Hearing and Appeal Tracking System

User Guide

Table of Contents

1.0 Getting Started	4
2.0 Logging In	5
3.0 Features: Main Screen	6
3.1 File Menu	6
3.2 Access	6
3.3 Reports	6
3.4 Decisions	6
3.5 Administrative	6
3.6 Help	6
4.0 Table Maintenance	7
4.1 Administrative Disposition Table	7
4.2 Agency Abbreviation Table	8-9
4.3 Appeal Disposition Table	10-11
4.4 Assistance Program Table	11-12
4.5 County Table	12-13
4.6 County Agency Table	13-14
4.7 CRIS-E Table	14-15
4.8 District Table	15-16
4.9 Hearing Address Table	16-18
4.10 Hearing Officer Table	18-19
4.11 Peppers Delay Table	19-20
4.12 Report Group Table	21-22
4.13 Report List Table	22-23
4.14 Representatives Table	23-24
4.15 User Access Table	24-25
5.0 Open Case	26
5.1 Open Case – Main Screen	26
5.2 Main Data Entry Screen	27-33
6.0 Reports	34
6.1 Bureau Reports	34
6.2 District Reports	35
7.0 Decisions Maintenance	36
7.1 Create a New Decision	36
7.2 Select a Decision	36
7.3 Print Original Decisions	36
7.4 Reprint Decisions/Recreate Electronic Copies	36
7.5 Print Bureau Copy	37
7.6 Decision Progress Report	37
7.7 Decision Template Maintenance	37
8.0 Working With Appeals	38
8.1 Appeal Summary Received Date	38
8.2 Adding a Peppers Delay to a Locked Appeal	38
8.3 Locked Appeals	38
8.4 Scheduling a Hearing for an Appeal	38
8.5 Scheduling a Hearing With Multiple Appeals	39
8.6 Transferring an Appeal	39

8.7 Withdrawn Appeals 39

9.0 Working With Clients 40
9.1 Create a New Client 40
9.2 Edit a Client 40
9.3 Transferring a Client 41
9.4 Client History 41
9.5 Locking Client Records 41

10.0 Working With Hearings 42
10.1 Abandoned Hearings 42
10.2 Editing a Hearing Date 43
10.3 Editing Versus Rescheduling a Hearing 43
10.4 Hearing Officers 43
10.5 Hearing Place/Address 43
10.6 Scheduling a Hearing With Multiple Appeals 43

Glossary 44-46

1.0 Getting Started

Introduction

The Hearing and Appeal Tracking System, known as HATS, provides a scheduling and tracking system for state hearings and tracking appeals. There are two groups of users for this system. Each has a different role. The first group of users is the Bureau office personnel who are responsible for entering the appeal upon receipt. Their role and responsibilities include original appeal entry, approval/monitoring of appeal status, and federal reporting. The second group of users is the District Office personnel responsible for denying or scheduling the appeal for a hearing. Their role and responsibilities include scheduling, entering the status of the hearing, providing status information to clients, generating various forms and reports, and entering Peppers information used for federal reporting.

System Requirements

To create requests and use the State Hearing and Appeal Tracking System, you will need the following:

- PC with at least 32 MB of RAM
- Windows 95, 98, or NT
- A Pentium 90 or higher processor
- BDE 5.01
- Groupwise
- Oracle Client
- Access to hum_sot_f5 Q:\Public\Request Tracking
- Valid login to the network
- Must be added to the HATS NAL (Zen Object Group)

2.0 Logging In

After the HATS icon is clicked, the system will require you to enter a NetWare password. The NetWare user name is automatically populated with the user name of the user logged-in to the network. The NetWare password is the same password you use to log-on to the network.

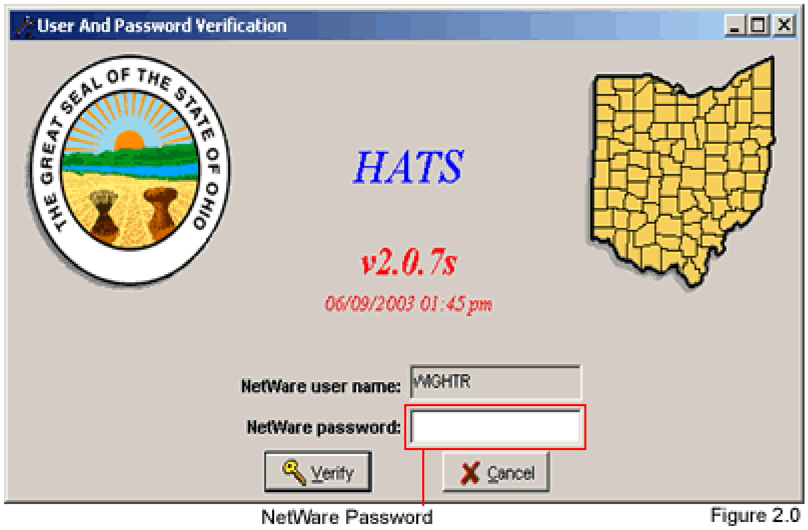


Figure 2.0

3.0 Features: Main Screen

This is the first screen you will see upon entering the HATS program.

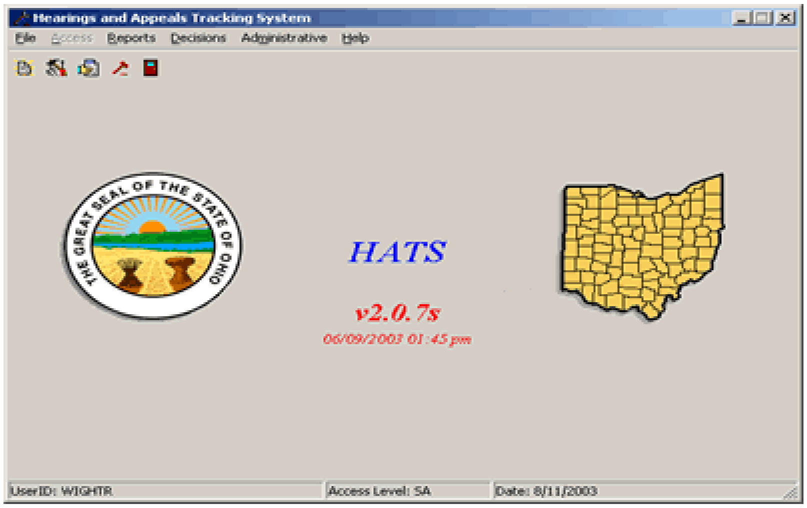


Figure 3.0

3.1 File Menu – The File Menu contains the following options:

- **Table Maintenance** – All system and look-up tables are maintained (See Chapter 4.0)
- **Open Case** – Used to search for a client or appeal (See Chapter 5.0)
- **Exit** – Closes the HATS application

3.2 Access – Toggle button for Districts allows them to switch between view-only access to statewide data and read/write access to the data for their assigned district

3.3 Reports – Opens a report selection window (See Chapter 6.0)

3.4 Decisions – Opens the Decisions Maintenance window (See Chapter 7.0)

3.5 Administrative – Produces a list of potential duplicate clients based on a match on case numbers

3.6 Help – Instructions on how to run the HATS program

4.0 Table Maintenance

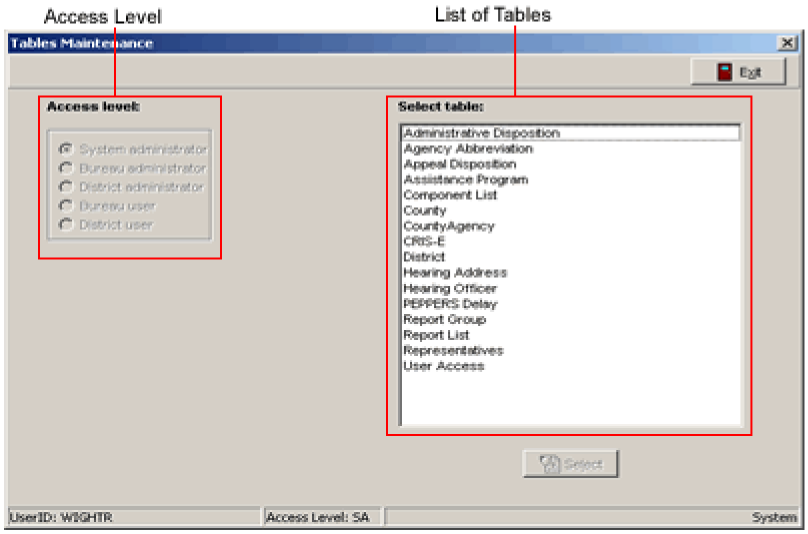


Figure 4.0

The Table Maintenance window allows authorized users to modify screens, create/edit users, and set access for users. The Access Level determines the amount of access a user has to the system, with System Administrator being the highest and District User being the lowest. These access level radio buttons are disabled and are for information purposes only. Access is set up for a user in the User Access table. The amount of access to tables depends on the user's access level role. The detail is affected by the component list.

4.1 Administrative Disposition Table– Manages the disposition rulings available in the drop-down list in the Administrative Appeal tab. These are valid Administrative Appeal Disposition codes from the Office of Legal Services.

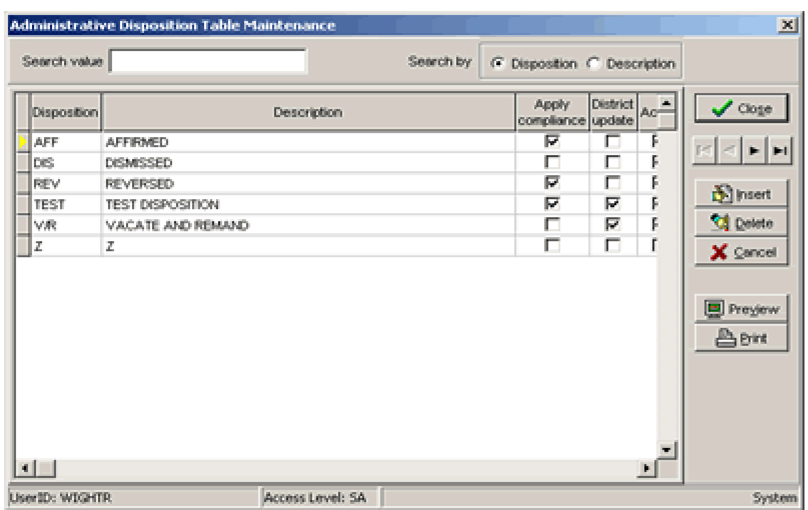


Figure 4.1

4.1.1 Administrative Disposition Table Fields

- Disposition – An abbreviation that stands for a disposition description.
- Description – The full name of the disposition.
- Apply Compliance – This is a flag that tells the system whether or not to display the message asking if there is a compliance when the disposition is chosen.
- District Update – This is a flag that indicates whether a District can continue to work with this appeal.
- Active – This button flags the disposition as active and should appear in the Disposition Type list in the Admin Appeal tab.

4.1.2 How to Create a New Administrative Disposition

- Click Insert. The Active box is automatically checked.
- Type in the abbreviated name of the disposition in the Disposition column.
- Type in the full disposition name in the description field.
- Click on the Apply Compliance check box, if applicable.
- Click on the District Update check box, if applicable.
- Click Close.

