

# IPAM

# APPL Entry Workbook

DHS-5223-ENG 1-14



## Combined Application Form

Apply online at [www.applymn.dhs.mn.gov](http://www.applymn.dhs.mn.gov)

**This application can be used to apply for any of the following programs:**

**Supplemental Nutrition Assistance Program (SNAP)** helps low income Minnesotans get the food they need for good nutrition and well-balanced meals. If you are age 60 and older and are applying for SNAP only, please use the "Supplemental Nutrition Assistance Program (SNAP) Application for Seniors" (DHS-5223F).

**Cash assistance programs** are provided to help families and individuals meet their basic needs until they can support themselves. Cash assistance programs include:

- Diversionary Work Program (DWP)
- Emergency Assistance (EA)\*
- General Assistance (GA)
- Group Residential Housing (GRH)
- Minnesota Family Investment Program (MFIP)
- Minnesota Supplemental Aid (MSA)
- Refugee Cash Assistance (RCA).

If you need help paying for child care, ask your worker how to apply for the **Child Care Assistance Program**.

**Need to apply for Health Care coverage?**  
Apply for free or low-cost coverage at MNsure, Minnesota's online health insurance marketplace.  
Go to [www.mnsure.org](http://www.mnsure.org) or call 855-366-7873.

**How to fill out this application**  
Read all of the information in this application. Tell someone if you need help filling out this application. Complete and turn in pages 1 - 10 as soon as possible. We can set your application date if we have your name, address and signature (page 1), but we must have the complete application to decide if you can get help.

For your application to be complete, you must answer all questions and have certain information verified. SNAP and cash programs require an interview with a worker. For SNAP, this can be a phone interview.

If you miss your interview appointment, you must reschedule. If you do not reschedule, we may stop or not approve your benefits.

You may need to provide proof of the information you report on this application. Your worker may ask for additional proofs. You may not get help until we get proof of this information. Bring the required information with you to the interview or send the information to your worker as soon as you can.

**Recertifications.** Report all changes in the past 12 months on this application. You may need to provide proof of the reported information.

Required Information	Cash Programs	SNAP
Identity of applicant or authorized representative (driver's license, state ID, passport, etc.)	✓	✓
Social Security numbers of all people applying for help	✓	✓
Residency in Minnesota (state ID, lease agreement, etc.)	✓	✓
Income** (paystubs, pension, etc.) or any other money coming into your household (unemployment, sponsor income, etc.). The agency will verify Social Security income.	✓	✓
Housing costs*** (rent/house payment receipt, mortgage, lease, etc.)	✓	✓
Medical costs*** (prescription and medical bills, etc.)	✓	✓
Relationship to other household members (birth certificates, marriage licenses, court documents, etc.)	✓	✓
Checking and savings accounts (bank statement, etc.)	✓	✓
Value of vehicles (cars, trucks, motorcycles, boats, etc.)	✓	✓
Current value of stocks/bonds, certificates of deposit, life insurance, trusts (statement, etc.)	✓	✓
Utility costs (utility statement, phone bill, etc.)	✓	✓
Proof of illness or disability (doctor's statement, etc.)	✓	✓

\* Before applying for Emergency Assistance, check with your agency regarding funding and specific eligibility criteria.  
\*\* Wage stubs from the last 30 days if you are employed or federal income tax records if you are self-employed.  
\*\*\* Your SNAP benefits may increase if you also provide proof of these expenses: child support paid for children not living with you; housing costs; medical expenses (including prescriptions) for people with disabilities or who are age 60 or older. Your DWP benefits may increase if you provide proof of your housing and utility costs.

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Minnesota Department of **Human Services**

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## Introduction

The purpose of this work book is to familiarize you with entering applications for public assistance on the MAXIS system. This workbook is designed to supplement what you have already learned. It is recommended that while completing this workbook, you have someone available to answer questions and assist you as needed. We recommend printing the workbook so that you can make notes as you complete your cases but it is not required.

Upon completion of this workbook you will be able to:

- Identify the four panels in APPL
- Perform Person Search
- Assess for Expedited SNAP
- Practice APPL entry
- Explain Automatic Person Search
- Add a person to the PMI file
- Enter a case note

Pre-requisites:

- Introduction to Public Assistance web based training
- Introduction to MAXIS and MMIS web based training
- A Financial Worker's Guide to the Combined Application Workbook

Materials required:

- Computer with access to the MAXIS Training Region and Pen/Pencil
- Applications – Justin, George, John, Hector, Jeffrey and Mary
- MAXIS navigation handout
- Expedited SNAP Evaluation Form (DHS-4834)

## IPAM- APPL Entry Workbook

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Before you get started, print all six applications, the MAXIS Navigation handout, and the Expedited SNAP evaluation form. The applications and handouts are in PDF format and having a paper copy is necessary. Doing this work ahead of time will make things easier when you begin to enter the applications on MAXIS.

To print the required documents, click on the links in the Table of Contents. This will open each document in a new window for you to print. After printing the documents you can simply close the PDF or use your BACK button, depending on your computer settings, to return to the workbook.

Now that you have printed your applications complete the following information:

- For all cases create a unique last name and social security number for all members and write them on the applications in the appropriate boxes. See instructions below.

### **Note:**

For John's case:

- Assign John the **same** last name and social security number that you assigned to the John listed on George's application. He is the same person.

### Creating Social Security Numbers (SSN) in MAXIS

When creating social security numbers in the MAXIS Training region, a helpful hint is to think of a phone number and drop one digit.

For example:      Phone # 507-441-1222      SSN becomes 507-44-1122

Then you can simply change the last digit for other members in the household.

**NEVER** make up social security numbers for your real world applications in the MAXIS production region.

### Helpful Hints

This workbook is designed to be a guide for entering applications on MAXIS. It is helpful to understand basic MAXIS navigation while completing the application entry. MAXIS is not a web based application so using your mouse is **not** recommended. Navigating in MAXIS using the keyboard is a better option. You learned about basic MAXIS navigation in your “Introduction to MAXIS and MMIS” web based training. You may wish to review the WBT again prior to beginning this workbook.

Here are some basic navigation hints:

- Use your **TAB** key to move from field to field
- The **SHIFT+TAB** key to move backward one field.
- Use the **NEW LINE ENTER** key (the Enter Key with an arrow) to move down one line.

The MAXIS Navigation handout from the “Introduction to MAXIS and MMIS” web based training is attached for you to use as you enter information onto MAXIS.

If you did not print the workbook, we recommend having dual monitors while completing the workbook. This allows you to have the workbook up on one screen and the MAXIS **Training** region up on the other. If dual monitors are not available, print the workbook.

The **black bolded text** throughout the workbook indicates an action that you need to take or information that you need to input into a field on MAXIS. You will also see the word “**Transmit**” throughout the workbook. When using MAXIS the far right ENTER or CTRL key is the **Transmit** key.

Good luck and remember if you have questions or encounter problems please ask a supervisor, mentor or co-worker at any time to assist you in completing the workbook.

## Case Entry 1: Justin

In this module, you will enter your first application. This is similar to the case you saw demonstrated in your online web based training. We will perform a person search on Justin to see if he is known to the PMI database. You will APPL this case and assign Justin a PMI number.

Objectives:

- Perform Person Search
- Complete APPL entry in MAXIS
- Assign PMI numbers

Please review Justin's application. He dropped off the application today at our agency. He lives alone. If you haven't done so already, create a last name and social security number. Write these on your application in the correct boxes.

The first thing we need to do is determine if Justin is potentially eligible for Expedited SNAP. This will determine if we need to invite Justin to complete a same-day interview and issue food benefits right away. SNAP interviews can be done in person or by telephone.

Use the Expedited SNAP Evaluation form to determine if Justin meets any criteria for Expedited SNAP, based on the information he listed on the CAF.

Which answer best describes Justin's situation?

- A. His household has less than \$150 per month in gross income and \$100 or less in liquid assets.
- B. He belongs to a migrant household with \$100 or less in liquid assets.
- C. His household's gross income + assets are less than his actual monthly housing and utility costs.
- D. He is not eligible because he does not fit into any of the above categories.

If you answered "D" you are correct! Now that you have assessed for Expedited SNAP the next step is to complete a Person Search.



## IPAM- APPL Entry Workbook

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Log in using your own MAXIS user ID and Password.

```
SYSTEM: A03DT2  WELCOME TO CICS
                TO EXIT, CLEAR SCREEN AND ENTER "LOGOFF"
TERMINAL: #E40
NODE: A03T#E40

DAY: THURSDAY

SYSTEM DATE: MAY 12, 2011
SYSTEM TIME: 11:49 AM

LOGONID: ==> X162###
PASSWORD: ==> 

NEW PASSWORD: ==>
(enter twice) ==>

CICS - XDT2 (SYSTEM SIGNON/SIGNOFF FACILITY)
```

### Transmit

At the top of your screen enter: **FMTF**

```


ACF01137 PWSCSP9 LAST SYSTEM ACCESS 08.33-05/12/11 FROM UH38
ACFAE139 CICS #E40 Signon OK: User=PWSCSP9 NAME=TRAINEE, 239
```

### Transmit

You should now be at the **SELF** Menu.



Make sure it says “**Training**” in the Environment field at the bottom of your screen. If it does not, **do not** proceed! Ask for assistance from a supervisor or co-worker now.

You will notice that the first case has very detailed explanations of each field and the information that should be entered in those fields. It is important that you follow the directions carefully. As you complete each case we will provide less and less instruction about the panels and fields and concentrate on what specifically should be entered in those fields. Compare your cases to the screen prints in the workbook to make sure you have the same information entered in all fields.

If you find that you missed a panel or need to return to a panel because you need to correct something simply continue with the remainder of the application until you complete the ADDR panel then re-enter APPL from the SELF menu to correct panels or add panels that were inadvertently missed in the APPL process.

To correct or add panels navigate to the SELF menu and enter APPL on the Function line, your case number, and on the Command line enter the name of the panel and reference number you would like to call up and enter **nn** (needs new) in the third field.

For example:

```
Function: appl
Case Number: 133324__
Benefit Period (MM YY): 01 12
User: PWSCSP9 Terminal: @076 Environment: LAB Command: memb 04 nn
Library: PWF23
```



Correct or add your panels transmit through the APPL queue to ADDR and then you may PF3 to return to SELF.

### SELF Menu

You learned about the importance of doing a thorough and accurate person search in your online web based training. Conduct a Person Search for Justin.

Navigate from the SELF Menu to the PERS function:

Function: **PERS**

#### **Transmit (far right enter key)**

The Person Search panel appears. Enter all the information we have about Justin from the application.

Last: **Last name you created**  
First: **Justin**  
Gender: **M**  
DOB: **07 11 1965**  
SSN: **SSN you created**

#### **Transmit**

The Match panel appears with the information you've just entered in PERS on the top.

