



Department of Human Resources
311 West Saratoga Street
Baltimore MD 21201

FIA ACTION TRANSMITTAL

Control Number: #12-10

Effective Date: October 1, 2011

Issuance Date: October 4, 2011

TO: DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES
DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT
FAMILY INVESTMENT SUPERVISORS

FROM: ROSEMARY MALONE, EXECUTIVE DIRECTOR, FIA
DEBBIE RUPPERT, EXECUTIVE DIRECTOR, DHMH/OES

Rosemary Malone
Debbie Ruppert
Patricia Nowakowski for
Debbie Ruppert

RE: PROCEDURES FOR PIRAMID PRE-REVIEW

PROGRAMS AFFECTED: FOOD SUPPLEMENT PROGRAM (FSP), TEMPORARY
CASH ASSISTANCE (TCA), TEMPORARY DISABILITY
ASSISTANCE PROGRAM (TDAP), AND MEDICAL
ASSISTANCE (MA)

ORIGINATING OFFICE: OFFICE OF QUALITY ASSURANCE

SUMMARY

Maryland's goal is to reduce our FSP error rate to less than 6 percent before October 2012. To do this, we are implementing PIRAMID Pre-Review, a new automated review system. PIRAMID Pre-Review, which was designed by a workgroup of local and central Family Investment staff and DHMH staff, replaces all existing case reviews for FSP, TCA, TDAP and MA, including the Supervisory Review System (SRS), Payment Accuracy Reviews (PAR), and sweeps. In SRS, the review was completed on sampled cases that had already been processed. If an error was found, it had to be corrected with an overpayment or underpayment. With PIRAMID Pre-Review, the reviewer finds the error before the benefit is issued or reauthorized and prevents a payment error.

ACTION REQUIRED

As each local department completes training, you will begin to review cases using PIRAMID Pre-Review. PIRAMID Pre-Review requires as many case reviews as possible:

- Before an **application** is finalized

- Immediately after a **redetermination** is done; and,
- When an **interim change** is made.

Samples of cases can be pulled from the GENERATOR V file, using the Weekly Application Status Report or one of four Redet reports. However, sampling is not required; simply opening a blank review form and entering the customer's information for ANY record that is being processed is a valid review. Completing a large volume of reviews and correcting the mistakes found will improve our accuracy!

PIRAMID Pre-Review is in YOUR office now.

Anyone who ordinarily reviewed cases in the SRS system or an in-house system should use PIRAMID Pre-Review, including a supervisor, lead worker or a Payment Accuracy Reviewer (PAR). Local offices can also choose to use peer case managers as reviewers in PIRAMID. Hands-on training is being conducted statewide, and after the training, Local IT staff can help you learn how to:

- Create a short-cut on your desktop to get to the PIRAMID folder for your office.
- Perform the "PREP your PC" steps on your PC, under your network logon, so that the Pre-review files will run correctly.

We have attached a training manual ("Handout_PIRAMID"), which shows you how to use the system, as well as a list of frequently asked questions (FAQ). The training manual and the FAQs are also available on FIPNET under Manuals, and in the PIRAMID Pre-review folder in your local office.

Each district office also has at least two PIRAMID Liaisons who can answer questions. If the Liaison does not have an answer, the Liaison will contact Vesta Kimble, Director of Quality Assurance. PIRAMID Pre-review is designed to collect as much information as possible about our errors so that targeted strategies can be developed in response. Data analysis of completed reviews is the responsibility of DHR/FIA staff, and the first analysis reports will be available in November 2011 (for reviews completed in October).

For the last three years, our Food Supplement Program (FSP) error rate has been too high. For FFY 2010, Maryland's FSP error rate was the WORST in the nation. As a result, the federal government has fined us more than \$2 million. States with error rates below 6% can compete for multi-million dollar bonuses. Maryland received one of those bonuses in FFY 2007, the last year our error rate was below 6%. But the primary reason we need to reduce our FSP error rate is to better serve our customers. We have done wonders with timeliness, now we need to make timely and accurate determinations in all programs our goal.

This is a goal we must all work to achieve. Rushing to process can mean we make data entry errors, take unauthorized shortcuts or process cases without required verification. Quality Control (QC) reviews of FSP and TCA cases and audits of TDAP cases as well as Department of Health & Mental Hygiene (DHMH) audits show repeated mistakes

made in cases that are costing Maryland and the Federal government millions of dollars. Working together, we can make all our determinations both timely and accurate, reduce our error rate, eliminate federal sanctions and compete for bonuses, and, most importantly, improve service to our customers.

Please note: Local Health Departments are not included in the PIRAMID review process at this time.

INQUIRIES

Please direct PIRAMID Pre-Review questions or concerns to the PIRAMID Liaisons in your district office. PIRAMID Liaisons should report any PIRAMID Pre-review system errors directly to Vesta Kimble, at vkimble@dhr.state.md.us instead of the OTHS Help Desk. Direct Food Supplement policy questions to Rick McClendon at 410-767-7307 or rmcclen@dhr.state.md.us. Direct TCA policy questions to Gretchen Simpson at 410-767-7987 or gsimpso@dhr.state.md.us. Please direct Medical Assistance policy questions to the DHMH Division of Eligibility Policy at 410-767-1463 or 1-800-492-5231 (select option 2 and request extension 1463) and MA CARES questions to Debbie Simon at 410-238-1363.

Attachments

cc: DHR Executive Staff
DHMH Executive Staff
FIA Management Staff
Constituent Services
Help Desk

Frequently Asked Questions about PIRAMID Pre-Review:

1. Does PIRAMID Pre-review replace SRS and the PAR process we are using now, even for Medical Assistance cases?

Answer: Yes.

2. What is the quota (minimum number) of reviews that is required to be performed each week/month?

Answer: There is no official quota; your district office must perform as many as possible, even up to 100% of applications and redeterminations for FSP.

3. How many days are allowed for a Case Manager to correct an error?

Answer: That depends on the type of mistake – some can be corrected immediately (such as a code in a CARES screen), while others require customer contact. All errors should be corrected as quickly as possible.

4. How will DHR & DHMH ensure that reviews are completed accurately?

Answer: DHR will perform second-level reviews of the cases that have been pre-reviewed and post-reviewed.

5. Will PIRAMID Pre-review allow fellow case managers and even trained clerks to review cases for accuracy?

Answer: Yes.

6. What if I have a question about the review process or a particular review question?

Answer: First, ask one of your PIRAMID Liaisons. If the Liaison does not know, he or she should contact Director of Quality Assurance, Vesta Kimble, at vkimble@dhr.state.md.us.

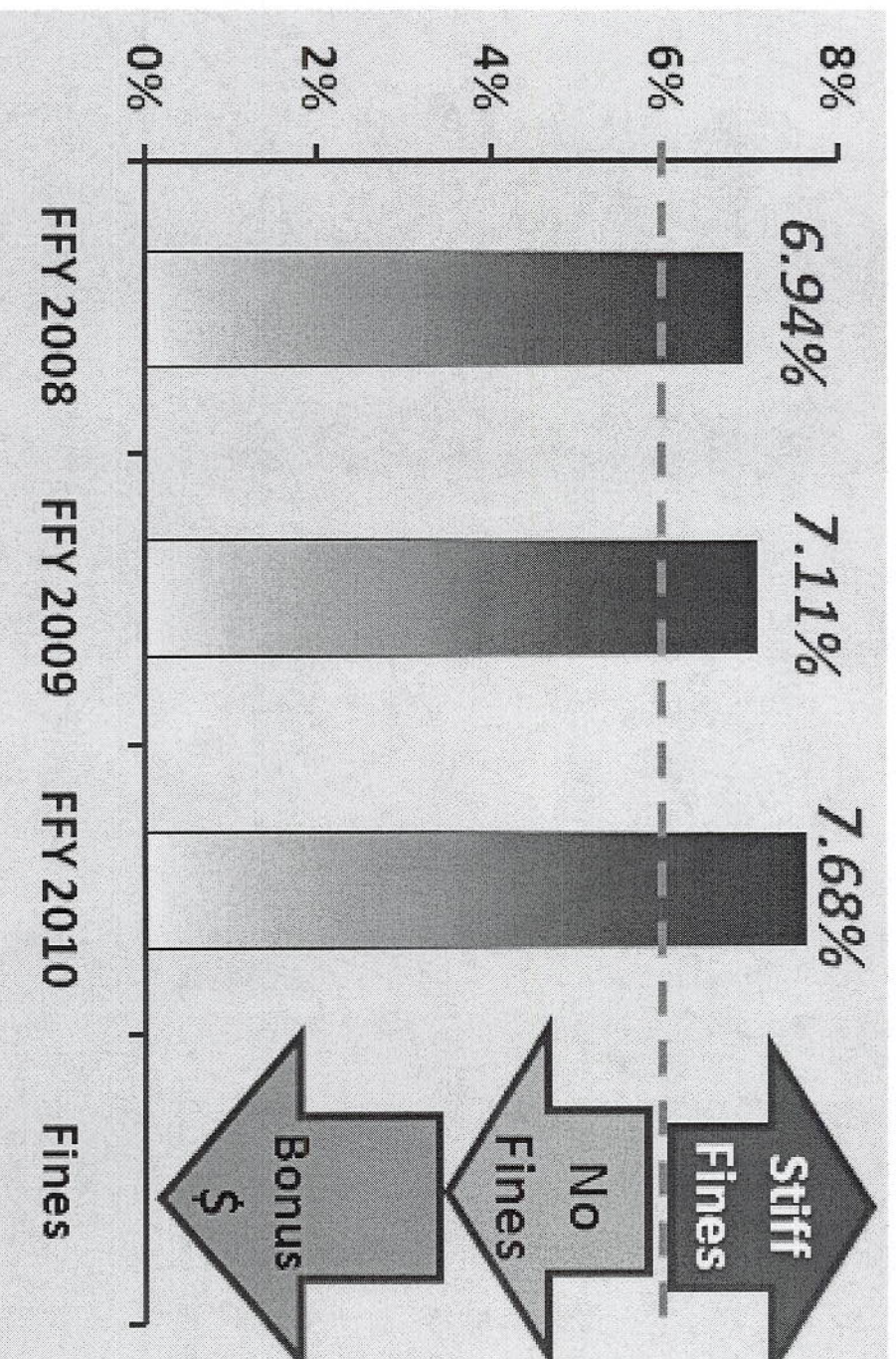
PIRAMID PRE-REVIEW

Training Handout

Revised 9.30.11

*Prepared by: Vesta Kimble
Director of Quality Assurance
Family Investment Administration
Maryland Department of Human Resources
vkimble@dhr.state.md.us*