4.1.3 How to Delete an Administrative Disposition

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you want to delete the row.
- Click Yes.
- Click Close.

4.1.4 How to Inactivate an Administrative Disposition

- Click on the row that needs to be inactivated.
- Uncheck the Active date.
- Type in the date that the disposition was inactivated.
- Click Close.

4.2 Agency Abbreviation Table – This is a table listing of the primary or unique key used to identify an agency.

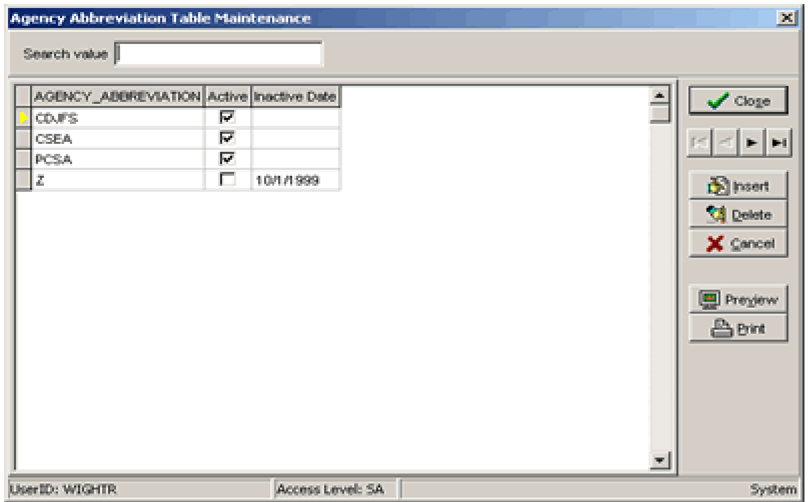


Figure 4.2

4.2.1 Agency Abbreviation Table Fields

- AGENCY_ABBREVIATION – This is the abbreviation that will be used to identify the agency in the list.
- Active – This button flags the abbreviation as active and will appear in the Agency Abbreviation list.
- Inactive Date – The date an Agency Abbreviation became inactive.

4.2.2 How to Create a New Agency Abbreviation

- Click Insert.
- Type in the agency abbreviation.
- Click Active.
- Click Close.

4.2.3 How to Delete an Agency Abbreviation

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you want to delete that record.
- Click Yes.
- Click Close.

4.2.4 How to Inactivate an Agency Abbreviation

- Click on the row that needs to be inactivated.
- Uncheck the Active button.
- Type in the date this Agency Abbreviation was inactivated.
- Click Close.

4.3 **Appeal Disposition Table** – Manages the disposition rulings in the Disposition tab. These are valid Disposition Codes for appeals.

4.3.1 Appeal Disposition Table Fields

- Disposition – Disposition code of an appeal.
- Description – Description of the disposition code.
- Action Taken on Hearing Request – This action taken on an appeal request determines which 4000 form to print and what information will be printed. Only System Administrators can alter this field.
- Apply Compliance – Indicates whether disposition may have a compliance.
- Include Into Decision – Indicates whether a disposition may be included on the decision form.
- Include Into Data Entry – Indicates whether a disposition may be included on the disposition tab of the data entry screen.
- Check Form 4000 – Indicates whether to check if a 4000 form has been generated.
- Active – Indicates whether the Appeal Disposition is active or not.
- Inactive Date – The date an Appeal Disposition became inactive.

4.3.2 How to Create a New Appeal Disposition

- Click on the List or Record tab, whichever is preferable.
- Click Insert.
- Type in the abbreviated name of the appeal disposition in the Disposition column.
- Type in the full appeal disposition name in the description field.
- Select on of the choices from the Action Taken on Hearing Request, if applicable.
- Check Apply Compliance box if applicable.
- Check Include Into Decision box, if applicable.
- Check Include Into Data Entry, if applicable.
- Check Form 4000 box, if applicable.
- Check Required for Decision, if applicable.
- Click Active.
- Click Close.

4.3.3 How to Delete an Appeal Disposition

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you want to delete the record.
- Click Yes.
- Click Close.

4.3.4 How to Inactivate an Appeal Disposition

- Click the row that needs to be inactivated.
- Uncheck the Active button.
- Type in the date the Appeal Disposition was inactivated.

- Click Close.

4.4 Assistance Program Table – Manages the Assistance Programs listed in the Appeal Info. tab. It contains all the valid Assistance Program codes.

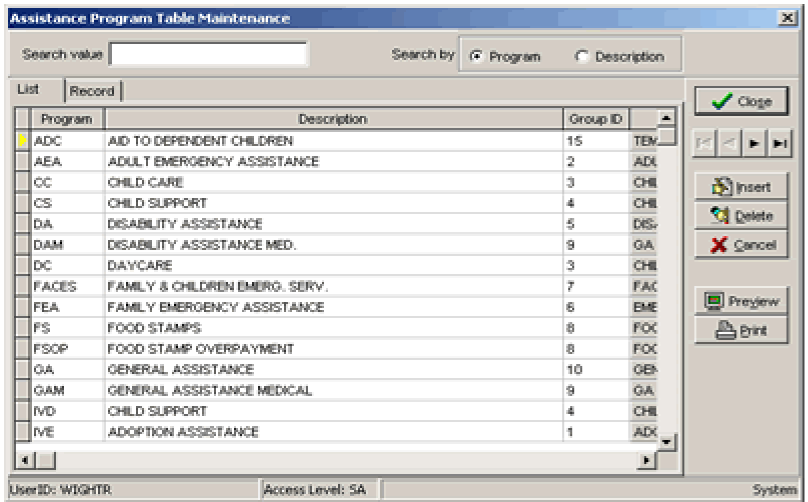


Figure 4.4

4.4.1 Assistance Program Table Fields

- Program – The name of the Assistance Program.
- Description – A brief description of the program.
- Group ID – The unique sequence number that defines how the Assistance Program is grouped on the Quarterly report.
- Group Name – The name of the group as it appears on the Quarterly report. This can only be altered by a System Administrator.
- Category – Number indicating which category the Assistance Program will be included on the Decision issued and Hearing Requests Pending reports.
- Exclude From Peppers – Indicates if Assistance Programs should be included on the Peppers report.
- Agency Abbreviation – An abbreviation for the agency name.
- Active – Indicates whether the Appeal Disposition is active or not.
- Inactive Date – The date an Assistance Program became inactive.

4.4.2 How to Create a New Assistance Program

- Click on List or Record tab, whichever is preferable.
- Click Insert.
- Type in the abbreviated name of the Assistance Program in the Program column.
- Type in the full Assistance Program name in the Description field.
- Select one of the choices form the Group ID, if applicable. The Group Name is selected based on this value.
- Select one of the choices from the Category, if applicable.
- Check Exclude from Peppers, if applicable.
- Select one of the choices from Agency Abbreviation, if applicable.

- The Active box is automatically checked.
- Click Close.

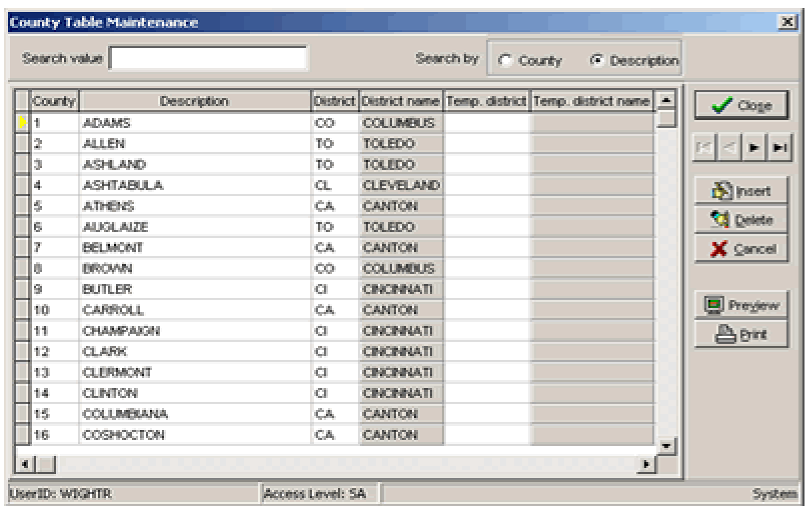
4.4.3 How to Delete an Assistance Program

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you want to delete the row.
- Click Yes.
- Click Close.

4.4.4 How to Inactivate an Assistance Program

- Click on the row that needs to be inactivated.
- Uncheck the Active box.
- Type in the date that the Assistance Program was inactivated.
- Click Close.

4.5 County Table – Manages the counties listed in the program.



County	Description	District	District name	Temp. district	Temp. district name
1	ADAMS	CO	COLUMBUS		
2	ALLEN	TO	TOLEDO		
3	ASHLAND	TO	TOLEDO		
4	ASHTABULA	CL	CLEVELAND		
5	ATHENS	CA	CANTON		
6	AUGLAIZE	TO	TOLEDO		
7	BELMONT	CA	CANTON		
8	BROWN	CO	COLUMBUS		
9	BUTLER	CI	CINCINNATI		
10	CARROLL	CA	CANTON		
11	CHAMPAIGN	CI	CINCINNATI		
12	CLARK	CI	CINCINNATI		
13	CLERMONT	CI	CINCINNATI		
14	CLINTON	CI	CINCINNATI		
15	COLUMBIANA	CA	CANTON		
16	COSHOCTON	CA	CANTON		

Figure 4.5

4.5.1 County Table Fields

- <u>County</u> – This is the county code.
- <u>Description</u> – The name of the county.
- <u>District</u> – The district abbreviation for which the county is assigned.
- <u>District Name</u> – The full name of the district.
- <u>Temp. District</u> – The district abbreviation for which a county is temporarily assigned.
- <u>Tem. District Name</u> – The full name of the temporary district.

4.5.2 How to Create a New County

- Click Insert.
- Type the county number.
- Type the county name in the Description field.
- Select one of the districts from the District drop-down list. The full district name will automatically appear in the next column.
- Select one of the districts from the Temp. District drop-down list, if applicable. The full name will automatically appear in the next column.
- Click Close.

4.5.3 How to Delete a County

- Click on the row that needs to be deleted.
- You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Delete.
- Click Close.

4.6 County Agency Table – Contains County Agencies that may be interested in receiving a copy of the hearing notice, dismissal and/or decision form related to an appeal.

4.6.1 County Agency Table Fields

- ID – Unique sequence of numbers for a county agency.
- County – County code.
- County Name – Name of the county where the agency is located.
- Abbreviation – An abbreviation for the agency name.
- Agency Name – the name of the agency assigned to a county.
- Address (line 1) – Street address where agency is located.
- Address (line 2) – Second line of the street address where the agency is located.
- City – City where the agency is located.
  - State – State where the agency is located.
- Zip Code – Zip code where the agency is located.
- Active – When this box is checked, the county agency is active.
- Inactive Date – The date a County Agency became inactive.

