

APPENDIX Y

APPENDIX Y
FINANCIAL EXCEPTION REVIEW (FXR) OVERVIEW

WELCOME TO FXR

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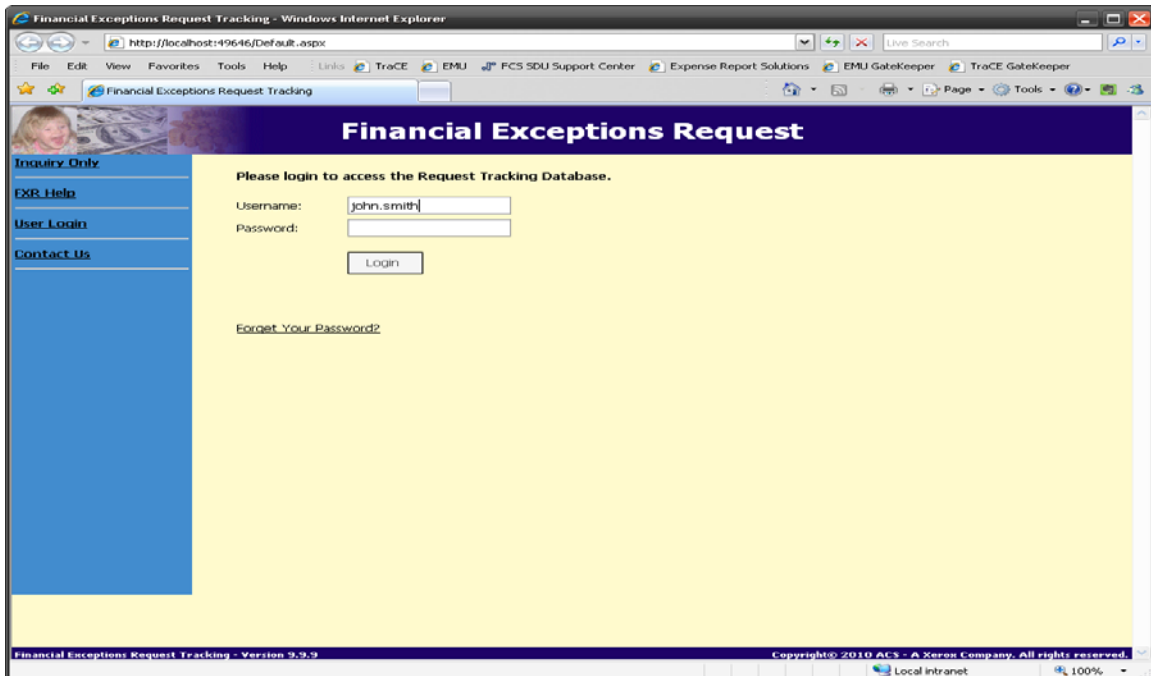
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For an overview of the FXR database usage please see the FXR Desk Reference at the link below.

[https://collab.pa.gov/dhs/pacses/Shared%20Documents/SCDU/Financial%20Exceptions%20Request%20\(FXR\)%20Desk%20Reference%20Guide.docx](https://collab.pa.gov/dhs/pacses/Shared%20Documents/SCDU/Financial%20Exceptions%20Request%20(FXR)%20Desk%20Reference%20Guide.docx)

Logging On

Access to the Financial Exceptions Request (FXR) database is obtained through the PACSES Home Page (PHP). The link is located under Case Management/FXR- Financial Exceptions Request, which will navigate the user to the FXR Login screen.



Do not use the BACK button after the user is logged into FXR.

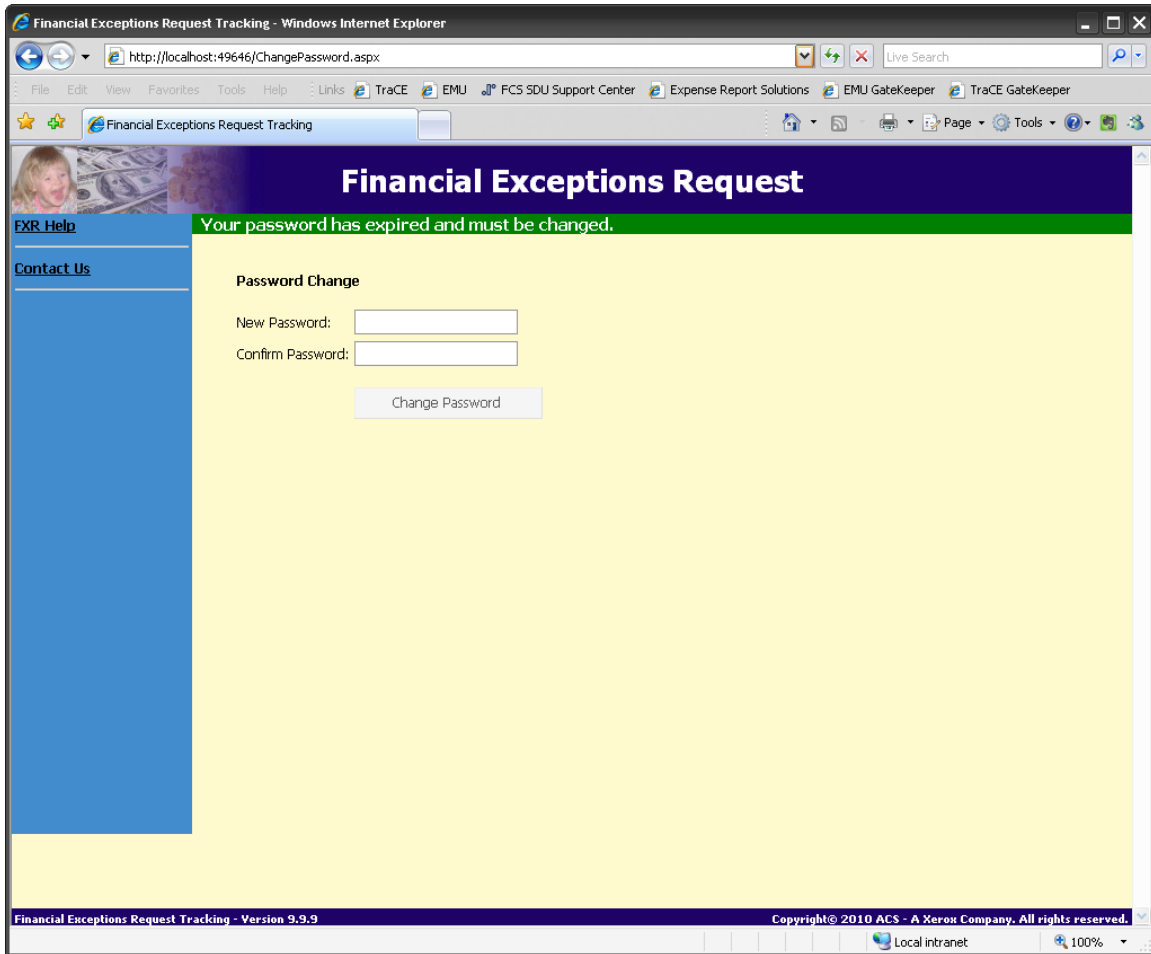
The left-hand side of the FXR Login page allows inquiry only. This allows users without access to search the database for requests. The Search Request on “Inquiry Only” navigates the user to the same Search Request screen as detailed in the Search Requests Section of this document.

Every approved user has a unique username and password. In most instances, the username is the user’s first name and last name combined with a period in between (example John Smith would be john.smith). The username and password identify the appropriate person to contact with questions or special instructions.

