

**Operations Memorandum**  
**Cash Assistance**  
**Medical Assistance**  
**Long Term Care**  
**SNAP**  
**Administration**  
**LIHEAP**  
**OPS130406**

**April 26, 2013**

**SUBJECT: Commonwealth of Pennsylvania Access to Social Services  
(COMPASS) Service Delivery Enhancements**  
**TO: Executive Directors**  
**FROM: Richard Wallace, Acting Director, Bureau of Operations**

**Purpose**

To inform County Assistance Offices (CAOs) that, effective April 28, 2013, enhancements will be made to COMPASS through implementation of the COMPASS Service Delivery Transformation (SDT) initiative.

**Background**

Currently in COMPASS, the application/renewal process and features for individuals are separate from the My COMPASS Account (MCA). Currently, the MCA provides features only available to active recipients, such as case benefit information. In an effort to improve self-service capability, the MCA will serve as the individual's 'one-stop shop' for application information, benefit information and correspondence.

In addition to MCA changes, updates will be made in COMPASS to direct individuals to benefits that are available outside of COMPASS and to make application processing more efficient and user-friendly for CAO workers. The intent of changes being implemented with the COMPASS SDT initiative is to reduce costs and relieve the CAOs' increasing workload.

**Discussion**

On April 28, 2013, enhancements will be implemented in COMPASS and eCIS, as it interfaces with COMPASS. Groups that will be affected by the enhancements include: Individuals, Community Partners (CPs), and CAO staff.

The enhancements to COMPASS, as outlined below, are divided into three areas: Fraud, Waste and Abuse (FWA), Self-Service Capability, and Application Processing.

These enhancements will:

Minimize FWA:

- Provide COMPASS users quick access to information about health and human services benefits that are not available on COMPASS.
- Allow individuals to select the specific benefits they would like to screen for in the Do I Qualify section.
- Screen/post-screen for benefits outside of COMPASS that may be available to the individual/household, such as Unemployment Compensation, Medicare and VA benefits.
- Continue to post-screen for school meals, but no longer post-screen for health care and child care.
- Incorporate fraud warning text in the beginning of the COMPASS application, on the COMPASS Rights & Responsibilities and on client notices to deter individuals from committing fraud.

Increase Self-Service Capability:

- Increase the utilization of MCA. Individuals will now log into their MCA or create an MCA username during the application and renewal process. The MCA will serve as the single portal to finish a saved application, check the status of an application, and scan documents. If the individual connects their MCA to a CIS case that is active or closed within the last six months, the individual can view their case benefit information (similar to the current MCA process).
- Provide the Head of Household (Payment Name) of an active or recently closed CIS case with the option to sign up for electronic notices (e-Notices). This will allow individuals to electronically receive all notices that are stored in eCIS to their MCA instead of through the mail. Notices that are not stored in eCIS, such as the Semi-Annual Reporting (SAR) forms, renewals and certain other notices will continue to be mailed.
- Populate applications with CIS case data for individuals and CPs that validate the Head of Household's identifying case information up front (similar to the current renewal process).
- Allow individuals and CPs to view the Pending Verification sent from eCIS, regardless of the individual's online notice preference. Pending Verification will be displayed on the Application Check Status screen in the MCA or Community Partner Dashboard (CPD) once a worker selects the Print Centrally button on the Pending Verification Items

screen in Case Processing. These pending verification details will be updated each time the Print Centrally button is selected.

#### Improve Application Processing:

- Permit paper applications to be scanned using only First Name/Last Name or SSN in File Clerk.
- Remove the Applying column on the CAPIND screen.
- Add the Driver's License (DL)/Identification (ID) fields to the CAPIND screen and remove the CAPIVI screen where the fields used to be.
- Add DL/ID fields to COMPASS and import information onto the CAPIND screen.
- Modify the search functionality on the CAPWAD screen by allowing the worker to use additional search parameters and not just the SSN.
- Make certain pre-populated fields in COMPASS non-editable, so the individual must 'Remove' the instance and 'Add' a new instance. This will prevent duplicate information from being imported into Case Processing.
- Clarify COMPASS data that was imported into Case Processing. When the COMPASS icon is selected, eCIS data that was updated with COMPASS data will be highlighted.
- Add the MCA Summary link to the Case Summary screen in Case Processing.
- Perform Global Information System validation for address information entered on the COMPASS Household screen.
- Modify the COMPASS PDF so it is more user-friendly for workers:
  - Display the MCA username.
  - Add SSN and Phone Number to the Household Information section.
    - Display the Case Number in the Household Information section for returning users, including new pre-populated applications, renewals, and user-entered cases.
    - Display DL/ID information.
    - Display an Education section.
    - Display the Resource section before the Income section to better align with Case Processing.
    - Display removed employment record(s) in the Past Employment section. The last paid date will be imported into Case Processing.
- Enable auto-forwarding functionality to override existing COMPASS application routing logic.

## **Next Steps**

1. Share and review this information with appropriate staff members.
2. Please contact your Area Manager if you have questions regarding this Operations Memorandum.
3. This Operations Memorandum will become obsolete upon release of revised Handbook changes.