**PF8** to look through all the matches to determine if Justin is known to MAXIS. Make sure you are looking at all of the possible matches. Justin may have previously been entered without an SSN.

**Note:** If you have an exact match to your SSN, **PF3** and create a different SSN.

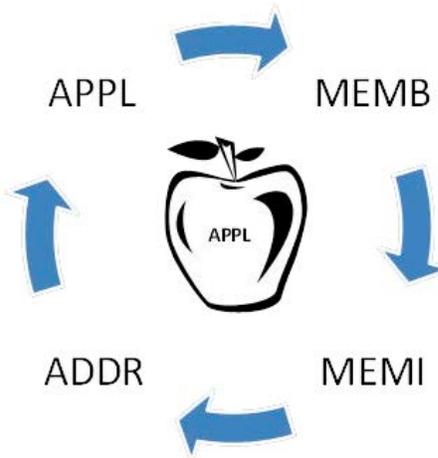
When you complete your person search **PF3 twice** to return to the SELF Menu.

### APPL Function

The information the client provides on the application is entered in the APPL function in MAXIS. For Justin's case you will initially be entering the information from page 1 of Justin's CAF.

There are four panels in the APPL function:

- APPL (Application)
- MEMB (Household Member)
- MEMI (Additional Member Info)
- ADDR (Address)



These panels are automatically queued in sequential order. You must complete a panel before the system allows you to continue to the next panel. If you miss a panel, see the instructions on page 9.

The fields completed on each panel will depend on which application form and what information the client has provided.

If a client provides only page 1 of the CAF we have limited information compared to the information from a completed CAF. With each of the cases we enter, you will learn the differences between the forms and the varying amount of information each form requires. All information provided by the client must be entered into MAXIS.

Look at the application and see if you can determine the application date.

### APPL Entry

On the SELF Menu enter:

Function:           **APPL**  
Case Number:    Leave blank

MAXIS assigns a case number for Justin once you've entered his information on the MEMB panel and assigned him a PMI number.

Remember, **TAB** will move you to the next field

Benefit Period:   **Current month/Current Year**

The system automatically defaults to the current month. If the application date is not the same as the current month, match the benefit month to the month of application. Remember, this field is important because it determines the date of program eligibility.

### Transmit

### The APPL Panel

The first panel in the queue is called the APPL (Application) panel. You will enter the date of application and the applicant's name.

Mandatory information must be completed on all four APPL panels. MAXIS won't let you leave the APPL function until you have either completed or visited the APPL, MEMB, MEMI, and ADDR panels

The system interacts with you via online messages, or edits. We will start at the top of the panel with the application date.

Application Date:       **Today (enter today's date)**

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This date is very important because it establishes when eligibility may begin. The date the application is received in your agency is the application date. Applications are date stamped with the date received or signed and dated by your agency.

The person listed as the Person 1 is the applicant and is loaded first in MAXIS. The case number is always attached to the applicant.

Justin is Person 1 on this application. Enter the following information:

Last:       **Name you created**  
First:       **Justin**  
M:           **R**

You will learn more about when to code the other fields on this panel in future classes.

This is the way your panel looks.

```
01/08/14 08:29:41                                MAXIS                                FMBACAM1
                                                Application (APPL)                                1 OF 0
Ref Last  First  M  *                                Application Date: CM CD CY  
*
* APPLICANT NAME
* Last: TRAINING_____ First: JUSTIN_____ M: R
*
*                                PMI Nbr:
*                                SMI Nbr:
*
*                                Stop Auto Deny: _
*                                Auto Deny Date:
*
*                                Withdrawal Status: _
*                                Voluntary Withdrawal Date:
*
*
Mode: A  Function: APPL  Case Nbr: _____  Month: 01 14  Command: _____
Co: 98  PW: PWSCSP9  SW: _____  Upd Date: _____  Notes: N  User: PWSCSP9

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  PMI  EXIT  CNOTE  PNOTE          PREV  NEXT  EDIT  OOPS  TRBL  INFO
```

**Press Transmit**

### The MEMB 01 Panel

This panel is used to record information about each household member listed on the application. Each household member will have their own MEMB panel. We need to complete a MEMB panel for Justin.

Note that Justin's name is listed as person 01 in the name reference window in the upper left-hand corner. MAXIS assigns the first person you enter into the system the reference number 01.

Next to the Reference Number field is the PMI number field. Once a PMI number is assigned to Justin, the system will display the PMI number in this field.

The Arrival Date and the SMI Number fields are also system entered fields.

Actual Date:                      Leave blank

Because some panels and fields in MAXIS are integrated with MEC<sup>2</sup>, the Actual Date field acts as a signal to the system on how/when to update MEC<sup>2</sup>.

When initially entering information into MAXIS, you should not complete the Actual Date field. This field is only updated when a change is made on certain panels, on specific fields. The date entered in the field should be the date the change occurred, not necessarily the date you are entering the information.

When updating an existing MEMB, MAXIS will require you to enter a date in the Actual Date field.

The applicant's last and first name are carried over for you from the APPL panel. Enter Justin's social security number in the SSN field.

SSN:                      **SSN you created**

Your cursor automatically jumped to the verification field.

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We do not request verification of the client's Social Security number. MAXIS verifies this for us via an interface with the Social Security Administration (SSA) once a person is found eligible.

To get a list of available codes for this field, press the **PF1** key.

Ver: **PF1**

You get a pop-up box. You have several options to choose from:

- A: SSN Appl For

"A" indicates that the client has applied for an SSN. This code is very common for newborns.

- P: SSN Provided, Ver Pending

"P" indicates that the client has provided his or her SSN. If the client has written their SSN on the application, you are not required to obtain a copy of the card.

- N: SSN Not Prvd

"N" indicates that the client has not provided us with his/her SSN.

- V: System Entered SSN Ver Via An Interface

"V" is system entered. MAXIS interfaces with the SSA to verify if this SSN matches what they have on file.

If SSA can't verify the SSN, you receive a message on MAXIS. If this happens, request that the client verify their SSN.

Enter a P in this field as Justin has provided his SSN on page 1 of the CAF.

Code: **P**

**Transmit**

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The code automatically goes in the verification field. Enter Justin's birthdate.

Birthdate:           **07 11 1965**  
Ver:                    Leave blank

This field is used to verify the person's date of birth.

Verifications are not required in the APPL function.

If you process an application that has verifications with it, you will code verification fields appropriately. If no verifications are received and you are only APPLing an application, then leaving the verification field blank is appropriate.

During this workbook we will leave most verification fields blank because the applications we process do not have verifications with them.

We will discuss coding of verification fields for specific programs in future courses.

Use your **Tab** key and go to the gender code field.

Gender:                **M**  
ID Ver:                Leave blank  
Rel to Applicant:     System entered

Remember MAXIS always codes the first person entered as reference number 01 and makes them the applicant.

Shared HH Excpt:     Leave blank

The Shared HH Exemption field pertains to MFIP/DWP cases only, and can be left blank in the APPL process.

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On the CAF, the following questions are directed to the applicant only:

- Do you need an interpreter?
- What is your spoken language?
- What is your written language?

In order to complete these fields for the other household members, you will need to ask the client the spoken and written language of the other household members. You can do this if the client is still in the office, or it can be done at the interview.

Use your **Tab** key and go to the spoken language field.

### **Press PF1**

MAXIS gives you a pop-up box of all the codes of languages known to the system, listed in alphabetical order. If the language spoken is not available, use the "Other" code, then enter the language name in the field next to this one.

Justin answered that he speaks English.

Code: **99**

### **Transmit**

The code will then appear in your Spoken Language field.

Use your **Tab** key and go to the Written Language field.

On the Written Language field, press **PF1** to view the codes. The written language is English.

Code: **99**

### **Transmit**

The code will then appear in your Written Language Field.

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The Written Language field will default to the code and text of the Spoken Language field if it's left blank.

Code the next two fields according to your application.

Needs Interpreter (Y/N):        **N**

Alias (Y/N):                        **N**

If you leave the Alias field blank, MAXIS will default to N (No).

If Justin listed an alias on his application, we would code this field with a Y (Yes). MAXIS would then add an ALIA (Alias) panel to our APPL queue.

Alien ID Nbr:                        Leave blank

The Alien ID Number field is used to record the client's alien number. Some clients who are not U.S. citizens are assigned an Alien ID number by U.S. Citizenship and Immigration Services.

Ethnicity Hisp/Lat (Y/N):        **N**

This field is used to record the ethnicity of the client. Enter a "Y" if the client is Hispanic or Latino. Enter an "N" if the client is not Hispanic or Latino. This is a mandatory Federal reporting requirement, however this question is optional for clients to answer.

Select the Race field with an "**X**" and **transmit**. A pop up window appears allowing you to record the race of a household member. You can record up to 5 races per client. Tab down and place an "**X**" next to "White" and **transmit**.

Tribal Indc:                        Leave blank

The Tribal Indicator code is used for Tribal TANF (MFIP) funds.

ADA Notice Type:                Leave blank



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## Automatic Person Search

When you complete the MEMB panel, an automatic Person Search occurs to ensure a duplicate PMI is not created.

For this exercise, if you have an exact SSN match **PF3** to return to your member panel and create a different SSN.

## Assigning a PMI Number

Review all possible matches by pressing **PF8** before adding a person and assigning a new PMI number.

Notice that the “Add” option under the PF5 key appears when there isn’t an exact SSN match and you’ve looked through enough possible matches.

```
01/08/14 08:32:49                                MAXIS                                FMAPSM1
                Person Search Matches (MTCH)

507-21-3244 TRAINING                                JUSTIN                                R M 07-11-1965
      *Alias
      SSN      Last Name      First Name  M Gnd  DOB      PMI Nbr
-----
_ 458-78-1873  TRAVERSE    GREG       G  M  08-17-2013  8372
_ 468-78-2246  TRAVERSE    KEVIN      K  M  12-26-2009   9437
_ 712-89-4321 * TRASH      ALEXANDER  B  M  07-15-2009   4893
_ 318-78-9874  TRAVERSE    FALLON     F  M  03-18-1978   8358
_ 510-78-8579  TRAVERSE    IZAK       I  M  09-11-2013   8384
_ 361-78-1682  TRAVERSE    EVAN       E  M  03-12-1943   6432
_ 391-78-9133  TRAVERSE    HANK       H  M  12-25-2004   8381
_ 151-78-7637  TRAVERSE    DAVID      D  M  11-28-2002   5917
_ 151-78-3718  TRAVERSE    DYLAN      D  M  11-28-2002   5918
* * * * *

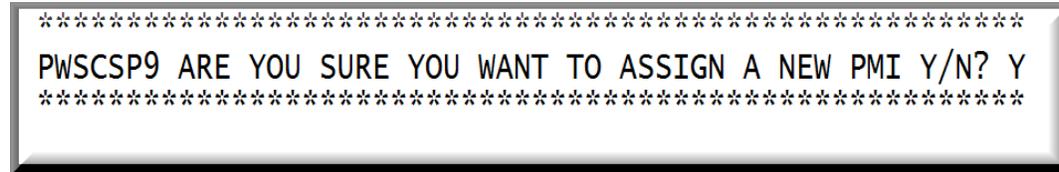
More: +/-      Mark with a 'X' for viewing extended information
                'A' for alias display (marked with *)
                'C' for Claim search
                'S' to select a match
                ↙
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      EXIT      ADD      PREV  NEXT      TRBL  INFO
YOU MAY EXIT, SCROLL, SELECT NAME OR ADD PERSON
```

Press **PF5**, MAXIS will ask if you really want to assign the person a PMI number.