Additional users can be added to FXR by sending an e-mail to FINEXAD@PACSES.com. Please provide the first and last name for each additional user. Additionally you will use the same e-mail group if access to FXR should be deleted for a specific worker.

The default password for users logging in for the first time is Password1; users will be prompted to change their password.

When the user’s password has expired the system will display the Change Password screen as shown below.



The new password must be typed in twice; once in the “New Password” field and then in the “Confirm Password” field. The new password must meet the following criteria:

- The new password must be at least eight characters long
- The new password must contain at least one number (1,2,3,4,5,6,7,8,9)
- The new password must contain at least one capitalized letter
- The new password must contain at least one symbol (!, @, #, \$, %, ^, &, *)
- The new password must not match any of the last twelve passwords used.

After selecting the “Change Password” button the user will be navigated to the Summary of Current Requests screen and a message will display informing the user of the successful password change.

Financial Exceptions Request Tracking - Windows Internet Explorer

http://localhost:49646/ProcessRequest.aspx

File Edit View Favorites Tools Help Links TraCE EMU FCS SDU Support Center Expense Report Solutions EMU GateKeeper TraCE GateKeeper

Financial Exceptions Request Tracking

Financial Exceptions Request

User: Brett Landis

Your password has been successfully changed.

Summary of Current Requests

Request ID: Search

Request ID	Request Type	Status	Assigned To	Due Date
177	Misposting	Open	Brett Landis	3/30/2011 12:00:00 AM
164	Misposting	Open	Brett Landis	3/25/2011 12:00:00 AM
153	175M	Open	Brett Landis	4/5/2011 12:00:00 AM

[Enter New Request](#)

Financial Exceptions Request Tracking - Version 9.9.9 Copyright© 2010 ACS - A Xerox Company. All rights reserved.

Local intranet 100%

If a user misplaces or forgets their password they can select the link on the login page titled “Forget Your Password?” This will start an email to FINEXAD@PACSES.com where their password can be reset for them.

Summary of Current Requests

After logging in the user is navigated to this screen. The user's profile (security level) determines what is displayed on the screen. This screen can be sorted by any of the columns by clicking on the column header.

Financial Exceptions Request

User: Brett Landis

[Add Request](#)
[Process Request](#)
[Search Requests](#)

[Contact Us](#)
[EXR Help](#)
[Logout](#)

Request ID: Search

Request ID	Request Type	Status	Assigned To	Due Date
177	Misposting	Open	Brett Landis	3/30/2011 12:00:00 AM
164	Misposting	Open	Brett Landis	3/25/2011 12:00:00 AM
153	175M	Open	Brett Landis	4/5/2011 12:00:00 AM

[Enter New Request](#)

Financial Exceptions Request Tracking - Version 9.9.9 Copyright © 2010 ACS - A Xerox Company. All rights reserved. Local intranet 100%

User's Roles

The [County User](#) will see any request that has been assigned back to the user for additional information and any request that has been submitted by that county user. Canceled, completed and denied requests will be displayed for one week after these actions has been completed. An open request will be displayed until it is canceled, completed or denied. This will allow the user to track requests submitted through the exceptions process.

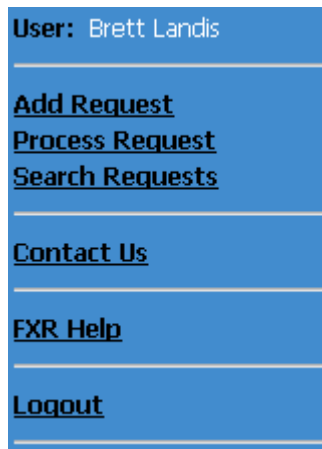
The [BCSE, SCDU or FXU User](#) will see any request that has been assigned to the user for processing. After a request is canceled, completed, denied or reassigned, it will be removed from the users screen.

This screen also allows the user to search for a specific FXR number. The search will only return results if the request is assigned to the user performing the search. If request number 123456 is assigned to FXU User and County User searches for the request on the Process Request Screen, County User will see no results of the search. Only the FXU User will see this request when they search on the request number on the process request screen.

A request may be assigned back to the requestor for additional action or information before the request can be processed. If this happens the requestor will see the request in the Summary of Current Requests screen with their name in the Assigned To field. When the user completes the requested action they should reassign the request back to the unit that had assigned it to them for additional information. If the request had been assigned to a worker who is out of the office for an extended period you may have the FXR reassigned by emailing the Finexad email group.

If a request has been denied you may choose to **appeal**. All appeals are automatically routed to BCSE Division of Field Operation for review.

The blue area to the left of the screen will be displayed on all screens within FXR. This area is the navigation menu.



[Add Request](#) is used to submit a new request.

[Process Request](#) is the user dashboard for request assigned to the user based on their role. This is also known as the summary of requests that require user action.

[Search Request](#) allows the user to search for a request based on the selected criteria. Results are returned based on the user's role.

[Reports](#) provide statistical information for new, completed and pending requests. This is only accessible by FXU and SCDU Supervisors.

[Contact Us](#) provides a direct e-mail link to Financial Exceptions should you experience any problems with the FXR database.

[FXR Help](#) directs you to the FXR User Document.

[Logout](#) should be used every time the user is finished using the FXR database.

Note: Closing the intranet is not an acceptable way of terminating the FXR session.

Add Request

By clicking on [Add Request](#), the user is navigated to the screen below.

The screenshot shows a web browser window titled "Financial Exceptions Request Tracking - Windows Internet Explorer". The address bar shows the URL "http://localhost:49646/NewRequest.aspx". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains various icons for navigation and search. The main content area has a dark blue header with the text "Financial Exceptions Request" and a sub-header "Add Request". Below the sub-header, there is a yellow background with the text "Enter the information for the new Request in the form below." The form contains several fields: "Request Type" (a dropdown menu with "175M" selected), "Defendant ID" (a text input field), "Defendant Name" (a text input field), "Case Details - Add New" (a text input field), "Check Details - Add New" (a text input field), "Receipt Details - Add New" (a text input field), and "Comments" (a large text area). At the bottom of the form are two buttons: "Add" and "Cancel". On the left side of the page, there is a blue sidebar with a navigation menu containing links for "Add Request", "Process Request", "Search Requests", "Contact Us", "EXR Help", and "Logout". The user's name "User: Brett Lands" is displayed at the top of the sidebar. The footer of the page includes the text "Financial Exceptions Request Tracking - Version 9.9.9" and "Copyright © 2010 ACS - A Xerox Company. All rights reserved." The browser's status bar at the bottom shows "Done" and "Local intranet".

Request Types are as follows:

- **175M** – This request should be submitted when a plaintiff that is active assistance receives a support check from PACSES.
- **Check Recipient Change** – This request type is used when money has been distributed and is either disbursed, on AHLD, PHLD, SUDS or HIRS. If the receipts have been disbursed the checks will need to be in the possession of the DRS before the request can be submitted. This request type is also used for overpayments to C & Y.
- **Distribute to Fee** - This type should be used for receipt distribution to fees outside of the normal distribution hierarchy. Please note that this request type will be reviewed by BCSE and answered in accordance with DRS Memo 2010-37.
- **HIRS Release** – This request type is used when there is a court order to have the six month IRS hold released early. These FXRs are routed to BCSE for review prior to processing.
- **Misposting** – This request should be submitted when a payor's payment(s) was posted to the incorrect member ID.
- **Money to DHS** – This request type should be used anytime money that has been distributed to DHS and needs to be redirected. The exception to this would be a receipt that was posted to the incorrect payor; this would be submitted under the misposting request type.
- **Offsets** – This request should be submitted when an offset needs to be manually adjusted. This replaces the incidents that were previously filed to manually adjust an offset.
- **OSPR** – This request is used when another state returns money to SCDU by issuing a check out of their account instead of returning the uncashed SCDU check. Some requests will require the worker to contact the other state when determining which receipt/s was returned.
- **Post Unidentified** – This request is submitted when a user identifies a payment that has been sent to SCDU by a payor that could not be identified to the payor. Receipt information can be found on CPUD. CPUR will give you the correct receipt formatting.
- **Undistributed Receipt** – This type of request should be used when a receipt that is on the NDST or HRCT needs to have a reversal performed so that the receipt can be distributed.
- **Void and Reissue** – This is used when a check recipient does not receive a SCDU check and a SCDU stop payment request form has been signed. If a check recipient returns a SCDU check to be redirected to another party this request type should not be used, the user should choose the Check Recipient Change request type.

