

General Information Memorandum

ISD-GI 16-48

TO: ISD Employees
FROM: Sean Pearson, Deputy Secretary, Income Support Division 
RE: Employment & Training (E&T) Transportation Reimbursements
DATE: June 1, 2016

Currently, ISD has a voluntary E&T program in which SNAP participants can participate. All participants who chose to volunteer will receive a transportation reimbursement of \$25 per month, in accordance with 7 CFR 273.7(d)(4). The participant must utilize the FSP 020 SNAP Employment and Training Program (E&T) Transportation Reimbursement Claim Form for each month that they wish to request the reimbursement. This form will verify their out-of-pocket travel costs to participate in the E&T program.

Field offices are responsible for processing the reimbursements through ASPEN by accessing the NMW screens and the reimbursements must be issued within 5 days from receipt of the request. The SNAP reimbursement request will no longer go through SL Start and instead will be received by ISD through the submission by the participant of the FSP 020 Reimbursement Claim form. Case comments in ASPEN need to reflect the date the FSP 020 form was received, the date the reimbursement was issued, the reason for the reimbursement and the amount issued; if the reimbursement request was denied, the reason for the denial must be clearly documented in case comments.

Attached are screen shots and instructions on how to issue the reimbursement.

The FSP 020 SNAP E&T Transportation Reimbursement Claim Form can be found on the forms drive at: \\disfasv025\ISDForms.

If you have questions regarding this GI, please contact Marisa Vigil at (505) 827-1326 or by e-mail at Marisa.Vigil@state.nm.us.

Steps to process E&T Transportation Reimbursements when the FSP 020 is scanned and a task is created:

Once the FSP 020 is scanned into ASPEN:

1. Pick the task up from the Inbox
2. Initiate the task by clicking Start
 - a. If the task isn't completed after hitting Start the user will see if on their dashboard
 - b. If task is continued go to page #5 to follow the next steps

My Inbox   

[Redacted] 's Inbox (Office)

Choose View

Additional Search Criteria

Search Results

Case / Applicator #	Document Title	Name	Received Date	Task Start Date	Queue	Status	Previous Action Taken By	Action Taken By	Action
[Redacted]	FSP 020 E&T Reimbursement Claim Form	[Redacted]	08/02/2016	08/02/2016 2:05 PM	Processing	New			Start
[Redacted]	FSP 020 E&T Reimbursement Claim Form	[Redacted]	07/29/2016	07/29/2016 10:37 AM	Processing	New			Start
[Redacted]	FSP 020 E&T Reimbursement Claim Form	[Redacted]	07/29/2016	07/29/2016 10:35 AM	Processing	New			Start
[Redacted]	RMC - Report My Changes PDF	[Redacted]	07/28/2016	07/28/2016 10:33 AM	Processing	New			Start
[Redacted]	RMC - Report My Changes PDF	[Redacted]	07/20/2016	07/20/2016 11:23 AM	Processing	New			Start
[Redacted]	RMC - Report My Changes PDF	[Redacted]	06/28/2016	06/28/2016 1:56 PM	Processing	New	[Redacted]		Start
[Redacted]	FSP 020 E&T Reimbursement Claim Form	[Redacted]	06/14/2016	06/14/2016 2:56 PM	Processing	New	[Redacted]		Start
[Redacted]	RMC - Report My Changes PDF	[Redacted]	05/23/2016	05/23/2016 9:58 AM	Processing	New	[Redacted]		Start

Start Next New Task

Record Set 1 of 1

Steps to create manual E&T Transportation Reimbursements:

Log into ASPEN with active SNAP case

3. Go into Reception Task on left navigation
4. Click on Reception Task Management
5. Processed box leave as "NO"
6. Enter Received Date (the date the actual FSP 020 was received)
7. Select Document Title as FSP 020 E&T Reimbursement Claim Form
8. Enter Individual number
9. Click Submit

The screenshot displays the 'Reception Task Management' interface. On the left is a navigation menu with categories like 'History', 'Case Info', and 'Navigation'. The main area is titled 'Reception Task Management' and contains several sections:

- Task Details:** Includes a 'Processed' dropdown set to 'NO', a 'Received Date' field set to '07 / 27 / 2016', a 'Document Title' dropdown with 'FSP' selected (a list of options is visible below it), and a 'Destination Office' dropdown set to 'Grant County ISO'. There is also a 'Priority' dropdown set to 'NO'. 'Reset' and 'Submit' buttons are present.
- Case/Vendor/New Individual:** Contains search fields for 'ASPEN Case #', 'Vendor #', and 'ORG Case #'. It also has fields for 'Individual #', 'FHB Case #', and 'Vendor Name' (split into First, Middle, Last). Below this is a 'Client Name' section with similar split fields.