4.6.2 How to Create a New County Agency

- Click Insert.
- Select one of the counties from the County drop-down list. The Name selected will automatically appear in the next column.
- Select one of the districts from the Abbreviation box, if applicable.
- Fill in the County Agency address in the Address (line 1), Address (line 2), City, State, and Zip Code fields.
- The Active box is automatically checked.
- Click Close.

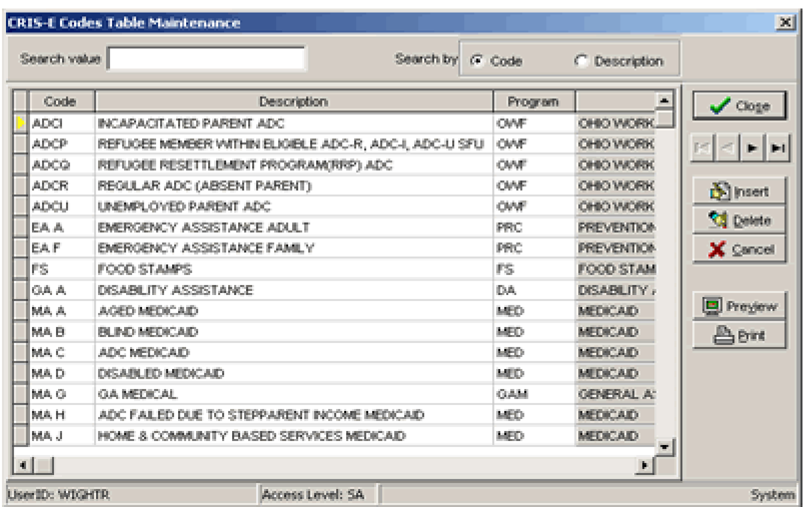
4.6.3 How to Delete a County Agency

- Click on the row that needs to be deleted.
- You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Delete.
- Click Close.

4.6.4 How to Inactivate a County Agency

- Click on the row to be inactivated.
- Uncheck the Active button.
- Type in the date this County Agency was inactivated.
- Click Close.

4.7 CRIS-E Table – This table manages the CRIS-E codes listed in the Appeal Info. tab in the "Cat." part of the "Cat./Seq." fields. It is a bureau maintained lookup table that contains all of the valid CRIS-E codes and their corresponding Assistance Program codes. One Assistance Program can be part of one or more CRIS-E codes.



Code	Description	Program	
ADCI	INCAPACITATED PARENT ADC	OWF	OHIO WORK
ADCP	REFUGEE MEMBER WITHIN ELIGIBLE ADC-R, ADC-I, ADC-U SFU	OWF	OHIO WORK
ADCQ	REFUGEE RESETTLEMENT PROGRAM(RRP) ADC	OWF	OHIO WORK
ADCR	REGULAR ADC (ABSENT PARENT)	OWF	OHIO WORK
ADCU	UNEMPLOYED PARENT ADC	OWF	OHIO WORK
EA A	EMERGENCY ASSISTANCE ADULT	PRC	PREVENTION
EA F	EMERGENCY ASSISTANCE FAMILY	PRC	PREVENTION
FS	FOOD STAMPS	FS	FOOD STAM
GA A	DISABILITY ASSISTANCE	DA	DISABILITY
MA A	AGED MEDICAID	MED	MEDICAID
MA B	BLIND MEDICAID	MED	MEDICAID
MA C	ADC MEDICAID	MED	MEDICAID
MA D	DISABLED MEDICAID	MED	MEDICAID
MA G	GA MEDICAL	GAM	GENERAL A
MA H	ADC FAILED DUE TO STEPPARENT INCOME MEDICAID	MED	MEDICAID
MA J	HOME & COMMUNITY BASED SERVICES MEDICAID	MED	MEDICAID

Figure 4.7

4.7.1 CRIS-E Table Fields

- Code – The abbreviation code name that will appear in the "Cat." field list.
- Description – A brief description of the program.
- Program – An abbreviation of the program.
- Active – This CRIS-E program is active and will appear in the list on the Appeal Info. tab.
- Inactive Date – The date the CRIS-E program became inactive.

4.7.2 How to Create a CRIS-E Listing

- Click Insert.
- Type the code of the program in the Code field.
- Type in a description of the program in the Description field.
- Type in the program type code in Program. The full name will appear in the Program Name field.
- The Active box is automatically checked.

4.7.3 How to Delete a CRIS-E Listing

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.7.4 How to Inactivate a CRIS-E Listing

- Click on the row that needs to be inactivated.
- Uncheck the Active button.
- Type in the date this CRIS-E program was inactivated.
- Click Close.

4.8 District Table – This is a district-maintained lookup table and contains the valid district codes. It also includes the address of the district office and associated county code.

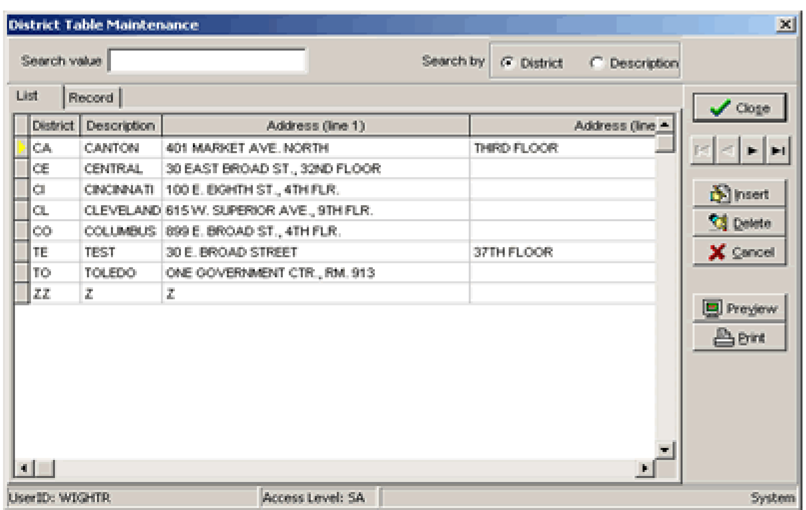


Figure 4.8

4.8.1 District Table Fields

- District – District code.
- Description – District name.

- Address (line 1) – First line of the street address of the district office.
- Address (line 2) – Second line of the street address of the district office.
- City – City where the district office is located.
- Zip Code – Zip Code where the district is located.
- Phone Number – District phone number.
- District County – The county code where the district is located.
- County Name – Descriptive name of the county where the district is located.
- Active – The district is active and will appear in the district list.
- Inactive Date – The date the district became inactive.

4.8.2 How to Create a New District

- Click on List or Record tab, whichever is preferable.
- Click Insert.
- Type in the code for the district in the District Code field.
- Type in a descriptive name for the district in the Description field.
- Fill in the district office address in the Address (Line 1), Address (Line 2), City, and Zip Code fields.
- Select one of the counties from the County drop-down box. The Name selected will appear in the County Name field.
- The Active box is automatically checked.
- Click Close.

4.8.3 How to Delete a District

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.8.4 How to Inactivate a District

- Click on the row to be inactivated.
- Uncheck the Activate button.
- Type in the date this district was inactivated.
- Click Close.

4.9 Hearing Address Table – This district-maintained lookup table populates the hearing address list on the Scheduling tab. It contains at least one hearing address for each county.

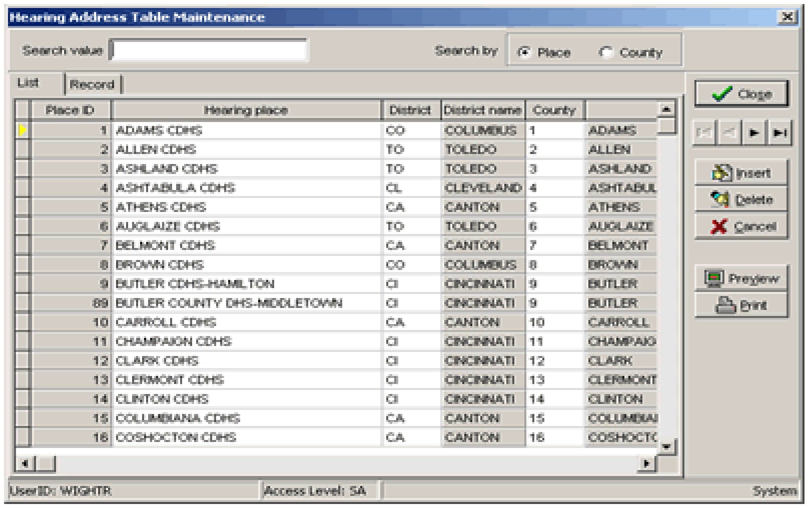


Figure 4.9

4.9.1 Hearing Address Table Fields

- Place ID – Unique sequence of numbers for hearing place.
- Hearing Place – Added and modified by districts, this is the place where the hearing will be held.
- District – District code.
- District Name – Descriptive name of the district.
- County – County where the district office is located.
- County Name – Descriptive name of the county where the hearings take place.
- Address (Line 1) – First line of the address for the place of the hearing in a given county.
- Address (Line 2) – Second line of the address for the place of the hearing in a given county.
- City – City where the hearing address is located.
- State – State where the hearing address is located.
- Zip Code – Zip code where the hearing address is located.
- Default Address – Flags if this is the default address for hearing in this district.
- Phone Number – Phone number for the hearing address.
- Contact 1 – Name of the contact person for this hearing address.
- Contact 2 – Name of the second contact person for this hearing address.
- Active – The hearing address is active and will appear in the list on the Scheduling tab.
- Inactive Date – Date hearing address became inactive.

4.9.2 How to Create a Hearing Address

- Click on List or Record tab, whichever is preferable.
- Click Insert.
- Type in the name of the place in the Place field.
- Select one of the districts from the District drop-down box.
- Select one of the counties from the County drop-down box.

- Fill in the County Agency address in the Address (Line 1), Address (Line 2), City, State, and Zip Code fields.
- If this is the default hearing address for the county, click the Default Address box.
- The Active box is automatically checked.
- Click Close.

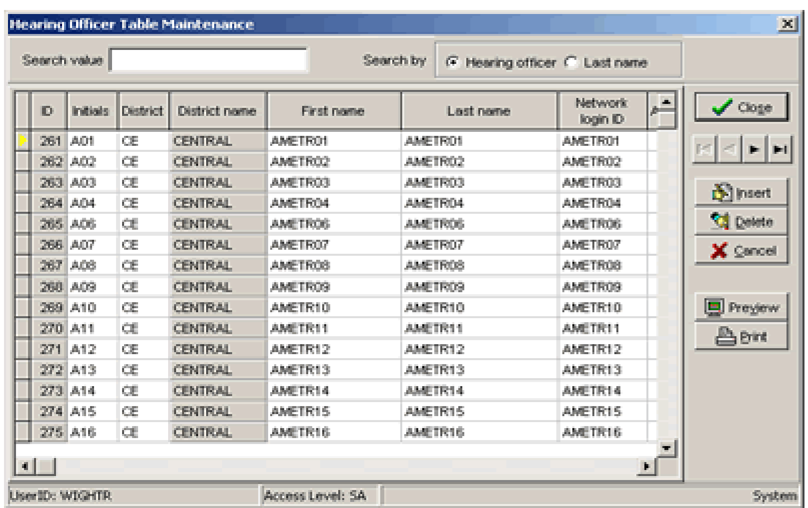
4.9.3 How to Delete a Hearing Address

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.9.4 How to Inactivate a Hearing Address

- Click on the row to be inactivated.
- Uncheck the Active button
- Type in the date this hearing address was inactivated.
- Click Close.

