Georgia DHR
Office of Child Support Enforcement

Constituent Services Portal Project
OCSE Training Manual
Administration Version

Admin Version 5.0
7/12/2004
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Cindy R. Moss
Introduction

1.0 Introduction
The purpose of this document is to provide training documentation to be used by OCSE and DFCS employees.
The intended audience of this document includes:
◆ OCSE Employees
◆ DFCS Employees

2.0 Background
The Constituent Services portal project is based on previously defined future releases of WMCC and confirmed by high-priority constituent needs discovered during the DHR OCSE Comprehensive Plan.
The constituent needs defined during the OCSE Comprehensive Plan Project were a result of a Constituent Needs Gap Analysis. During the gap analysis the planning team surveyed 350 Custodial Parents (CPs) and Non-Custodial Parents (NCPs) to get a better understanding of their needs as they relate to obtaining information about their child support cases. In addition, the team met with OCSE agents to understand the type of constituent services that would help them complete their jobs more efficiently and effectively. The result of the gap analysis was a defined list of functionality to be implemented on the georgia.gov portal architecture, available to CPs and NCPs. The functionality would meet the high-priority constituent needs identified during the comprehensive planning project. The three highest needs identified included payment information, case status information and application processing. The Constituent Needs Gap Analysis Report included in Attachment 1 of this form.
Findings from an OCSE Business Process Reengineering project found that increasing customer service by providing more self-service options like the functionality included in the Constituent Services portal project, is the key to increasing the efficiency and productivity of OCSE.
The Constituent Services Project is scheduled for March 2004 through September 2004. The functionality will be implemented as a phased rollout with four different releases. Each release adds increased functionality and self-service options. The first release is currently schedule for deployment March 2004.
The benefits of increased self-services are numerous and include the following:
   o Improved customer service
   o Improved productivity and efficiency of child support staff
   o Increased Federal incentive payments
   o Decreased telephone and mail volume
   o Reduced postage costs
   o Increased access to child support services
   o Ability to provide information on other services for which OCSE customers may be eligible, which would benefit those in greatest need
   o Increased accessibility for out-of-state constituents
## Schedule

### 2.1 Release Schedule and Content

<table>
<thead>
<tr>
<th>RELEASE</th>
<th>CONTENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1- April 3, 2004</td>
<td>• Public Information and Administrative Pages&lt;br&gt;• CP View Payments and Payment Details&lt;br&gt;• CP Request Copy and Stop Payment of Checks&lt;br&gt;• CP View Case Status&lt;br&gt;• CP Update Address and Employer Information</td>
</tr>
<tr>
<td>2- May 14, 2004</td>
<td>• Online Payments&lt;br&gt;• NCP View Payments and Payment Details&lt;br&gt;• CP Direct Deposit Setup and Cancellation&lt;br&gt;• NCP View Case Status&lt;br&gt;• NCP Update Address and Employer Information</td>
</tr>
<tr>
<td>3- July 9, 2004</td>
<td>• Search for a Child Support Office&lt;br&gt;• Email Customer Service&lt;br&gt;• CP Request Case Closure&lt;br&gt;• CP and NCP View Case Activities&lt;br&gt;• CP and NCP View Appointments&lt;br&gt;• Add/Update NCP Locate Information</td>
</tr>
<tr>
<td>4- September 17, 2004</td>
<td>• CP Online Application&lt;br&gt;• NCP Online Application</td>
</tr>
</tbody>
</table>
3.0 Release One

Instructions for login to the CSPP and the screens that are currently available follow. The first screen is accessible by anyone with Internet access. The information provided on this screen is the same information provided on the OCSE website. The Tabs located at the top of the screen: Our Services, Make Payment, Apply Now, Case Payments, Provide Info and My Case are not accessible until a Constituent Registers and logins to the CSPP. An OCSE employee does not have to register. They need to select “Sign In” to gain access.
3.1 Register
For Release One there is no functionality available to the NCP. The first time the CP enters the site, she/he will be required to Register.
Registration Complete - Please Sign In

After entering the 4 required fields on the registration page, the “Registration Complete” page will display.

