parent or relative and any members who still live with that person.

When the child is a minor parent, use code "B" to stop the LBP for the minor parent and the minor parent's child when the LBP was chosen by a parent or needy relative and:

- ◆ The minor parent and minor parent's child leave that person's home and become eligible on another case, or
- ◆ The minor parent turns 18, or is 18 and completes high school, and applies for a separate FIP case, or
- ◆ The minor parent applies for a separate FIP case after the minor parent and child are canceled due to the parent or relative's LBP. Consider the minor parent as living in the home of a self-supporting parent in this situation.

See [4-J, To Whom the Limited Benefit Plan Is Applied and Minor Parents Living With FIP Parent](#), for more information.

C LBP started in error. Entered by either **IM** or **PROMISE JOBS**.

IM uses code "C" to stop an entire LBP when:

- ◆ The person who chose the LBP was referred to PROMISE JOBS in error because the person was exempt due to the receipt of SSI, school attendance, or alien status when the LBP was imposed.
- ◆ The final appeal decision reverses the LBP.

PROMISE JOBS uses code "C" to stop an entire LBP when PROMISE JOBS determines the LBP was started in error.

Do not use code "C" to stop an LBP when a person becomes exempt after the notice is issued imposing an LBP. Use code "W."

See [4-J, Stopping a Limited Benefit Plan](#), and [4-Appendix, PJPM, Stopping a Limited Benefit Plan](#), for more information.

D The person who chose the LBP left the home. Entered by **IM** only. Use code "D" to stop an LBP for the remaining parent and children when the parent who chose the LBP leaves the home.

The LBP remains in place for the parent who chose the LBP and any children living with that parent. See [4-J, LIMITED BENEFIT PLAN, Limited Benefit Plan Variations, Two-Parent Households, and Stopping a Limited Benefit Plan](#) for more information.

I Administrative stop for individuals. Entered by **IM** only. Use code "I" to stop an LBP for a person in the LBP when the LBP needs to remain active for the person who chose the LBP and neither reason code "B" or "D" applies. Some situations where code "I" applies:

- ◆ A person on the case is incorrectly included in the LBP.
- ◆ An appeal is filed of a notice canceling FIP due to an LBP that is in effect for the person who chose the LBP and possibly others. The LBP must be stopped pending the appeal for the persons canceled from FIP when the appeal is filed:
 - Before the effective date of the intended action on the notice, or
 - Within 10 days from the date the participant receives the notice. The date on which the notice is received is considered to be five days after the date on the notice, unless the participant shows the participant did not receive the notice within the five-day period.

The LBP must remain in effect for the person who chose it and for any others previously canceled due to the LBP.

On June 1, 2005, a parent who chose an LBP effective January 1, 2004, returns to the home of the other parent and children, who are on FIP. On June 2, IM sends a notice to cancel FIP effective July 1, 2005. The household files an appeal on June 7, 2005.

The IM worker uses reason code "I" to stop the LBP for the parent and children who had been receiving FIP and makes ABC entries to reinstate FIP for them. The LBP remains active for the parent who chose the LBP.

See [4-J, To Whom the Limited Benefit Plan Is Applied](#) and [Stopping a Limited Benefit Plan](#), for more information.

- R Person reconsidered. **PROMISE JOBS-entered only**. Use code "R" to stop an LBP when the person who chose the LBP reconsiders the LBP (signs an FIA and if a subsequent LBP, completes 20 hours of PROMISE JOBS activity).

See [4-J, Reconsidering a Limited Benefit Plan](#), and [4-Appendix, PJPM, Reconsidering an Active Limited Benefit Plan](#), for more information.

- W Administrative stop for entire LBP. **IM-entered only**. Use code "W" to stop the entire LBP when no other stop reason applies. Code "W" applies when the LBP was started according to policy but needs to be temporarily or permanently stopped due to a change in the person's circumstances. Some situations to use reason code "W":

- ◆ Person becomes exempt: The person who chose the LBP is currently exempt due to the receipt of SSI, school attendance, or alien status, but became exempt after the notice is issued to impose the LBP.
 - If the LBP is a **first** LBP, stop the LBP with reason code "W."
 - If the LBP is a **subsequent** LBP and the six-month period of ineligibility has expired, stop the LBP with reason code "W."
 - Continue a **subsequent** LBP when the six-month period is in effect.