Maryland's Food Supplement Payment Error Rate



For three years,

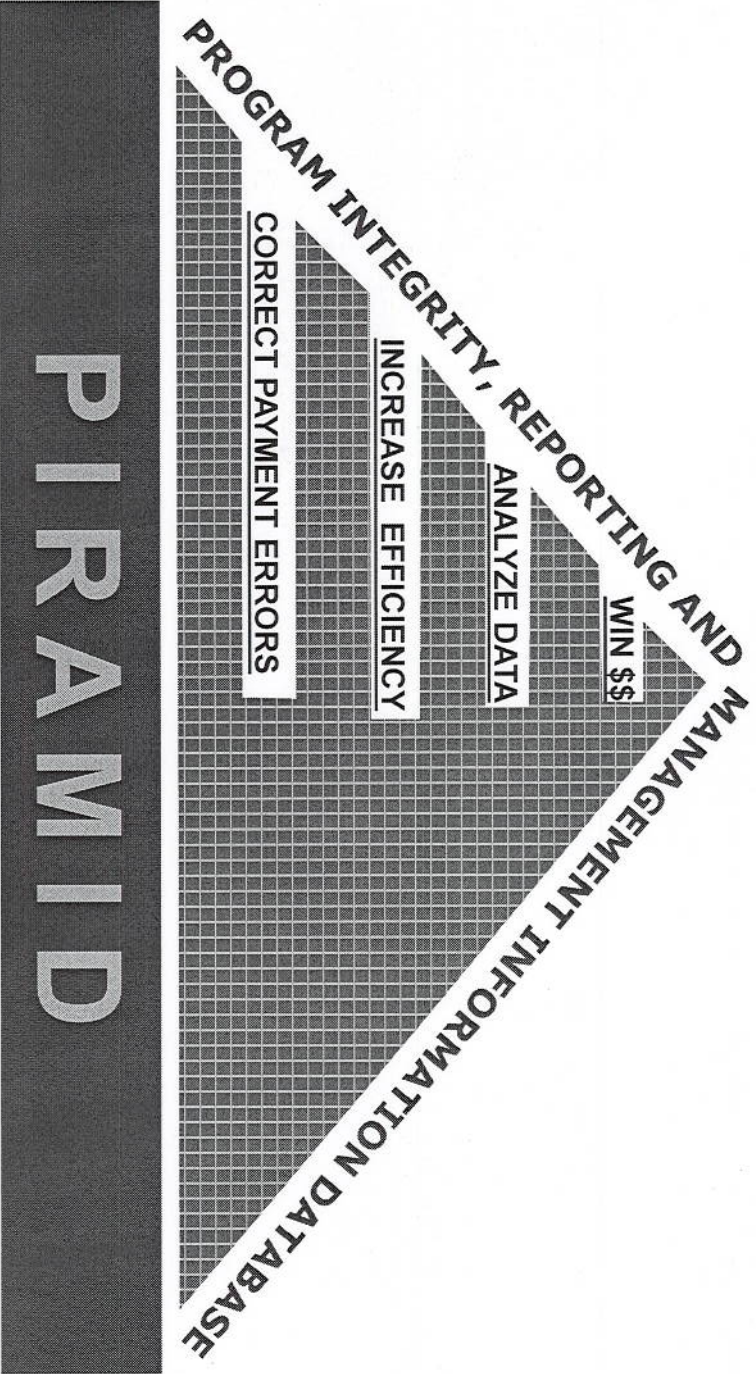
Our FSP error rates have been too high...

Our rate is now the WORST in the nation...

We have been fined more than \$2 million...

Our goal is to reduce our error rate to
less than 6 percent before October 2012.

Introducing...



PIRAMID Pre-Review will help us review more cases than SRS or PAR or 'sweeps.'

We will review cases BEFORE the benefits are issued or immediately afterwards.

We can review cases chosen from a sample, or any case that is ready for "Q-ing" on CARES or that has just recently been finalized.

By answering questions that were designed from Quality Control errors, we can prevent future payment errors.

PIRAMID Pre-Review is in YOUR office now.

First, you need a short-cut on your desktop to get to the PIRAMID folder in your office.

Then you need to perform the “PREP your PC” steps on your PC, under your network logon, so that the Pre-review files will run correctly.

A picture book for these steps is available from your supervisor or District Office Manager.

When you are ready...

Double-click, on the
PIRAMID short-cut

My Documents
DHR
Phonebook

My Computer
DHR
Net
DHNET

My Network
Places
Paint

Recycle Bin
Calculator

Internet
Explorer

GroupWise

GroupWise
Messenger

WPM Client

MD
MOCHESSE

PIRAMID

start

Microsoft PowerPoint ...

2:39 AM

E:\PIRAMID

File Edit View Favorites Tools Help



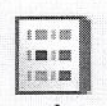
Back



Search



Folders



Address

E:\PIRAMID

PRE-REVIEW



Double-click, on the
PRE-REVIEW folder.

If you are a “Liaison,” then you will need to open the GENERATOR V.

The next few slides describe how the Liaison pulls samples of cases for PIRAMID Pre-Review.

More detailed instructions for the Liaisons is available in the GENERATOR V Manual.

If you are a Reviewer, just go along for the tour for the next few slides.

E:\PIRAMID\PRE-REVIEW

File Edit View Favorites Tools Help



Back



Search



Folders



Address



E:\PIRAMID\PRE-REVIEW\

AWAITING_CORRECTION

COMPLETED

REPORTS

ALL_STAFF.XLSM

BLANK_Pre-review_Form1.xls

GENERATOR V 2007.xlsm

Double-click, on the
GENERATOR V file.

A Liaison can select samples of cases to review in the "GENERATOR V" file.

A sample can be just for Program and Status (such as FSP_Pending), or for Program and Status AND

One other variable, such as:

Case Manager Logon ID

OR Sup Logon ID

OR a Due Date range

OR for SAIL applications

BUILD YOUR PRE-REVIEW SAMPLE(S)

Select samples one at a time

Clear all sample choices

Your app data is from > 8/26/2011

Your redet data is from > 05/29/2011

STEP 1: Scroll down to choose a targeted sample:

STEP 2: Then choose the sample size:

DIRECTIONS: After completing STEP 1 and STEP 2, click on the 'CREATE SAMPLE' button. Wait a few seconds until you get a message letting you know the sample was created successfully. Then pull another sample, if you need to.

APPLICATIONS:

Week ending
8/26/2011

Date sample was pulled

BY PROGRAM

Create sample of apps by Program Type & Status

FSP denied

20

Your sample was created and saved to the PRE-REVIEW FOLDER on 9/9/2011

- FSP pending
- FSP_time
- FSP_denied
- ExFSP_pending
- ExFSP_active
- ExFSP_denied
- TCA_pending
- TCA_active

SELECT ONE PROGRAM
Click to reveal the drop-down box.
Then select one program in the yellow box and the sample size in the yellow box to the right.
Then click on the gray "Create sample of apps by Program Type & Status" button.
Wait a few seconds.

Liaisons:
Pick a program and status.
For example, FSP Pending.

BUILD YOUR PRE-REVIEW SAMPLE(S)

Select samples one at a time

Clear all sample choices

Your app data is from> 8/26/2011

Your redet data is from> 05/29/2011

STEP 1: Scroll down to choose a targeted sample:

STEP 2: Then choose the sample size:

DIRECTIONS: After completing STEP 1 and STEP 2, click on the 'CREATE SAMPLE' button. Wait a few seconds until you get a message letting you know the sample was created successfully. Then pull another sample, if you need to.

APPLICATIONS:

Week ending
8/26/2011

Date sample was pulled

BY PROGRAM

Create sample of apps by Program Type & Status

FSP denied

20

Your sample was created and saved to the PRE-REVIEW

FOLDER on 9/9/2011

FSP pending

29
30
31
32
33
34
35
36

Liaisons: Pick a sample size.

SELECT ONE NUMBER to pull the sample size you want.
If there are no applications in this Program Type, then your sample list will be blank.

BUILD YOUR PRE-REVIEW SAMPLE(S)

Select samples one at a time

Clear all sample choice

Your app data is from > 8/26/2011

STEP 1: Scroll down to choose a targeted sample:

STEP 2: Then choose the sample size:

You are ready to pull this sample: FSP_pending

This message box will tell you if your sample is ready to pull.

APPLICATIONS:

Week ending
8/26/2011

Date sample was pulled

BY PROGRAM

Create sample of apps by Program Type & Status

FSP_denied

20

FSP_pending

30

Then click on the gray button to create the sample list.

The sample list will be created and saved to the "SAMPLES" folder.

The sample list will stay open only for a few minutes because someone else might need to select a case to review.

09_10_11.FSP_pending.xls [Compatibility Mode] 9:15 AM

PLEASE NOTE: This file will save and close at this time ---->

Revised 9.4.11

Create Pre-Review Form

Select time below.

As Of Date	LDSS Num	DO Num	Supervisor Id	Supervisor Name	Worker Id	Worker Name	HOH Name (name fill)	HOH IRN
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	<I	88
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	ERINE	
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03K	CHARLENA JONES,	VTHA	34
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03K	CHARLENA	NYA	14
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	JACKSON, JERRY	3A	38
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	JACKSON, JERRY		42
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	NA	50
8/26/2011 03		030	REH039	ROLLINS, NORMA	RAC03D	SMITH, ROLAND	YEL	93
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	JACKSON, JERRY	ROLLAH	85
8/26/2011 03		030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	IN	1

SAMPLE PATHS

Print sample list

9/10/11 9:10 AM

Any Reviewer can open a Sample List and click on a case to review it. Click in the yellow box beside the case to enter the time from the drop-down box. Then click the "Create Pre-Review Form" button.