This page shows the USER ID and includes a message to the user that their password is their IRN (Client ID).

The user is instructed to immediately change their “temporary” password by clicking on the “Please Sign In” button.
After clicking on “Please Sign On” from the “Registration Complete” page, this Sign On page displays. The user must enter both their USER ID and their IRN (Client ID for the first sign in only) and click on the “Sign In” button. **The Client's User ID is the first letter of their first name, first 3 letters of their last name and the last 4 digits of the SSN.** The OCSE employee will not need to register, they will go directly to Sign In and enter their $TARS UserID and Password.
Change Password

The USER ID will automatically display on this screen. The user must enter: current password (IRN/clientid), new password (any combination of alpha/numeric characters), re-enter the new password, and then click Submit:

The name will display on every screen the user goes to while signed in. If the user clicks on "Sign off," a verification page will display, and the user's name will no longer display.

A screen will then display verifying that the user's password has been changed. By clicking on "next", the user will be returned to the Homepage. If the user does not register successfully, there are several error messages that will display:

- The information you provided does not match our records. Please verify and try again or contact your agent for further information.
- User corresponding to IRN “99999999” has already been registered with the portal.
- You cannot register for access to the Portal. Please contact your Agent for further assistance.

This message will display if the User has a family violence indicator or good cause upheld indicator attached to their IRN. The User will be required to appear in person with identification at any local office. Staff will review the identification, and if verified, will contact the Portal Call Center (PCC), identify themselves as an OCSE employee, verify that the client is who they say they are and then hand the telephone to the CP. The PCC will register the CP via admin functions

(See Administrative Section). The CP may choose to remove the family violence indicator and if so, then she/he will be able to register onto the CSPP.
3.2 Child Support Services

Once successfully registered, the User will be returned to the main menu. If the User is both a NCP and a CP, they will be required to choose the view that they want to access for the session.
Select View - OCSE Employee Signed In

After signing in, OCSE employees will choose if they want to view a NCP case or CP Case and must enter the correct Client ID in order to access the case using this screen.
3.3 Administration
Resetting passwords is a function of the Portal Call Center.

If you have questions or need assistance using georgia.gov please contact the georgia.gov Contact Center Monday - Friday 8 a.m. - 5 p.m.

Email: help@georgia.gov
Atlanta metro: (404) 818-6600
Statewide (Toll free): (866) 351-0001

When a User requests to have their password reset. The PCC will not look up IRN (Client ID) for Users. In order for the User to be allowed to have their password reset, they will need to provide the IRN (Client ID). The PCC will sign in to the CSPP and then verify the caller's name, SSN from the information. After verification, they will proceed to the Admin screens.

Click on the Admin tab and select “Reset Password”.

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Portal Call Center - Admin - Reset Password
Portal Call Center - Admin - Reset Password

Input the Client Id and Submit.

Portal Call Center - Admin - Password Reset Successfully

When the reset was successful this screen will display. The User will be told to login using the Client ID/IRN and the password and they will be required to obtain a new password.
Registering Users with Family Violence Indicators. Users will be instructed to go to their local child support office and provide identification. The OCSE will call the PCC and then hand the telephone to the USER. The PCC will go to the Admin and click Register User and will then update the information in the Register User screen.

A new UserName will be created and the PCC will tell the User that they will input the Client ID/IRN for the first access and then will be required to enter a new password.
3.4 **Case Payments**

The CSPP allows access to all payments received in the last year. To access the information, click on Case Payments. If no payments have been made a message will display “No information available at this time.” If the check screen is accessed, it will display a message “No Check Information.”

The check display allows the User to see basic Check information and if they click on the highlighted and underlined date, details of the check will display. If the method of payment was Direct Deposit, then Direct Deposit will appear instead of Check under Method.