Note: Please contact your PACSES SME with any additional concerns regarding which FXR category could be filed for your situation.

Request Types by User

Users have specific access to the FXR database and which request types they may enter dependent upon their roles. Below is a list of the request types that each user type has access to.

- **County User** –
 - IRS Release
 - Misposting
 - Money to DHS
 - Offsets
 - OSPR
 - Post Unidentified
 - Undistributed Receipt
 - Void and Reissue
 - Distribute to Fee
- **BCSE User** –
 - 175M
 - Money to DPW (Department of Human Services)
 - HIRS Release
 - Distribute to Fee
- **SCDU User** –
 - Misposting
 - Post Unidentified
 - Void and Reissue
- **FXU User** –
 - All Request Types

Search Request

This function allows the user to search the database using a number of criteria and returns all requests that meet the selected criteria. The worker's dashboard can be sorted using the buttons in the headers of the columns.

Search Requests

Use the filters below to search for requests.

Request ID:	<input type="text"/>	Assigned To:	<input type="text"/>
Request Type:	<input type="text"/>	Due Before:	<input type="text"/>
Status:	<input type="text"/>	From Date:	<input type="text"/>
Defendant ID:	<input type="text"/>	To Date:	<input type="text"/>
Case ID:	<input type="text"/>	County:	<input type="text"/>
Check Recipient ID:	<input type="text"/>	Request By:	<input type="text"/>
Check Number:	<input type="text"/>		

Search

Reset

The fields on the search correspond to the information entered in the Add Request process:

- **[Request ID](#)** – This field should be used when the user knows the request number and wishes to display the information for that request only.
- **[Request Type](#)** – This field can be used to display all the request in a particular request type (175M, Check Recipient Change etc)
- **[Status](#)** – The user can query the database on any of the valid statuses. The valid statuses are Open, Complete, Cancel, Holding (This status is used internally if the request needs to be held for a period of time until processing can be completed), Deny, Appeal, Waiting (This status is used when a request for information is sent and a response is needed)
- **[Defendant ID](#)** – When this field is populated the only requests displayed will be those submitted containing this member ID in the defendant ID field.
- **[Case ID](#)** – When this field is populated, all requests that have been submitted that contain this case ID will be returned.

- [Check Recipient ID](#) – When this field is populated, all requests that have been submitted that contain this Check Recipient ID will be returned.
- [Check Number](#) – When this field is populated, all requests that have been submitted that contain this check number will be returned.
- [Request By](#) – When this field is populated, all the requests submitted by the particular user will be returned. This corresponds with requestor name in the “submit new requests” process.
- [Assigned To](#) – This search will show all requests that are currently assigned to the user selected.
- [Due Before](#) – Each request has a due date. When a date is entered in this field, all requests with a due date equal to or before the date selected will be returned.
- [From and To Date](#) – Both of these fields must be populated to display all new requests submitted during the beginning and ending dates.
- [County](#) – When the county code is entered in this field, all requests submitted by the particular county will be displayed.
- [Request By](#) – When this field is populated, all the requests submitted by the particular user will be returned. This corresponds with requestor name in the “submit new requests” process.

Explanation of Required Fields for New Requests

Request Type - select from the “Request Type” drop-down box.

Defendant ID and Defendant Name – enter the defendant’s information

Additional Information Boxes – The user will notice links on the screens depending on the type of FXR request. For example, a 175 M request will require Case, Check, Member and Receipt Details. .

Reports (for SCDU and FXU Users only)

This feature returns statistical information showing the number of pending requests at the beginning of the period, the number of new requests submitted, the number of requests processed and the number of requests pending at the end of the period specified by the user.

175M

Add Request

Enter the information for the new Request in the form below.

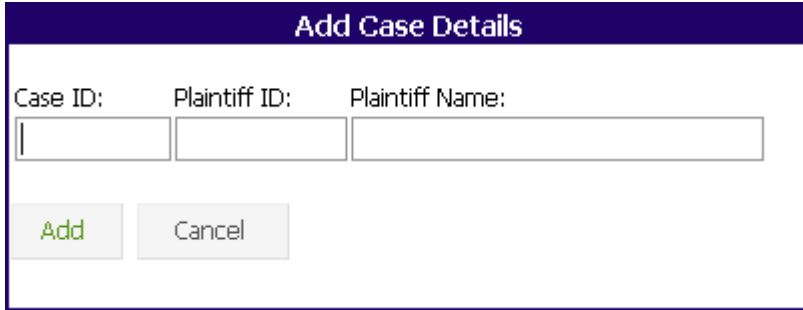
Request Type:	<input type="text" value="175M"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Case Details - Add New	
Check Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>

All fields are required.

[Defendant ID](#) – The PACSES member ID for the defendant whose receipt needs to be redirected.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

Case Details – Clicking on this link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

[Plaintiff Name](#) - The name of the member entered in the Plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Check Details – This is for the SCDU checks that are being returned by the check recipient. Clicking on the link will display the following screen:

Add Check Details					
Check No:	Check Date	Check Amount	Recipient:	Recipient Type:	Name on Check
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select <input type="button" value="v"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>				

All fields are required.

[Check No.](#) – This is the SCDU check that is being returned.

[Check Date](#) – The date displayed on the SCDU check being returned.

[Check Amount](#) – The amount of the SCDU check being returned.

[Recipient](#) – This should be the check recipient ID from PACSES.

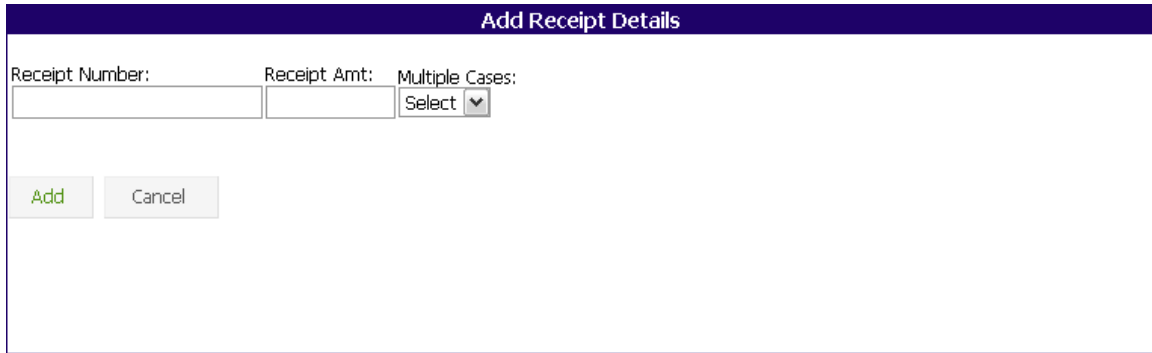
[Recipient Type](#) – This is a drop down menu and should be the check recipient type from PACSES.