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Note that the pop-up window begins with your worker number; all PMI additions are tracked by worker number. Answer the question with a **Y**.



### Transmit

#### MEMI 01 Panel

Notice at the bottom of the screen you now have a case number. After Justin is added MAXIS assigns a case number.

Write down the case number in the space provided at the top of the page 1 of the CAF.

MEMI is where additional information about each person in the household is entered.

The top of the panel shows the reference number assigned to this person and the name of the person.

The next line shows us the SSN that we entered on the MEMB panel and shows the PMI number that has been assigned to this person.

Notice Justin's system-entered PMI Type is M. This means his PMI was assigned as part of a MAXIS or MEC<sup>2</sup> case.

Actual Date:

Leave blank

Do not need to complete the Actual Date field when entering information for the first time.

**TAB** down and record Justin's marital status.

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Marital Status: **N = Never Married**  
**PF1** to find the appropriate code if needed. Note: "S" does not equal "Single" – it is separated. This is a common error.

Spouse Ref Nbr: Leave blank

This field is used to record the reference number of the spouse of this household member. The name of a spouse will be system entered directly after the reference number.

### Tab

Last Grade Completed: **12**

This field is used to enter the last grade of school completed.

Citizen (Y/N): **Y**

This field is used to record whether or not Justin is a U.S. citizen.

Citizenship Ver: Leave blank

Use this field to record the type of U.S. citizenship verification received.

### Tab

MA Citizenship Ver: Leave blank

This field is **only** coded for Minnesota health care programs and is used to:

- record if an applicant is exempt from citizenship and identity verification,
- request verification of citizenship and identity from the Social Security Administration, or
- view SSA citizenship verification response.

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Cmdty/Other St FS End Dt: Leave blank

On page 1 of the CAF there is a question that asks if anyone has ever received public assistance, commodities, or SNAP benefits before.

If the response is yes to this question indicate on the MEMI panel the last day of the month the client received SNAP or commodities.

For example, if the client stated they received SNAP in Wisconsin on July 4<sup>th</sup>, you would contact Wisconsin to verify that the case there is closed and then enter July 31<sup>st</sup> as the Cmdty/Othr St FS End Dt.

Justin did not indicate receipt of public assistance in another state. Leave this field blank.

GRH St Residence (Y/N): Leave blank

Document whether residence requirements are met.

In MN > 12 Months (Y/N): Leave blank

On this field, record whether or not the client has been in Minnesota for more than 365 days at the date of application. This field is typically used for cash programs that have a residency requirement. If a client enters something in the "Most Recently Moved to MN" field then code the field.

Residence Ver: Leave blank

This field is used to record the verification for the "In MN > 12 Months" field.

MN Entry Date: Leave blank

This field is used to record the date this person entered Minnesota in order to track 30 day residence requirements for some programs.

Former State: Leave blank

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This field is used to record the state in which the applicant spent the most time in the 30 days before moving to Minnesota.

Leave the rest of the fields on this panel blank. They are program specific and will not be completed in the APPL process.

This is the way your MEMI panel for Justin looks.

```
01/08/14 08:33:59          MAXIS          FMCDAA6
CAF 4,5,6a, 6b          Additional Member Info (MEMI)          1 of 0

Ref Last First M * Ref Nbr: 01 TRAINING, JUSTIN R
01 TRAIN JUSTIN R * SSN: 507-21-3244   PMI: 10087   PMI Type: M
* Actual Dt: __ __ __ SMI:          Alien ID:
*           Marital Status: N
*           Spouse Ref Nbr: __
*           Last Grade Completed: 12
*           Citizen (Y/N): Y           Citizenship Ver: __
*           MA Citizenship Ver: -
* Cmdty/Othr St FS End Dt: __ __ __ GRH St Resi (Y/N): -
* In MN > 12 Months (Y/N): -           Residence Ver: -
*           MN Entry Date: __ __ __   Former State: -
*           Time Limit: __           Temporary Residence: -
*           Placement Type: -         Adoption Assistance: -
*           Minor Crgvr Lvg Arrang: - TANF Exemption: -
*           Fam Vio Waiver Beg Dt: __ 01 __

Mode: A Function: APPL Case Nbr: __148060 Month: 01 14 Command: __ __
SV: 98 PW: PWSCSP9 SW: Updated: User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP PMI  EXIT CNOTE PNOTE      PREV NEXT EDIT OOPS TRBL INFO
```

### Transmit

The system will bring up another blank MEMB panel. There are no additional household members to add so transmit to get to the next screen in our queue.

### Transmit

## IPAM- APPL Entry Workbook

---

### ADDR Panel

This panel is used to record the household's residence and mailing address.

Address Eff Date:      Leave blank

At initial application, if this field is left blank, the system defaults to the application date.

### Residence Address

This section is used to record the applicant's physical residence address. MAXIS issues notices and other correspondence to this address if another mailing address is not entered.

All fields in this section must be completed. If someone is homeless, use your agency's address. Check your county procedures to find out how to complete this information for the homeless.

Enter the address without any punctuation. When the address is standardized, the system will change it to upper case with no punctuation.

Street:                **1175 89<sup>th</sup> Ave NE**  
                             **Apt 2**  
City:                    **Blaine**  
St:                      **MN**  
Zip:                     **55434**

Resi Co:                **PF1** to view the codes available to complete the  
County Residence field.

Code:                  **02** for Anoka County

### **Transmit**

Resi Co:                02 (field is populated from PF1 code entry)

Ver:                    Leave blank

## IPAM- APPL Entry Workbook

---

Homeless (Y/N): Leave blank

The homeless field will default to “N” if you leave it blank.

Indian Reservation (Y/N): Leave blank

This field is used to indicate whether or not the address is on an Indian reservation. It doesn't matter whether or not the client is a tribal member, only that he or she is living on an Indian reservation.

This may affect how cash and SNAP cases are budgeted. If you leave this field blank, the system defaults to an N.

Name of Reservation: Leave blank

Justin doesn't live on a reservation, so leave this field blank as well.

### Mailing Address

Leave Blank

If a separate mailing address is provided enter it in this field. Justin does not have a separate mailing address.

### Phone

Record Justin's home phone number including the area code.

Phone One:                   **(763) 783-2715**

Press **PF1** to view the codes for various types of phone numbers.

Code:                         **H** for home

### **Transmit**

Justin lists no other phone numbers so the remaining fields are left blank.

This is how the ADDR panel for Justin looks:

## IPAM- APPL Entry Workbook

```
01/08/14 08:35:34                MAXIS                FMBDGAM6
                                Address (ADDR)                1 of 0

Ref Last First M * Address Eff Date: 01 08 14
01 TRAIN JUSTIN R * Residence Address
*                               Street: 1175 89TH AVE NE APT 2
*
*                               City: BLAINE_____ St: MN
*                               Zip: 55434__ 1214 Resi Co: 02 Ver: __
* Homeless (Y/N): N Indian Reservation (Y/N): N
*                               Name of Reservation: __
* Mailing Address
*                               Street: _____
*                               _____
*                               City: _____
*                               St: __ Zip: _____
*                               Phone One: ( 763 ) 783 2715 Type: H
*                               Phone Two: ( __ ) __ __ Type: _
*                               Phone Three: ( __ ) __ __ Type: _
Mode: A Function: APPL Case Nbr: __148060 Month: 01 14 Command: __ __ __
SV: 98 PW: PWSCSP9 SW: Updated: User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
HELP PMI EXIT CNOTE PREV NEXT EDIT OOPS TRBL INFO
RESIDENCE ADDRESS IS STANDARDIZED
```

### Transmit and stop.

A message at the bottom of the panel says the address has been standardized. The system standardizes the address to match the address format listed in the Postal Services directory. This is done to ensure that the client will receive benefits and notices.

If you receive a pop-up window warning appears stating “Mail to this Residence address will not be delivered by the US Postal Service,” follow up as necessary to ensure the address is accurate until the message “RESIDENCE ADDRESS IS STANDARDIZED” appears. Things like abbreviations and punctuation often result in an address not standardizing.

The post office website has a list of appropriate abbreviations that may prove helpful. Click on the following link or copy and paste the website’s url into your browser to access the Unites States Post Office website. Click on the “abbreviations” tab when you are on the site.

### [USPS – Send Mail - Addressing Tips](https://www.usps.com/send/addressing-tips.htm?)

<https://www.usps.com/send/addressing-tips.htm?>

#### **Transmit**

This is the end of the APPL queue.

Press **PF3** to exit.

The system returns to the SELF menu. If you haven't already written down the case number, notice that MAXIS retains it on the SELF menu. Record the case number on your application.

#### **Case Notes**

A case note needs to be written regarding the entry of the information from Justin's page 1 of his CAF.

To enter a case note complete the following fields on the SELF menu:

Function:	<b>Case</b>
Case Number:	<b>Case Number for Justin</b>
Benefit Period:	<b>Current Month</b>
Command:	<b>Note</b>

#### **Transmit**

To add a case note we need to use the PF9 key – Press **PF9**

The first line in the case note is used as a title or subject line to describe what the case note is about. Check with your county for the content and structure of your case notes, many counties have standardized case notes in place for you to use.

The level of detail of the note depends on the how much information is known at the time of entry. Use the following for Justin's case note:

**\*\*\*CASE APPL'D\*\*\***

.  
**CAF page 1 received on CM/CD/CY.**

.  
**Assessed for Expedited SNAP, client does not meet expedited criteria.**

**HH size = 1. Justin (MEMB 01).**

**No PMI match found, assigned PMI number.**

**Sent Justin information regarding date and time of his SNAP interview.**

.  
**Worker Name**

Once the case note is entered, save the case note by pressing PF3.

Press **PF3**

**PF3** twice to the SELF Menu

Case notes can be updated by the worker who created them on the day they are created. After that, the case note is saved permanently, as is, and cannot be updated.