<table>
<thead>
<tr>
<th>Date</th>
<th>Method/Check No.</th>
<th>Amount</th>
<th>Payor</th>
<th>Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/08/2004</td>
<td>Direct Deposit</td>
<td>$300.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>05/18/2004</td>
<td>Check 3161021</td>
<td>$150.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>05/12/2004</td>
<td>Check 33087731</td>
<td>$249.09</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>01/09/2004</td>
<td>Check 31653346</td>
<td>$125.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>12/24/2003</td>
<td>Check 31491388</td>
<td>$275.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>12/05/2003</td>
<td>Check 31201974</td>
<td>$125.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>12/02/2003</td>
<td>Check 31241205</td>
<td>$150.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>11/18/2003</td>
<td>Check 31098747</td>
<td>$150.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
<tr>
<td>11/07/2003</td>
<td>Check 30977577</td>
<td>$150.00</td>
<td>R. EAST</td>
<td>460013088</td>
</tr>
</tbody>
</table>
Check Details

After clicking on the highlighted and underlined check date, this screen will appear.

This screen allows the User to see the address where the check was mailed and if the check has cleared the bank, then they can request a copy of the check.

If the payment was sent via Direct Deposit, there will be no ability to request a copy.
After clicking on Request a copy of this check, the user will be required to select an option, click next and then click submit.
Email to Request Copy of Check

If a request for a copy is made, then this email will be forwarded to the OCSE employee assigned to the case. The employee will follow the same procedures currently followed when receiving requests to obtain copies of checks. If the CP has requested more than 6 in a calendar year, then OCSE should not process the request until the CP pays the $5 per check image requirement.
A message is displayed to the User. It states that if they have requested more than 5 check
copies in the last calendar year, then their request will not be processed until they provide
the local office with the $5 per check fee. It also advises them that the check images will be mailed to
their current address within 10 days of receipt of the request or fee if applicable.

If the check has not cleared the bank, then the User will be allowed to request a stop payment if
the check is greater than 25 days old. No stop payments will be allowed on Direct Deposit. CPs
and OCSE employees will be allowed to use this screen to request stop payments.
Stop Payment Questions

After clicking on Stop payment on this check, the user will be required to select an option, click next and then click submit.
Stop Payment - Do you have this check?

If the User checks that they have the check, then they will not be allowed to request a stop payment. They will receive a message as shown here.

Email - Stop Payment for Case

When the request is submitted an email is sent to OFS.
A message is displayed to the CP, and will state the following:
Your stop payment request has been submitted, if you receive this check, PLEASE DO NOT cash it. A replacement check will be sent to your local office within 10 days. You do not need to contact your Agent, they will contact you when the replacement check is received. You will be required to sign an affidavit in order to obtain the check.

The CP will be able to obtain a list of checks received for the last 12 months.
### Payment Details - Amounts paid to arrears and to current support

By clicking on the date, details of the payment will display. If money was applied to state arrears or a recoupment that information will display. If the case is TANF, a GAP explanation is available.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Payor</th>
<th>Case</th>
<th>Due to You</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/07/2004</td>
<td>$300.00</td>
<td>R. EAST</td>
<td>460012089</td>
<td>$300.00</td>
</tr>
</tbody>
</table>

- **Paid to Current Support:** $300.00
- **Paid to Arrears:** $0.00
- **Due to You:** $300.00

Helpful Information: This is a break down of the payment amount. It is divided into amount paid to arrears, and current support.
Mailing Address
Changes to your mailing address affect where your payments are mailed.

Address Line 1: UNIT 1
Address Line 2: 1475 RAIDER DR SE
City: DALTON
State: GEORGIA
Country: Zip: 30721

Last Updated: 03/08/2004

Residential Address

Address Line 1: 1475 RAIDER DR
Address Line 2: UNIT 1
City: DALTON
State: GEORGIA
Country: Zip: 30721

Last Updated: 03/03/2004

Phone & Email

My Info - Mailing and Residential Addresses
To Update the Address this screen will be provided. Once updated, a new screen displays with the information input and the CP must verify the information prior to it updating.