4.10 Hearing Officer Table – This district-maintained lookup table populates the hearing officers drop-down list on the Scheduling tab. It contains all valid hearing officers.



ID	Initials	District	District name	First name	Last name	Network login ID
261	A01	CE	CENTRAL	AMETR01	AMETR01	AMETR01
262	A02	CE	CENTRAL	AMETR02	AMETR02	AMETR02
263	A03	CE	CENTRAL	AMETR03	AMETR03	AMETR03
264	A04	CE	CENTRAL	AMETR04	AMETR04	AMETR04
265	A06	CE	CENTRAL	AMETR06	AMETR06	AMETR06
266	A07	CE	CENTRAL	AMETR07	AMETR07	AMETR07
267	A08	CE	CENTRAL	AMETR08	AMETR08	AMETR08
268	A09	CE	CENTRAL	AMETR09	AMETR09	AMETR09
269	A10	CE	CENTRAL	AMETR10	AMETR10	AMETR10
270	A11	CE	CENTRAL	AMETR11	AMETR11	AMETR11
271	A12	CE	CENTRAL	AMETR12	AMETR12	AMETR12
272	A13	CE	CENTRAL	AMETR13	AMETR13	AMETR13
273	A14	CE	CENTRAL	AMETR14	AMETR14	AMETR14
274	A15	CE	CENTRAL	AMETR15	AMETR15	AMETR15
275	A16	CE	CENTRAL	AMETR16	AMETR16	AMETR16

Figure 4.10

4.10.1 Hearing Officer Table Fields

- <u>ID</u> – Unique sequence of numbers for the hearing officer.
- <u>Initials</u> – Initials of the hearing officer.
- <u>District</u> – District code.
- <u>District Name</u> – Descriptive name of the district where the hearing officer works.

- First Name – First name of the hearing officer.
- Last Name – Last name of the hearing officer.
- Network Login ID – The hearing officer's Network Login ID.
- Active – The hearing officer is active and will appear in the district list.
- Inactive Date – Date hearing officer became inactive.

4.10.2 How to Create a Hearing Officer

- Click Insert.
- Type in the initials of the hearing officer in the Initials field.
- Select one of the districts from the District drop-down list.
- Type in the first name of the hearing officer.
- Type in the last name of the hearing officer.
- Select the Network Login ID of the hearing officer from the Network Login ID drop-down list.
- The Active box is automatically checked.
- Click Close.

4.10.3 How to Delete a Hearing Officer

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.10.4 How to Inactivate a Hearing Officer

- Click the row to be inactivated.
- Uncheck the Active button.
- Type in the date this hearing officer was inactivated.
- Click Close.

4.11 Peppers Delay Table – This lookup table is maintained by the Bureau. It contains the valid reasons for a delay other than Abandoned Good Cause and Reschedule.

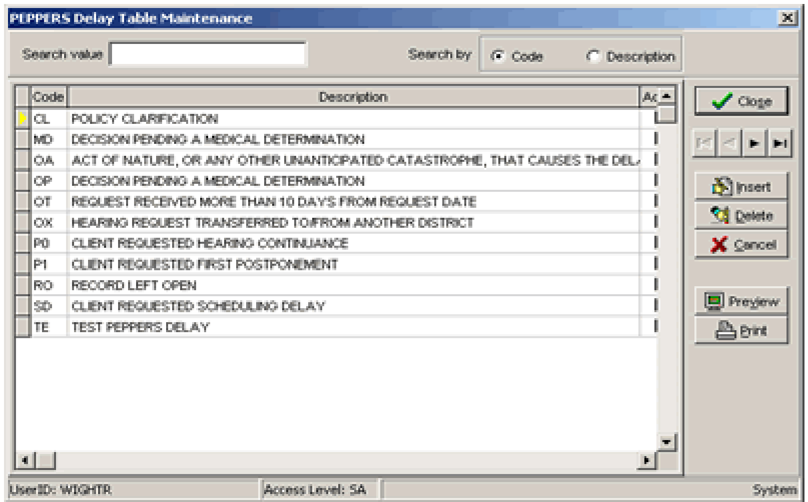


Figure 4.11

4.11.1 Peppers Delay Table Fields

- Code – Code for delay reason.
- Description – Description of the Peppers Delay.
- Active – Indicates whether the Peppers Delay is active or not.
- Inactive Date – This Peppers Delay is no longer active and this is the date it was inactivated.

4.11.2 How to Create a Peppers Delay

- Click Insert.
- Type in the code name of the Peppers Delay in the Code field.
- Type in the descriptive name of the Peppers Delay in the Description field.
- The Active box is automatically checked.
- Click Close.

4.11.3 How to Delete a Peppers Delay

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you want to delete the record.
- Click Yes.
- Click Close.

4.11.4 How to Inactivate a Peppers Delay

- Click on the row to inactivate.
- Uncheck the Active button.
- Type in the date this Peppers Delay was inactivated.
- Click Close.

4.12 Report Group Table – This table contains each group that is printed on the quarterly report.

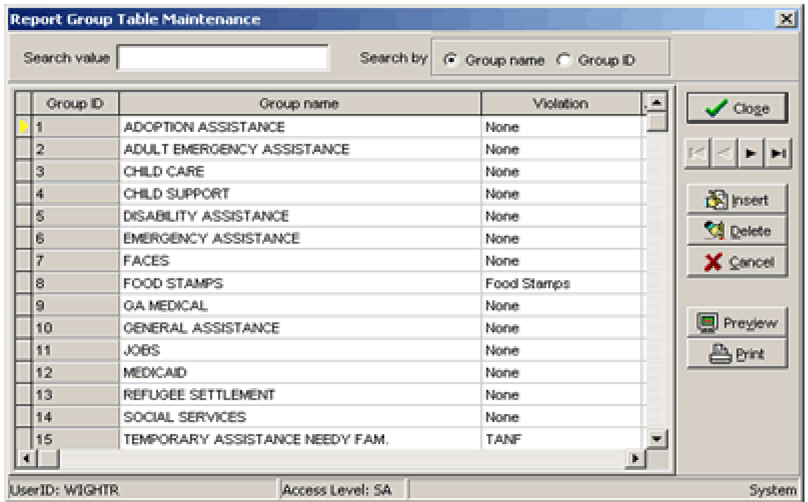


Figure 4.12

4.12.1 Report Group Table Fields

- Group ID – Unique sequence of numbers for the report group.
- Group Name – The name of the group as it appears on the quarterly report.
- Violation – The violation that gets printed on the quarterly report and indicates with which group total it will be included. This is either Food Stamps or TANF.
- Active – This report group is Active.
- Inactive Date – This report group is no longer active and this is the date it was inactivated.

4.12.2 How to Create a Report Group

- Click Insert.
- Type in the descriptive name of the report group in the Group Name field.
- Select the type of violation from the Violation drop-down list.
- The Active box is automatically checked.
- Click Close.

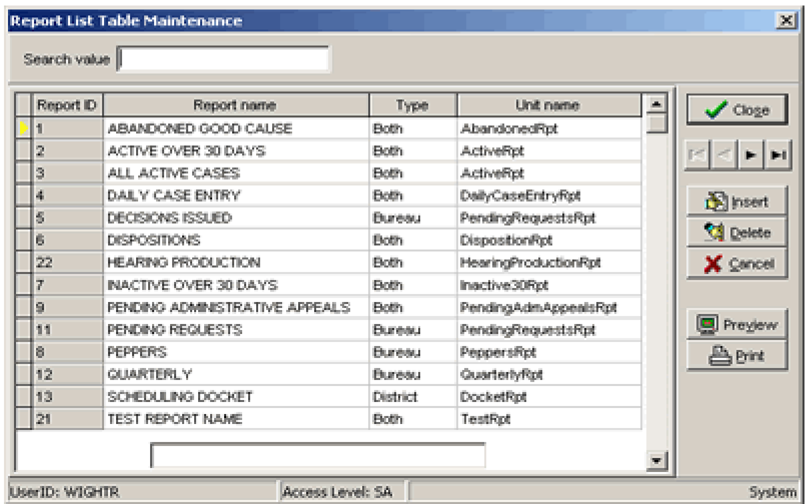
4.12.3 How to Delete a Report Group

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Delete.

4.12.4 How to Inactivate a Report Group

- Click on the row to inactivate.
- Uncheck the Active button.
- Type in the date this Report Group was inactivated.
- Click Close.

4.13 Report List Table – This table contains each report generated by the system and who is authorized to run it.



Report ID	Report name	Type	Unit name
1	ABANDONED GOOD CAUSE	Both	AbandonedRpt
2	ACTIVE OVER 30 DAYS	Both	ActiveRpt
3	ALL ACTIVE CASES	Both	ActiveRpt
4	DAILY CASE ENTRY	Both	DailyCaseEntryRpt
5	DECISIONS ISSUED	Bureau	PendingRequestsRpt
6	DISPOSITIONS	Both	DispositionRpt
22	HEARING PRODUCTION	Both	HearingProductionRpt
7	INACTIVE OVER 30 DAYS	Both	Inactive30Rpt
9	PENDING ADMINISTRATIVE APPEALS	Both	PendingAdmAppealsRpt
11	PENDING REQUESTS	Bureau	PendingRequestsRpt
8	PEPPERS	Bureau	PeppersRpt
12	QUARTERLY	Bureau	QuarterlyRpt
13	SCHEDULING DOCKET	District	DocketRpt
21	TEST REPORT NAME	Both	TestRpt

Figure 4.13

4.13.1 Report List Table Fields

- <u>Report ID</u> – Created by the system. This is a unique number sequence given to the report.
- <u>Report Name</u> – The name of the group as it appears on the quarterly report.
- <u>Type</u> – Designates which office will run the report. The choices are Bureau, District, or Both (common).
- <u>Unit Name</u> – Identifies which .pas file has the programming for the report.

4.13.2 How to Create a Report List

- Click Insert.
- Type in the descriptive name of the report list in the Report Name field.
- Select the type of report list from the drop-down Type list.
- Type in the unit name in the Unit Name field.
- Click Close.

4.13.3 How to Delete a Report List

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.14 Representatives Table – This lookup table contains name and address information for individuals or agencies who represent clients (appeals).