- ◆ **Needy relative:** When a needy relative chooses an LBP and later reapplies for **the needs of the children only**:
 - If the LBP is a **first** LBP, temporarily stop the LBP with reason code "W."
 - If the LBP is a **subsequent** LBP and the six-month period of ineligibility has expired, stop the LBP with reason code "W."
 - Continue a **subsequent** LBP for the relative and the children when the six-month period is in effect when the children continue to live with the relative.

If the relative later reapplies for the relative's own needs and the LBP has been temporarily stopped using code "W," use the LBP Reactivate function to reimpose the LBP. To get FIP again, the relative must sign an FIA and if a subsequent LBP, complete 20 hours of PROMISE JOBS activity.

Do not use code "B" or "D" to stop the LBP for the children when a needy relative chooses an LBP and later reapplies for the needs of the children only **unless** the children no longer live with the relative. If you do, the Eligibility Tracking System (ETS) will not properly count the relative's use of the 60-month limit.

When a child is receiving FIP on a case with an adult who has a FIP status code "I" and an In-Home code of "Y" on the ABC TD03 screen, ETS counts the FIP payments towards the adult's 60-month limit. The count is appropriate when the adult is a parent, but it is not appropriate when the adult is a specified relative. Temporarily stop the entire LBP using reason code "W."

See [4-J, Stopping a Limited Benefit Plan](#), and [4-Appendix, PJPM, Stopping a Limited Benefit Plan](#), for more information.

- Z **System-entered only.** The LBP was initially stopped pending an appeal and later reactivated with a new effective date.
- ◆ **DATE FIA SIGNED TO RECONSIDER:** Only PROMISE JOBS staff can make an entry in this field. Entry is required when the STOP REASON entry is "R." Enter the date the person who chose the LBP signed an FIA to reconsider. Enter the date in MM-DD-CCYY format.

- ◆ **APPEAL DATE:** Only IM staff can make an entry in this field. Entry is required when the STOP REASON entry is "A." Enter the date that the appeal request was filed. The system compares the APPEAL DATE entered to the NOTICE DATE and the LBP START DATE to make certain that the LBP should be stopped so benefits can continue pending the appeal decision.

When an LBP previously stopped with reason A is reactivated, PJCase will determine a new LBP START DATE.

The LBP – Stop screen contains these two action buttons:

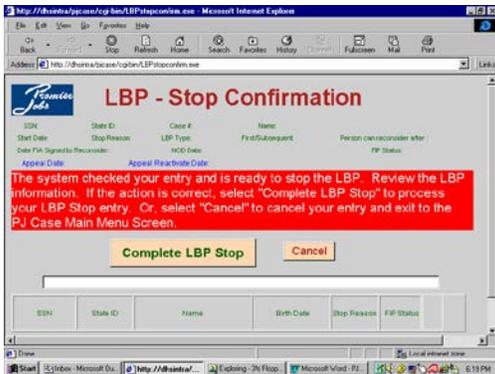
- ◆ **STOP LBP:** Select this button to continue your stop entry. The system will edit your entries.
 - If your entry is successful, the system displays the LBP Stop Confirmation screen.
 - If your entry is not successful, the system displays an error message in red text.

NOTE: If the IM selects the STOP REASON code "B," "D," or "I" and clicks the STOP LBP button:

- The system displays a message to prompt you to select the person to be stopped, and the screen populates with all persons included in the LBP other than the person who chose the LBP.
 - Click in the box in the STOP? field next to each appropriate person to enter an "X" in the field and include that person in the Stop LBP.
- ◆ **CANCEL:** Select this button to stop your entry and to return to the PJCase Main Menu.

Steps to Stop an LBP

Follow the instructions below to stop an LBP. To stop an LBP, you must access the LBP - Stop screen. IM workers can follow three different paths to access the screen while PROMISE JOBS workers have two paths available to follow.

Step	Action
2	<p>IM staff:</p> <ul style="list-style-type: none"> ◆ If you select code "A," also enter the date the appeal was filed in the APPEAL DATE: field. ◆ If you select code "B," "D," or "I," select STOP LBP. The system will display each person included in the LBP. Click on the STOP? field next to each person who is no longer affected by the LBP. <p>PROMISE JOBS staff: If you select code "R," enter the date that the FIA was signed in the DATE FIA SIGNED TO RECONSIDER field in the MM-DD-CCYY format.</p>
3	<p>Select the STOP LBP button. The system will display the LBP - Stop Confirmation screen.</p>
4	 <p>Select either:</p> <ul style="list-style-type: none"> ◆ COMPLETE LBP STOP, to process the entry, or ◆ CANCEL, to stop processing the entry and return to the PJCase Person screen.