To update the employer address the CP must answer a few questions.
Are you currently employed?

Then they will be allowed to provide employer and insurance information that will update $TARS.
The CP will be able to find her Case Number, Case Status with an explanation and the office that handles the case.

### 4.0 Release Two

Release two provides functionality for the NCP. There has also been additional information added to clarify the contact information for questions concerning Registration and Password Reset.
4.1 Portal Call Center Contact Information
The Customer Service Screen has been added to provide the NCP/CP with the Portal Call Center contact information for Registration, Password Reset, and Navigation help.
4.2 Paternity Acknowledgment
Information about acknowledging Paternity is now available. Below is a screen shot of the information provided.
4.3 NCP Registration and Password Reset

Information is now available for the NCP to access via the CSPP. The NCP will be required to register onto the site. To Register they will select Registration, input their First Name, Last Name, SSN and IRN(ClientID).
Registration Complete

Upon entering submit they will be given a UserName, it is important that they remember this UserName in order to access the CSPP.
After registering they will immediately be taken to the Sign In Screen, this is also the Screen that they will access every time they wish to enter the site. They will enter their User ID. (The Client's User ID is the first letter of their first name, first 3 letters of their last name and the last 4 digits of the SSN.) The first login the password is the Client ID/IRN, after logging in they will be required to select their own password.
Change Password

In order to change your password, you must enter your current password first. Next, enter your new password, and then enter that same new password again to confirm it. When you have finished, click on Submit and the process is complete.

*User ID: GHOL5916
*Current Password: 
*New Password: 
*Re-enter New Password: 

Submit

This screen is how the password is changed.
Select View - When client has both CP and NCP status in cases

After the NCP signs in, if he has cases where he is the CP or NCP this screen is displayed so that he can choose the role he wishes to view. He cannot view NCP and CP in the same sequence. He will have to click on “Select View” to change the role he wishes to view.
Agents now have the ability to send ALERTS or Bulletins to both CPs and NCPs. These ALERTS are manually input by the agent and display on the screen as soon as the user signs in. The user may delete the alerts by clicking on the message at the bottom of the sign-in page: “Don't show this alert next time...”. A permanent record of the alert is stored in the Case Action Log (CAL).
The NCP will now have access to his payment record. The Record lists the payment date, payment source type of payment amount, and the case(s) the payment applied to.

**Payment Screen listing all NCP cases**

The following payments have been received in the last year. Click on the payment amount to view payment details.

<table>
<thead>
<tr>
<th>Date</th>
<th>Source</th>
<th>Method</th>
<th>Amount</th>
<th>Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/10/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$39.54</td>
<td>250007375</td>
</tr>
<tr>
<td>06/10/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$45.54</td>
<td>160007306</td>
</tr>
<tr>
<td>06/10/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$62.00</td>
<td>80004217</td>
</tr>
<tr>
<td>06/03/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$39.54</td>
<td>250007375</td>
</tr>
<tr>
<td>06/03/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$45.54</td>
<td>160007306</td>
</tr>
<tr>
<td>06/03/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$62.00</td>
<td>80004217</td>
</tr>
<tr>
<td>05/27/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$62.00</td>
<td>80004217</td>
</tr>
<tr>
<td>05/27/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$45.54</td>
<td>160007306</td>
</tr>
<tr>
<td>05/27/2004</td>
<td>WAGE ASSIGNMENT</td>
<td>CHECK</td>
<td>$39.54</td>
<td>250007375</td>
</tr>
<tr>
<td>Date</td>
<td>Status</td>
<td>Description</td>
<td>Amount</td>
<td>Account Numbers</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------</td>
<td>----------------------</td>
<td>---------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>04/23/2004</td>
<td>UNEMPLOYMENT</td>
<td>ELECTRONIC FUNDS TRANSFER</td>
<td>$81.72</td>
<td>250007375 160007306 80004217</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$23.23 250007375</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>$35.26 80004217</td>
<td></td>
<td></td>
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<td>04/23/2004</td>
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<td>ELECTRONIC FUNDS TRANSFER</td>
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<tr>
<td></td>
<td></td>
<td>$13.49 160007306</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>$35.26 80004217</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/16/2004</td>
<td>UNEMPLOYMENT</td>
<td>ELECTRONIC FUNDS TRANSFER</td>
<td>$81.72</td>
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<tr>
<td></td>
<td></td>
<td>$35.26 80004217</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**One Payment Credited to numerous cases**