Congratulations you just entered your first application!



### Check for understanding case entry 1

1. When do you first do a PERS search?

---

2. What date is used to establish the application date?

---

**Note:** Check your answers using the Answer Key located at the back of the guide.

## Case Entry 2: George

For this case less detailed instructions regarding every field will be provided. Don't forget to use the PF1 key for help with unfamiliar fields. Perform a person search on all persons listed on the application to see if they are known to the PMI database. APPL this case and assign each person a PMI number.

Objectives:

- Perform Person Search
- Complete APPL entry in MAXIS
- Assign PMI numbers

### George's Application

Let's look at George's application. He dropped off the application today at our agency. He lives with his children. Create a last name and Social Security numbers for George and his children if you haven't done so already. Write these on your application in the appropriate boxes.

One of the first steps to take after receiving a complete application is to assess for Expedited SNAP. Use the Expedited SNAP Evaluation form to determine if George meets any criteria for Expedited SNAP, based on the information he listed on the CAF.

Which answer best describes George's situation?

- A. His household has less than \$150 per month in gross income and \$100 or less in liquid assets.
- B. He belongs to a migrant household with \$100 or less in liquid assets.
- C. His household's gross income + assets are less than his actual monthly housing and utility costs.
- D. He is not eligible because he does not fit into any of the above categories.

If you answered "D" you are correct! Now that you have assessed for Expedited SNAP the next step is to complete a Person Search.

### Person Search

From the Self Menu navigate to the Person Search panel. Make sure your case number field is blank. If you have timed out of MAXIS enter your password and **transmit** to continue.

Function:           **PERS**

#### **Transmit**

Last Name:           **Last Name You created**

First Name:          **George**

Gender:              **M**

DOB:                 **02 20 1965**

SSN:                 **SSN you created**

#### **Transmit**

### MTCH Panel

The Match Panel displays the information you have just entered on the top. A list of names will appear as possible matches.

If you find an exact SSN match, **PF3** and choose a different unique SSN.

Following the same process, conduct a person search for John and Michelle. Once you are sure there are no matches, **PF3** to return to the SELF menu.

Now we are ready to enter the application information on MAXIS.

Function:           **APPL**

Benefit Period:     **Current Month/Current Year**

#### **Transmit**

# IPAM- APPL Entry Workbook

## APPL

Application Date: **Today**

Applicant Name:  
Last: **Name you created**  
First: **George**  
M: **M**

This is what George's APPL panel looks like.

```
01/07/14 14:25:50                MAXIS                FMBACAM1
                                Application (APPL)        1 OF 0

Ref Last  First  M  *                               Application Date: CM CD CY
                *
                * APPLICANT NAME
                * Last: WASHINGTON_____ First: GEORGE_____ M: M
                *
                *                               PMI Nbr:
                *                               SMI Nbr:
                *
                *                               Stop Auto Deny: _
                *                               Auto Deny Date:
                *
                *                               Withdrawal Status: _
                *                               Voluntary Withdrawal Date:
                *
                *
Mode: A  Function: APPL  Case Nbr: _____  Month: 01 14  Command: _____
Co: 98  PW: PWSCSP9  SW:                Upd Date:                Notes: N  User: PWSCSP9

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  PMI  EXIT  CNOTE PNOTE      PREV  NEXT  EDIT  OOPS  TRBL  INFO
```

**Transmit**

## IPAM- APPL Entry Workbook

---

### MEMB 01

George's name carried over from the APPL panel.

SSN:	<b>SSN you assigned</b>
Ver:	<b>P</b>
Birthdate:	<b>02 20 1965</b>
Ver:	Leave blank
Gender:	<b>M</b>
ID Ver:	Leave blank

MEMB 01 is the applicant. The relationship field was coded 01-Applicant by the system.

Spoken Language:	<b>99</b>
Written Language:	<b>99</b>
Needs Interpreter (Y/N):	<b>N</b>
Alias:	N
Alien ID Nbr:	Leave blank
Ethnicity Hisp/Lat (Y/N):	<b>N</b>

Select the Race field with an **"X"** and **transmit**. A pop up window appears allowing you to record the race of a household member. You can record up to 5 races per client. **Tab** down and place an **"X"** next to **"White"** and **transmit**.

Leave the remainder of the fields on the MEMB panel blank, as they do not pertain to George.

## IPAM- APPL Entry Workbook

This is the way your MEMB panel for George looks.

```
01/07/14 14:28:19          MAXIS          FMBDAAM2
CAF Questions 1, 3a, 3b   Household Member (MEMB)      1 of 1

Ref Last  First  M * Ref Nbr: 01  PMI Nbr:          _ Arrival Date:
01 WASHI GEORGE M *          SMI NBR:          Actual Date:  _ _ _
* Last: WASHINGTON_____ First: GEORGE_____ M: M
*          SSN: 612 98 4566          Ver: P
*          Birthdate: 02 20 1965          Ver:  _ Age: 48
*          Gender: M          ID Ver:  _
* Rel To Applicant: 01 Applicant
* Shared HH Excpt:  _
* Spoken Language: 99 English_____
* Written Language: 99 English (HRF)_____
*          Needs Interpreter (Y/N): N
*          Alias (Y/N): N          Alien ID Nbr: _____
*          Ethnicity Hisp/Lat (Y/N): N
*          Race: white
* Tribal Indc:  _          ADA Notice Type:  _
* Date Of Death:  _ _ _

Mode: A  Function: APPL  Case Nbr: _____  Month: 01 14  Command: _____
Sv: 98    PW: PWSCSP9    SW: _____    Updated: _____    User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  PMI  EXIT  CNOTE PNOTE          PREV  NEXT  EDIT  OOPS  TRBL  INFO
```

### Transmit

The system automatically does a Person Search once you have completed the MEMB panel. Check carefully for potential matches. At this point assign a new PMI number to this person if no match already exists.

**PF8** until you have reviewed all possible matches.

# IPAM- APPL Entry Workbook

```

01/07/14 14:29:18                                MAXIS                                FMAPSMM1
                Person Search Matches (MTCH)

612-98-4866  WASHINGTON                GEORGE                M  M  02-20-1965
      *Alias
      SSN                Last Name                First Name                M Gnd  DOB                PMI Nbr
-----
_ 612-64-8787  WASHINGTON                MICHELLE                R  F  03-03-1997  10025
_ 320-81-9143  WASECA                    EDMUNDO                E  M  10-21-1969   6411
_ 151-83-3647  WANTONWAN                DARREN                 D  M  01-01-1965   5556
_ 151-85-3647  WINONA                    DARREN                 D  M  01-01-1965   5717
_ 635-84-6548  WILKIN                    CORNELIUS              C  M  06-21-1967   5080
_ 151-80-3647  WADENA                    DARREN                 D  M  01-01-1965   8416
_ 151-79-3647  WABASHA                   DARREN                 D  M  01-01-1965   5223
_ 635-79-6548  WABASHA                   CORNELIUS              C  M  06-21-1967   4707
_ 421-81-6547  WASEC-FRIEND             BERNARD                B  M  04-22-1971   4852
* * * * *
More: +/-      Mark with a 'X' for viewing extended information
                'A' for alias display (marked with *)
                'C' for Claim search
                'S' to select a match
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      EXIT      ADD      PREV  NEXT      TRBL  INFO
YOU MAY EXIT, SCROLL, SELECT NAME OR ADD PERSON
  
```

Press **PF5** to add George. MAXIS identifies you by worker number and asks if you really want to add this person.

Answer **Y** to assign George a PMI number.

**Transmit**

## IPAM- APPL Entry Workbook

---

### MEMI 01

The MEMI panel is used to gather additional information about each person. Notice that you now have a case number for George. You should write it down at the top of the CAF page 1 in the space provided. Remember: Use the PF1 key to view codes needed to complete the necessary fields on this panel.

Actual date:	Leave blank
Marital Status:	<b>N</b>
Spouse ref nbr:	Leave blank
Last Grade Completed:	<b>11</b>
Citizenship (Y/N):	<b>Y</b>
Citizenship Ver:	Leave Blank
SSA/MA Citizenship Ver:	Leave blank
Cmdty/othr st fs end dt:	Leave blank
GRH st resi (y/n):	Leave blank
In MN> 12 Months (Y/N):	Leave blank
Residence Ver:	Leave blank

The rest of the fields pertain to specific public assistance programs and can be left blank. You will learn more about their use as needed in future courses.

## IPAM- APPL Entry Workbook

This is how George's MEMI panel looks.

```
01/07/14 14:30:04          MAXIS          FMCDAAAM6
CAF 4,5,6a, 6b          Additional Member Info (MEMI)          1 of 0

Ref Last First M * Ref Nbr: 01 WASHINGTON, GEORGE M
01 WASHI GEORGE M * SSN: 612-98-4866   PMI: 10026   PMI Type: M
* Actual Dt: ___ ___ ___ SMI:          Alien ID:
*          Marital Status: N
*          Spouse Ref Nbr: ___
*          Last Grade Completed: 11
*          Citizen (Y/N): Y          Citizenship Ver: ___
*          MA Citizenship Ver: ___
* Cmdty/Othr St FS End Dt: ___ ___ ___ GRH St Resi (Y/N): ___
* In MN > 12 Months (Y/N): ___          Residence Ver: ___
*          MN Entry Date: ___ ___ ___          Former State: ___
*          Time Limit: ___ ___ ___          Temporary Residence: ___
*          Placement Type: ___          Adoption Assistance: ___
* Minor Crgvr Lvg Arrang: ___          TANF Exemption: ___
* Fam Vio Waiver Beg Dt: ___ 01 ___

Mode: A Function: APPL Case Nbr: __148043 Month: 01 14 Command: ___ ___
Sv: 98 PW: PWSCSP9 SW:          Updated:          User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
HELP PMI EXIT CNOTE PNOTE PREV NEXT EDIT OOPS TRBL INFO
```

**Transmit**

### MEMB 03

Another MEMB panel appears. Member panels must be completed for all people living in the household whether or not they are requesting assistance. We have two more people listed on our application, so let's start with John, George's son.

#### Assigning reference #'s to other household members

There is a best practice to follow when assigning reference numbers to other household members in MAXIS. Most of the time we assign reference numbers using the following:

- MEMB 01            Applicant
- MEMB 02            Spouse
- MEMB 03-19       Children of the applicant
- MEMB 20 +         All others

Assigning reference numbers does not determine relationships. Relationships are coded in the Relationship field on MEMB.

Assign reference 03 to John and 04 to Michelle.