09_10_11_FSP_pending.xls [Compatibility Model]

PLEASE NOTE: This file will save and close at this time -----> 9:15 AM

Revised 9.4

Create Pre-Review Form

Select time below.

As Of Date

LDSS Num DO Supervisor Id Supervisor Name Worker Id Worker Name HOH Name (name fill) HOH IRN

Sample Size	Sample Selected	Print sample list
30	FSP_pending	9/10/11 9:10 AM

9:10 AM	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	HOH Pending		88
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	RINE		
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03K	JONES, CHARLENA	THA		34
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03K	JONES, CHARLENA	YA		14
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03A	JACKSON, JERRY	A		38
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03A	JACKSON, JERRY			42
	8/26/2011 03	030	REX03M	MBAGWU, SUNDAY	RAA03E	VEREEN, STACEY	IA		50
	8/26/2011 03	030	REH039	ROLLINS, NORMA	RAC03D	SMITH, ROLAND	EL		93
	8/26/2011 03	030	REX03M	SUNDAY	RAG03A	JACKSON, JERRY	LLAH		85
	8/26/2011 03	030	REX03M	SUNDAY	RAA03E	VEREEN, STACEY			1

SELECT THE TIME
Click on the drop-down arrow and then click on the time. Then, click on the "Create Review Form" button above to begin a new review.

This file will automatically save when you close it. It will also automatically save after being open for 5 minutes.

SAMPLE PATHS

Your Pre-review form will open and auto-fill the case information from the GENERATOR V file, which is from the most recent CARES Weekly App Status Report. Note how the file has auto-saved with a particular name (Date, District Office #, Client ID #, Worker's LogOn ID#).

Do not change the name of a file or move it from where it auto-saves.

09_10_11_030_3XXXXX222_RAA03E.xls [Compatibility Mode]

1. Select your name in the 'Pre-reviewer' box to the right

26 questions still to answer

Ready to create report

Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &lor Logon ID	Supervisor &lor Logon ID	Del Rsn
3XXXXX222	1XXXXX456	TXXXX, CATHERINE	RAA03E	MBAGWU, SUNDAY	CD
Program(s) to review	Application Date	Pre-review file name	Status Redet Type	Due Date	Approval/Denial Date
FSP	8/18/2011	E:\Secure\Windows\PRE-REVIEW\ as of 7.31.11\IDEMO\09_10_11_030_3XXXXX222_RAA03E.xls	P	9/17/2011	
Review CARES Element		Link to Policy Manual	Primary Question	Secondary question if needed	Tertiary question if needed

Questions Report SQL

After you select your name as the Reviewer...

1. Select your name in the 'Pre-reviewer' box to the right				District Office > 030	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Del Rsn	1. Select Pre-reviewer	
3XXXX222	1XXXX456	TXXXX, CATHERINE	CD	Valerie Fowlkes Sunday Mbagwu Sherell Lewis Shahn Safedi Norma Rollins	
Program(s) to review	Application Date	Pre-review file name	Den Code	SELECT YOUR NAME Select your name from the drop-down box below.	
FSP	8/18/2011	E:\Secure\Windows\PRE-REVIEW as of 7.31.11\DEMO\09_10_11_030_3XXXX222_RAA03E.XI			
Review		Link to Policy	Pre-reviewer's Comments		
CARES Element		Manual	Error Cause for Sub-element		
Questions Report SQL					

Click on the “Begin Review” button on the left.

09_10_11_030_3XXXXX222_RAA03E.xls [Compatibility Model]

2. Click on the 'Begin Review' button on the left to begin the review.

				District Office >	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Del Rsp	Pre-reviewer	
3XXXXX222	1XXXXX456	TXXXX, CATHERINE	CD	Sherrell Lewis	
Program(s) to review	Application Date	Pre-review file name	Den Code	Time/Date pre-review completed	
FSP	8/18/2011	E:\Securall\Windows\PRE-REVIEW as of 7:31.11IDEMO\09_10_11_030_3XXXXX222_RAA03E.XI			
Review		Link to Policy Manual	Pre-reviewer's Comments		
CARES Element					

Questions Report SQL

**Wait as the review questions load in order.
Then you can begin your review.**

09_10_11_030_3XXXX222_RAA03E.Xls [Compatibility Mode]

PRE-REVIEW QUESTIONS & Key Case Information on CARES

26 questions still to answer

Ready to
create report

Client ID 3XXXX222	Assistance Unit 1XXXX456	Head of Household Name (Lastname, Firstname) TXXX, CATHERINE	Worker Name &/or Logon ID RAA03E	Supervisor &/or Logon ID MBAGWU, SUNDAY	Del Rsp CD
Program(s) to review FSP	Application Date 8/18/2011	Pre-review file name E:\Secure\Windows\PRE-REVIEW as of 7.31.11\DEMO\09_10_11_030_3XXXX222_RAA03E.XI	Status Redet Type P	Due Date 9/17/2011	Approval/Denial Date

Review		Link to Policy Manual	Primary Question	Secondary question if needed	Tertiary question if needed
1.1 APPL	Application		Is there a date-stamped application or a SAIL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?		
2.1 APPL	Application		Was the application or EDD signed by a household member age 18 or older?		

Helpful hint: As you move through the review, use the arrows to move up and down, and from side to side. Tap on the arrow a few time to go in that direction.

PRE-REVIEW QUESTIONS & Key Case Information on CARES

Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &/or Logon ID	Supervisor &/or Logon ID	Del Rsn
3XXXXX222	1XXXXX456	TXXXX, CATHERINE	RAA03E	MBAGWU, SUNDAY	CD
Program(s) to review	Application Date	Pre-review file name	Status Redet Type	Due Date	Approval/Denial Date
FSP	8/18/2011	E:\Secure\l\Windows\PRE-REVIEW as of 7.31.11\DEMO\09_10_11_030_3XXXXX222_RAA03E.Xl	P	9/17/2011	

Review	Link to Policy	Primary Question	Secondary question if needed	Tertiary question if needed
1.1 APPL	Application	Is there a date-stamped application or a SALL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?		
2.1 APPL	Application	Was the application or EDD signed by a household member age 18 or older?		

**Look at the case record and CARES screens and click in the yellow box for each question that appears.
 Yes = Correct (usually)
 No = Error (usually)
 N/A = Question does not apply to the case.**

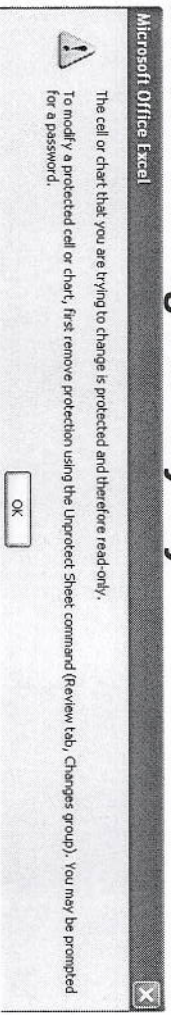
PRE-REVIEW QUESTIONS & Key Case Information on CARES

				26 questions still to answer		Ready to create report	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &/or Logon ID	Supervisor &/or Logon ID	Del Rsp		
3XXXX222	1XXXX456	TXXXX, CATHERINE	RAA03E	MBAGWU, SUNDAY	CD		
Program(s) to review	Application Date	Pre-review file name	Status /Redet Type	Due Date	Approval/Denial Date	Den Code	
FSP	8/18/2011	E:\Secure\Windows\PRE-REVIEW as of 7.31.11\DEMO\09_10_11_030_3XXXX222_RAA03E.XI	P	9/17/2011			
Review		Link to Policy	Primary Question		Secondary question if needed		Tertiary question if needed
1.1	APPL	Application	Is there a date-stamped application or a SALL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?		<div style="border: 1px solid black; padding: 5px;"> SELECT YOUR ANSWER Select Yes, No or N/A for not applicable. </div>		
2.1	APPL	Application	Was the application or EDD household member age 18		<div style="border: 1px solid black; padding: 5px;"> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A </div>		

During your review, you might encounter a WHITE drop-down box.

Select a choice from the box ONLY IF the question above the box applies to your case.

Please note: When you choose a selection, you will receive this error message. Just click OK. Your selection will register anyway.



Review	Link to Policy	Primary Question	Secondary question
69.1 ERIN2 Wages & Salaries	Manual (Future)	If the customer reported one of the following jobs, was the income coded as SE on the ERIN1 screen?	Yes
69.2 ERIN2 Wages & Salaries		<ul style="list-style-type: none"> Child care Babysitting Home health aide under contract Delivery route (newspaper, pizza) Runs errands for pay Cuts lawns, gardening Snow removal/ shoveling Computer-based sales at home Drives bus or van under contract Drives bus or van; paid by the trip Other 	SELECT YOUR ANSWER Select Yes, No or N/A for not applicable. N/A
75.1 ERIN2 Retro MIA			If not, did the case request the verification

For any question that is answered with an error finding, the entire row will turn RED. As seen below, the "No" answer indicates an error.