Below is an example of one payment applying to multiple cases.
Case Payments - Payment Details

The NCP can click on the payment amount and receive details about the payment. Below is a payment that all applied to current support. If a portion of a payment applied to any arrears account that amount will appear in the Paid to Arrears.

Case Payments - Payment Details - Amount Retained

If a portion of the payment is retained due to a recoupment then this will display.
If the full payment or a portion of the payment is in NCP escrow, then this screen will display and they can click on “Verify Your Mailing Address” to make sure the address is correct.
Once the Refund check is mailed this screen will display.
Refund mailed to NCP & returned

If the refund has already mailed but has been returned, this screen will display.
The NCP will be able to see details about his support order(s).

He can choose the case number (if he has multiple cases) and then the support orders associated with the specific case appear.

If he has multiple orders he can choose the one to review by clicking the order number.
Support Order Details

The Support Order Details provides the NCP with specific information concerning the order selected.

It provides the order number, support order type, current monthly amount (converts all frequencies to a monthly figure) current repay on arrears amount, and the total arrears balance.
NCP’s address & contact Info

The address and contact information for the NCP displays the information that is currently held in sequence 1 of the address and employer fields in $TARS.
If there is employer data in $TARS then it will appear on this screen and the NCP can provide updated information by clicking Update.
If there is medical information on $TARS$ then it will appear on this screen and the NCP can provide updated information by clicking Update.
The NCP will be allowed to Submit information but it will not automatically update $TARS.

The Agent assigned the case, will receive a prompt and the information will be located in the IVA Detail Screen in $TARS.
These are screen shots of the “New” IVA Details Screen in $TARS. If an Agent receives a prompt stating the NCP provided new information via the CSPP, the appropriate step is to go to Case Management, NCP, IVA Details NCP.

From this screen the Agent can select to view the data from DFCS (IVA) or CSPP. The Agent can select the data that they want transferred over to the $TARS screens.

For example if you want the address to go to the NCP Address Screen then click the Address box and the sequence you want it to appear, click all the other reject buttons
for other information but do not check address and submit.

The address will then appear in the NCP address field in the selected sequence. You can also select all the data by clicking on the Select all button.

This is what the screen looks like when CSPP is selected.

---

**CSPP - NCP Address**

<table>
<thead>
<tr>
<th>Address Selection:</th>
<th>Sequence Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCP CURRENT ADDRESS SELECTION(C)</td>
<td>(None Selected)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>Country</td>
<td>Zip</td>
</tr>
</tbody>
</table>

**CSPP - NCP Employer**

| Employer Selection: Sequence Number: |
|-------------------------------|-------------------------------|
|                                |                               |

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Start Date</th>
<th>End Date</th>
<th>Self Employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1</td>
<td>Address Line 2</td>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Country</td>
<td>Zip</td>
<td>Phone Number</td>
</tr>
<tr>
<td>Salary</td>
<td>Salary Frequency</td>
<td>Contact Allowed</td>
<td>Contact Person</td>
</tr>
</tbody>
</table>

**CSPP - NCP Status**

<table>
<thead>
<tr>
<th>Military Status</th>
<th>Branch</th>
<th>Entry Date</th>
<th>Discharge Date</th>
<th>UnEmployment Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incarcerated Currently</td>
<td>Incarcerated Previously</td>
<td>Institution</td>
<td>Union/Local</td>
<td></td>
</tr>
</tbody>
</table>

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**CSPP - NCP Insurance**

<table>
<thead>
<tr>
<th>Select Insurance</th>
<th>Insurance Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Policy Holder Name</th>
<th>Policy Number</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Address Line 1</th>
<th>Address Line 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Country</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone</th>
<th>Applicant Role</th>
<th>Effective Date</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Children Covered**

<table>
<thead>
<tr>
<th>Child Name</th>
<th>Child ID</th>
<th>Case Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Reject CSPP Information**

- [ ] All
- [ ] Address
- [ ] Demograph
- [ ] Employer
- [ ] Insurance

The data below is display only, and cannot be selected or transferred.