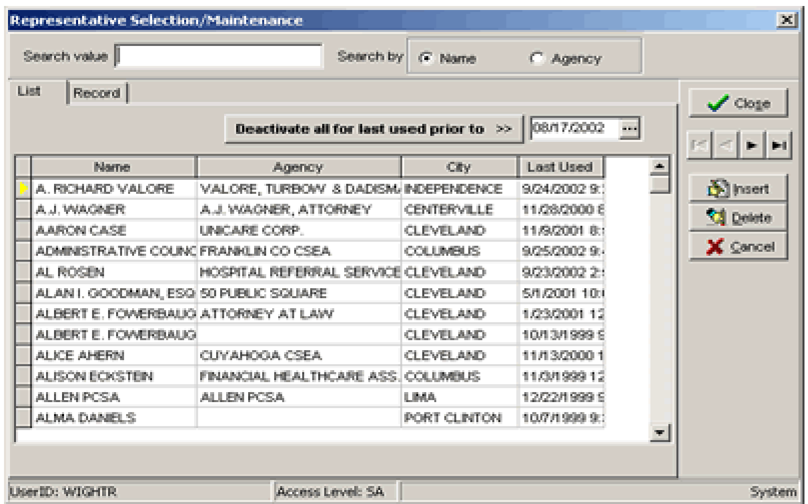


Figure 4.14

4.14.1 Representatives Table Fields

- Name – Name of the representative for the appeal.
- Agency – The name of the representative agency for the appeal.
- City – City address for the representative of the appeal.
- Last Used – Date that representative was last used for an appeal.
- Active – Indicates where this representation is active or not.

4.14.2 How to Create a Representative

- Click Insert.
- Type the name of the representative in the Agency field.
- Type in the address in Address 1, Address 2, City, State, and Zip Code fields.
- Select the type of violation from the Violation drop-down list.
- The Active box is automatically checked.
- Click Close.

4.14.3 How to Delete a Representative

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.

- Click Yes.
- Click Close.

4.14.4 How to Inactivate a Representative

- Click on the ellipsis next to the date at the top of the list tab.
- Select the date on the calendar that will be used as a deactivation cutoff date. Any representative that has a last date prior to this date will be changed to inactive records.
- Click Ok.
- Click Close.

4.15 User Access Table – This lookup table contains a listing of all the users of HATS. There are five access levels.

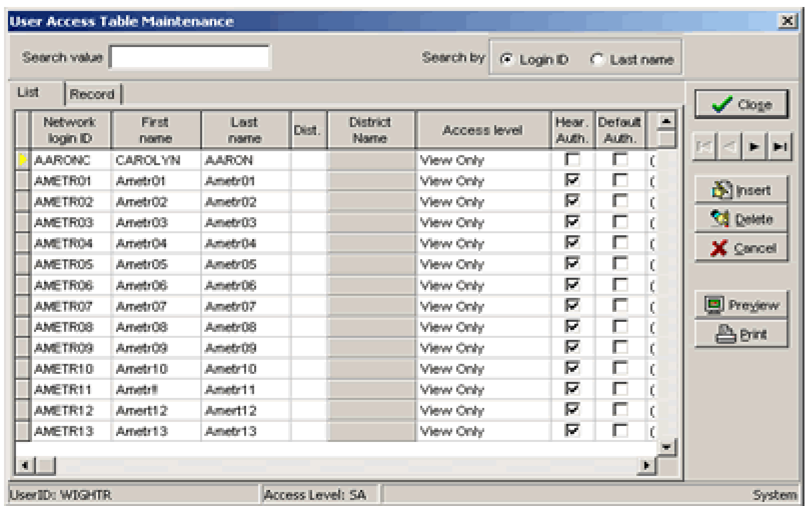


Figure 4.15

4.15.1 User Access Table Fields

- Network Login ID – An ID that will match the Network Login ID.
- First Name – The first name of the user.
- Last Name – The last name of the user.
- Dist. – District code.
- District Name – Descriptive name of where the user works.
- Access Level – Indicates the level of application access for the user.
- Hearing Authority – Indicates whether the authorized user is a hearing authority.
- Active – This user is active and will appear in the list on the Appeal Info. tab.
- Inactive Date – This user is no longer active and this is the date the person was inactivated.

4.15.2 How to Create a New User

- Click Insert.
- Type in the login name of the user in the Network Login ID field.
- Type in the first name of the user.
- Type in the last name of the user.
- Select one of the districts from the District drop-down box.
- Select the access level for the new user from the Access Level drop-down box.
- Click on Hearing Authority, if applicable.
- Click on Default Authority, if applicable.
- The Active box is automatically checked.
- Click Close.

4.15.3 How to Delete a User

- Click on the row that needs to be deleted.
- Click Delete. You will be prompted to confirm that you do want to delete the record.
- Click Yes.
- Click Close.

4.15.4 How to Inactivate a User

- Click on the row to be inactivated.
- Uncheck the Active button.
- Type in the date this user was inactivated.
- Click Close.

5.0 Open Case

5.1 Open Case – Main Screen

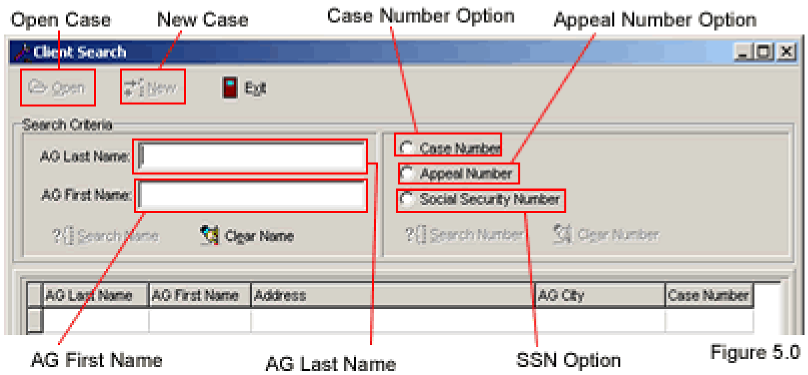


Figure 5.0

5.1.1 Open Case – This button has the same functionality as double clicking on the highlighted search results in the client grid. It opens the main data entry screen for a specific client.

5.1.2 New (Case) – Once a name search is performed, this button activates. When the button is clicked, the name that was typed to perform the search is used to create a new client and opens the main data entry screen in the insert mode.

5.1.3 AG Last Name – This is used to perform a name search on a client. If a result is found, the corresponding client records with a name matching the search criteria appear in the grid.

5.1.4 AG First Name – Further narrows down the last name search by adding extra criteria for the search.

5.1.5 Case Number – Once the radio box is clicked, a corresponding field appears to type in a case number. It is the only parameter used to perform the search. If a match is found, the Client Info. window is displayed. An error is displayed if no match is found.

5.1.6 Appeal Number – Once the radio box is clicked, a corresponding field appears to type in a case number. It is the only parameter used to perform the search. If a result is found, that appeal number is displayed on the Appeal Info. tab. An error is displayed if no match is found.

5.1.7 Social Security Number – Once the radio box is clicked, a corresponding field appears to type in a social security number. It is the only parameter used to perform the search. If a match is found, the Client Info. window is displayed. An error is displayed if no match is found.

5.1.8 Search Results in the Client Grid – This listing appears if any results are found from a name search.

5.2 Main Data Entry Screen

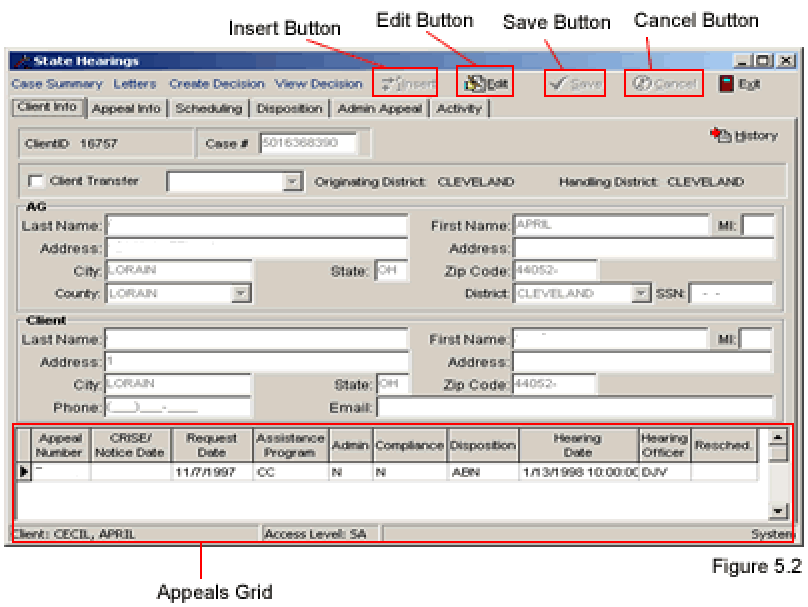


Figure 5.2

5.2.1 Appeals Grid – List of all appeals filed on behalf of the client.

5.2.2 Case Summary – Report of pending appeals and all hearing history for a client.

5.2.3 Letters – Description and status of letters pertaining to the client.

5.2.4 Create Decision Button – Creates a decision for selected appeal in grid.

5.2.5 View Decisions Button – View a decision for selected appeal in grid.

5.2.6 Insert Button – Inserts a record for selected appeal in grid. For appeals, it inserts a new appeal for the client.

5.2.7 Edit Button – Edits a record for selected appeal in grid. For appeals, it edits the selected appeal for the client.

5.2.8 Save Button – Saves the record.

5.2.9 Cancel Button – Cancels an Insert or Edit transaction.

5.2.10 Exit Button – Exits the current window.

5.2.11 Client Info. Tab. – Contains information about the client.

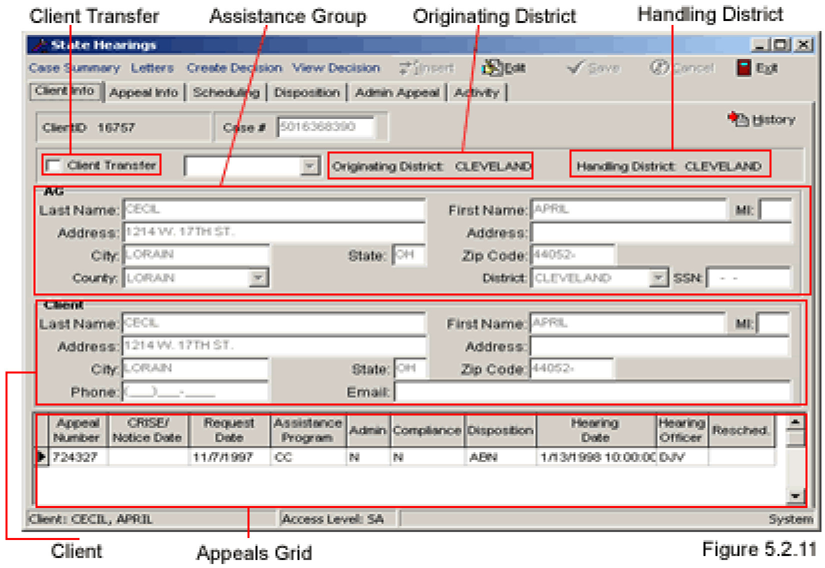


Figure 5.2.11

- Appeals Grid – List of appeals filed on behalf of the client.
- Insert – Always disabled on this tab since Insert mode is automatic if "New" is clicked on in the Client Search window.
- Edit – Allows user to edit client information.
- Client Transfer – Enables user to transfer client to another district.
- Originating District – The district listed at the time the client was first entered.
- Handling District – The district currently handling this client.
- Assistance Group – The name of the person and address to which all notices are mailed.
- SSN – The social security number of the client.
- Client – The person for whom the appeal is filed and their address.