Ref number:	<b>03</b>
Actual date:	Leave blank
Last name:	<b>Name you assigned</b>
First name:	<b>John</b>
M:	<b>J</b>
SSN:	<b>SSN you assigned</b>
Ver:	<b>P</b>
Birthdate:	<b>03 28 1992</b>
Ver:	Leave blank
Gender	<b>M</b>
ID Ver:	Leave blank

On the relationship field, press **PF1** to reveal the codes.

MAXIS uses the relationship code to determine household composition. Here you code John's relationship to George as listed on the application.

## IPAM- APPL Entry Workbook

---

Note that at the bottom of the pop-up window, there is a More + sign. This means that there is another page of codes available. You may need to use the PF8 key to see more codes.

Code: **03**

### **Transmit**

Rel to Applicant: 03

We do not have information about language or the need for an interpreter for anyone but George at this point, leave these fields blank for the rest of the household. Ask George for this information when he completes his SNAP interview, and update MAXIS at that time.

Spoken Language: Leave blank

Written Language: Leave blank

Needs Interpreter (Y/N): Leave blank

Alias: **N**

Alien ID nbr: Leave blank

Ethnicity Hisp/Lat (Y/N): **N**

Select the Race field with an **“X”** and **transmit**. Tab down and place an **“X”** next to **“White”** and **transmit**.

## IPAM- APPL Entry Workbook

This is how your MEMB panel for John looks.

```
01/07/14 14:51:19          MAXIS          FMBDAAM2
CAF Questions 1, 3a, 3b   Household Member (MEMB)      2 of 3

Ref Last  First  M * Ref Nbr: 03  PMI Nbr: 10027    _ Arrival Date:
01 WASHI GEORGE M *          SMI NBR:          Actual Date:  _ _ _
03 WASHI JOHN   J * Last: WASHINGTON_____ First: JOHN_____ M: J
04 WASHI MICHELL R *          SSN: 612 87 8787    Ver: P
*          Birthdate: 03 28 1992    Ver:  _ Age: 21
*          Gender: F                ID Ver:  _
* Rel To Applicant: 03  child
* Shared HH Excpt:  _
* Spoken Language:  _ _____
* Written Language:  _ _____
*          Needs Interpreter (Y/N):  _
*          Alias (Y/N): N            Alien ID Nbr: _____
*          Ethnicity Hisp/Lat (Y/N):  _
*          Race: white
* Tribal Indc:  _          ADA Notice Type:  _
* Date Of Death:  _ _ _

Mode: D  Function: APPL  Case Nbr:  _148043  Month: 01 14  Command:  _ _ _
SV: 98    PW: PWSCSP9    SW:          Updated: 01 07 14  User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP PMI  EXIT  CNOTE PNOTE          PREV NEXT EDIT OOPS TRBL INFO
```

### Transmit

After completing John's MEMB panel the system goes to the Person Search Matches (MTCH) panel to see if he is known to the PMI database. View all possible matches to see if John is known to the PMI database.

**PF 8** to review all possible matches.

## IPAM- APPL Entry Workbook

```

01/07/14 14:32:53                                MAXIS                                FMAPSMM1
                Person Search Matches (MTCH)

612-87-8787  WASHINGTON                                JOHN                                J F 03-28-1992
            *Alias
            SSN                Last Name            First Name  M Gnd  DOB        PMI Nbr
-----
_ 461-81-1975  WASECA                DAISY       D F 09-14-2001 5605
_ 612-28-7249  WARD                   ANNE        M F 05-21-1986 1919
_ 333-11-8671 * WASHINGTON            STEVEN      H M 01-01-1977 867
_ 150-72-8968  WHITE                  BETSY       N F 09-20-1987 4466
_ 333-11-8681 * WASHINGTON            KRISTOPHER E M 07-17-2009 868
_ 431-84-9816  WILKIN                 HAILEY      H F 01-01-1996 6856
_ 321-84-6547  WILKIN                 EVE         E F 01-14-1996 5970
_ 320-77-9223  WATSON                 JENNIFER   N F 04-23-1988 5976
_ 418-80-9687  WADENA                 HOLLY       H F 04-19-1999 7760
* * * * *
More: +/-      Mark with a 'X' for viewing extended information
                'A' for alias display (marked with *)
                'C' for Claim search
                'S' to select a match
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
                HELP      EXIT      ADD      PREV  NEXT      TRBL  INFO
YOU MAY EXIT, SCROLL, SELECT NAME OR ADD PERSON
    
```

**PF5** to add John. Answer **Y** in the pop-up window to add John to the PMI database.

### Transmit

#### MEMI 03

Complete John's MEMI panel. Remember to write down his PMI number anywhere on the application near his name.

Actual date:	Leave blank
Marital Status:	<b>N</b>
Spouse ref nbr:	Leave blank
Last Grade Completed:	<b>12</b>
Citizen (Y/N):	<b>Y</b>
Citizenship Ver:	Leave blank
SSA/MA Citizenship Ver:	Leave blank
Cmdty/othr st fs end dt:	Leave blank
GRH st resi (Y/N):	Leave blank
In MN > 12 Months (Y/N):	Leave blank
Residence Ver:	Leave blank

## IPAM- APPL Entry Workbook

This is how your MEMI panel for John looks.

```
01/07/14 14:33:24          MAXIS          FMCDAM6
CAF 4,5,6a, 6b          Additional Member Info (MEMI)          1 of 0

Ref Last  First  M * Ref Nbr: 03  WASHINGTON, JOHN J
01 WASHI GEORGE M * SSN: 612-87-8787  PMI: 10027  PMI Type: M
03 WASHI JOHN   J * Actual Dt: __ __ __ SMI:          Alien ID:
*           Marital Status: N
*           Spouse Ref Nbr: __
*           Last Grade Completed: 12
*           Citizen (Y/N): Y          Citizenship Ver: __
*           MA Citizenship Ver: __
* Cmdty/Othr St FS End Dt: __ __ __ GRH St Resi (Y/N): __
* In MN > 12 Months (Y/N): __          Residence Ver: __
*           MN Entry Date: __ __ __ Former State: __
*           Time Limit: __          Temporary Residence: __
*           Placement Type: __          Adoption Assistance: __
*           Minor Crgvr Lvg Arrang: __ TANF Exemption: __
*           Fam Vio Waiver Beg Dt: __ 01 __

Mode: A  Function: APPL  Case Nbr: __148043  Month: 01 14  Command: __ __
SV: 98      PW: PWSCSP9      SW:          Updated:          User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP  PMI  EXIT  CNOTE PNOTE          PREV  NEXT  EDIT  OOPS  TRBL  INFO
```

### Transmit

#### MEMB 04

Another blank MEMB panel appears. Complete a MEMB panel for Michelle.

Ref number:       **04**  
Actual date:       Leave blank  
Last name:        **Name you created**  
First name:       **Michelle**  
M:                **R**  
SSN:              **SSN you created**  
Ver:              **P**  
Birthdate:        **03 03 1997**  
Gender:           **F**

## IPAM- APPL Entry Workbook

Rel to Applicant: **03**  
Spoken Language Leave blank  
Written Language: Leave blank  
Alias: **N**  
Alien ID nbr: Leave blank  
Ethnicity Hisp/Lat (Y/N): **N**  
Select the Race field with an **"X"** and **transmit**.

Tab down and place an **"X"** next to **"White"** and **transmit**.

This is the way your MEMB panel for Michelle looks.

```
01/07/14 14:50:58          MAXIS          FMBDAAM2
CAF Questions 1, 3a, 3b   Household Member (MEMB)      3 of 3

Ref Last  First  M * Ref Nbr: 04  PMI Nbr: 10028    _ Arrival Date:
01 WASHI GEORGE M *          SMI NBR:          Actual Date:  _ _ _
03 WASHI JOHN  J * Last: WASHINGTON_____ First: MICHELLE___ M: R
04 WASHI MICHELL R *          SSN: 654 04 5444    Ver: P
*          Birthdate: 03 03 1997    Ver:  _ Age: 16
*          Gender: F                ID Ver:  _
* Rel To Applicant: 03  Child
* Shared HH Excpt:  _
* Spoken Language:  _
* Written Language:  _
*          Needs Interpreter (Y/N):  _
*          Alias (Y/N): N            Alien ID Nbr:  _
*          Ethnicity Hisp/Lat (Y/N):  _
*          Race: White
*          Tribal Indc:  _          ADA Notice Type:  _
*          Date Of Death:  _ _ _
Mode: D  Function: APPL  Case Nbr:  _148043  Month: 01 14  Command:  _ _ _
SV: 98    PW: PWSCSP9    SW:          Updated: 01 07 14  User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP PMI  EXIT CNOTE PNOTE    PREV NEXT EDIT OOPS TRBL INFO
ENTER A VALID COMMAND OR PF-KEY
```

### Transmit

The system takes you to MTCH to see if she is known to the PMI database.

**PF 8** to review all possible matches.

## IPAM- APPL Entry Workbook

```

01/07/14 14:34:55                                MAXIS                                FMAPSMM1
                                Person Search Matches (MTCH)

654-04-5444 WASHINGTON                                MICHELLE                                R F 03-03-1997
                                *Alias

      SSN                                Last Name                                First Name                                M Gnd  DOB                                PMI Nbr
-----                                -
_ 866-26-6123 WILLIAMS                                MICHELLE                                B F 08-15-1979 1981
_ 333-09-1791 * WASHINGTON                                BETTY                                M F 03-13-1937 9179
_ 729-11-3777 WINTER                                MICHELLE                                B F 08-15-1979 9093
_ 179-13-1211 WILLIAMS                                MICHELLE                                B F 08-15-1979 2119
_ 333-11-8691 * WASHINGTON                                SARA                                O F 07-17-2011 869
_ 251-16-5665 * WASHINGTON                                MONIQUE                                A F 06-21-1977 2010
_ 612-24-6546 WASHINGTON                                JOHN                                J M 03-28-1992 10024
_ 321-81-6547 WASECA                                EVE                                E F 01-14-1996 6416
_ 470-40-5003 WILLIAMS                                CAROLINE                                T F 02-14-1997 5778
* * * * *

More: +/-      Mark with a 'X' for viewing extended information
              'A' for alias display (marked with *)
              'C' for Claim search
              'S' to select a match

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP      EXIT      ADD      PREV  NEXT      TRBL  INFO
YOU MAY EXIT, SCROLL, SELECT NAME OR ADD PERSON
    
```

**PF5** to add Michelle. Answer **Y** in the pop-up window to add Michelle to the PMI database.

### Transmit

#### MEMI 04

For Michelle's MEMI panel complete the same fields we did for George and John. Write down Michelle's PMI number near her name on the application.