---

**NCP-IVA-NCP-Detail - Constituent Services Portal - STARS Screen Part 3**
The NCP can also view information about his case.
Authorize Direct Deposit

You must review and agree to the following to receive direct deposit:

I authorize Child Support Enforcement (CSE) to deposit my child support payments directly into my checking account. CSE is also authorized to adjust any over/under deposit it has made to my checking account. I understand the deposits/adjustments will be made electronically by Automated Clearing House (ACH) transactions and I must allow the Federal Reserve two (2) workdays from the disbursement date to have the funds available to my financial institution.

I also understand the following:

- It is my responsibility to provide correct routing and account information for ACH transactions.
- CSE does not verify my information with a pre-note.
- I must immediately notify CSE online or contact my local office if my banking information changes.
- I can stop my direct deposit online or by contacting the CSE Hotline.
- I must notify CSE online or contact customer service if my address changes.

I AGREE

Authorize Direct Deposit

The CP is now able to apply for Direct Deposit on the CSPP. She must read the follow and click I Agree in order to proceed.
The CP will enter her banking information in order to apply for Direct Deposit. She is be required to list the name, city, and state of her bank.

In addition she is required to include the routing and account number. A picture of a check is displayed to insure the CP uses the right numbers.
If the CP enters incorrect information, she will be notified.
After entering the data, the CP is allowed an opportunity to check the information to insure it is accurate prior to submitting.
After submitting, the CP will receive notice that the request has been received.

At this point $TARS$ is automatically updated with the CP Direct Deposit information and the next child support received will go to the bank account identified by the CP.
The CP will also be allowed to Cancel Direct Deposit.
She clicks “Cancel Direct Deposit and Next”.

---

**Cancel Direct Deposit**
Direct Deposit Cancellation request received

The CP will receive this information and $TARS removes the direct deposit information from the CP screen.

The case information will be sent for a Debit Card to be established on the CP on the night that this happens.
You will notice a change to the Custodian Detail Screen.

The Financial Institution Name, City, and State now appear. When the CP applies for Direct Deposit on the CSPP she will be required to complete these fields and they will automatically update $TARS.

An Agent is not required to complete these fields when they update a Direct Deposit but if they have the information they should complete it.
Our Services information includes:
- responsibilities for applications (attachment 1)
- child support collection info (attachment 2)
- requirement to notify OCSE of changes

New INFO RE CASE PROCESSING includes several areas, all highlighted in your call script handout, pages 3 - 12.

One of the major changes in release 3 is that constituents will be able to email OCSE directly from the portal. (see next slide)
Email Customer Service

The constituent must provide their name and either a telephone number or email address.

Messages are limited to 150 characters.
If the email is sent from the public home page, the email will go to the SCSU.
If the email is sent from a customer after he/she has signed in, the email will go to the generic email address assigned to the office that manages the case.
These generic email addresses are included in the OFFICE FINDER section, also available in release 3 (see next slide).