5.2.12 Appeal Info. Tab – Contains information about the selected appeal.

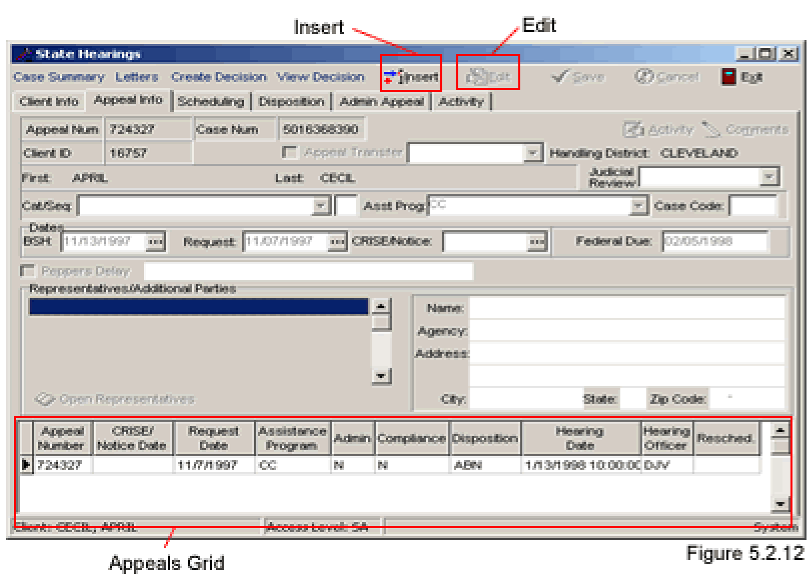


Figure 5.2.12

- Appeals Grid – List of appeals filed on behalf of the client.
- Insert – Adds a new appeal for the client.
- Edit – Edits the selected appeal from the grid at the bottom of the screen.
- Appeal Transfer – Transfers the selected appeal from one district to another.
- Activity – Inserts a dated comment into the record for the appeal.
- Comments – Inserts notes for internal use only.
- Cat/Seq – The drop-down Category field lists the CRIS-E category of assistance program and is associated to an Assistance Program. The box next to it is the sequence that denotes which individual is making the claim in the household.
- Assistance Program – Displays a list of choices given to select the type of CRIS-E program the client is using that generated the notice. Assistance Program is automatically completed if Cat is entered.
- Case Code – Used for Ad Hoc Reporting.
- BSH – Date the appeal added to the system.
- Request – The earliest date that the Bureau determines the appeal request was received by the office.
- CRIS-E Notice – The date the CRIS-E notice was mailed to the client.
- Federal Due Date – Calculated by the program based on the Assistance Program selected.
- Peppers Delay – The reason to explain why an appeal had a disposition rendered.
- Representatives/Additional Parties – A listing of anyone who has an interest in a case.

5.2.13 Scheduling Tab – Contains information about the hearing of the selected appeal.

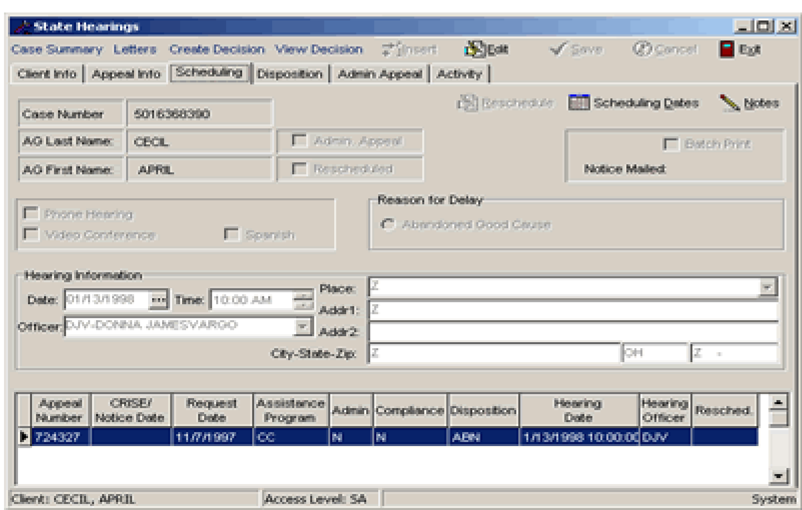


Figure 5.2.13

- Appeals Grid – List of appeals filed on behalf of the client.

- Insert – Inserts a new hearing for the selected appeal in the grid.
- Edit – Edits a hearing for the selected appeal in the grid.
- Save – Saves the new hearing or hearing changes for the selected appeal in the grid.
- Cancel – Removes the changes made since the last save of the selected appeal in the grid.
- Reschedule – Allows the user to reschedule the hearing to a different date.
- Scheduling Dates – History of dates scheduled for the hearing.
- Notes – Comments that are added to the notice mailed to the client.
- Admin Appeal – Designation alerting the user that this hearing is for an Admin Appeal.
- Rescheduled – Designation alerting the user that this hearing has been rescheduled at least once.
- Batch Print – This is a toggle button that, when checked, adds the current notice to the list of notices to be included in the regularly scheduled batch printing.
- Notice Mailed – Displays date that the scheduling notice was mailed to the client.
- Phone Hearing – Adds information to the notice telling the client that the hearing will take place over the phone.
- Video Conference – Adds information to the notice denoting that the hearing will take place via video conferencing.
- Spanish – Designates the notice will be printed in Spanish.
- Abandoned Good Cause – Is checked if a client calls after ten days from the hearing to explain why they did not appear at the hearing and did not call within the ten day grace period.
- Date – The date the hearing is scheduled to take place.
- Time – The time the hearing is scheduled to take place.
- Officer – The hearing officer assigned to this appeal.
- Place/Address – Lists the place and address where the hearing is scheduled to place.

5.2.14 Disposition Tab – Contains information about the disposition of the selected appeal.

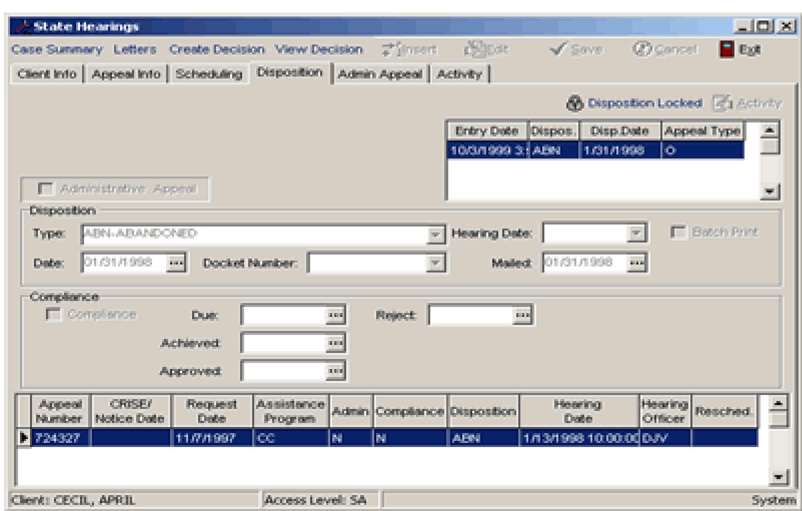


Figure 5.2.14

- Appeals Grid – List of appeals filed on behalf of the client.
- Insert – Adds a new disposition for the selected appeal.
- Edit – Edits a disposition for the selected appeal.
- Save – Saves the disposition entered for the selected appeal.
- Cancel – Cancels the changes made since the last save for the selected appeal.
- Administrative Appeal – Denotes that the disposition was rendered on an administrative appeal.
- Activity – Dated comments on the disposition.
- Type – Denotes the type of disposition rendered. This is available for appeals that have been denied, pending, abandoned, or withdrawn on insert.
- Date – The disposition date.
- Docket Number – This is a tracking number assigned by the Office of Legal Services to an Administrative Appeal.
- Hearing Date – The date is automatically filled in after a hearing listed.
- Mailed – The date the disposition is mailed to the client.
- Batch Print – This adds the disposition to the disposition batch printing on the mainframe run at night.
- Compliance – Checking this button adds a compliance to the disposition that the county will be required to fill out when they are required to comply with the decision.
- Compliance Due Date – This is the date by which the county must comply.
- Compliance Achieved – This is the date the county lists as their date of compliance.
- Compliance Approved – After a compliance has been achieved or claimed, this is the date that the Bureau approves their action
- Compliance Reject – After the county claims compliance was achieved, this is the date that the Bureau Approves their action.

5.2.15 Admin Appeal Tab – Contains information about the selected administrative appeal.

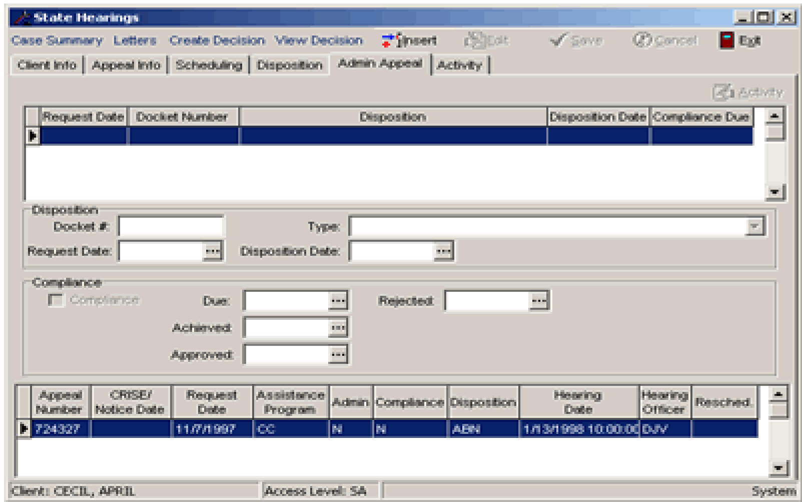


Figure 5.2.15

- Appeals Grid – List of appeals filed on behalf of the client.
- Insert – Adds a new Administrative Appeal for the client.
- Edit – Edits the selected appeal from the grid at the bottom of the screen.
- Save – Saves an Administrative Appeal.
- Cancel – Removes the changes made since the last save for the selected appeal.
- Disposition Display Grid – Lists the dispositions that have been rendered on the appeal.
- Docket Number – A tracking number assigned by the Office of Legal Services to an Administrative Appeal.
- Type – The ruling rendered on the disposition.
- Request Date – The date the Administrative Appeal request was received in the Office of Legal Services.
- Disposition Date – The date the Disposition Type was entered for the Administrative Appeal.
- Compliance – A check adds a compliance form to the disposition.
- Activity – Inserts a dated comment into the record for the appeal.