Result of Stopping an LBP

When an IM or PROMISE JOBS worker confirms an LBP stop entry, the following events occur **immediately**:

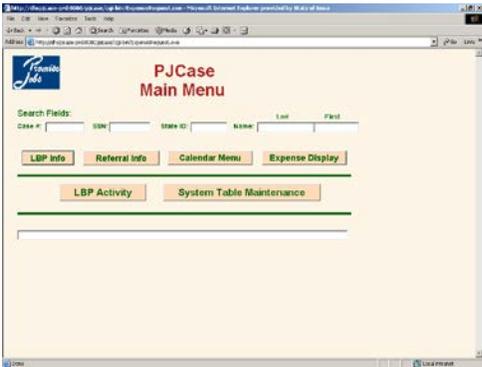
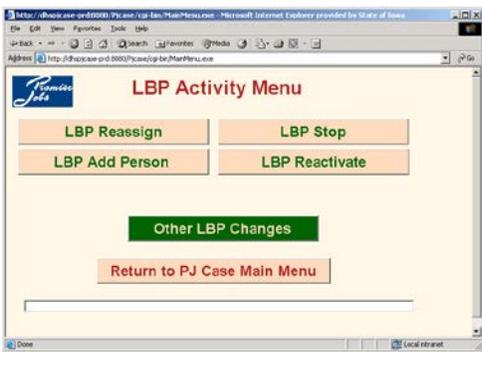
- ◆ The LBP Display screen displays the LBP as stopped with the entered reason and the date the stop entry processed. When an LBP is stopped using reason A – Appeal, the LBP Display screen will also display the worker entered appeal date and “New” as the APPEAL REACTIVATE DATE.
- ◆ The system sends an email to either the IM worker or the PROMISE JOBS worker based on who made the LBP stop entry.
- ◆ The ABC system no longer displays LBP information in the TD03 screen for the persons who were in the LBP, unless the persons are in another active LBP on the case. (See [Stopping One LBP for a Household With Multiple LBPs](#) for more information.)
- ◆ The system changes the FIP status code of the persons who were in the LBP from “I” to “N,” unless:
 - The person has an “I” status code for reasons other than the LBP. The system does not change the status code from “I” to “N” when the person’s FIP notice reason code is 203, 310, 311, 312, 313, 908 or 995;
 - The person did not have an “I” status code yet, as the stop entry was made before the effective date of the LBP; or
 - The person is in another active LBP on the case.
- ◆ When the person who chose the LBP has a JOBS code of “U” or “V,” the system will change the code to:
 - “8,” “L,” “7,” or “K” if FIP is active; or
 - “X” or “Y” if FIP is not active.
- ◆ If a date existed in the RECONSIDERATION PENDING SINCE field in LBP Display, this date is removed.
- ◆ The system records the transaction in the LBP Transaction History.

With some stop reasons entered by IM or PROMISE JOBS, the system automatically issues a *Notice of Decision* when processing the entry as indicated in the following table. The notice is sent to the household on the next working day.

If a *Notice of Decision* is needed, and the system does not send a notice, make an entry in ABC to issue the notice or manually issue the notice.

For instance, when the final decision on an appeal reverses an LBP, the LBP Stop Reason needs to be changed from an "A" (stopped pending the appeal) to a "C" (error) to reflect the decision. If this is not done when the final decision is issued, PJCase will not allow PROMISE JOBS to start another LBP if the person later chooses one, as PJCase considers the appeal to still be pending.