09_10_11_030_3XXXXZ22_Sherelli_Lewis_RAA03E.xls (Compatibility Model)

PRE-REVIEW QUESTIONS & Key Case Information on CARES

Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &/or Logon ID	Supervisor &/or Logon ID	Del Rsn	
3XXXXZ22	1XXXX456	TXXX CATHERINE	RAA03E	MBAGWU, SUNDAY	CD	
Program(s) to review	Application Date	Pre-review file name	Status /Reder Type	Due Date	Approval/Denial Date	Den Code
FSP	8/18/2011	E:\Securell\Windows\PRE-REVIEW as of 7:31\INDEMO\AWAITING_CORRECTION\09_10	P	9/17/2011		
CARE Element	Review Manual	Link to Policy	Primary Question	Secondary question if needed	Tertiary question if needed	
65.1 ERN1	Wages & Salaries	All	Is the employer name/employment type coded correctly (Examples: "E" for earned income and "SE" for self-employment)?	No		
66.1 ERN2	Wages & Salaries		Do the wages on CARES match the case verification and frequency for household members, including ineligible household	<div style="border: 1px solid black; padding: 2px;"> SELECT YOUR ANSWER Select Yes, No or N/A for not applicable. </div>		

Questions Report SQL


PRE-REVIEW QUESTIONS & Key Case Information on CARES

District Office > 030

Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Pre-reviewer	Begin time of review	Re-reviewer (optional)	
3XXXX222	1XXXX456	TXXX, CATHERINE	Sherrell Lewis	9/11/11 10:29 PM		
Program(s) to review		Application Date	Pre-review file name	Time/Date pre-review completed		
FSP		8/18/2011	E:\Securell\Windows\PRE-REVIEW as of 7.31.11\DEMON\AWAITING CORRECTION\09_10	9/10/11 5:08 AM	Revised 9.6.11	
CARE Element	Review Element	Link to Policy Manual	Primary Question	Pre-reviewer's Comments	Error Cause for Sub-element	Contributing Cause
65.1 ERN1	Wages & Salaries		Is the employer name/employment type coded correctly (Examples: "E" for earned income and "SE" for self-employment)?	The previous employer's name is still in CARES. You need to enter "ACME Sales, Inc."	Employer name not entered in CARES	Oversight
66.1 ERN2	Wages & Salaries		Do the wages on CARES match the case verification and frequency for household members, including ineligible household			

SELECT CONTRIBUTING CAUSE
 Click on the drop-down box to select the contributing cause that best describes how the error occurred.

Oversight
 Data entry mistake
 Reported information not entered
 Database information not entered
 AIBS, SVES, SAVE not obtained
 Other

- For each error you have, tap on the arrow to move to the right,  and then:
- Type in "Pre-reviewer's Comments" how the error can be corrected, and
- Select an "Error Cause" & a "Contributing Error Cause" to the far right.
- After you do, the row will turn green again.

Then tap back to the left  to get back to the remaining questions.

Helpful hint: Contributing causes should be selected with care.

- Do not choose "Other" or you DHR will need to investigate your review.
- Most errors are: Oversight, or Data entry mistakes, or Database information not obtained
- Select "Policy Error" ONLY when you can determine it was a conscious decision on the part of the case manager.

PRE-REVIEW QUESTIONS & Key Case Information on CARES				District Office > 030	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)		Pre-reviewer	
3XXXX222	1XXXX456	TXXX, CATHERINE		Sherrell Lewis	
Program(s) to review	Application Date	Pre-review file name	Time/Date pre-review completed	Begin time of review	Re-reviewer (optional)
FSP	8/18/2011	E:\Securall\Windows\PRE-REVIEW as of 7.31\INDEMO\AWAITING_CORRECTION\09_10	9/10/11 5:06 AM	9/10/11 4:53 AM	Revised 9.6.11
CARE Review Element	Link to Policy Manual	Primary Question	Pre-reviewer's Comments	Error Cause for Sub-element	Contributing Cause
65.1 ERN1	Wages & Salaries	Is the employer name/employment type coded correctly (Examples: "EI" for earned income and "SE" for self-employment)?	The previous employer's name is still in CARES. You need to enter "ACHIE Sales, Inc."	Employer name not entered in CARES	Oversight
66.1 ERN2	Wages & Salaries	Do the wages on CARES match the case verification and frequency for household members, including ineligible household members?			

SELECT CONTRIBUTING CAUSE
Click on the drop-down box to select the contributing cause that best describes how the error occurred.

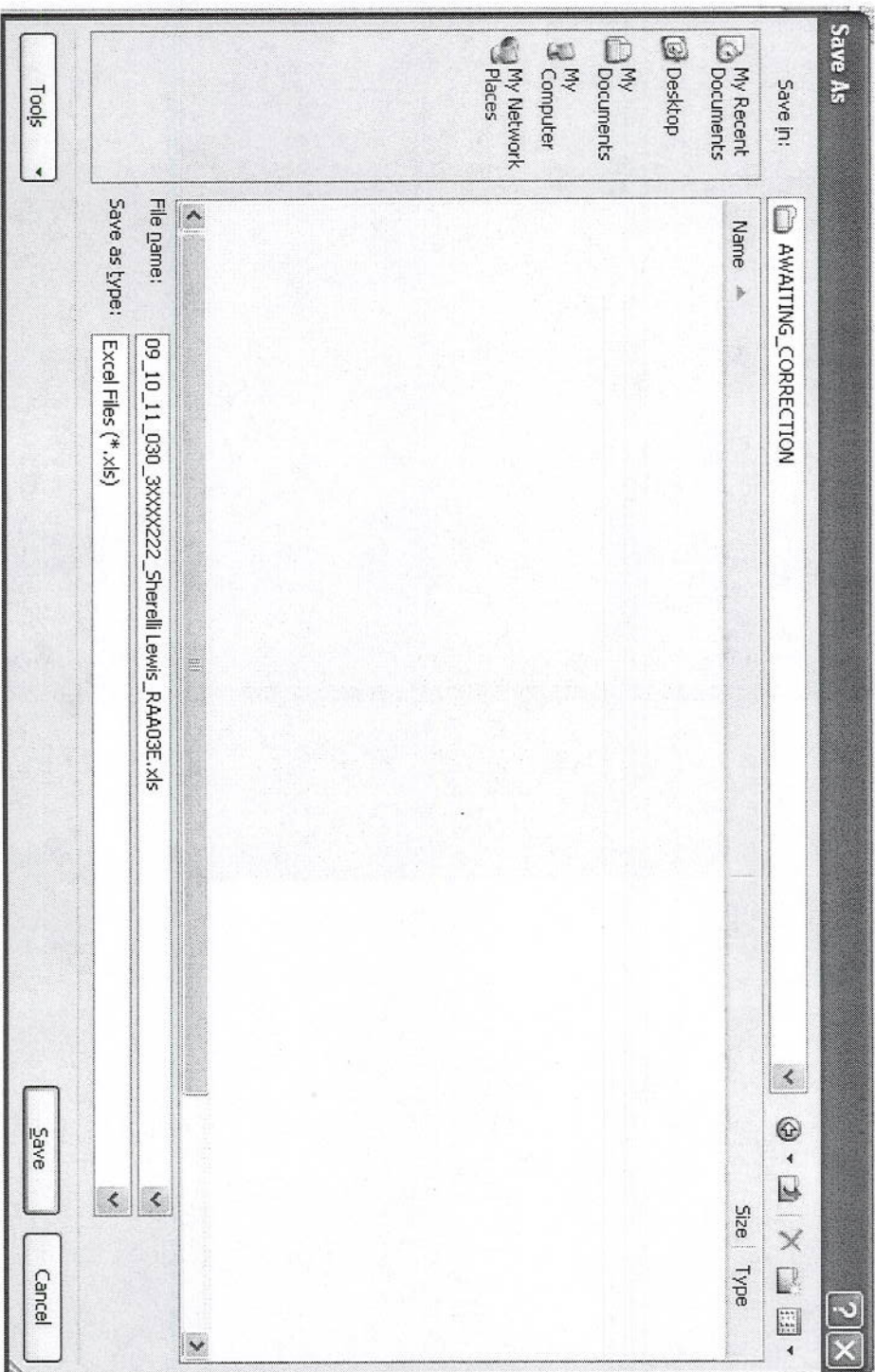
Oversight
Data entry mistake
Reported information based on timely Database information (ABS, SVES, SAVE) not obtained
Policy error
Other

When you have answered all the questions, the purple message at the top will say "All questions have been answered". Then, click on the gray "Ready to create report" button on the right.

PRE-REVIEW QUESTIONS & Key Case Information on CARES

PRE-REVIEW QUESTIONS & Key Case Information on CARES				All questions have been answered		Ready to create report		Del Rsp
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &/or Logon ID	Supervisor &/or Logon ID	Del Rsp			
3XXXX222	1XXXX456	TXXX, CATHERINE	RAA03E	MIBAGWU, SUNDAY	CD			
Program(s) to review	Application Date	Pre-review file name	Status /Pre-Review Type	Due Date	Approval/Denial Date			Den Code
FSP	8/18/2011	E:\Secure\Windows\PRE-REVIEW as of 7.31.11\DEMO\09_10_11_030_3XXXXX222_RAA0	P	9/17/2011				
CARE Element	Review Element	Link to Policy Manual	Primary Question	Secondary question if needed	Tertiary question if needed			
1.1 APPL	Application		Is there a date-stamped application or a SAIL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?	Yes				
2.1 APPL	Application		Was the application or EDD signed by a household member age 18 or older?	N/A				
3.1 APPL	Redetermination		If a Customer Information Form or other Redet form was provided by the customer, was it date-stamped?	Yes				

This window will open. You need to click "Save". DO NOT re-name the file or choose somewhere else to save it.



When you created the report, your review auto-saved to the "AWAITING_CORRECTION" folder.

Your report will then appear, with the errors listed at the top in light yellow-colored boxes.