5.2.16 Activity Tab – Displays all activities entered on the Appeal Info, Disposition, and Admin Appeal tabs.

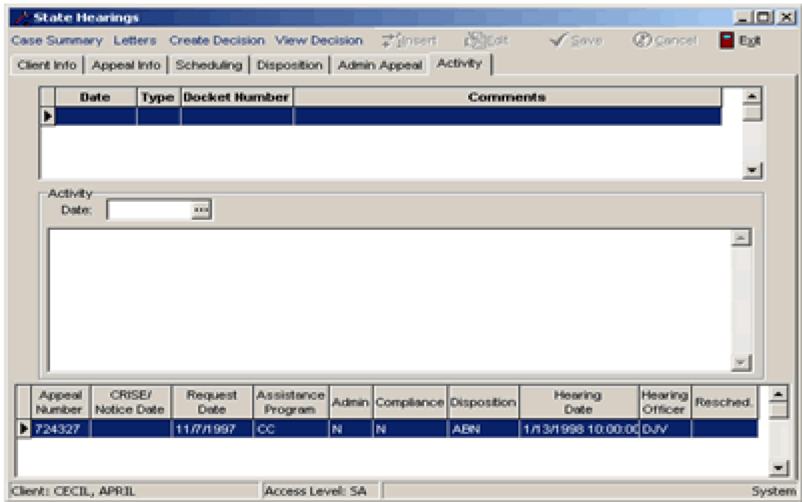


Figure 5.2.16

- Appeals Grid – List of appeals filed on behalf of the client.
- Insert – Adds a new activity for the selected appeal.
- Edit – Edits an activity for the selected appeal.
- Save – Saves the activity information for the selected appeal.
- Cancel – Cancels the changes made since the last save.
- Activity Grid – The list of activity notes for that appeal.
- Date – Date comment was created.
- Comments – Freeform memo area for viewing a note in the activity

6.0 Reports

6.1 Bureau Reports – This set of windows creates pre-programmed Bureau reports based on information in the program.

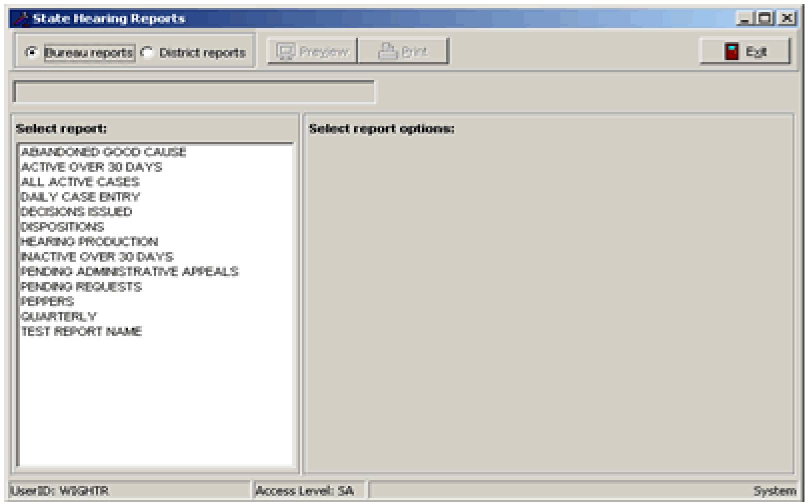


Figure 6.1

- Abandoned Good Cause - Appeals that had a disposition of Abandoned, but were later determined to have cause.
- Active Over 30 Days - Appeals that have been active over 30 days beyond Request Date.
- All Active Cases - All appeals that have no disposition at end of reporting month.
- Daily Case Entry - Appeals that have been entered in HATS within a specified date range.
- Decision Issued - Summary of appeals by district that have a disposition of Sustained or Overruled within reporting period.
- Dispositions - Appeals with a disposition.
- Inactive Over 30 Days - Inactive appeals that took longer than 30 days beyond Request Date to render a disposition.
- Pending Administrative Appeals - Administrative appeals that have no disposition.
- Pending Requests - Summary of appeals by district that have no disposition date within reporting month.
- Peppers - Summary of decisions not issued in 30 days and pending appeals by district.
- Quarterly - Summary appeals with a disposition, grouped by assistance program.

6.2 District Reports – This set of windows creates pre-programmed district reports based on information in the program.

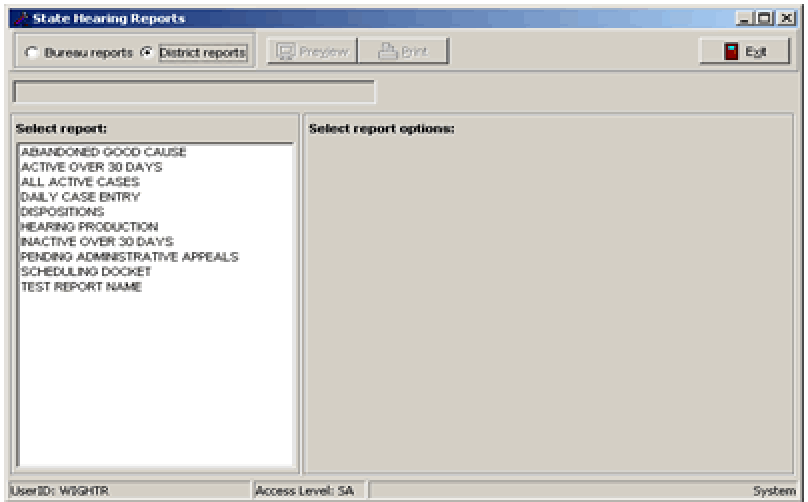


Figure 6.2

- Abandoned Good Cause - Appeals that had a disposition of Abandoned, but were later determined to have good cause.
- Active Over 30 Days - Appeals that have been active over 30 days beyond Request Date.
- All Active Cases - All appeals that have no disposition at end of reporting month.
- Daily Case Entry - Appeals that have been entered in HATS within a specified date range.
- Dispositions - Appeals with a disposition.
- Inactive Over 30 Days - Inactive appeals that took longer than 30 days beyond Request Date to render a disposition.
- Pending Administrative Appeals - Administrative appeals that have no disposition.
- Scheduling Docket - Hearing information for scheduled appeals.

7.0 Decisions Maintenance

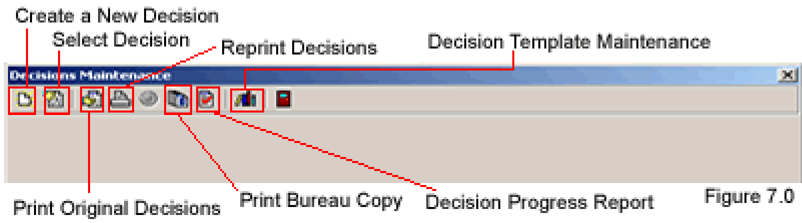


Figure 7.0

7.1 Create a New Decision – This button will allow you to enter data for a new decision.

1. Type the name of the Hearing Officer in the "Search value" field.
2. Select whether the person is an officer or a supervisor.
3. Click OK.

7.2 Select a Decision – Click this button to select a decision.

1. Select the "Status Type."
2. Click on a decision to view, then click "Select."
3. You are then able to update or delete the decision.

7.3 Print Original Decisions – Prints only the current decision.

- If you do not see the desired decision to select, you can click "All" in the "Hearing Authorities" or use the "Change" button to switch the selected authorities displayed.
- Click "Select One" to select the current decision with the row pointed (triangle) to the left. Use the arrows to the right to navigate up and down the list. "Select All" will select the entire list. "Unselect All" will deselect the entire list, and "Unselect One" will deselect the current decision with the row pointer (triangle) to the left of the row.
- Click the "Print" button.

7.4 Reprint Decisions/Recreate Electronic Copies – Reproduces documents for current decisions only.

7.5 Print Bureau Copy – Prints out hard copies of the decision based on dates for the decision's original printing

- This does not alter the system information or make any other changes associated with an original printed.
- This includes the decision, certification (not included in original printing), and any compliances.
- This button can only print or recreate electronic copies for a decision that has a "Printed" status.

7.6 Decision Progress Report – Cumulative report that prints all decisions printed since the last time the report was printed.

7.7 Decision Template Maintenance – Maintain templates that have been created for decisions.

- Templates are independent of a particular decision on an appeal.
- "Insert" and "Delete" can only be accessed for templates from Decisions Maintenance.
- To load a template:

    1. Click "File" then "Load from Template"
    2. Click the template to load by clicking on the template name
    3. Click "OK"
    4. Type in the information accordingly
    5. Click "File" then "Save and Exit"
    6. Click the "Save Decision" button

- To create a new template:

    1. Click "Decisions Templates Maintenance"
    2. Click the "Insert" button
    3. Click the "Editor" button
    4. Create the template
    5. Click "File" then "Save As"
    6. Type in the name of the template
    7. Click "File" then "Exit"
    8. Type a descriptive name in the "Template Name" column next to the asterisk by the blank field
    9. Check or uncheck the "Read Only" box as needed
    10. Click the "Close" button.

8.0 Working With Appeals

8.1 Appeal Summary Received Date - The county receives a copy of every appeal request in the system, and sends in a paper summary of the appeal and why the request was made. The date is when the Bureau receives the summary. This summary is created independently of the HATS system.

8.2 Adding A Peppers Delay To A Locked Appeal

1. Click on the appeal to receive the Peppers Delay in the appeals grid on the main data entry screen.
2. Select the Appeal Info. tab then click on the Appeal Locked button.
3. Check the Peppers Delay box. A drop-down box of Peppers Delay reasons and explanations will appear.
4. Select a Peppers Delay reason from the drop-down menu.
5. Click Save.

8.3 Locked Appeals - If there has been an approved or printed (issued) decision for the current appeal, the appeal is locked.

8.4 Scheduling a Hearing for an Appeal

Once the appeal is entered into the system, a hearing needs to be scheduled to hear the case, unless the appeal is withdrawn or denied.

1. Click on the Scheduling tab of the main data entry screen.
2. Click on the appeal to schedule in the Appeal grid.
3. Click on the Insert button.
4. Check or uncheck Batch Printing as needed.

5. Select any parameters to appear on the notice such as Phone Hearing, Spanish and Video Conference.
6. Fill in the date to hold the hearing of the appeal. If the hearing date does not allow for a ten day notice to the client, a confirmation message will ask if you want to override this requirement. If a date, time and officer is selected that matches an existing hearing for the client, the system will ask if you want to add these new appeals to the existing hearing.
7. Select a hearing officer.
8. Select the place for the hearing. The default hearing address is automatically listed if there is one. This is the place where hearings in that district are usually held, but this can be changed to schedule the hearing at another venue.
9. Click Save.

8.5 Scheduling a Hearing with Multiple Appeals

Multiple appeals can be selected to be heard at the same time for a client. However, if multiple appeals are joined together for one hearing, when one is rescheduled, they all will be rescheduled.

1. Click on the Scheduling tab in the main data entry screen.
2. Click on the first appeal to be scheduled then shift or control click on the other appeals.
3. Schedule the appeal with a date, time, hearing officer, place and add any necessary scheduling notice parameters.
4. Click Save.

8.6 Transferring an Appeal

Transferring an Appeal moves only the selected appeal or appeals to a new handling district.

1. Click on the Appeal Info tab on the main data entry screen.
2. Select the appeals from the appeal grid that will be transferred. To select more than one, click on the first appeal, then hold down the shift or control key while clicking on the other appeals.
3. Click on the Appeal Transfer box on the Appeal Info. tab.
4. Select the new handling district from the drop-down menu next to the box.
5. Click Save.