[Name on Check](#) – This should be the check recipient name on the SCDU check that is being returned.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

[Cancel](#) – This will close the “Add Check Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:



The screenshot shows a form titled "Add Receipt Details". It contains three input fields: "Receipt Number:", "Receipt Amt:", and "Multiple Cases:". The "Multiple Cases:" field is a dropdown menu with "Select" and a downward arrow. Below the input fields, there are two buttons: "Add" (green text) and "Cancel" (grey text).

All fields are required

Receipt Number – This is the PACSES receipt number for the payment that needs to be redirected. The receipt number must be 20 characters long, which includes partial release suffixes.

Receipt Amount – This should be the total amount of the receipt that should be redirected to a new check recipient.

Multiple Cases – This requires a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

Add - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

Cancel – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should ADD the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Check Recipient Change

Add Request

Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="Check Recipient Change"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Check Mailed to SCDU:	<input type="text" value="Select"/>
Case Details - Add New	
Check Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>

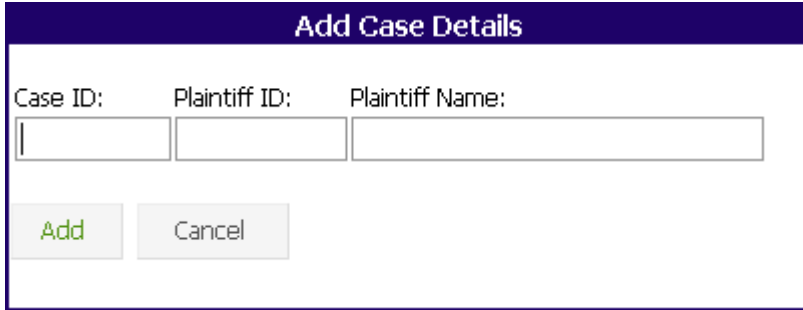
All fields are required

[Defendant ID](#) – The PACSES member ID for the defendant whose receipt needs to be redirected.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

[Check Mailed to SCDU](#) – This is a Yes or No.

Case Details – Clicking on this link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

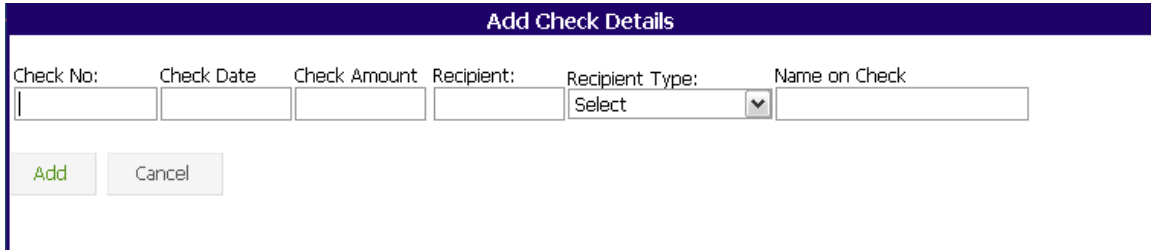
[Plaintiff Name](#) - The name of the member entered in the Plaintiff's ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Check Details - This is not a required link on this type of request. However, if the check recipient that received the money in error returns the original SCDU check the information must be added to the request.



Check No:	Check Date	Check Amount	Recipient:	Recipient Type:	Name on Check
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼	<input type="text"/>

[Check No.](#) – The SCDU check number that is being returned.

[Check Date](#) – The date displayed on the SCDU check being returned.

[Check Amount](#) – The amount of the SCDU check being returned.

[Recipient](#) – This should be the check recipient ID from PACSES.

[Recipient Type](#) – This is a drop down menu and should be the check recipient type from PACSES.

[Name on Check](#) – This should be the check recipient name on the SCDU check that is being returned.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

[Cancel](#) – This will close the “Add Check Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:

All fields are required.

[Receipt Number](#) – This is the PACSES receipt number for the payment that needs to be redirected. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This should be the total amount of the receipt that should be redirected to a new check recipient.

[Multiple Cases](#) – This is a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

[New Collection Date](#) – Check this box if the receipt requires a current collection date in order for it to distribute as requested.

[Current Receipt Location](#) – Choose the appropriate current receipt location from the drop down box AHLD, HIRS, PHLD, SUDS, DISR or Check (disbursement issued).

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Distribute to Fee

Add Request

Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="Distribute to Fee"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Case Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>

All fields are required.

Defendant ID –The PACSES member ID for the defendant whose receipt needs to be distributed to a fee/s.

Defendant Name – The name of the member that was entered in the defendant ID field.

Case Details – Clicking on this link will display the following screen:

Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

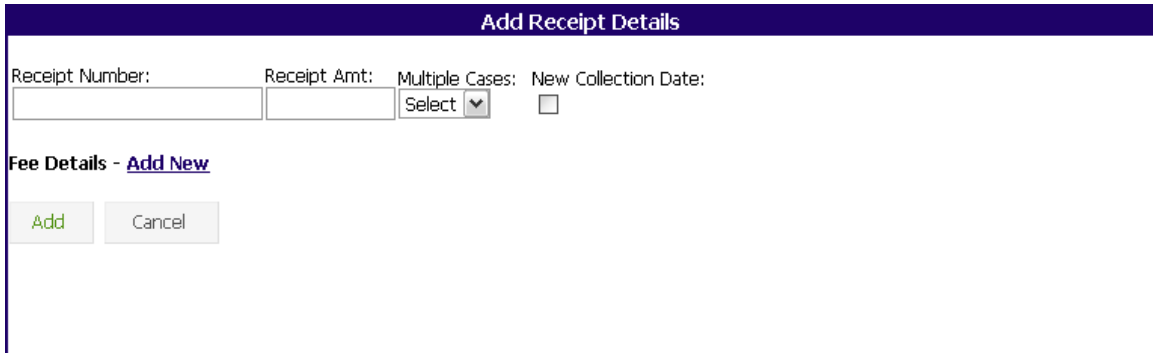
[Plaintiff Name](#) - The name of the member entered in the Plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: that if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:



Add Receipt Details

Receipt Number: Receipt Amt: Multiple Cases: New Collection Date:

Fee Details - [Add New](#)

All fields are required.

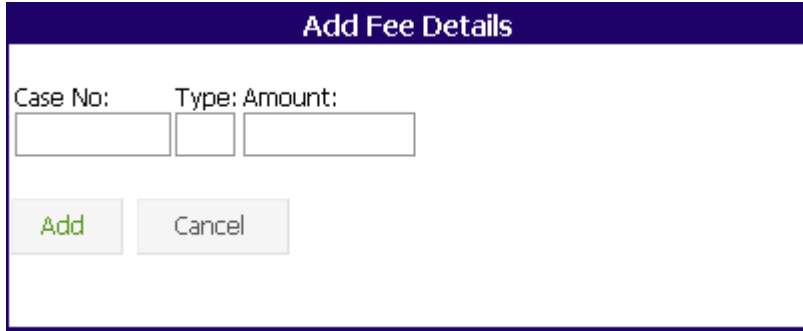
[Receipt Number](#) – This is the PACSES receipt number for the payment that needs to be distributed to a fee/s. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This should be the total amount of the receipt that needs to be distributed.

[Multiple Cases](#) – This requires a Yes or No. If the receipt listed needs distributed to more than one case the field should be marked, yes.

[New Collection Date](#) – Check this box if the receipt requires a current collection date in order for it to distribute.

Fee Details - Clicking on the Fee Details link displays the following screen:



The screenshot shows a form titled "Add Fee Details". It contains three input fields: "Case No:", "Type:", and "Amount:". Below these fields are two buttons: "Add" and "Cancel".

All fields are required.