Acutal date:	Leave blank
Marital Status:	<b>N</b>
Spouse ref nbr:	Leave blank
Last Grade Completed:	<b>10</b>
Citizen (Y/N):	<b>Y</b>
Citizenship Ver:	Leave blank
SSA/MA Citizenship Ver:	Leave blank
Cmdty/Othr st fs end dt:	Leave blank
In MN>12 Months (Y/N):	Leave blank
Residence Ver:	Leave blank

## IPAM- APPL Entry Workbook

This is the way your MEMI 04 panel for Michelle looks.

```
01/07/14 14:35:34          MAXIS          FMCDAM6
CAF 4,5,6a, 6b          Additional Member Info (MEMI)          1 of 0

Ref Last  First  M * Ref Nbr: 04 WASHINGTON, MICHELLE R
01 WASHI GEORGE M * SSN: 654-04-5444   PMI: 10028   PMI Type: M
03 WASHI JOHN   J * Actual Dt:  __ __  SMI:           Alien ID:
04 WASHI MICHELL R *           Marital Status: N
*           Spouse Ref Nbr:  __
*           Last Grade Completed: 10
*           Citizen (Y/N): Y           Citizenship Ver:  __
*           MA Citizenship Ver:  __
* Cmdty/Othr St FS End Dt:  __ __  GRH St Resi (Y/N):  __
* In MN > 12 Months (Y/N):  __           Residence Ver:  __
*           MN Entry Date:  __ __  Former State:  __
*           Time Limit:  __           Temporary Residence:  __
*           Placement Type:  __       Adoption Assistance:  __
*           Minor Crgvr Lvg Arrang:  __ TANF Exemption:  __
*           Fam Vio Waiver Beg Dt:  __ 01  __

Mode: A  Function: APPL  Case Nbr:  __148043  Month: 01 14  Command:  __
SV: 98    PW: PWSCSP9    SW:           Updated:           User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
      HELP PMI  EXIT CNOTE PNOTE          PREV NEXT EDIT OOPS TRBL INFO
```

### Transmit

Another blank MEMB panel appears.

Do we have another household member to add?

The system does not know how many members are listed on the application, so MAXIS always provides a blank MEMB panel to add more members. We have no other household members to add.

### Transmit

### ADDR

At application, leave the effective date field blank. The system will default to the application date.

#### Residence Address

Street: **1332 Grand Ave**  
City: **Saint Paul**  
St: **MN**  
Zip: **55105**

On the Co Res field, press **PF1** to reveal the codes.

Code: **62**

#### **Transmit**

Co Res: **62**

Again, since we are in the APPL function and George has not provided verifications, you will leave the verification field blank.

Leave the homeless and Indian Reservation fields blank, as they will default to NO.

#### Mailing Address

Leave blank. George does not have a separate mailing address.

#### Home Phone

Record George's phone number including the area code.

Phone One: **651 297 5511**  
Type: **H**

## IPAM- APPL Entry Workbook

If the client has a second phone number, such as a cell or work number, enter that phone number in the additional phone fields. Because George does not indicate another phone you can leave it blank.

This is the way your ADDR panel for this household looks.

```
01/07/14 14:37:04                MAXIS                FMBDGAM6
                                Address (ADDR)                1 of 0

Ref Last  First  M * Address Eff Date: 01 07 14
01 WASHI GEORGE M * Residence Address
03 WASHI JOHN   J * Street: 1332 GRAND AVE_____
04 WASHI MICHELL R *
*                               City: SAINT PAUL_____ St: MN
*                               Zip: 55105__ 2607  Resi Co: 62 Ver: __
* Homeless (Y/N): N      Indian Reservation (Y/N): N
*                               Name of Reservation:  __
* Mailing Address
* Street: _____
*
*                               City: _____
*                               St:  __ Zip: _____
* Phone One: ( 651 ) 297 5511  Type: H
* Phone Two: (  __ )  __  __  Type:  _
* Phone Three: (  __ )  __  __  Type:  _
Mode: A  Function: APPL  Case Nbr: __148043  Month: 01 14  Command:  __  __  __
SV: 98    PW: PWSCSP9    SW:                Updated:                User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP PMI  EXIT CNOTE                PREV NEXT  EDIT  OOPS TRBL  INFO
RESIDENCE ADDRESS IS STANDARDIZED
```

### Transmit

The system standardizes the address to match the address format listed in the Postal Service's directory. MAXIS will give you an online message if the address is not found as a match with the U.S. Postal Service. If one of these messages is received, follow up with the client.

### Transmit

The panel changes from add mode (green fields) to display mode (white fields). An online edit displays that command line navigation or a PF key must be used.

Before you exit the case enter a case note for George's case.

Look at the PF keys.

Which PF key can we use to navigate to the Case Note function?

**Press PF4**

Which PF key must be used to create a new case note?

**Press PF9**

Enter the following case note for George's case.

**\*\*\*New application\*\*\***

**CAF received CM CD CY**

**Does not meet expedited SNAP criteria.**

**APPL'd CAF**

**Household consists of George and his two children John and Michelle.**

**None were known to the PMI database.**

**Assigned new PMI numbers for all listed on CAF.**

**Worker Name**

**PF3** to save your case note.

**PF3** to return to the ADDR panel.

**PF3** to return to the SELF menu.

Write down George's case number on his application in the case number box.



**Check for understanding case entry 2**

1. What reference number would you assign Member 01's spouse and their three children? What about a roommate living in the home?

---

2. When would you code the "MA Citizenship Ver:" field on MEMI?

---

**Note:** Check your answers using the Answer Key located at the back of the guide.

## Case Entry 3: John

Our next applicant is John who has submitted a CAF. Do a Person Search to determine if John is already known to MAXIS. If he is, don't add him as a new person. You will perform a match resolution instead. For this application only identify fields that need to be completed.

Our objectives for this case are:

- Perform Person Search.
- Complete APPL entry.
- Select a match from the PMI file.

Take a few minutes to review John's application and identify the information you will need to enter in the APPL process. Remember, John is the same person that is also listed on George's application so assign John the same last name and Social Security number that you created for him on George's case.

You will do a Person Search on John, using the information provided on his CAF.

Function: **PERS**

**Transmit**

# IPAM- APPL Entry Workbook

## Person Search Panel

Last: (John's last name from George's application)  
First: John  
Gender: M  
DOB: 03 28 1992  
SSN: (SSN assigned to John from George's application)

## Transmit

```
01/07/14 14:58:33 MAXIS FMAPSAM1
Person Search (PERS)
* Last: WASHINGTON_____
*
Enter Person Data *
*
* First: JOHN_____
* Gender: M DOB: 03 28 1992
*
* SSN: 612 87 8787
* PMI Nbr: _____
* Alien ID: _____
* SMI Nbr: _____
*
Function: PERS Case Nbr: _____ Month: 01 14 Command: ____ _
Cnty: 98 PW: PWSCSP9 SW: Name: User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP EXIT OOPS TRBL INFO
```

## MTCH

Information at the top of the screen is what was entered on PERS. Compare what is at the top of the screen with all possible matches to determine if John has already been assigned a PMI number.

Did you find a match with John's name, Social Security number and date of birth? You should have an exact match. If you do not, check your SSN and DOB and make sure it matches the information on George's application and re-enter it.

## IPAM- APPL Entry Workbook

We need to determine if John is active on a case, an affiliated member of someone else's case, or on a closed case.

This panel doesn't give us any of that information.

Enter an **X** in the Select field before John's name.

```
01/07/14 14:59:11 MAXIS FMAPSM1
Person Search Matches (MTCH)

612-87-8787 WASHINGTON JOHN M 03-28-1992
*Alias
SSN Last Name First Name M Gnd DOB PMI Nbr
-----
X 612-87-8787 WASHINGTON JOHN J F 03-28-1992 10027
_ 612-24-6546 WASHINGTON JOHN J M 03-28-1992 10024
_ 612-98-4866 WASHINGTON GEORGE M M 02-20-1965 10026
_ 215-51-5151 WASHINGTON BEN B M 06-21-1982 1856
_ 612-64-8787 WASHINGTON MICHELLE R F 03-03-1997 10025
_ 612-98-4566 WASHINGTON GEORGE M M 02-20-1965 10023
_ 333-11-8671 * WASHINGTON STEVEN H M 01-01-1977 867
_ 333-11-8681 * WASHINGTON KRISTOPHER E M 07-17-2009 868
_ 333-09-1801 WASHINGTON ELMER J M 02-12-1936 9180
* * * * *
More: + Mark with a 'X' for viewing extended information
'A' for alias display (marked with *)
'C' for claim search

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
HELP EXIT PREV NEXT TRBL INFO
```

### Transmit

### DSPL

On this screen we can see that John is an affiliated member of someone else's case. He is not the applicant. We know this because under Appl (applicant) the field is blank. If he were the applicant, there would be a Y for yes under Appl.

DSPL also shows no participation dates. This is because only the APPL process has been completed for this case. From DSPL the applicant cannot be determined. All that is known is that John is on another case.

## IPAM- APPL Entry Workbook

---

Since he listed no other household members, it may be that John moved out of the household or decided to come in and apply on his own.

Before doing more research, find the worker's name and phone number for this case.

Move your cursor onto the worker number using either the mouse or arrow keys.

Press **PF1**. The name and number of the worker assigned to this case is displayed in the pop-up box. If this were a real case, make a note of this information and contact this worker about John.

**Transmit** to remove the pop-up box.

Let's investigate John's current status on this case.

Place an **X** in the Select field in front of the case number.

**Transmit**

```
01/07/14 15:00:34                MAXIS                FMAPSPM1
                                Person Search Display (DSPL)

Name: WASHINGTON, JOHN J                SSN: 612-87-8787 DOB: 03-28-1992
Gender: F Alien ID:                    PMI Nbr: 10027
                                        SMI Nbr:
    Select Program: __

Case      Prog      Participation      Affiliated      App1      Sv      Worker
(X) 148043      AP                01/14 CAF I      98      PWSCSP9

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
      HELP          EXIT                PREV  NEXT                TRBL  INFO
```



# IPAM- APPL Entry Workbook

```
01/08/14 08:54:18 MAXIS FMACAAM1
* * * * * Case Status Display (CASE) * * * * *
*
* PERS - Person Status CURR - Current Case Display
* NOTC - Notice Display HISC - Cash Payment History
* HISF - FS Payment History NOTE - Case Notes
* ADHI - Address History EXIT - Select Function
*
*
*
*
*
*
* * * * *
Function: CASE Case Nbr: __148043 Month: 01 14 Command: CURR __ __
Cnty: 98 PW: PWSCSP9 SW: User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP EXIT TRBL INFO
```

There are several options available in the CASE function. CURR (Current Statuses Display) will provide more information. On the command line enter:

Command: **CURR**

**Transmit**

## IPAM- APPL Entry Workbook

```
01/07/14 15:01:29          MAXIS          FMKHTAM1
                          Current Statuses Display (CURR)

  _ Program History          _ Case Application History

  Current Status      Appl Dt
  -----
Case: CAF1 PENDING      01/07/14

Emergency Cash Program
_ Date EA Last Used
  Function: CASE Case Nbr: __148043 Month 01 14 Command: ____ _
Co: 98 PW: PWSCSP9 SW:          Name: WASHINGTON,GEORGE          User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
      HELP          EXIT          NEXT PREV          TRBL INFO
```

CASE/CURR shows that this case is at the CAF1 pending stage. This means that the APPL function has been completed; however, no further action has been taken on the case at this point. Let's look at the Person Status (PERS) panel for this case.