09_10_11_030_3XXXX22_Sherrell Lewis_RAA03E.xls [Compatibility Mode]

PRE-REVIEW REPORT		2	Errors identified in pre-review		E-mail report to:		& supervisor too?		Finalize review & save to COMPLETED sub-folder	
Client ID	Assistance Unit	Head of Household Name	Worker Name & Logon ID	Supervisor	Del Rsn	Date of Correction(s)				
3XXXX22	1XXXX456	TXXX, CATHERINE	RAA03E	MBAGWU, SUNDAY	CD				E-Signed by:	
Program(s) to review		Application Date/Redet Date	Status / Redet Type	Due Date	Approval/Denial Date	Den Code	Who Corrected Case?	Time/Date pre-review ended		
FSP		8/18/2011	P	9/17/2011				9/10/11 5:06 AM		
CARES	Error Element	Primary Question	Secondary question if needed	Tertiary question if needed	Pre-reviewer's Comments	Error Cause for Sub-Element				
11.1	Clean ces	MABS (Unemploy-ment Compen-	Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?	No	You need to run a MABS clearance on Mr. Txxxx	MABS clearance not performed on all household members				
69.1	ERN2	Wages & Salaries	If the customer reported one of the following jobs, was the income coded as SE on the ERN1 screen?	No		Income incorrectly coded as EI instead of SE				
1.1	APPL	Application	Is there a date-stamped application or a SAIL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?	Yes						
2.1	APPL	Application	Was the application or EDD signed by a household member age 18 or	N/A						
3.1	APPL	Redeter- mination	If a Customer Information Form or other Redet Form was provided by the customer, was it date-stamped?	Yes						

You can E-MAIL the review automatically to the case manager for correction. Follow these steps:

09_10_11_030_3XXXXX222_Sherell_Lewis_RAA03E.xls [Compatibility Mode]

PRE-REVIEW REPORT

1. Select the Case Manager's name in the yellow drop-down box.

3. Click on the "E-mail report to:" button.

2. Select "Yes" if you want to copy the Case Manager's supervisor.

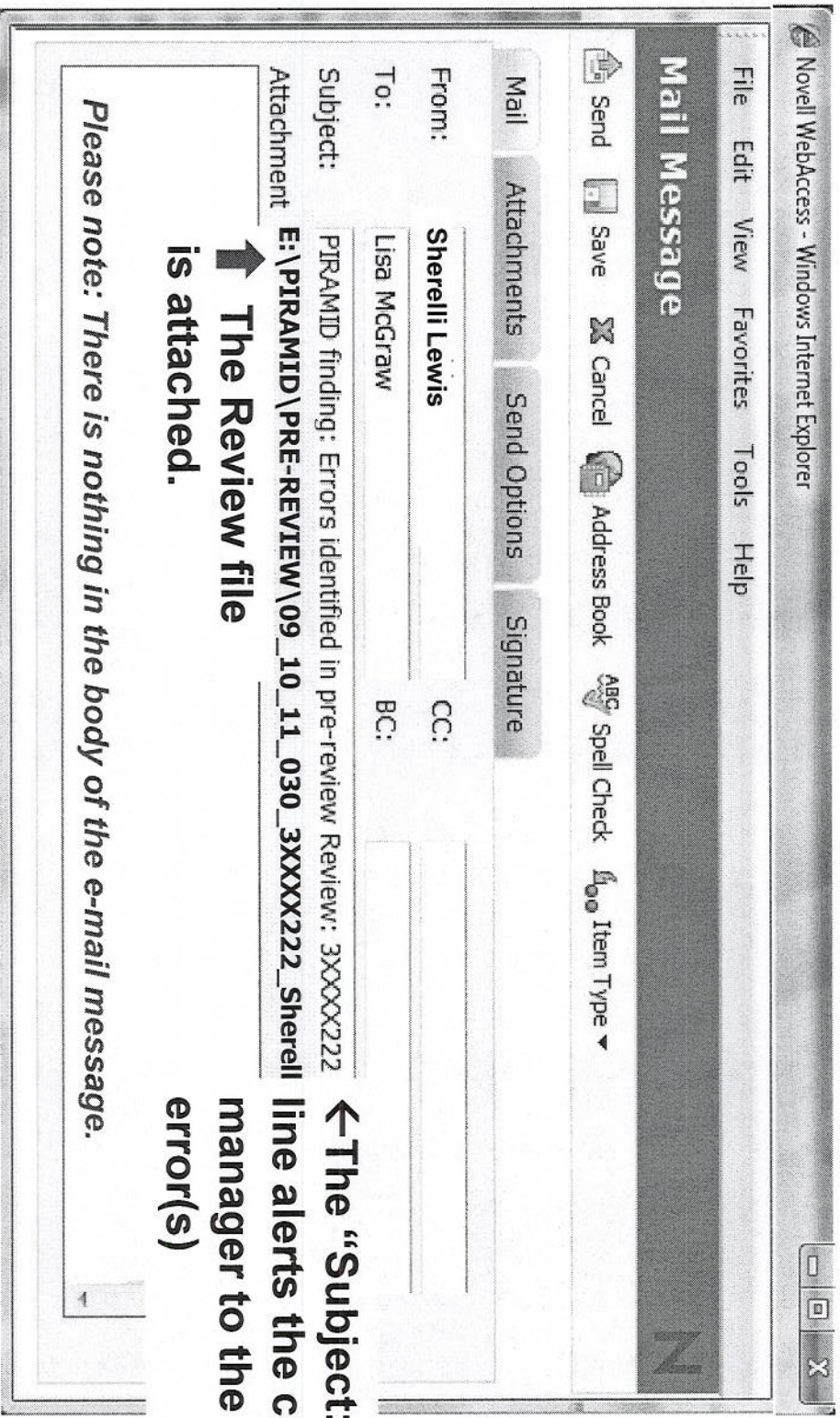
Client ID	Assistance Unit	Head of Household Name	Application Date/Redet Date	Redet Type	Due Date	Approval/Denial Date	Denial Code
3XXXXX222	1XXXXX456	TXXX, CATHERINE					
FSP			8/18/2011	P	9/17/2011		
11.1	CLEARAN CES	MABS (Unemployment Compensation)	Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?	No			
69.1	ERN2	Wages & Salaries	If the customer reported one of the following jobs, was the income coded as SE on the ERN1 screen?	No			
1.1	APPL	Application	Is there a date-stamped application or a SALL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or	Yes			

E-mail report to: Lisa McGraw

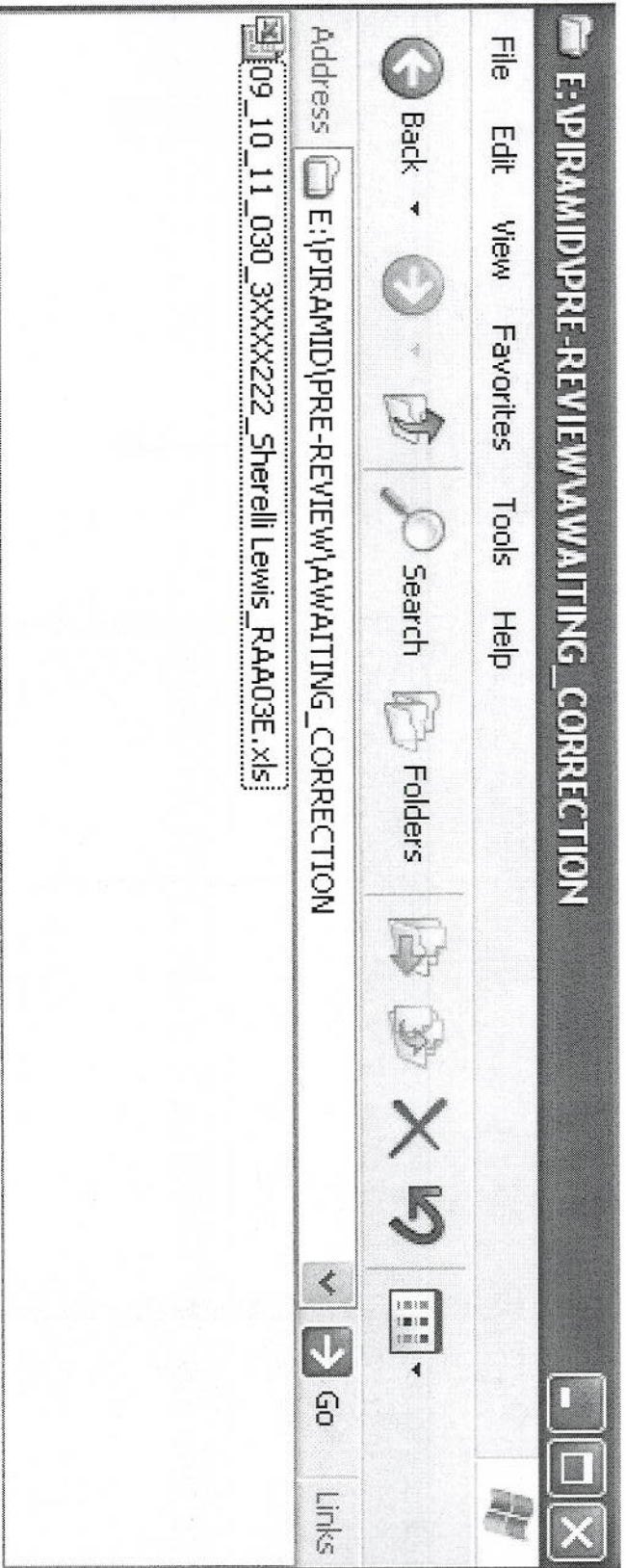
& supervisor too? Yes


- Jeanette Brown
- Jerry Jackson
- Karimor Antikowoshe
- Larasha McFadden
- Linda Bowman
- LISA MCGRAW
- Mecca Ortiz
- Nicholas Yenglich

To send an e-mail, you need to be logged into GroupWise, or else you will be prompted to log into GroupWise. Then your e-mail will be sent automatically. This is what the e-mail looks like.



When all errors have been corrected, open the file from the "AWAITING CORRECTION" folder.



Tap to the right  to locate the bright yellow boxes. For each error, click to choose "Corrected." The only time you would choose "Not Corrected" is if in fact there was no error at all. This is the only way you can change your mind about an error. Please note: Either one or the other must be chosen to finalize the review.

09_10_11_030_3XXXXX222_Sherelli_Lewis_RAA03E.xls [Compatibility Model]

PRE-REVIEW REPORT

Finalize review & save to COMPLETED sub-folder

Print report

Client ID Assistance Unit Head of Household Name

3XXXXX222 1XXXXX456 TXXXX, CATHERINE

E-Signed by:

Sherelli Lewis

Program(s) to review Application Date/Redet Date

Time/Date pre-review ended

Time/Date pre-review began

FSP 8/18/2011

9/10/11 5:06 AM

9/10/11 4:53 AM

CARES Error Element Primary Question

11.1 Clearan MABS (Unemployment Compen-sation) Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?

Error Cause for Sub-element
MABS clearance not performed on all household members

Contributing Cause
Database information (MABS, SVES, SAVE) not obtained

Corrected?
 Corrected

69.1 ERN2 Wages & Salaries If the customer reported one of the following jobs, was the income coded as SE on the ERN1 screen?