Case No: This is the case that you want the fee distributed to.

Type: This is the fee type that you want the receipt distributed to.

Amount: This is the receipt amount that you want to distribute to the fee.

Add: This will save all fee information entered and navigate the user back to the Add Receipt Screen.

Cancel – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should **ADD** the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

HIRS Release

Add Request

Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="HIRS Release"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Court Ordered Release:	<input type="text" value="Select"/>
Case Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>

All fields are required.

[Defendant ID](#) – The PACSES member ID for the defendant on the case that the user is requesting the joint IRS to be released.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

[Court Ordered Release](#) – This is a Yes or No field. It will be used by BCSE when determining if the early release of the joint IRS is warranted. If this field is a Yes the county may be contacted to provide the court order.

Case Details – Clicking on this link will display the following screen.



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), from the same payor, where the joint IRS is holding and early release is being requested.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

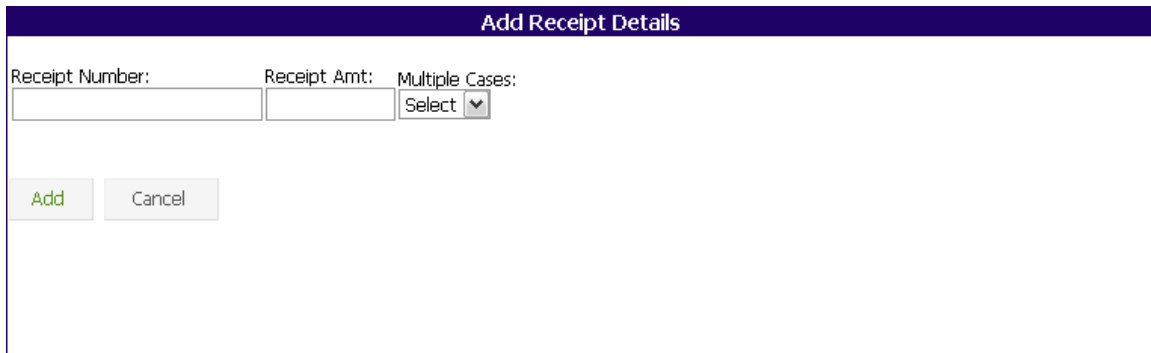
[Plaintiff Name](#) - The name of the member entered in the Plaintiff's ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:



The screenshot shows a form titled "Add Receipt Details". It contains three input fields: "Receipt Number:", "Receipt Amt:", and "Multiple Cases:". The "Multiple Cases:" field is a dropdown menu with "Select" and a downward arrow. Below the input fields, there are two buttons: "Add" (in green) and "Cancel" (in grey).

All fields are required.

[Receipt Number](#) – This is the PACSES receipt number for the payment that early release is being requested. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This should be the total amount of the receipt that early release is being requested.

[Multiple Cases](#) – This is a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Receipt Number is not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present on the request the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Misposting

Add Request

Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="Misposting"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Error Source:	<input type="text" value="Select"/>
Case Details - Add New	
Check Details - Add New	
Member Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>

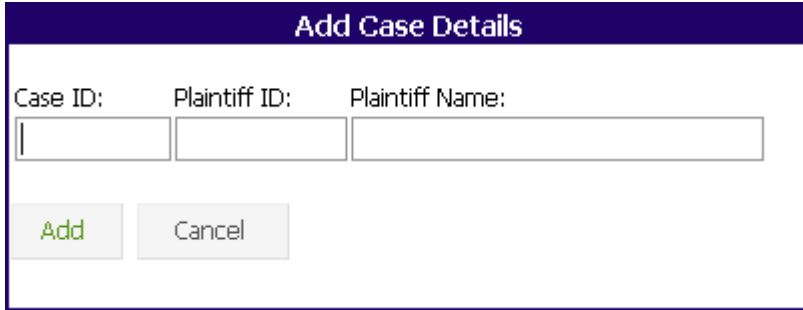
All fields are required.

[Defendant ID](#) – Enter the PACSES member ID for the defendant that the receipt was posted to incorrectly. Please note that this field must be numeric and 10 digits in length.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

[Error Source](#) – The name of the entity causing the misapplied receipt IE: employer, DRS, SCUDU.

Case Details - Clicking on the link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s) where money posted in error.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

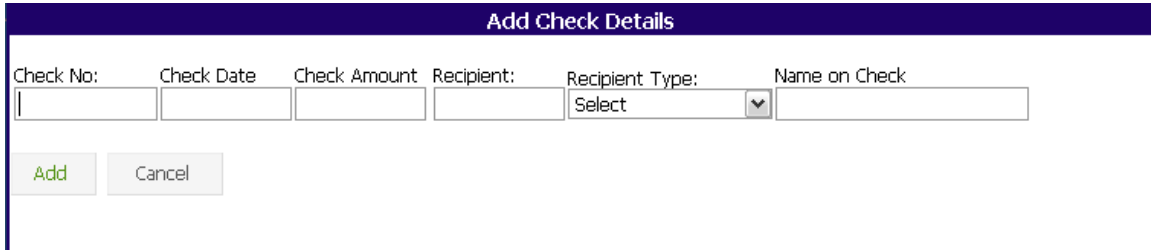
[Plaintiff Name](#) - The name of the member that was entered in the plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Check Details - This is not a required link to use on this type of request. However, if the check recipient that received the money in error returns the original SCDU check the information must be added to the request.



Check No:	Check Date	Check Amount	Recipient:	Recipient Type:	Name on Check
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼	<input type="text"/>

All fields are required.

[Check No.](#) – The SCDU check number that is being returned.

[Check Date](#) – The date displayed on the SCDU check being returned.

[Check Amount](#) – The amount of the SCDU check being returned.

[Recipient](#) – This should be the check recipient ID from PACSES.

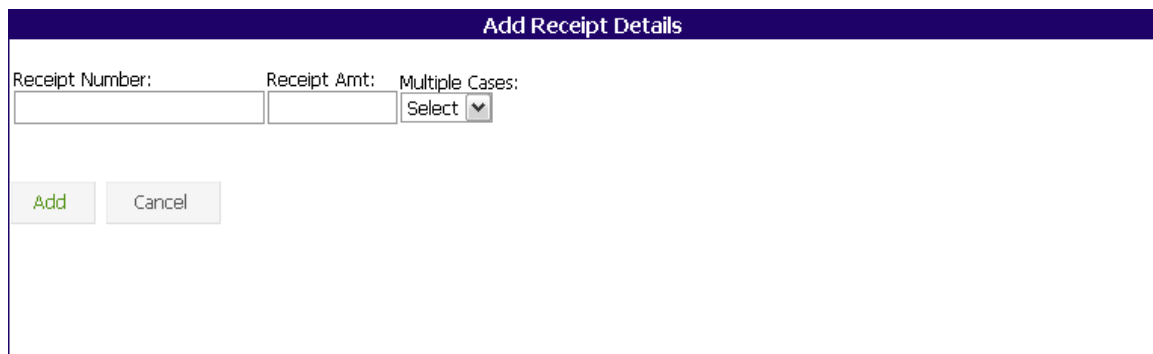
[Recipient Type](#) – This is a drop down menu and should be the check recipient type from PACSES.

[Name on Check](#) – This should be the check recipient name on the SCDU check that is being returned.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

[Cancel](#) – This will close the “Add Check Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:



The screenshot shows a form titled "Add Receipt Details". It contains three input fields: "Receipt Number:", "Receipt Amt:", and "Multiple Cases:". The "Multiple Cases:" field is a dropdown menu with "Select" and a downward arrow. Below the input fields are two buttons: "Add" and "Cancel".