To change an LBP Stop Reason, follow these steps:

Step	Action
1	 <p>The screenshot shows the PJCase Main Menu interface. At the top, there is a search bar with fields for Case #, SSN, State ID, Name, Last, and First. Below the search bar are several buttons: LBP Info, Referral Info, Calendar Menu, Expense Display, LBP Activity, and System Table Maintenance. The LBP Activity button is highlighted in the image.</p> <p>From the PJCase Main Menu, select the LBP ACTIVITY button to display LBP Activity Menu screen.</p>
2	 <p>The screenshot shows the LBP Activity Menu interface. It features several buttons: LBP Reassign, LBP Stop, LBP Add Person, LBP Reactivate, Other LBP Changes, and Return to PJ Case Main Menu. The Other LBP Changes button is highlighted in the image.</p> <p>Click on the OTHER LBP CHANGES button to display the Other LBP Changes screen.</p>

Step	Action
	<p>The screen also has a section for New LBP Data, which contains a field called NEW CASE STOP REASON:. This field has a dropdown box with Stop Reason code options for the case. These options are:</p> <ul style="list-style-type: none"> A Appeal C LBP in error E Expired R Cooperated W Stop entire LBP for other reasons Z Administrative stop <p>NOTE: The New LBP Data section also contains a dropdown box listing the possible LBP types for the new case. Do not choose a new LBP type when changing a Stop Reason.</p> <p>To change a Stop Reason for the case, use the dropdown box to choose the appropriate Stop Reason. Click on the APPLY CHANGES button.</p> <p>To change a Stop Reason for a person, enter the appropriate code in the NEW PERSON STOP REASON field next to the person whose Stop Reason you want to change. Click on the APPLY CHANGES button.</p> <p>If you want to stop processing your changes, click on the CANCEL button. You will be returned to the previous screen.</p>
5	<p>Once you have selected APPLY CHANGES, the Other LBP Changes screen will appear with the updated information and a message asking you to review the changes. After reviewing the changes, select either:</p> <ul style="list-style-type: none"> ◆ UPDATE LBP, to confirm your changes, or ◆ CANCEL, to stop your changes.

Once you have confirmed the entry, the LBP List and LBP Display screens will show the LBP with the new stop reason.

NOTE: The Other LBP Changes function does not send any notices or cause the ABC system to recalculate benefits. You must make entries in the ABC system to take these actions when needed.

Update and confirm the ABC entries before using the LBP Reactivate function to add the person to the LBP.

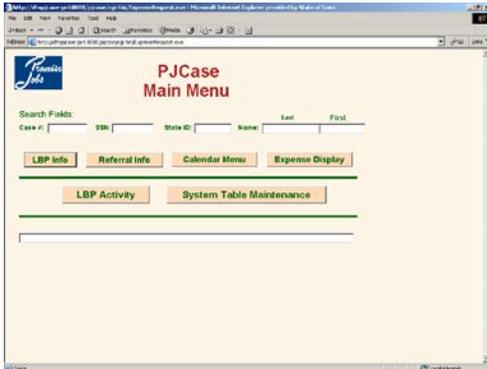
When the case has two parents and each has an LBP that needs to be reactivated, you will need to make separate entries to reactivate each parent's LBP.

Reactivating LBP Stopped for Reason A

When IM reactivates an LBP that has been stopped using reason A – Appeal, the system will apply a new LBP start date.

NOTE: IM workers cannot reactivate an LBP that was stopped due to an appeal with a date before October 27, 2003. If reactivation is required, contact central office through normal channels.

Follow the steps below to reactivate an LBP stopped due to reason code "A."

Step	Action
1	 <p>On the PJCase Main Menu screen, select the LBP ACTIVITY button to display the LBP Activity Menu screen.</p>

Step	Action
	<p>The top of the LBP Reactivate screen displays information about the LBP and the person who chose the LBP.</p> <p>The middle section of the screen contains appeal information.</p> <p>The LBP Reactivate screen displays a System Generated New LBP Start Date and a blank field that allows worker to enter a "User Entered New LBP Start Date." The IM worker may enter a different LBP start date if the system-generated date does not apply.</p> <ul style="list-style-type: none"> ◆ The system-generated date applies when timely notice is needed to reactivate the LBP. Timely notice is needed when FIP is active or FIP is canceled effective the same date as the system-generated date. <p>NOTE: Make no entry in the USER ENTERED NEW LBP START DATE field when the system-generated date applies.</p> <ul style="list-style-type: none"> ◆ The user-entered date applies when FIP was reinstated pending the appeal but has been canceled for reasons other than the LBP with an effective date earlier than the system-generated date. A user-entered effective date must be after the date the final decision is issued. <p>Enter the new effective date in the USER ENTERED NEW LBP START DATE field if applicable.</p>
5	<p>The bottom of the screen displays a list of all persons who were originally included in the LBP with "On LBP" in the Located column and an "X" in the REACTIVATED? field. Delete the "X" if the person no longer lives in the home and is no longer affected by the LBP.</p> <p>The list also includes each person currently attached to the case who was not included in the LBP with "On Case" in the Located column (e.g., a child born after the imposition of the original LBP).</p>