At the bottom right of the form area, there are 'Reset' and 'Submit' buttons.

Once you click submit you should receive a message at the top of the screen that states: "Request has been submitted successfully"

The screenshot shows the 'Reception Task Management' web application. On the left is a navigation menu with categories like 'History', 'Navigation', and 'Organizer'. The main content area is titled 'Reception Task Management' and features a success message: '14200 Request has been submitted successfully'. Below this is a 'Task Details' section with fields for 'Processed' (set to 'NO'), 'Received Date' (mm/dd/yyyy), 'Document Title' (with a dropdown menu showing options like 'ABA/VO Recertification Recertification'), and 'Priority' (set to 'NO'). The 'Case/Vendor/New Individual' section contains search fields for 'ASPH Case #', 'Vendor #', 'Individual #', and 'FHB Case #', along with a 'Vendor Name' section with 'First', 'Middle', and 'Last' name fields.

NEXT...

1. Go to EDM on left navigation
2. Select Inbox
3. Click on Additional Search Criteria
4. Enter Document Title – FSP 020 E&T Reimbursement Claim Form
5. Enter Case number
6. Click Search

The screenshot displays the ASPEN system interface. On the left is a navigation menu with categories like 'Navigation', 'ASPER Home', 'Reception Task', 'EDM', and 'Index'. The 'Index' section is expanded, showing options such as 'Document Inquiry and Re-index', 'ECF', 'Application Registration', 'Scheduling', 'Data Collection', 'Eligibility', 'Case Maintenance', 'H&W Works', 'Simulation', 'Waiver', 'Benefit Issuance', 'Benefit Recovery', 'Correspondence', 'Recertification', 'SCI Employer Groups', 'Interfases', 'Security', 'Inquiry', 'Alerts', 'Provider Management', 'Manage Office Resources', 'Reference Tables', 'Reports', 'Batch Reports', 'Case Reads', 'Quality Control', and 'Performance'.

The main content area is titled 'My Inbox' and shows 'Bernadette Silverio-quintana's Inbox (Office)'. It includes a 'Choose View' section and an 'Additional Search Criteria' section with 'Reset' and 'Search' buttons. The 'Document Details' section contains search filters: 'Date Received From' and 'Date Received To' (both with date pickers), 'Document Title' (with 'FSP' entered), 'Show Completed Duplicate' (checkbox), 'Expired' (checkbox), 'IR Due Month' (dropdown), and 'PR Due Month' (dropdown). A dropdown menu is open under 'Document Title', listing: 'FSP 001 (S) Assessment', 'FSP 003 E&T ADA/YD Registration', 'FSP 005 Work Activity Placement', and 'FSP 020 E&T Reimbursement Claim Form'. Below this is the 'Case/Application/New Individual' section with fields for 'ASPEN Case/Application #', 'FID Case #', and 'ORG Case #', and a 'Prefix' dropdown set to 'First'. Another 'Reset' and 'Search' button is present.

The 'Search Results' section shows a table header with columns: 'Case', 'Application', 'Document Title', 'Name', 'Received Date', 'Task Start Date', 'Queue', 'Status', 'Previous Action Taken By', 'Action Taken By', and 'Action'. The table body is currently empty.

FSP 020 E&T Reimbursement Claim Form Task displays in the Search Results

Click Start (for the Case that you want to process the reimbursement request for)

The screenshot shows the ASPEN Home interface with a navigation menu on the left and a search results table. The search results table has the following data:

Application	Document Title	Name	Received Date	Task Start Date	Queue	Status	Previous Action Taken By	Action Taken By	Action
[REDACTED]	FSP 020 E&T Reimbursement Claim Form	[REDACTED]	07/27/2016	07/27/2016 11:03 AM	Customer Service	New			Start
[REDACTED]	FSP 020 E&T Reimbursement Claim Form	[REDACTED]	07/27/2016	07/27/2016 11:20 AM	Customer Service	New			Start
[REDACTED]	FSP 020 E&T Reimbursement Claim Form	[REDACTED]	07/27/2016	07/27/2016 11:23 AM	Customer Service	New			Start

At the bottom right of the search results, there is a button labeled "Start Next New Task" and a pagination indicator "Record Set 1 of 1".

You will now see the "Electronic Documents Details" screen

Click Start

The screenshot shows the "Electronic Documents Details" screen. At the top, there are buttons for "Back to Inbox", "Change Queue", "Complete", "Continue", and "Start". Below these are fields for Case #, Case Name/ Vendor Name, Scanned Location (ASPEN Project Office), Group #, Received Date (07/27/2016), and Scanned Date (07/27/2016). The Queue is set to "Customer Service".

Under "Electronic Document Inbox Details", there is a table with columns for Document Title, Document Details, and Received Date. One entry is visible: "FSP 020 E&T Reimbursement Claim Form" with a received date of 07/27/2016.