All fields are required.

[Receipt Number](#) – This is the PACSES receipt number for the payment that was misapplied. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This is the total amount of the receipt that was misapplied.

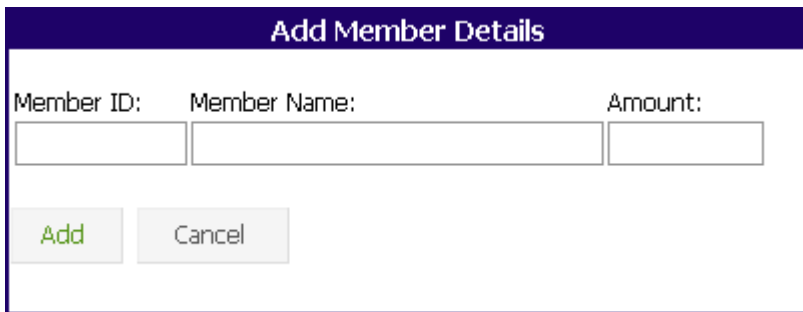
[Multiple Cases](#) – This is a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

[Add](#) – This saves all entered information and navigates the user back to the Add Request screen.

Note: if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Member Details – This is where the user should enter the information to have the receipts posted correctly. Clicking on the Member Details link will display the following screen:



Member ID:	Member Name:	Amount:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

Member ID – The PACSES member ID that the payment should have been posted. The member ID must be 10 numeric digits.

Member Name – The name of the member that was entered in the member ID field.

Amount – This should be the amount of the receipt that was misposted that should be posted to the member entered.

Add - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Member ID field is not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

Cancel – This will close the “Add Member Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted and where the money should be redirected.

After all the required information has been added to the Add Request screen the user should ADD the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present on the request the user will receive an error message. See the screen print below.

Add Request

Enter the information for the new Request in the form below.

Request Type:	Misposting
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Error Source:	Select
Case Details - Add New	<input type="text"/>
Check Details - Add New	<input type="text"/>
Member Details - Add New	<input type="text"/>
Receipt Details - Add New	<input type="text"/>
Comments:	<input type="text"/>



[Cancel](#) – This will be utilized if the user does not want to submit the request.

Money to DHS

Add Request

Enter the information for the new Request in the form below.

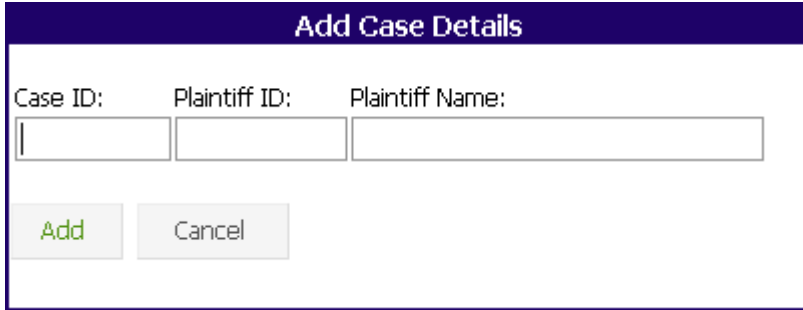
Request Type:	Money to DHS ▼
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Case Details - Add New	
Receipt Details - Add New	
Comments:	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>

All fields are required.

[Defendant ID](#) – The PACSES member ID for the defendant whose receipt needs to be redirected.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

Case Details – Clicking on this link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

[Plaintiff Name](#) - The name of the member entered in the Plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:

All fields are required

[Receipt Number](#) – This is the PACSES receipt number for the payment that needs to be redirected. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This should be the total amount of the receipt that was distributed to DHS and needs to be redirected.

[Multiple Cases](#) – This is a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

[New Collection Date](#) – Check this box if the receipt requires a current collection date in order for it to distribute as requested.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: that if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Offsets

Add Request

Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="Offsets"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Offset Member ID:	<input type="text"/>
Offset Member Name:	<input type="text"/>
Offset Case ID:	<input type="text"/>
Offset Amount:	<input type="text"/>
Comments:	<input type="text"/>

Add

Cancel

All fields are required.

Defendant ID – The PACSES member ID for the defendant on the case that needs to have an offset manually adjusted.

Defendant Name – The name of the member that was entered in the defendant ID field.

Offset Member ID – The PACSES Member ID for the member that requires the manual offset adjustment.

Offset Case ID – The PACSES case ID that is requiring the manual offset adjustment.

Offset Amount – The amount that the offset should be adjusted.

Comments – In this section it should be detailed why the offset should be adjusted and if the adjustment should be an increase or decrease in the amount of the offset.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

OSPR

Add Request

Enter the information for the new Request in the form below.

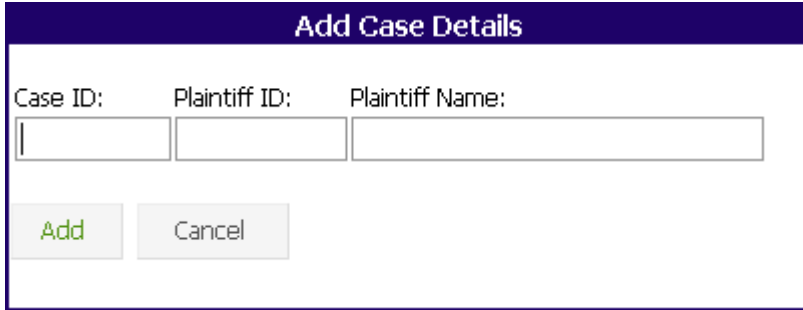
Request Type:	<input type="text" value="OSPR"/>	<input type="button" value="v"/>
Defendant ID:	<input type="text"/>	
Defendant Name:	<input type="text"/>	
Case Details - Add New		
Receipt Details - Add New		
Comments:	<input type="text"/>	
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

[Defendant ID](#) – The PACSES member ID for the defendant whose receipt needs to be redirected.

[Defendant Name](#) – The name of the member that was entered in the defendant ID field.

Case Details – Clicking on this link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

[Plaintiff Name](#) - The name of the member entered in the Plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:

All fields are required.

Receipt Number – This is the PACSES receipt number for the payment that needs to be redirected. FXU will enter all zeros for the receipt number. The county will supply the receipt number/s in the comment section that pertains to the returned funds from the other state.

Receipt Amount – FXU enters \$0.00 as the information is contained in the comment section

Multiple Cases – This requires a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

New Collection Date – FXU does not check this box – it is the counties responsibility to indicate if a current collection date is necessary and provide in the comment section.

Add - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

Cancel – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should **ADD** the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Post Unidentified – County or FXU User

A County or FXU User will see the following information for the Post Unidentified Requests. A SCDU user will see a different set of information which will be explained in the second set of screens.

Add Request
Enter the information for the new Request in the form below.

Request Type:	<input type="text" value="Post Unidentified"/>
PACSES Receipt No:	<input type="text"/>
Posting Member ID:	<input type="text"/>
Receipt Type:	<input type="text" value="Select"/>
Check Details - Add New	
Comments:	<input type="text"/>

All fields are required.

[PACSES Receipt No.](#) – The receipt number that the county identified in PACSES should be populated in this field. This should be 20 digits in length which includes the partial release suffixes.

[Posting Member ID](#) – The PACSES member ID of the payor whom the unidentified receipt should be posted.

[Receipt Type](#) – Select from the drop down box whether the receipt is on suspense or an OTC entry that requires identification.

Check Details - This is a required field. Clicking on the Check Details link displays the following screen:

Add Check Details				
Check No:	Cleared Date	Payment Amt	Payment Source Name	Payment Source:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select <input type="button" value="v"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>			

All fields are required.