CALL SCRIPTS PAGE 12
Office Finder

DROP DOWN BOXES
(1) County
(2) Office name (same listing that displays on $TARS during a search)
PAYMENT FREQUENCIES were scheduled to be available in release 3, but to my knowledge are not ready. If this changes, I will let you know via email.
Provide Info Menu Options

PROVIDE INFO-->
New option is for the CP to provide updated information about the NCP.
The CP may provide info in the areas of:
Name-->Name, birth information, marital status
License-->drivers/professional
Employer-->Employer
Other Income-->child support/spousal support/etc.
Contacts-->Contacts
Criminal History
Vehicle
Other Children
Physical description
Address
Insurance
Parents
Military
Property
Investments
Additional Info

Other Parent Information

Select the area where you would like to provide information. You may provide information in just one or multiple areas.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>License</td>
<td>Address</td>
</tr>
<tr>
<td>Employer</td>
<td>Insurance</td>
</tr>
<tr>
<td>Other income</td>
<td>Parents</td>
</tr>
<tr>
<td>Contacts</td>
<td>Military</td>
</tr>
<tr>
<td>Criminal History</td>
<td>Property</td>
</tr>
<tr>
<td>Vehicle</td>
<td>Investments</td>
</tr>
<tr>
<td>Other Children</td>
<td>Additional Information</td>
</tr>
</tbody>
</table>
Each AREA that is selected will display a drop-down box for the NCP's name at the top of the page. The CP must select the NCP from the drop-down box.
Marital

Marital Status: [PLEASE SELECT]

Spouse's Name: [PLEASE SELECT]

Date Married: [PLEASE SELECT]

*Required Entry

NEXT

Marital
Each time an area of information is updated, the EDIT or SUBMIT screen will appear to display the data that was input.

**Updated Other Parent Info Displays**

First: Reggie  
Middle: Brice  
Last: Sr  
Maiden/Other:  
Social Security Number: 222334444.

Birth Date: 12/25/1955  
Birth City: Las Vegas  
Birth State: NEVADA

Marital Status: MARRIED  
Spouse's Name: Shawnee Brice  
Date Married: 05/31/2004
Confirmation - information successfully submitted.

Each area of info that is submitted will result in a confirmation screen display.
Update License Info
Other Parent Licensing - Professional License Info
Other Parent Licensing - License Type
Other Parent Employment

YOLANDA MARINE

*Non-Custodial Parent: 

**PLEASE SELECT**

**PLEASE SELECT**

REGINALD BRICE(10013219)

*Currently employed? 

☐ Yes ☐ No

*Required Entry

NEXT ▶
Other Parent Employment - Currently Employed?
As each field is populated on the OTHER INCOME page, a total appears and is updated at the bottom of the page. After clicking on NEXT, an EDIT/SUBMIT page appears and then a confirmation page.
The only DROP-DOWN boxes on this screen are

(1) identify NCP
(2) state of contact
Other Parent Criminal History

If "YES" is highlighted in response to whether the NCP has a criminal history or not.....the following page displays......
If "YES" is highlighted in response to the questions about parole and/or incarceration, additional information fields appear......see next slide.
### Other Parent Criminal History

**Non-Custodial Parent:** OCTAVIOUS LANE (460801220)

#### Criminal History

- **Does NCP have a criminal record?**
  - [ ] Yes
  - [ ] No
  - [ ] Unknown

- **Is NCP on Parole?**
  - [ ] Yes
  - [ ] No
  - [ ] Unknown

- **Parole Officer:**
- **Phone:**

- **Is NCP Incarcerated?**
  - [ ] Yes
  - [ ] No
  - [ ] Unknown

- **Institution Name:**
- **City:**
- **State:** PLEASE SELECT

---

**Other Parent Criminal History - Parole / Incarceration**
DROP DOWN BOXES:
(1) Identify NCP
(2) Year of vehicle
(3) State of vehicle registration
If the CP answers "yes" .....additional information fields will display... see next slide
Other Parent Child Info

*Non-Custodial Parent: PLEASE SELECT

*Is the NCP legally responsible for supporting biological or adopted child(ren) not on this case? [ ] Yes [ ] No