Below this is another table with columns for Case #, Name, Task Status, and Action Taken By. The entry shows Case # [REDACTED], Name [REDACTED], Task Status "New", and Action Taken By.

At the bottom, there is a "Comments" section with a text area and a "Start" button. A box labeled "Click Start" with an arrow points to this button.

At the very bottom, there are buttons for "Back to Inbox", "Change Queue", "Complete", "Continue", and "Start".

You will now see the “Initiate Works Program Reimbursement Request” screen

1. Select Program
2. Select Reimbursement reason
3. Enter Comments regarding the Reimbursement Request
4. Click Request Reimbursement

The screenshot displays the 'Initiate Works Program Reimbursement Request' interface. On the left is a navigation menu with categories like 'Navigation', 'Inbox', and 'Application Registration'. The main area contains a header with 'Name', 'ID #', 'Benefit Type', 'Household Group', and 'Participation Status'. Below this is a 'Request Reimbursement' button. The 'Reimbursement Request' section includes an 'Individual ID' field, a 'Program' dropdown menu (set to 'SNAP'), a 'Reimbursement Reason' dropdown menu (set to 'Other'), and a 'Comments' text area containing the word 'Test'. A second 'Request Reimbursement' button is located at the bottom right of the form.

You will now see the “Enter Works Program Reimbursement Request” screen

1. Enter Reimbursement Month (this is the month that the reimbursement is being requested for)
2. Select Reimbursement Category as Mileage
3. Select Reimbursement Sub-Category at Mileage - Travel Reimbursement
4. Select Reimbursement Amount \$25
5. Travel Advance Amount should be \$0
6. Enter Comments regarding the Reimbursement
7. Hit Submit

The screenshot shows the 'Enter Works Program Reimbursement Request' web application. On the left is a navigation menu with categories like 'History', 'Navigation', and 'Organizer'. The main content area is titled 'Enter Works Program Reimbursement Request' and contains several sections: 'Individual Information' with fields for Name, ID #, Benefit Type, Household Group, and Participation Status; 'Request Details' with fields for Reimbursement Month (07, 2016), Reimbursement Category (Mileage), Reimbursement Sub-Category (Mileage - Travel Reimbursement), Reimbursement Amount (\$ 25), and Travel Advance Amount Deduction (\$ 0); and a 'Comments' field containing the text 'Test'. Buttons for 'Previous', 'Reset', and 'Submit' are located at the bottom right of the form.

Initiate Works Program Reimbursement Request screen displays the following message at the top of the screen:

“Reimbursement has been successfully requested”

The screenshot shows the 'Initiate Works Program Reimbursement Request' screen. On the left is a navigation menu with categories like 'Navigation', 'Organizer', 'ASPIEN Home', 'Reception Task', 'EDM', 'Inbox', 'Document Inquiry and Re-index', 'ECF', and various application and management tasks. The main content area has a title bar with the page name and user icons. Below the title bar, there are fields for 'Name', 'ID #', 'Benefit Type', 'Household Group', and 'Participation Status'. A green checkmark icon and a message state: 'Reimbursement has been successfully requested. Please go to home page to process another task.' Below this is a 'Reimbursement Request' section with a 'Program' dropdown set to 'SNAP' and a 'Reimbursement Reason' dropdown. A 'Comments' text area is also present. At the bottom right of the form area, there are buttons for 'View' and 'Reimbursement Details'.

The system will need to Batch overnight in order to view Benefit Issuance.

1. Once the Batch is completed:
2. Go into Benefit Issuance on left Navigation
3. Click on View Benefits
4. Enter Case #
5. Enter the Benefit Period Begin Date and Benefit Period End Date
6. Click Search
7. Payment amount will display

This is the screen you will view only after the Batch job is run:

Benefit Summary Inquiry

Case Name: [REDACTED] Case #: [REDACTED] Case Action: Case Status: Approved

Reset Search

Search Criteria

Case #: [REDACTED] EDG #: [REDACTED] Vendor ID: [REDACTED]

Grantee Id: [REDACTED] Program Type: [REDACTED] Warrant/EFT#: [REDACTED]

EBT Benefit #: [REDACTED]

Benefit Period Date Range

Benefit Period Begin Date: 07/27/2016 Benefit Period End Date: 07/27/2016

Reset Search

Search Results

Case Number	Grantee Vendor Name	COE	Benefit Period	Benefit Type	Payment Amount	Recoupment Amount	Warrant/EFT/ Benefits	Warrant/ EBT Available Date	Benefits Status
[REDACTED]	[REDACTED]	WORKS PROGRAM RECOUPMENT	07/01/2016 07/31/2016	Supplemental	\$25.00	\$0.00	C27511850	07/27/2016	Issue Requested