Check No – The check number that was sent to SCDU by the payor. This is not the SCDU check number.

Check Cleared Date – The date the check sent by the payor cleared the payor’s bank.

Payment Amount – The amount of the check sent to SCDU.

Payment Source Name – The name on the check sent to SCDU.

Payment Source – The source of the payment from the payor. (i.e. employer, money order, personal check etc.)

Add - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

Cancel – This will close the “Add Check Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should ADD the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present,

the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Post Unidentified – SCDU User

The following screen should be used by the SCDU user to enter a Post Unidentified Request.

Add Request
Enter the information for the new Request in the form below.

Request Type:	Post Unidentified ▼
SCDU Batch No:	<input type="text"/>
SCDU Batch Date:	<input type="text"/>
Posting Member ID:	<input type="text"/>
Receipt Type:	Select ▼
Check Details - Add New	
Comments:	<input type="text"/>

All fields are required.

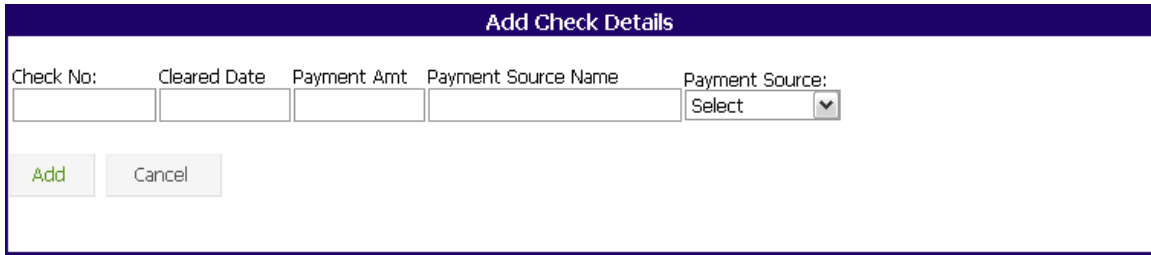
[SCDU Batch No](#) – The SCDU batch number of the unidentified payment.

[SCDU Batch Date](#) – The date of the SCDU batch number of the unidentified payment.

[Posting Member ID](#) – The PACSES member ID of the payor whom the unidentified receipt should be posted.

[Receipt Type](#) – Select from the drop down box whether the receipt is on suspense or an OTC entry that requires identification.

Check Details - This is a required field. Clicking on the Check Details link displays the following screen:



Check No:	Cleared Date	Payment Amt	Payment Source Name	Payment Source:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ▼

All fields are required.

[Check No](#) – The check number that was sent to SCDU by the payor. This is not the SCDU check number.

[Check Cleared Date](#) – The date the check sent by the payor cleared the payor’s bank.

[Payment Amount](#) – The amount of the check sent to SCDU.

[Payment Source Name](#) – The name on the check sent to SCDU.

[Payment Source](#) – The source of the payment from the payor. (i.e. employer, money order, personal check etc.)

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Check Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Undistributed Receipt

Add Request

Enter the information for the new Request in the form below.

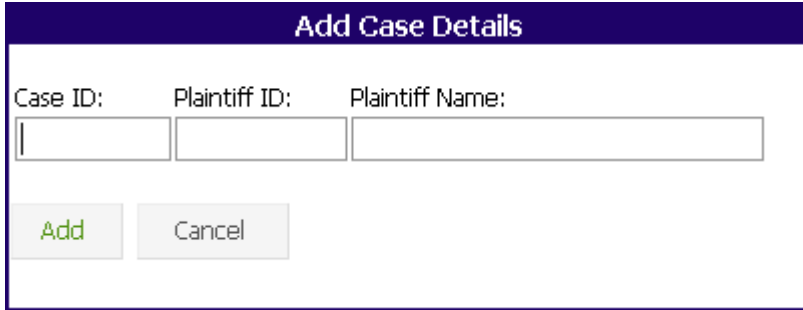
Request Type:	<input type="text" value="Undistributed Receipt"/>
Defendant ID:	<input type="text"/>
Defendant Name:	<input type="text"/>
Case Details - Add New	
Receipt Details - Add New	
Comments:	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>

All fields are required.

Defendant ID – The PACSES member ID for the defendant whose receipt needs to be redirected or updated with a current collection date.

Defendant Name – The name of the member that was entered in the defendant ID field.

Case Details – Clicking on this link will display the following screen:



Add Case Details		
Case ID:	Plaintiff ID:	Plaintiff Name:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	<input type="button" value="Cancel"/>	

All fields are required.

The case details are for the case(s), with the same payor, that need to be redirected to a new check recipient.

[Case ID](#) - PACSES case ID, must be nine (9) numerical digits.

[Plaintiff ID](#) – The PACSES member ID for the plaintiff, this must be ten (10) numerical digits.

[Plaintiff Name](#) - The name of the member entered in the Plaintiff ID field.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

Note: if the Case ID and Member ID fields are not populated with the correct number of digits the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Case Details” box and return to the “Add Request” screen.

Receipt Details - This is a required field. Clicking on the Receipt Details link displays the following screen:

All fields are required.

[Receipt Number](#) – This is the PACSES receipt number for the payment that needs to be redirected or updated with a current collection date. The receipt number must be 20 characters long, which includes partial release suffixes.

[Receipt Amount](#) – This should be the total amount of the receipt that needs to be redirected or updated with a current collection date.

[Multiple Cases](#) – This requires a Yes or No. If the receipt listed distributed to more than one case the field should be marked, yes.

[New Collection Date](#) – Check this box if the receipt requires a current collection date in order for it to distribute.

[Receipt Location](#) – Choose the appropriate current receipt location from the drop down box IE: NDST, HRCT etc.

[Add](#) - This will save all information entered and will navigate the user back to the Add Request screen. It is important to note that if the Receipt Number is not populated with the correct number of digits, the worker will receive an error message to check the length of the fields.

[Cancel](#) – This will close the “Add Receipt Details” box and return to the “Add Request” screen.

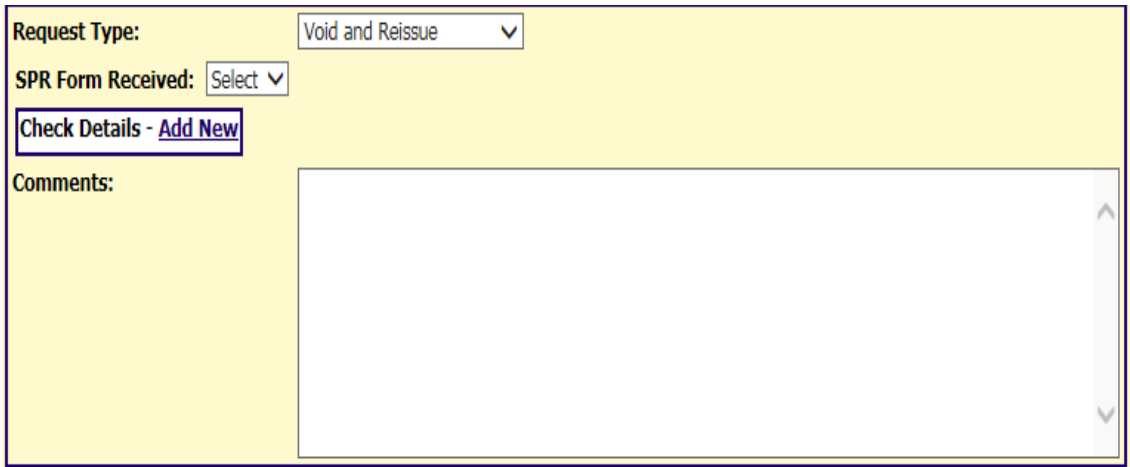
Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

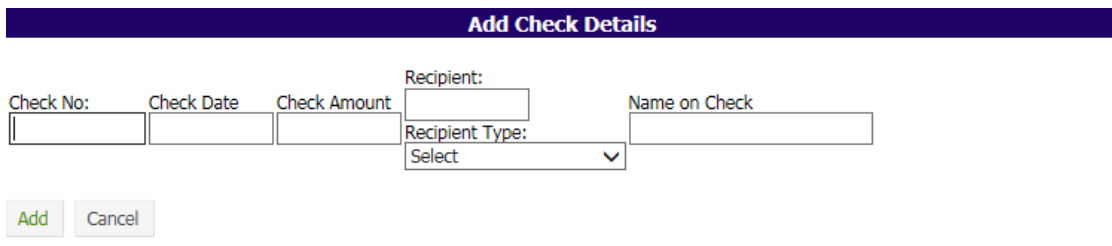
Void and Reissue



All fields are required.