8.7 Withdrawn Appeals

1. Click on the Disposition tab on the main data entry screen.
2. Click on the appeal in the grid that has been withdrawn.
3. Click Insert from the Disposition tab.
4. In the Type drop-down list, select Withdrawal.
5. The hearing date scheduled for the appeal, if there is one, will appear in the Hearing Date field.
6. Click Save.

9.0 Working With Clients

A client is a person who starts the appeal process. A client has received benefits from one or more CRIS-E programs but has received notice of either a denial or termination of those benefits. The client then decides to appeal this notice. When the Bureau of State Hearings receives this appeal, it is entered into HATS.

9.1 Create a New Client

Before a new client can be entered in the system, a search must first be performed to confirm whether the client has ever filed an appeal. This minimizes creating duplicate records. If no match is found, then the user selects the "New" button to create a new client in the system.

1. Select File then Open.
2. Type in the name of the client.
3. Click Search Name. The New button will activate. If a client has never filed an appeal, the first and last name will not appear in the client search. If a name does appear, review the address and other information to ensure that the correct client has been selected.
4. Click New. A blank Client Info. window will appear.
5. The name typed in the Client Search will appear in both the AG last name and the Client last name edit boxes. The information can be changed, if needed, to another name.
6. Type in the case number.
7. Fill out the AG Address fields. The client's information, including first and last name, along with the address will be filled in while completing the AG fields, but may be overwritten.
8. Select the county where the client lives. A county must be chosen to save the record and continue. The district will automatically be completed based on county.
9. Type in the social security number of the client.
10. Click Save.

9.2 Edit a Client

Before a client can be edited in the system, a search must first be performed.

1. Select File then Open.
2. Type in the name of the client.
3. Click Search Name. The New button will activate. If the client is not found, then they will have to be created in the system.
4. Select the client to edit from the results grid by clicking on the entry or by pointing to the client row and clicking Open. If no match is found, an error message will appear.
5. Click Edit on the Client Info tab.
6. Make any changes needed.
7. Click Save to write the information to the database.

9.3 Transferring a Client

Client Transfer moves the client and all the client's records that have not been locked with a decision.

1. On the Client Info. tab of the client to transfer, click on the Client Transfer box.
2. Select the new handling district from the drop-down menu next to the box.
3. Click Save.

9.4 Client History - Once a client is locked, before a client can have their information edited, the current information must first be archived through the history button.

9.5 Locking Client Records - If there has been an approved or printed (issued) decision for the current client address, then the client is locked. To unlock, select Client History. This function will write the current address to a history file and allow the client to be changed to new information that will be used for future correspondence.

10.0 Working With Hearings

10.1 Abandoned Hearings

Abandoned Hearings occur when the client fails to attend the scheduled hearing. The client still has ten days to explain why they failed to appear at the hearing so they can reschedule. Initially, the hearing is considered to be "Pending Abandoned". On the eleventh day, the hearing is considered officially "Abandoned". After the eleventh day, the client may still show good reason for not appearing, such as the client was hospitalized. If the reason is accepted, the hearing changes to "Abandoned Good Cause" and can be rescheduled.

10.1.1 Pending Abandoned Hearings

Enter a "Pending Abandoned" disposition on the appeal after the client fails to appear at the hearing.

1. Click on the appeal to receive the disposition.
2. Click on the Disposition tab.
3. Click Insert.
4. Select PND-PENDING ABANDONED from the drop-down list in Disposition Type.
5. The hearing date scheduled for the appeal will appear in the Hearing Date field.
6. Click Save.

10.1.2 Rescheduling a Previously Scheduled Hearing Date

1. Click on the Disposition tab of the main data entry screen.
2. Click in the Appeal grid on the appeal to be rescheduled.
3. Click Reschedule.
4. Make any changes needed.
5. Click Save. The previously scheduled date and time of the hearing will now appear in the Schedule Dates grid.

10.1.3 Rescheduling Hearings Abandoned With Good Cause

1. Click on the appeal in the grid that has been abandoned with good cause in the main data entry screen.
2. On the Scheduling tab, click Edit.
3. In the Reason For Delay area, click on the Abandoned Good Cause box. The current date will appear.
4. Click Save.
5. Click Reschedule.
6. Change the date, time, hearing officer and hearing address to the information of the new hearing.
7. Click Save.

10.2 Editing a Hearing Date

1. Click in the Appeal grid on the appeal to be edited.
2. Click Edit.
3. Make any corrections to the hearing that are needed.
4. Click Save.

10.3 Editing Versus Rescheduling a Hearing

At first glance, the Edit and Reschedule buttons on the scheduling tab look like the same function, but they serve very different purposes. The Edit function should be used when making corrections to a hearing that has already been scheduled. Reschedule is used to move the hearing to another time or date. This usually occurs when the client is unable to attend the hearing at the currently scheduled time. A Rescheduled hearing results in special processing in two areas:

1. If the Assistance Program is Food Stamps, the Federal Due Date is adjusted which gives the district more time to settle the appeal.
2. It acts as a credit, also known as an exemption, on the Peppers Report.

10.4 Hearing Officers

The Hearing Officer is a state employee who is responsible for conducting the hearing for an appeal and rendering the decision. The hearing officer is listed first by the person's initials, a dash and then first and last name on the scheduling tab.

10.5 Hearing Place/Address

These fields list the place and address where the hearing is scheduled to take place. The drop-down list shows all the different hearing addresses available in that district for the hearing. If there is a default hearing address, it will automatically display on screen. The program selects a default address by looking at the client address county to determine the county for the default hearing address in the list. If there is no default hearing address in that district for that county, the program will not list a default address. However, all the addresses available in that county and district will be available.

10.6 Scheduling a Hearing With Multiple Appeals

Multiple appeals can be selected to be heard at the same time for a client. However, if multiple appeals are joined together for one hearing, when one is rescheduled, they all will be rescheduled.

1. Click on the Scheduling tab in the main data entry screen.
2. Click on the first appeal to be scheduled then shift or control click on the other appeals.
3. Schedule the appeal with a date, time, hearing officer, and place and add any necessary scheduling notice parameters.
4. Click Save.

Glossary

A

Abandoned Good Cause: Beginning the eleventh day after the client abandons the hearing, they still have the opportunity to give a good reason why they were unable to attend the hearing. If good reason is shown, the hearing can be switched to "Abandoned Good Cause" on the scheduling tab and the appeal can be rescheduled. The date MUST be changed when rescheduling the hearing.

ABN Cases: ABN (Abandon) cases are appeals that were originally assigned a PND (Pending Abandon) disposition because the client did not show for a hearing. The client has 10 days to request a reschedule. If no reschedule request has been made within 10 days, an ABN disposition is automatically assigned. To reinstate the appeal, the client must show good cause and the HATS case is changed to Abandon Good Cause.

Activity: Dated comments on the disposition.

Admin Appeal Disposition Date: The date the disposition was made on the Administrative Appeal which is different than a Disposition Date listed on an Appeal.

Admin Appeal Request Date: Date the request was received in the Office of Legal Services.

Administrative Appeal: A special appeal request that is usually a result of the client disagreeing with the disposition.

AG Name: Head of Household

Agency Representation: The person who appears to represent the county agency at the hearing.

Appeal Summary: Created independently of HATS, this report is a paper summary of what all the appeals are about and why each was made. This summary of every appeal request in the system is prepared by the County and then sent to the Bureau.

Appeal Summary Received Date: Date the Appeal Summary is received by the Bureau.

Appeal Transfer: Transfers the selected appeal from one district to another.

Appellant Representation: The person who appears to represent the client at the hearing.

Assistance Group: The name of the person and address to whom all notices are mailed.

B

BSH Date: Date the appeal added to the system.

C

Case Code: Ad Hoc placeholder field for creating reports.

Case Number: Comes from the Client Screen. This is a CRIS-E assigned number.

Case Summary: Report of pending appeals and all hearing history for a client.

Client: This is the person who starts the appeal process by appealing a denial or termination of benefits from one or more CRIS-E programs.

Client History Button: Once a client is locked, before a client can have their information edited, the current information must first be archived through the history button.

Client ID: A unique system generated number assigned to the client after a save on a newly created client.

Compliance: Follow up with the county to make sure that the county is doing what they are told based on the ruling. The compliance form is mailed out along with the decision/notice.

Compliance Achieved Date: Date the county claims they complied with the decision.

Compliance Approved Date: After the Compliance is claimed to be achieved, this is the date that the Bureau approves their action.

Compliance Due Date: The date the County claims they complied with the decision/ruling.

Compliance Rejected Date: After the County claims they achieved the Compliance, this is the date that the Bureau rejects their action.

County Review: The county may request a review of a hearing decision. They have time limits to request a review and they are issued by the Office of Legal Services. But even if the decision is found to be incorrect, the hearing cannot be changed.

CRIS-E Notice Date: The date the CRIS-E notice was mailed.

D

Decision: Summary of the rulings in a hearing.

Decision Text: The narrative of the decision explaining the reason for the disposition.

Disposition: Ruling or determination of outcome of the appeal such as sustained, overruled or vacate and remand.

Disposition Date: The date the Disposition Type was entered for the appeal or administrative appeal.

Docket Number: This is the same number as the one on the Appeal Info. tab. It is a tracking number assigned by the Office of Legal Services to an Administrative Appeal.

F

Federal Due Date: Based on Assistance Program, this is the date the disposition is due by Federal Regulation.

H

Handling District: This is the district that is currently responsible for the appeal.

Hearing Authority: Person who reviews then approves or rejects the decision and disposition submitted by the Hearing Officer of the appeal. They can also change the narrative, disposition or if there is a Compliance. If the Hearing Authority rejects the decision, they will change the status from "Submitted" to "New" which will send it back to the Hearing Officer.

Hearing Date: The date the hearing was held or scheduled to take place. This is the most recent hearing date at the time of the disposition.

Hearing Officer: A state employee who is responsible for conducting the hearing for an appeal and rendering the decision.

Hearing Time: This is the time the hearing will take place

J

Judicial Review: Appeals which have been appealed to the Court of Common Pleas.

Judicial/County Review: Gives user the ability to mark if both a county review and a judicial review are requested.

M

Mailed: The date the disposition is mailed to the client.

N

Notice Mailed: Also known as the Scheduling Notice Mailed Date, this is the date the scheduling notice or hearing notice was printed and mailed to the client.

O

Originating District: District where the client lived at the time the case/appeal was first entered.

P

Pending Abandoned: If a hearing is held and the client fails to appear, this is considered a case that is "Pending Abandoned". The case is only considered "Abandoned" if ten days pass without word from the client.

Peppers Delay: Reason given why appeal had a disposition rendered late. This can be changed in Table Maintenance.

R

Representatives/Additional Parties: Anyone who has an interest in the case such as the attorney of the client, friends, relatives, County and Bureau departments.

Request Date: The earliest date that the Bureau determines the appeal or administrative appeal request was received by the office.

T

Template: A structured document for the narrative explaining the reason for the rulings or dispositions given on an appeal.

W

Withdrawn Appeals: When a client decides to no longer pursue the appeal and withdraws it, the appeal takes the "Withdrawal" disposition.