Income incorrectly coded as EI instead of SE

Policy error

SELECT ANSWER
If you corrected the error, select "Corrected". Otherwise, if there was a reason the error was not corrected, select "Not Corrected"

1.1 APPL Application Is there a date-stamped application or a SAIL app (e-signed or with a signature page), or an EDD in the case record for the cert. period or action under review?

2.1 APPL Application Was the application or EDD signed by a household member age 18 or

3.1 APPL Redeter-mination If a Customer Information Form or other Redet form was provided by the customer, was it date-stamped?

Click on the drop-down box to select the name of the staff person who corrected the review.

09_10_11_030_3XXXX222_Sherelli Lewis_RAA03E.xls [Compatibility Model]

PRE-REVIEW REPORT		All errors have been addressed		E-mail report to: Lisa McGraw		& supervisor too?	
Client ID	Assistance Unit	Head of Household Name	Worker Name & Logon ID	Supervisor	Del Rsn	Date of Correction(s)	Who Corrected Case?
3XXXX222	1XXXX456	TXXX, CATHERINE	RAA03E	MBAGWU, SUNDAY	CD	9/10/2011	Lisa McGraw
Program(s) to review		Application Date/Redet Date		Approval/Denial Date		Den Code	
FSP		8/18/2011	P	9/17/2011			Lisa McGraw
	CARES Error Element	Primary Question		Secondary question if needed		WHO CORRECTED THE ERRORS	
11.1	Clearances (Unemployment Compensation)	Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?		No		Select the name of the staff member who corrected the errors.	
69.1	ERN2 Wages & Salaries	If the customer reported one of the following jobs, was the income coded as SE on the ERN1 screen?		No		<ul style="list-style-type: none"> Latasha McGadden Linda Bowman LISA MCGRAW Meooca Ortiz Nicholas Yendic Nisha Marshall Norma Rollins Oliver Njong 	

Enter the date the correction(s) was made, even if you are entering the date on a later day.

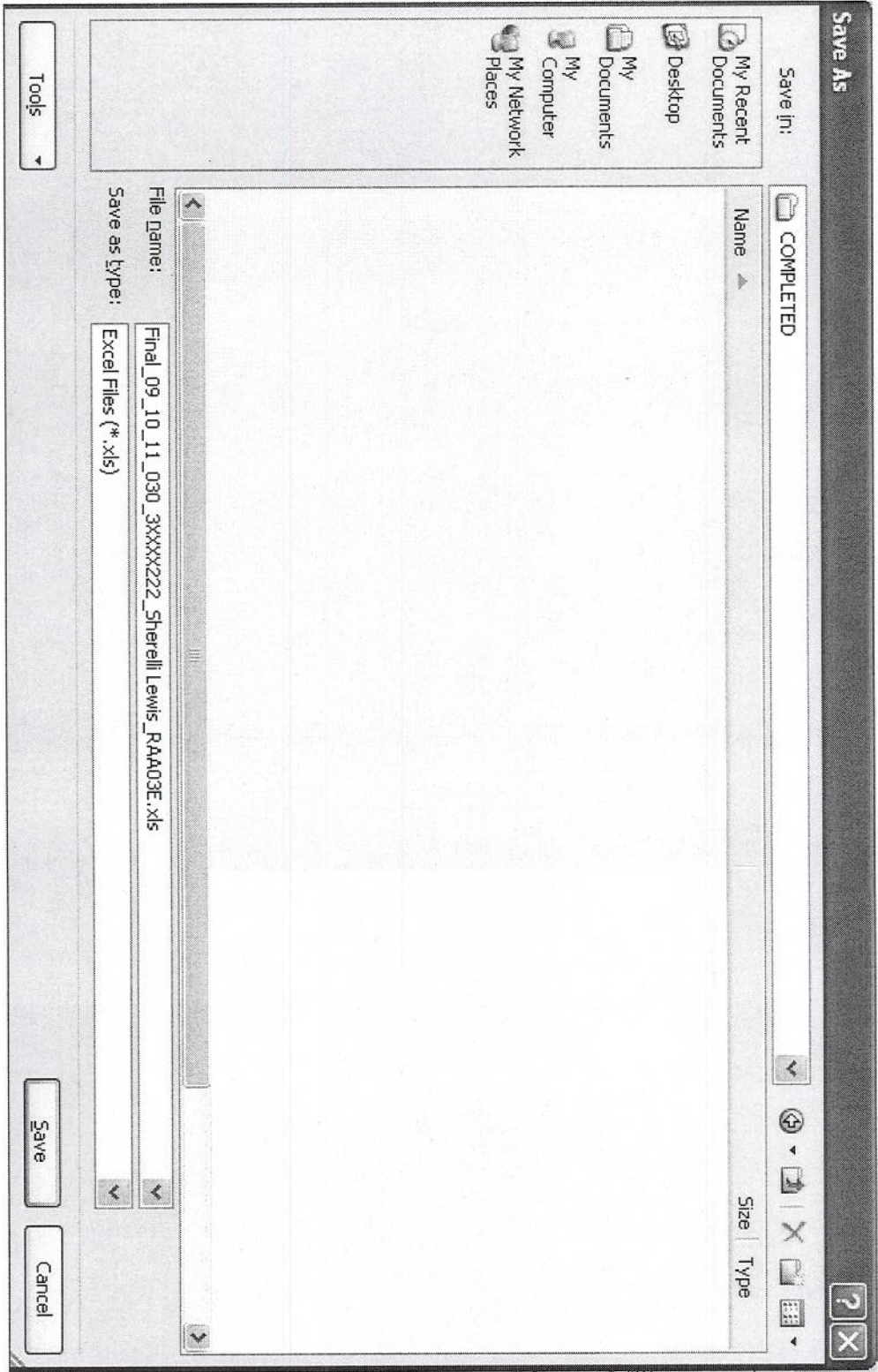
09_10_11_030_3XXXX222_Sherelli_Lewis_RAA03E.xls [Compatibility Mode]

PRE-REVIEW REPORT		All errors have been addressed		E-mail report to: Lisa McGraw		& supervisor too?	
Client ID	Assistance Unit	Head of Household Name	Worker Name & Logon ID	Supervisor	Del Rsn	Date of Correction(s)	Who Corrected Case?
3XXXX222	1XXXX456	TXXX, CATHERINE	RAA03E	MBAGW		9/12/2011	Lisa McGraw
Program(s) to review	Application Date/Redet Date	Status /Redet Type	Due Date	Approval/D	ENTER THE DATE Enter the date that the CORRECTIONS were made.		
FSP	8/18/2011	P	9/17/2011		Lisa McGraw		
CARES	Error Element	Primary Question	Secondary question if needed	Tertiary question if needed	Pre-reviewer's Comments		
11.1 cas	MABS (Unemployment Compensation)	Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?	No		You need to run a MABS clearance on Mr. Txxx		

Note the 'smiley face' 😊 indicating your review is ready to finalize.
 Click on the gray button at the top, named "Finalize & save to the COMPLETED sub-folder."

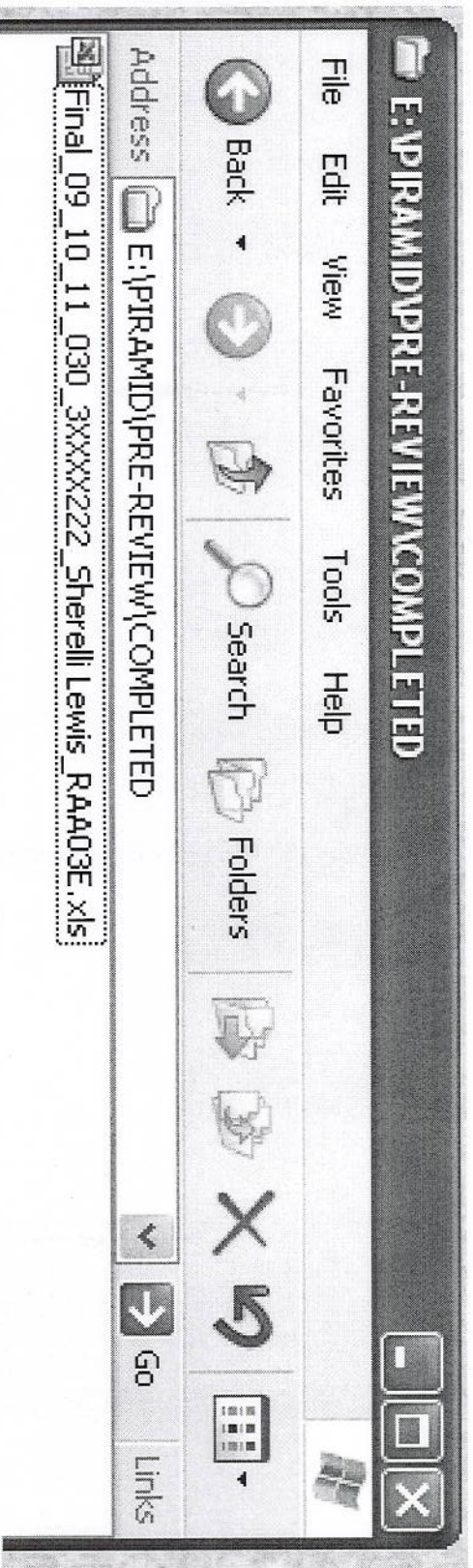
PRE-REVIEW REPORT		E-mail report to: Lisa McGraw		& supervisor too?		Finalize review & save to COMPLETED sub-folder	
Client ID	Assistance Unit	Head of Household Name	Supervisor	Del Rsn	Date of Correction(s)		
3XXXX222	1XXXX456	TXXX, CATHERINE	MBAGWU, SUNDAY	CD	9/12/2011		E-Signed by:
Program(s) to review		Application Date/Redet Date	Approval/Denial Date	Den Code	Who Corrected	Time/Date pre-review ended	
FSP		8/18/2011			Lisa McGraw	9/10/11 5:06 AM	
	CARES Error Element	Primary Question	Yed	Tertiary question if needed	Pre-reviewer's Comments	Error Cause for Sub-element	
11.1	Clearan ces (Unemploy- ment Compen- sation)	MABS Was a MABS clearance performed for HH members 18 years and older and 16 - 17 year old not in school?			You need to run a MABS clearance on Mr. Txxxx	MABS clearance not performed on all household members	
69.1	ERN2 Wages & Salaries	If the customer reported one of the following jobs, was the income coded as SE on the ERN1 screen?				Income incorrectly coded as EI instead of SE	

***This window will open. You need to click "Save."
DO NOT re-name the file or choose somewhere else to save it.***



The file will auto-save to the “COMPLETED” folder, with the word “Final” in front of the name.