Results of Reactivating LBP Stopped for Reason A

When you reactivate an LBP that was stopped pending an appeal, the following things occur:

- ◆ As soon as you confirm your entry:
 - The LBP LIST screen displays the reactivated LBP with a new start date. The original LBP is displayed with Stop Reason code "Z" and the date that you made the reactivation entries as the stop date.
 - The LBP Display screen will display the LBP as active.
 - The ABC TD03 screen of each reactivated person will display:
 - The last month of FIP eligibility in the FIP LIMIT field.
 - The LBP Start Date and either "1" for a first LBP or "Sub" for a subsequent LBP in the LBP field.
 - The LBP Referral Transaction History screen will show that the LBP was reactivated, the date and time of entry, and the worker number of the person who made the entry.
- ◆ During ABC processing:
 - The system will generate a *Notice of Decision* to the household using the following case and individual notice reason codes:
 - 257 A first LBP was reactivated with a "new" effective date.
 - 258 A subsequent LBP was reactivated with a "new" effective date.
 - If FIP is active, the system recalculates benefits and cancels FIP for the persons reactivated to the LBP.
- ◆ At the next ABC month-end processing, ABC assigns the "I" FIP status code to the person affected.

If the person is not active for FIP and a notice is needed, make an entry in the ABC system to issue the notice. When you have reactivated an LBP that was stopped for reasons other than "A" (appeal), use the following notice reasons to inform the client that FIP remains canceled or is denied:

- ◆ 262: For a subsequent LBP within the six-month ineligibility period.
- ◆ 268: For a first LBP or a subsequent LBP that is beyond the six-month ineligibility period.
- ◆ 861: For each person added to the LBP.

See [14-B\(6\)](#), [Denying an Application](#), and [Canceling Ongoing Benefits: Issuing Another Notice on New Information](#), for more information.

Reassigning an LBP to a New Case Number

IM staff use the LBP Reassign function to assign an active LBP to another case number when:

- ◆ The person who chose the LBP moves in with another FIP household and the LBP applies to persons in the new home, or
- ◆ The active LBP was established on a case that has been dropped from the ABC system before 3/24/06.

The LBP Reassign function also allows IM workers to:

- ◆ Add persons from the new case to the LBP, and
- ◆ Reactivate persons originally included in the LBP who are now stopped.

Important: PJCase cannot process a stop entry for the person who chose an LBP when the LBP is assigned to a case number that is dropped from the ABC system. PJCase will give you error message 5037 if you make a stop entry in this situation. The LBP must be reassigned to the new case number. You can stop an LBP for a person who is not the chooser even if the case number is no longer on ABC.

- ◆ **VENDOR CODE:** This field requires entry of the vendor's nine-digit federal tax identification or social security number.
- ◆ **GET PROVIDER:** This button is used to obtain provider name and address information when a provider number has been entered. Clicking the GET PROVIDER button enables the PAY PROVIDER button.

If the provider is in the State Accounting payment system, a vendor list will be displayed so the correct location can be selected.

If the provider is not in the State Accounting payment system, PJCase will generate error message 5184, "Vendor not found in the I/3 payment system. Contact your local PJ designee for assistance."

- ◆ **PAY TO PROVIDER:** This field allows you to indicate when the expense allowance payment is to be paid to the service provider rather than the PROMISE JOBS participant. This field must be completed when the allowance type is "P." To enable this button, enter the provider number and click on the GET PROVIDER button.
- ◆ **PROVIDER VENDOR LOCATION:** This field displays the two-digit identifier for the provider vendor location. The system populates this field when the vendor is selected from the vendor list.
- ◆ **VENDOR TYPE:** Use the dropdown list to select a vendor type when the PAY TO PROVIDER button is selected. The vendor types are:

C	Corporation
G	Government or nonprofit
P	Partnership
S	Sole proprietor
U	Public service
I	Individual

- ◆ **VENDOR CODE:** Select the applicable code when the PAY TO PROVIDER button is selected:

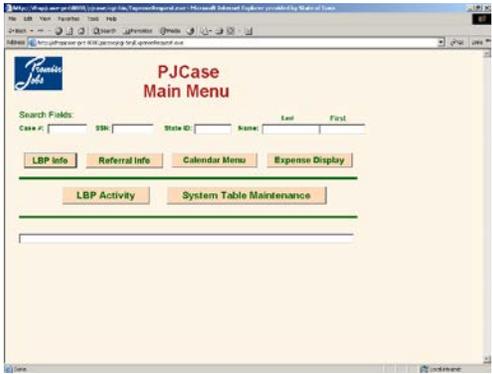
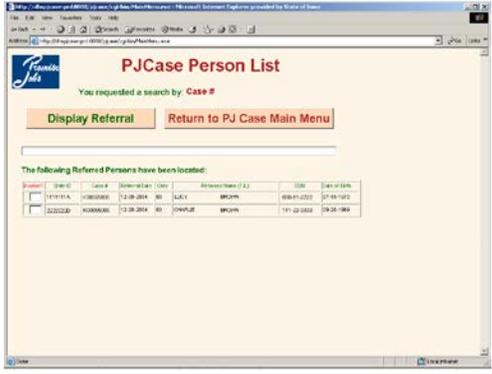
E	Employer identification number
S	Social security number

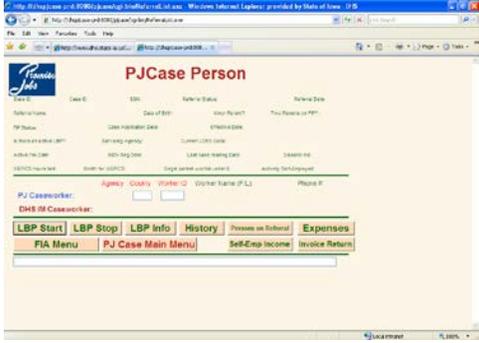
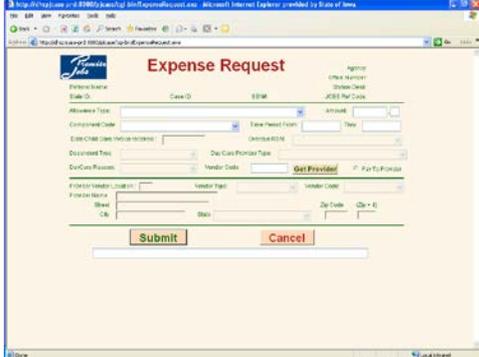
- ◆ **PROVIDER NAME:** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.
- ◆ **STREET:** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.
- ◆ **CITY:** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.
- ◆ **STATE:** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.

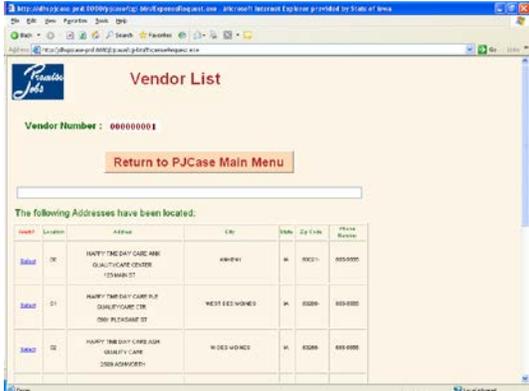
- ◆ **ZIP CODE:** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.
- ◆ **(ZIP + 4):** The system populates this field when the vendor is selected from the vendor list. Worker entry in this field is not allowed.

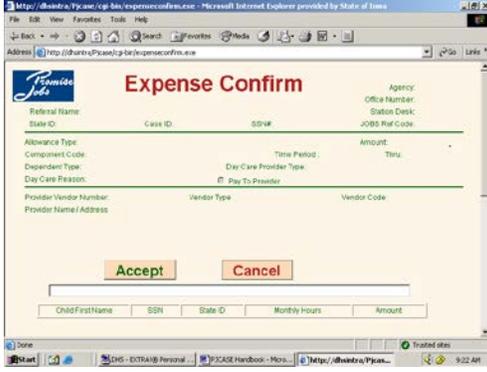
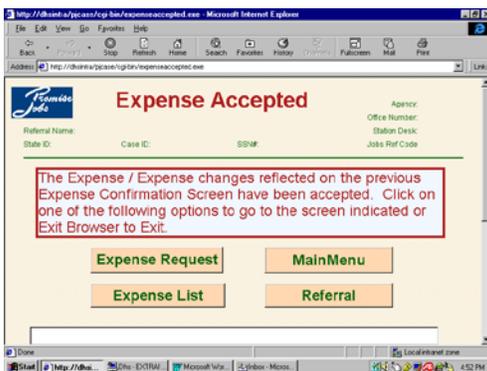
Issuing Payment to a Participant