Command:       **PERS**

**Transmit**

## IPAM- APPL Entry Workbook

```
01/07/14 15:02:08 MAXIS FMKPEAM1
Case Status - Person Status (PERS)

Person Information
For January 2014

Ref Last Name: First Name: PMI CASH FS HC GRH IV-E CCAP
Nbr SSN: Relationship: Number Stat Stat Stat Stat Stat Stat

01 WASHINGTON GEORGE 10026
612-98-4866 Applicant

03 WASHINGTON JOHN 10027
612-87-8787 child

04 WASHINGTON MICHELLE 10028
654-04-5444 child

Function: CASE Case Nbr: __148043 Month: 01 14 Command: ____ _
Co: 98 PW: PWSCSP9 SW: Name: WASHINGTON, GEORGE M User: PWSCSP9

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP EXIT PREV NEXT TRBL INFO
```

This panel shows us that John is a household member on George's case and is listed as George's child. Please remember that the PERS panel does not give you a complete member history of everyone who was ever on the case, only those on the case for that month.

Please write down John's PMI number for future reference. Let's investigate further by viewing the case Address History (ADHI) panel.

Command: **ADHI**

**Transmit**

## IPAM- APPL Entry Workbook

```
01/07/14 15:02:41          MAXIS          FMKADAM1
                          Address History (ADHI)          Page: 1
C ----- Residence ----- | C ----- Mailing -----
U WASHINGTON, GEORGE M      | U WASHINGTON, GEORGE M
R EFF DATE: 01/07/14      | R
R 1332 GRAND AVE          | R
E                           | E (SAME AS RESIDENCE ADDRESS)
N SAINT PAUL, MN 55105-2607 | N
T _____              | T _____

Function: CASE Case Nbr: __148043 Month: 01 14 Command: _____
Co: 98 PW: PWSCSP9 SW: Name: WASHINGTON, GEORGE M User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11--PF12---
      HELP      EXIT      PREV NEXT      TRBL INFO
```

Compare the address listed on this panel with the address that John listed on his application. John has a different address than George. It appears that John has moved out of his father's house. The date John moved out will need to be determined.

How does this change George's case? John will no longer be part of George's MAXIS case; he needs to be set up on his own case.

Notify George's worker that John is applying on his own case and is no longer part of George's household.

George's worker will have to track George's case and deny John because he is no longer in the household.

Make sure that John is not approved on George's case prior to approving him on his own case.

These steps will help prevent the possibility of duplicate eligibility for John.

**PF3** until you get to the SELF Menu.

## IPAM- APPL Entry Workbook

---

We can APPL John's case now that:

- We know that John is in PND1 status on George's case,
- We have already notified George's worker that John moved out,

Function:                   **APPL**

Use the **End** key to delete George's case number.

Case Number:            Leave blank

Benefit Period:         **Current Month/Current Year**

Be sure the Benefit Period is the month of application.

### **Transmit**

You may need to re-enter your password if MAXIS timed out.

### **APPL**

APPL Date:               **Today**  
Last Name:               **John's last name from George's  
application**  
First Name:               **John**  
Middle Initial:           **J**

# IPAM- APPL Entry Workbook

```
01/07/14 15:03:21                MAXIS                FMBACAM1
                                Application (APPL)        1 OF 0

Ref Last  First  M *                Application Date: 01 07 14
*
* APPLICANT NAME
* Last: WASHINGTON_____ First: JOHN_____ M: M
*
*                PMI Nbr:
*                SMI Nbr:
*
*                Stop Auto Deny: _
*                Auto Deny Date:
*
*                Withdrawal Status: _
*                Voluntary Withdrawal Date:
*
Mode: A  Function: APPL  Case Nbr: _____  Month: 01 14  Command: _____
Co: 98  PW: PWSCSP9  SW:                Upd Date:                Notes: N  User: PWSCSP9

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP  PMI   EXIT  CNOTE PNOTE        PREV  NEXT  EDIT  OOPS  TRBL  INFO
```

## Transmit

### MEMB

SSN: **SSN for John from George's application**  
Ver: **P**  
Birthdate: **03 28 1992**  
Ver: Leave blank  
Gender: **M**  
ID Ver: Leave blank

What code is entered for John's spoken language?

Spoken Language: **99**  
Written Language: **99**

Needs Interpreter: **N**  
Ethnicity Hisp/Lat: **N**

## IPAM- APPL Entry Workbook

Select the Race field with an “X” and **transmit**. A pop up window appears allowing you to record the race of a household member. Tab down and place an “X” next to “White” and **transmit**.

```

01/07/14 15:04:17          MAXIS          FMBDAAM2
CAF Questions 1, 3a, 3b   Household Member (MEMB)          1 of 1

Ref Last  First  M * Ref Nbr: 01  PMI Nbr:          _ Arrival Date:
01 WASHI JOHN  M *          SMI NBR:          Actual Date:  _  _  _
* Last: WASHINGTON_____ First: JOHN_____ M: M
*          SSN: 612 87 8787          Ver: P
*          Birthdate: 03 28 1992          Ver:  _ Age: 21
*          Gender: M          ID Ver:  _
* Rel To Applicant: 01 Applicant
* Shared HH Excpt:  _
* Spoken Language: 99 English_____
* Written Language: 99 English (HRF)_____
*          Needs Interpreter (Y/N): N
*          Alias (Y/N): N          Alien ID Nbr: _____
*          Ethnicity Hisp/Lat (Y/N): N
*          _ Race: white
*          Tribal Indc:  _          ADA Notice Type:  _
*          Date Of Death:  _  _  _

Mode: A  Function: APPL  Case Nbr: _____  Month: 01 14  Command: _____
Sv: 98    PW: PWSCSP9    SW:          Updated:          User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP PMI  EXIT CNOTE PNOTE          PREV NEXT EDIT OOPS TRBL INFO
  
```

### Transmit

The system automatically queues in the Person Search Matches (MTCH) panel.

Before John can be selected as a match, view the extended information.

Place an **X** in the Select field in front of his name.

```

01/07/14 15:05:40          MAXIS          FMAPSMM1
          Person Search Matches (MTCH)

612-87-8787  WASHINGTON          JOHN          M M 03-28-1992
          *Alias
          SSN          Last Name          First Name  M Gnd  DOB          PMI Nbr
-----
X 612-87-8787  WASHINGTON          JOHN          J  F 03-28-1992 10027
  
```

### Transmit

# IPAM- APPL Entry Workbook

## DSPL

```

01/07/14 15:06:56                MAXIS                FMAPSPM1
                Person Search Display (DSPL)

Name: WASHINGTON, JOHN J                SSN: 612-87-8787 DOB: 03-28-1992
Gender: F Alien ID:                    PMI Nbr: 10027
                SMI Nbr:
Select Program: __

Case      Prog      Participation      Affiliated      Appl      Sv      Worker
148043    AP                01/14 CAF I      98      PWSCSP9
    
```

We have already researched this. We know that this is the correct John. However, MAXIS makes you view this information as a fail-safe before selecting a match. **PF3** to return to MTCH.

## Selecting a Match

We must select John to make a match.

Toward the bottom of the screen, there is a code that is used to select him.

Place an **S** in the Select field in front of John's name and **Transmit**.

```

01/07/14 15:07:29                MAXIS                FMAPSMM1
                Person Search Matches (MTCH)

612-87-8787 WASHINGTON                JOHN                M M 03-28-1992
                *Alias
                SSN                Last Name                First Name                M Gnd                DOB                PMI Nbr
-----
X S 612-87-8787 WASHINGTON                JOHN                J F 03-28-1992 10027
_ 612-24-6546 WASHINGTON                JOHN                J M 03-28-1992 10024
_ 612-98-4866 WASHINGTON                GEORGE                M M 02-20-1965 10026
_ 215-51-5151 WASHINGTON                BEN                B M 06-21-1982 1856
_ 612-64-8787 WASHINGTON                MICHELLE                R F 03-03-1997 10025
_ 612-98-4566 WASHINGTON                GEORGE                M M 02-20-1965 10023
_ 333-11-8671 * WASHINGTON                STEVEN                H M 01-01-1977 867
_ 333-11-8681 * WASHINGTON                KRISTOPHER                E M 07-17-2009 868
_ 333-09-1801 WASHINGTON                ELMER                J M 02-12-1936 9180
* * * * *

More: +                Mark with a 'X' for viewing extended information
                'A' for alias display (marked with *)
                'C' for Claim search
                'S' to select a match

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
                HELP                EXIT                PREV NEXT                TRBL INFO
    
```

## IPAM- APPL Entry Workbook

### REDD

The Resolve Data Differences (REDD) panel displays two columns of information about this person.

The left column displays the data just entered on MEMB. The right column shows the data already on file in MAXIS.

MAXIS asks if we want to select this match.

Answer **Y** to select this match.

```
01/07/14 15:08:02                MAXIS                FMAPSMM3
                                Resolve Data Differences (REDD)

                                Entered                    File
                                -----                    -----
                                SSN: 612-87-8787            612-87-8787
                                Last Name: WASHINGTON        WASHINGTON
                                First Name: JOHN            JOHN
                                Initial: M                   J
                                Gender: M                   F
                                DOB: 03-28-1992            03-28-1992

                                Do you want to select this match (Y/N)? Y

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      HELP      EXIT                                PREV  NEXT                                TRBL  INFO
```

### Transmit

The system takes us to John's MEMI panel. Notice that it pulled in the information on file.

Any other person-based panels on file for John would also be pulled over from the old case to the new case. That is why there is already data entered on MEMI for John.

## IPAM- APPL Entry Workbook

---

We need to review the information that MAXIS had on file for John on the MEMI and MEMB panels to make sure it is all still correct and complete.

John's MEMI panel indicates that:

- John has never been married,
- His last grade completed was 12,
- He is a U.S. citizen,

John's MEMI panel is complete and matches the information on his application.

Note that you now have John's case number, write it down on his application. His PMI number should be the same one you already noted.

### **Transmit**

A blank MEMB panel appears. We do not have any other members to add so transmit to continue to the ADDR panel.