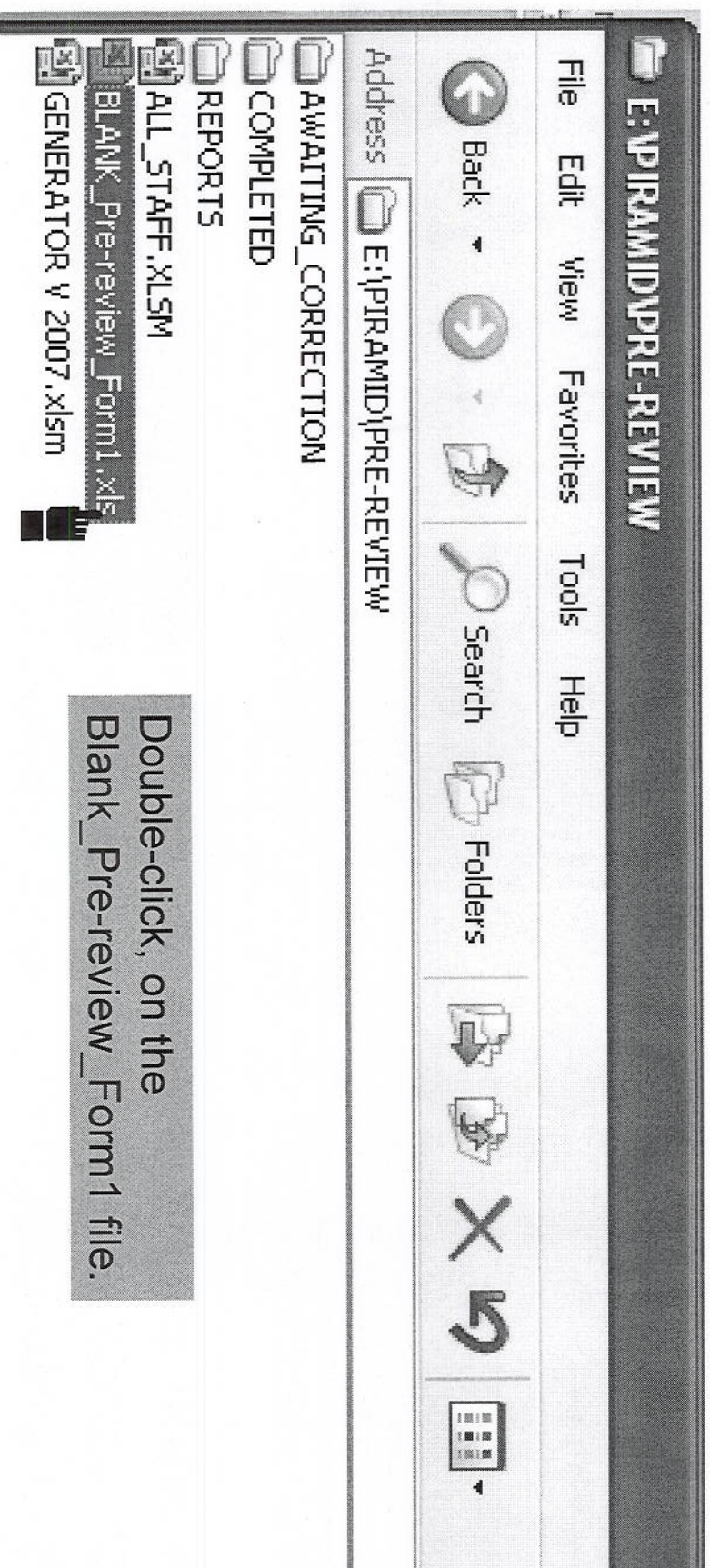
DHR will analyze all reviews in this folder and only reviews in this folder.



Please note: If your review has no errors, then when you click on the “Create Report” button, your review will auto-save to the “COMPLETED” folder.

You do not need to pull a sample in order to review a case in PIRAMID Pre-review.

You can simply open the "Blank_Pre-review_Form1" file.



Double-click, on the
Blank_Pre-review_Form1 file.

First, select your district office from the drop-down box.

4. 1. Select your 3-digit district office code in the yellow box to the right >>>				1. Select your District Office >>	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)		020	
				021	
				030	
				031	
				032	
				033	
				034	
				040	
3. Program(s) to review			Application Date	Pre-review file name	
				E:\Secure\I\Windows\PRE-REVIEW as of 7.31.11\BLANK\BLANK_Pre-	
Review CARES Element	Link to Policy Manual	Primary Question	Pre-reviewer's Comments	Error C	

SELECT YOUR 3-DIGIT DO #
 Click on the arrow to the right of the yellow box to reveal the drop-down box. Then click on your District Office.
 If you are reviewing a case from a different District Office, then click on that case's District Office.

Then fill in as much of the case information as you can, including:
Client ID, Assistance Unit #, Head of Household's name, Worker Logon ID, Supervisor's Logon ID, Program(s), Status, Application Date, Due Date, Delay Code if applicable, Denial/Approval date if applicable.


Also, select your name as the Reviewer. Then click "Begin Review."

BLANK_Pre-review_Form1.xls [Read-Only] [Compatibility Mode]

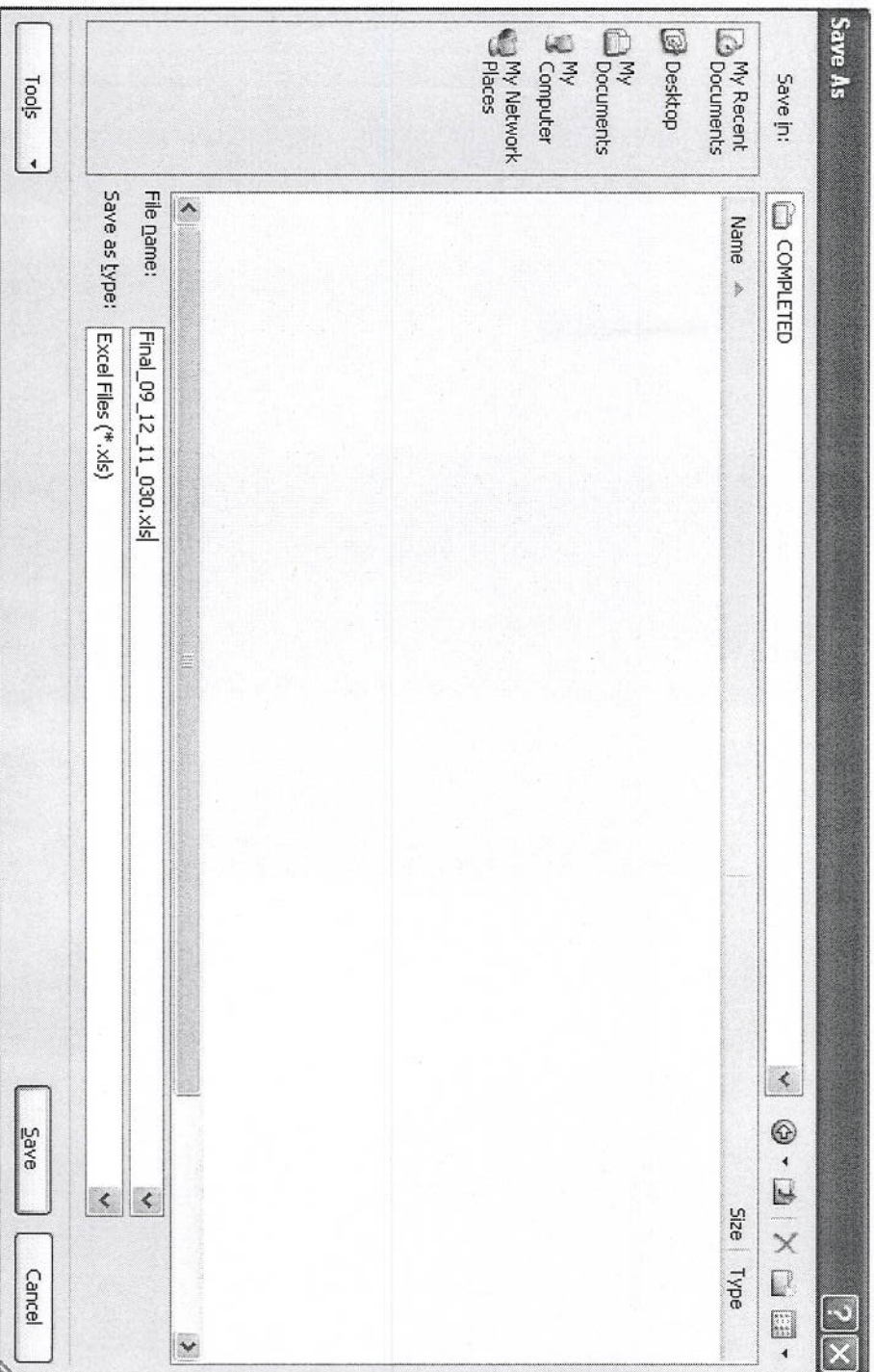
2. Click on the 'Begin Review' button on the left to begin the review.		24 questions still to answer		<input type="button" value="Ready to create report"/>	
Client ID	Assistance Unit	Head of Household Name (Lastname, Firstname)	Worker Name &or Logon ID	Supervisor &or Logon ID	Del Rsn
123456789	987654321	Test, Justa	REE123	RFF321	
Program(s) to review	Application Date	Pre-review file name	Status /Redel Type	Due Date (Overdue)	Approval/Denial Date
FSP	7/1/2011	E:\Secure\Windows\PRE-REVIEW as of 7.31.11\BLANK\BLANK_Pre-	P	7/31/2011	
Review CARES Element	Link to Policy Manual	Primary Question	Secondary question if needed	Tertiary question if needed	
SELECT YOUR NAME Select your name from the drop-down box below.					