Follow these steps to issue an expense allowance payment in PJCase:

Step	Action																					
1	 <p>On the PJCase Main Menu screen, enter the person’s case number, SSN, state identification, or name in the applicable search field. Select REFERRAL INFO to display the PJCase Person List screen.</p> <p>NOTE: If there is only one person referred on the case, you will go directly to that person’s PJCase Person screen. Go to Step 3.</p>																					
2	 <table border="1"> <thead> <tr> <th>Case #</th> <th>Case #</th> <th>Referral Date</th> <th>Case</th> <th>Referral Name (L)</th> <th>SSN</th> <th>Age (Years)</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>010111A</td> <td>12-08-2014</td> <td>80</td> <td>JULY</td> <td>880411202</td> <td>37-59-1912</td> </tr> <tr> <td><input type="checkbox"/></td> <td>020222B</td> <td>12-08-2014</td> <td>80</td> <td>OWPLR</td> <td>191-02-0000</td> <td>38-28-1969</td> </tr> </tbody> </table> <p>Enter an “X” in the DISPLAY? field next the appropriate person and click on the DISPLAY REFERRAL button. This displays the PJCase Person screen.</p>	Case #	Case #	Referral Date	Case	Referral Name (L)	SSN	Age (Years)	<input type="checkbox"/>	010111A	12-08-2014	80	JULY	880411202	37-59-1912	<input type="checkbox"/>	020222B	12-08-2014	80	OWPLR	191-02-0000	38-28-1969
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<input type="checkbox"/>	020222B	12-08-2014	80	OWPLR	191-02-0000	38-28-1969																

Step	Action
3	 <p>Click on the EXPENSES button to display the Expense Request screen.</p>
4	 <p>Complete the following fields:</p> <ul style="list-style-type: none"> ◆ ALLOWANCE TYPE: ◆ AMOUNT: ◆ COMPONENT CODE: ◆ TIME PERIOD FROM: ◆ THRU: ◆ VENDOR CODE: <p>Select GET PROVIDER button.</p>
5	<p>For new providers not in the State Accounting payment system, PJCase will display error message 5184, "Vendor not found in I/3. Contact your local PJ designee for assistance."</p> <p>For providers in the State Accounting payment system, continue to step 6.</p>

Step	Action
6	<p>If the provider is in the State Accounting system, PJCase will display the Vendor List screen. Provider addresses can be either two or three lines.</p>  <p>Scroll through the vendor list addresses.</p> <p>If the address on the claim does not match an address on the vendor list screen, do not proceed with issuing the payment. Contact your local PJ designee for further assistance.</p> <p>If the address on the claim matches an address on the vendor list screen, select the correct vendor location by clicking on the select link.</p> <p>You will return to the Expense Request screen with the vendor information fields completed.</p> <p>Click on the SUBMIT button.</p> <p>If your entry is successful, the system displays the Expense Confirm screen.</p> <p>If your entry is not successful, the system displays an error message.</p> <p>If you receive error message 5160, "Person not on FIP. Submit pends for CO review or Cancel stops the entry," see Payment Pended for Central Office Review.</p> <p>If not, continue to Step 7.</p>

Step	Action
7	 <p>On the Expense Confirm screen, verify that the data is correct and select either:</p> <ul style="list-style-type: none"> ◆ ACCEPT, to process the entry and display the Expense Accepted screen, or ◆ CANCEL, to return to the Referral screen.
8	 <p>On the Expense Accepted screen, select:</p> <ul style="list-style-type: none"> ◆ EXPENSE REQUEST, to make entry to issue another expense allowance, ◆ EXPENSE LIST, to view all pending expense allowance entries for the person, ◆ REFERRAL, to return to the person's PJCase Person screen, or ◆ MAIN MENU, to return to the PJCase Main Menu screen.

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