SPR Form Received – This is a drop down menu that will either be Yes or No

Check Details - This is a required link on this type of request.



All fields are required.

Check No. – The SCDU check number that is being returned.

Check Date – The date displayed on the SCDU check being returned.

Check Amount – The amount of the SCDU check being returned.

Recipient – This should be the check recipient ID from PACSES.

Recipient Type – This is a drop down menu and should be the check recipient type from PACSES.

[Name on Check](#) – This should be the check recipient name on the SCDU check that is being returned.

[Add](#) - This will save all entered information and will navigate the user back to the Add Request screen.

[Cancel](#) – This will close the “Add Check Details” box and return to the “Add Request” screen.

Comments - This is a required field and is “free formed” text so the user can explain why the request is being submitted.

After all the required information has been added to the Add Request screen the user should [ADD](#) the request.

Adding the request will assign the request number and will assign the request to the appropriate unit for processing. If all the required elements are not present, the user will receive an error message and will need to complete all the required elements of the request.

If the user determines that the request should not be submitted, the Cancel button should be used so the request is not saved in the database.

Other Actions Available

After the request is submitted, a user may find it necessary to either cancel the request or add additional comments to the request. This can be accomplished by finding the appropriate request number using the search function under the process request function. When the request is located, the user should click on the request number; this will display all the information for the request. At the top of the screen the user will see the [Add Comments](#), [Change Status](#), [Reassign Request](#), and [Add Processing Comments](#). Only the actions that are underlined can be performed by the user. The security profile of the user determines what action can be taken by the user. Either the user, who originally submitted the request has the request assigned to them for processing or a supervisor (FXU, BCSE and SCDU) can utilize these functions.

Request Detail for #177

[Add Comment](#) [Change Status](#) [Reassign Request](#) [Add Processing Comment](#)

Request Type:	Misposting	Creator:	Brett Landis
Defendant ID:	1234567879	County:	N/A
Defendant Name:	Test J. Smith	Status:	Open
Error Source:	DRS	Assigned To:	Brett Landis
		Request Date:	3/30/2011 2:27:32 PM
		Due Date:	3/30/2011 12:00:00 AM

Add Comments – This option can be used when the user wants to add additional instructions to the request. Only the requestor or the user who the request is assigned to for processing can add comments to the request.

Add Comment

Comment:

If the user tries to Add Comment without any information, an error message will be displayed. After the comment is added the user should use the Add Comment button and is taken back to the Request Details screen. If the user entered the Add Comments field in error the Cancel button should be used to exit the field without adding comments.

Change Status - A county user can use this function to cancel a request that was submitted by them or appeal a request that has been denied. FXU, BCSE and SCDU users can use this function to complete, cancel, or deny a request.

The image shows a software dialog box titled "Change Status". At the top, there is a dark blue title bar with the text "Change Status" in white. Below the title bar, the dialog has a white background. On the left side, there is a label "Status:" followed by a dropdown menu. Below the dropdown menu is a label "Comment:" followed by a large, empty text area with a vertical scrollbar on the right side. At the bottom of the dialog, there are two buttons: "Change Status" on the left and "Cancel" on the right. The "Change Status" button has a green outline, while the "Cancel" button is plain grey.

When a status is being changed on this screen comments must also be added. Without adding comments the user will not be able to save the status change. If the change status screen is entered in error, the Cancel button should be used to exit the screen without changing the status.

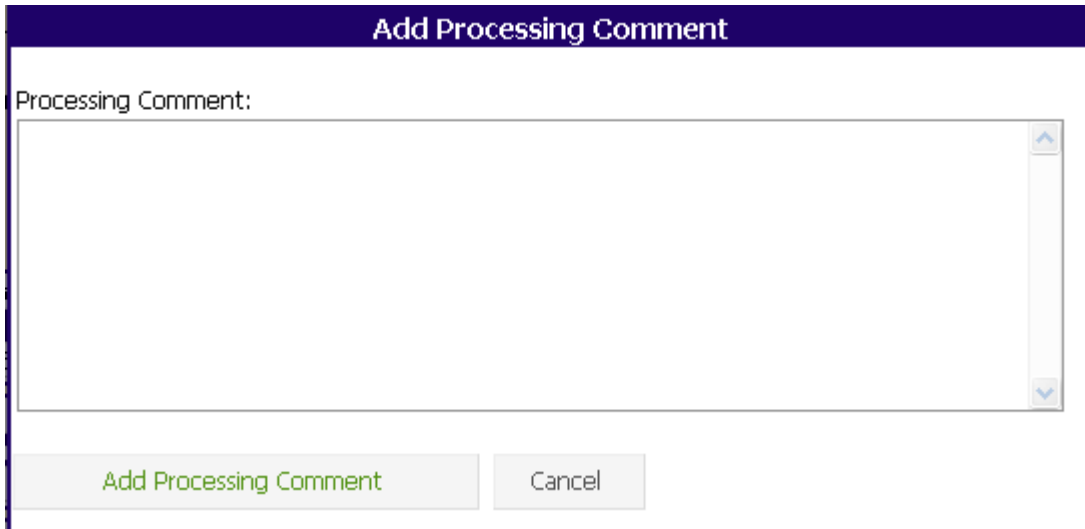
Reassign Request – FXU, BCSE and SCDU users will utilize this function to assign a request to another unit for processing. County users can only reassign a request that has been assigned back to them for additional information.

The screenshot shows a web form titled "Reassign Request". The form contains the following elements:

- User:** A dropdown menu for selecting a user.
- Action Due By:** A text input field containing the date "4/13/2011".
- Comment:** A large text area for entering a comment.
- Buttons:** Two buttons at the bottom: "Reassign" (highlighted in green) and "Cancel".

When a request is being reassigned to another unit the action due by date will automatically default to the current date but can be overridden by the user. The user must select a user in the Assigned To field and also add comments to the request before the system will save the comments and reassignment. If all fields are not populated an error message will be received notifying the user that all information is required. If the Reassign Request is entered in error the cancel button will navigate the user back to the Request Details.

Add Processing Comments – This option can be used when a BCSE or FXR user wants to add additional instructions to the request that only BCSE or FXR users can see.



The image shows a dialog box titled "Add Processing Comment". It features a dark blue header bar with the title in white. Below the header, the text "Processing Comment:" is displayed above a large, empty text input field with a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: "Add Processing Comment" (with green text) and "Cancel".

If the user tries to Add Processing Comment without any information, an error message will be displayed. After the comment is added the user should use the Add Processing Comment button and is taken back to the Request Details screen. If the user entered the Add Comments field in error the Cancel button should be used to exit the field without adding comments.