Questions Report SQL

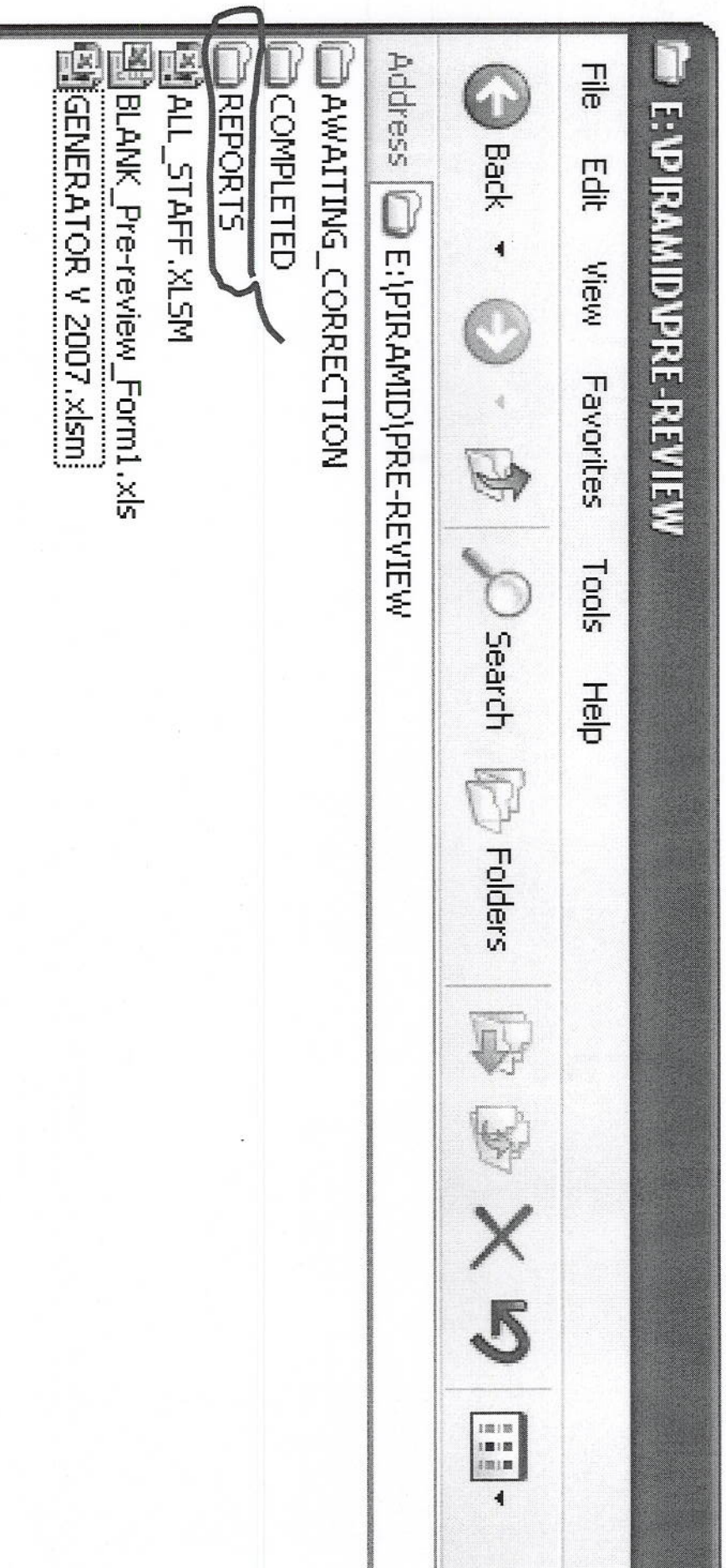
Note how the Due Date field is RED if the application is still pending, is overdue, and does not have a customer delay code in the Del Rsn field.

Answer the questions, just as you would for a sampled case. If there are no errors, you will see the  symbol, letting you know that the review is ready to be finalized.

When you click on the “Ready to create report” button, this window will open. Click on Save, and your file will auto-save to the “COMPLETED” folder.



After hours, DHR will retrieve and analyze all completed reviews, and then return reports to your "REPORTS" folder.

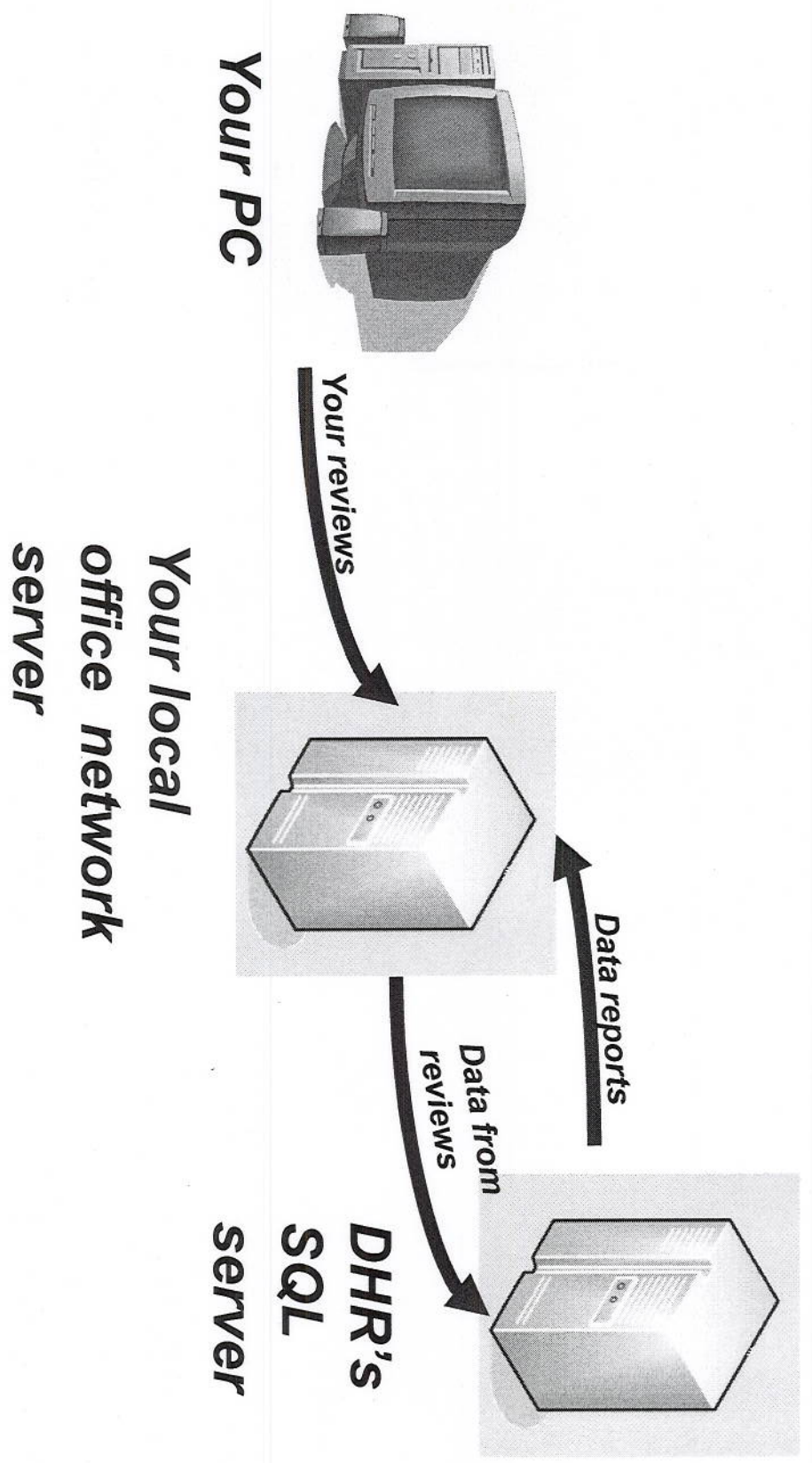


The reports are still being designed with input from you, the user.

- ***Overview of findings***
- ***Errors by:***
 - ***Error element***
 - ***Error causes***
 - ***Case Manager***
 - ***Unit***
 - ***District Office***
- ***Error trends over time***
- ***Productivity***

The first reports are expected to be ready in early November 2011.

From your PC...to your local server...to DHR...



***The goal is to complete
as many reviews as possible:***

- ***before an application is finalized***
- ***immediately after a redet is done***
- ***for reported interim changes***

***Completing a large volume of reviews
and correcting the mistakes found
will improve our accuracy!***

We can then qualify for BONUS \$\$\$\$

- FLORIDA.....\$ 6,083,577**
- TEXAS.....\$6,243,012**
- MISSISSIPPI.....\$1,182,562**
- MARYLAND?.....\$?,???,???**

There are a few rules to remember about PIRAMID Pre-review:

- Only one person can be in any one file at one time
 - For example, the GENERATOR V
 - The exception is the “Blank_Pre-review_Form1,” which you open as a “Read Only”
- Sample lists will save and close on their own after 4-5 minutes. Let them auto-close.
- All files will auto-save when closed.
- All files will save at 9:30 PM if left open, and then will post a message to close the file because it has disconnected from the server during the night.