### **Transmit**

## IPAM- APPL Entry Workbook

---

### ADDR

Complete the residence address field; John's application does not list a separate mailing address from his residence address.

Street:           **2801 Dakota Ave S**  
City:             **St Louis Park**  
St:               **MN**  
Zip:              **55416**

Press **PF1** on the "Resi Co" (county of residence) field. **PF8** to scroll through the counties; note that they are listed alphabetically.

What is the county code for Hennepin? \_\_\_\_\_

Code:            **27**

**Transmit** to go back to ADDR

Ver:             Leave blank  
Phone One:     **612 596 1300**  
Type:           **H (Home)**

**Transmit**

The message at the bottom of the panel states "Residence Address Is Standardized."



## IPAM- APPL Entry Workbook

### MEMB

John's name, SSN, verification of SSN, Birthdate, Gender, Ethnicity and Race fields are populated. Since John reported his spoken and written language and indicated that he does not need an interpreter on his application, let's update his MEMB panel with this information.

Notice that data on John's MEMB panel data is white and in the bottom left corner the Mode field has the code "D" for display mode. We need to change this panel to edit mode before we can update John's information.

What PF key do we use to put John's MEMB panel into edit mode?

Press **PF9**

Spoken Language: **99**  
Written Language: **99**  
Needs Interpreter (Y/N): **N**

```
01/07/14 15:11:22                MAXIS                FMBDAAM2
CAF Questions 1, 3a, 3b    Household Member (MEMB)                1 of 1

Ref Last  First  M * Ref Nbr: 01  PMI Nbr: 10027    _ Arrival Date:
01 WASHI JOHN  J *                SMI NBR:                Actual Date:  _ _ _
* Last: WASHINGTON_____ First: JOHN_____ M: J
*                SSN: 612 87 8787                Ver: P
*                Birthdate: 03 28 1992                Ver:  _ Age: 21
*                Gender: F                ID Ver:  _
* Rel To Applicant: 01 Applicant
* Shared HH Excpt:  _
* Spoken Language: 99 _____
* Written Language: 99 _____
*                Needs Interpreter (Y/N): N
*                Alias (Y/N): N                Alien ID Nbr: _____
*                Ethnicity Hisp/Lat (Y/N): N
*                _ Race: white
*                Tribal Indc:  _                ADA Notice Type:  _
*                Date Of Death:  _ _ _

Mode: E Function: APPL Case Nbr: __148058 Month: 01 14 Command:  _ _ _
Sv: 98 PW: PWSCSP9 SW: Updated: 01 07 14 User: PWSCSP9
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
HELP PMI EXIT CNOTE PNOTE PREV NEXT EDIT OOPS TRBL INFO
```

**Transmit**

John's MEMB panel is now updated with the additional information reported on his CAF.

### CASE/NOTE

The last part of the APPL process is case note entry. Use the PF4 key to enter a case note.

Press **PF4**

Press **PF9** to add a case note.

Describe in our case note how a match was found in MAXIS.

Use the following as your case note:

**SNAP application received and APPL'd - \*\*\* PMI Match Selected \*\*\*  
Found a match for John in Person Search.  
Contacted worker from affiliated case; confirmed that John has moved out of that household to current address.  
John is applying on his own case & is no longer part of affiliated household.  
Further processing of case pending.  
Worker Name.**

### PF3

Remember, before approving eligibility for John, you would need to check the system again to make sure that John is not active on George's case.

### PF3

**Transmit** through the queue until you get to ADDR. You cannot PF3 out of the APPL function until you are at the end of the queue.

At ADDR, **PF3** to exit to the SELF menu.

Congratulations you have now entered your third case!



### Check for understanding Case Entry 3

1. What are the 3 panels in the CASE function that you visited?

---

2. How do you identify worker name and information on the DSPL panel?

---

**Note:** Check your answers using the Answer Key located at the back of the guide.

## Case entry 4: Hector

For the next application we will simply provide you with an opportunity to enter the application without so much explanation. Feel free to review the previous cases in the workbook to assist you with field entry on this application. Don't forget that the PF1 key is available to assist you with these codes.

Please review Hector's application. Hector dropped off a CAF at our agency this morning. He also listed his children Miguel and Josefina as household members.

Please create a last name and unique social security numbers for all household members. Don't forget to do your person searches in MAXIS before entering the APPL function.

### PERS

Function: **PERS**

#### **Transmit**

Conduct a search for Hector.

Last: **Name you created**

First: **Hector**

Gender: **M**

DOB: **09-19-1975**

SSN: **SSN you created**

#### **Transmit**

Confirm that you do not have a match. **PF8** to review all possible matches.

**PF3 back to PERS**

**PF10** to clear your screen

Conduct a search for Hector's two children.

Last:	<b>Name you created</b>
First:	<b>Miguel</b>
Gender:	<b>M</b>
DOB:	<b>02/01/1999</b>
SSN:	<b>SSN you created</b>

**Transmit**

Confirm that you do not have a match:

**PF3 back to PERS**

**PF10** to clear your screen

Last:	<b>Name you created</b>
First:	<b>Josefina</b>
Gender:	<b>F</b>
DOB:	<b>11/16/2002</b>
SSN:	<b>SSN you created</b>

**Transmit**

Confirm that you do not have a match:

**PF3 twice** back to the SELF Menu.

## IPAM- APPL Entry Workbook

---

Function: **APPL**  
Benefit Period: **Current Month/Current Year**

**Transmit**

### APPL

Application Date: **Today**  
Last: **Name you created**  
First: **Hector**  
M: **A**

**Transmit**

### MEMB 01

SSN: **SSN you assigned**  
Ver: **P**  
Birthdate: **09 19 1975**  
Gender: **M**  
Spoken Language: **01**  
Needs Interpreter (Y/N): **N**  
Ethnicity Hisp/Lat: **Y**  
Race: **White**

**Transmit**

Add Hector to PMI database by pressing **PF8** to review all matches. If you do not get the PF5 option to add him you have a SSN match. Change your SSN and try again. Press **PF5**. Enter **Y** to add Hector to the PMI database.

**Transmit**

## IPAM- APPL Entry Workbook

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### MEMI 01

Marital Status: **D**  
Citizen (Y/N): **Y**  
Citizenship Ver: Leave blank  
SSA/MA Citizenship Ver: Leave Blank  
In MN >12 Months (Y/N): **Y**  
Residence Ver: **N**

**Transmit**

### MEMB 03

Ref Nbr: **03**  
Last: **Name you created**  
First: **Miguel**  
M: **R**  
SSN: **SSN you created**  
Ver: **P**  
Birthdate: **02 01 1999**  
Gender: **M**  
Rel To Applicant: **03**  
Ethnicity Hisp/Lat: **Y**  
Race: **White**

**Transmit**

Add Miguel to PMI database by pressing **PF8** to review all matches. If you do not get the PF5 option to add him you have a SSN match. Change your SSN and try again. Press **PF5**. Enter **Y** to add Miguel to the PMI database.

**Transmit**

## IPAM- APPL Entry Workbook

---

### MEMI 03

Marital Status: **N**  
Citizen (Y/N): **Y**  
Citizenship Ver: Leave blank  
SSA/MA Citizenship Ver: Leave blank  
In MN > 12 Months: **Y**  
Residence Ver: **N**

### **Transmit**

### MEMB 04

Ref Nbr: **04**  
Last: **Name you created**  
First: **Josefina**  
M: **H**  
SSN: **SSN you created**  
Ver: **P**  
Birthdate: **11 16 2002**  
Gender: **F**  
Rel To Applicant: **03**  
Ethnicity Hisp/Lat: **Y**  
Race: **White**

### **Transmit**

Add Josefina to PMI database. **PF8** to review all possible matches. If you do not get the PF5 option to add her you have a SSN match. Change your SSN and try again. Press **PF5**. Enter **Y** to add Josefina to the PMI database.

### **Transmit**

**MEMI 04**

Marital Status:                   **N**  
Citizen (Y/N):                   **Y**  
Citizenship Ver:                Leave blank  
SSA/MA Citizenship Ver:       Leave blank  
In MN > 12 Months:           **Y**  
Residence Ver:                 **N**

**Transmit twice**

**ADDR**

**Residence Address**

Street:                        **101 Dugan St N**  
City:                           **Welcome**  
St:                              **MN**  
Zip:                            **56181**  
Resi Co:                       **46**  
Phone One:                   **507 728 3590**  
Type:                          **H**  
Phone Two:                   **507 728 3648**  
Type:                          **C**

**Transmit**

Your address standardized.

### **Transmit**

**PF4** to enter a case note

**PF9** to add

### **Case Note:**

**\*\*\*APPL'd CAF received CM/CD/CY\*\*\***

**Household size of 3: Dad Hector, son Miguel, daughter Josefina.**

**All requesting SNAP only. Assigned PMIs to all as all unknown to systems.**

**Transferred to intake team for processing.**

### **Worker Name**

**PF3** back to the SELF menu.

## Case entry 5 and 6: On Your Own Cases

You have entered four guided applications on MAXIS. Now enter two applications on your own using the APPL process. Have a co-worker or supervisor available to you in case you have questions or encounter problems while you enter the last two cases for Jeffrey and Mary.

If you haven't done so already please create last names and social security numbers for all members on both applications and write them on your applications. Person search all members on the application in the appropriate system (MAXIS and/or MMIS), complete the APPL process and CASE/NOTE. When you are finished have a co-worker, mentor, trainer or supervisor review your cases for accuracy.

\*Don't forget to review each case for Expedited SNAP.

Once you have completed the APPL process for these two cases you have completed the workbook.

After entering six applications in MAXIS, you will be well on your way to understanding how the APPL function works in MAXIS. If you find that you still need assistance, please ask for help from a co-worker or supervisor. It is important that you understand how to APPL a case prior to coming to future DHS training. If you are unable to APPL independently when coming to training you may be asked to return to the county.

**Note: Write down the six case numbers you've completed. You will be asked to enter the case numbers in your assessment so that your cases can be reviewed by DHS staff prior to coming to future training.**

This is the end of this section of the IPAM Training sequence. Mark the IPAM Workbook as completed on your IPAM Training Checklist. Continue to the next activity listed on the checklist which is either the IPAM Webinar (optional) or the IPAM Assessment.

If you encounter difficulties with locating or registering for a course, contact your supervisor for assistance.

## Answer Key

### Check for understanding Case Entry 1

1. Prior to completing the APPL process
2. The date the agency receives and date stamps the application or request

### Check for understanding Case Entry 2

1. MEMB 02, 03, 04, and 05 and MEMB 20
2. Health Care cases only

### Check for understanding Case Entry 3

1. CURR, PERS, ADHI
2. Place your cursor on the user ID under “Worker”