Other Child

First Name:
Middle Name:
Last Name:
Suffix:
Birth Date: mm/dd/yyyy

*Required Entry

NEXT
Other Parent Description - Physical Description

DROP DOWN BOXES:
(1) Hair-->bald/black/brown/blond/gray/red/white/other
(2) Eyes-->black/blue/brown/gray/green/hazel/pink
(3) height
(4) race-->Asian/Black/Hispanic/Mixed/Native American/
   Pacific or Alaskan native/unknown/white
**Other Parent Address**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Custodial Parent</td>
<td>PLEASE SELECT</td>
</tr>
<tr>
<td>Address Line 1</td>
<td></td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>PLEASE SELECT</td>
</tr>
<tr>
<td>Country</td>
<td>UNITED STATES</td>
</tr>
<tr>
<td>Zip</td>
<td></td>
</tr>
</tbody>
</table>

**Phone & Email**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td></td>
</tr>
<tr>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>Mobile</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

*Required Entry

DROP DOWN boxes for State & Country
Other Parent Insurance

If YES is entered, additional fields will display.....
See next slide
Other Parent Insurance - Insurance Info
Other Parent Insurance - When NCP is selected

System requires the NCP name be identified in the DROP DOWN BOX at the top of the page.
When the NCP is identified,
the children’s names listed in the case appear at the bottom of the page.
Note: Phone number must be entered with no spaces/dashes
If the child listed is covered under the insurance plan identified, the box beside the child’s name should be populated.
### Other Parent's Parent Info

<table>
<thead>
<tr>
<th>Relationship:</th>
<th>☐ Mother  ☐ Father</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Middle Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Suffix:</td>
<td></td>
</tr>
<tr>
<td>Maiden Name:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deceased:</th>
<th>☐ Yes  ☐ No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1:</td>
<td></td>
</tr>
<tr>
<td>Address Line 2:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>State:</td>
<td>PLEASE SELECT</td>
</tr>
<tr>
<td>Zip:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>Birth City:</td>
<td></td>
</tr>
<tr>
<td>Birth State:</td>
<td>PLEASE SELECT</td>
</tr>
</tbody>
</table>
Other Parent Military

**Non-Custodial Parent:** PLEASE SELECT

**Military**

**Military Branch:** PLEASE SELECT

**Military Status:** PLEASE SELECT

**Service Number:**

**Dates Served:** mm/dd/yyyy to mm/dd/yyyy

*Required Entry

**DROP DOWN BOXES:**

(1) Identify NCP
(2) Military branch: Air Force/Army/Coast Guard/Marine Corp/
National Guard/Navy
(3) status: active/dishonorable discharge/general discharge/
honorable discharge/military disability/no military service/
prior military service/reserves/retired
Other Parent Property

JACQUELINE PERSKY

*Non-Custodial Parent:  PLEASE SELECT

Property

Description: 
Estimated Value: 
Address Line 1: 
Address Line 2: 
City: 
State:  PLEASE SELECT
Zip: 
Lien Holder: 

*Required Entry

No required field except the NCP's name.
Data may be input in any field with no additional drop down fields.
Other Parent Investments

*Non-Custodial Parent: PLEASE SELECT

Investments

*Is NCP currently in Bankruptcy?  ○ Yes  ○ No  ○ Unsure

Institution/Bank Name: 
Investment Type: 
Account Number: 
Account Value: 

*Required Entry

Is NCP currently in bankruptcy?
No additional drop down fields appear when either of the boxes are populated.
Other Parent Other Information

JACQUELINE PERSKY

*Non-Custodial Parent: PLEASE SELECT

Other Info

Enter other information which may be helpful in locating the non-custodial parent.

Comment/Note:

150 characters remaining on your input limit

*Required Entry

NEXT

Data is restricted to 150 characters, as indicated at the bottom of the screen.
As info is typed, the character count decreases.
Case Activity

These activities have occurred on your case(s) within the last 60 days.

<table>
<thead>
<tr>
<th>Date</th>
<th>Case Number</th>
<th>Source</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/24/2004</td>
<td>880011264</td>
<td>Agent</td>
<td>PORTAL: CP REQUESTS THAT CASE BE CLOSED REASON: ICR COMMENTS:</td>
</tr>
<tr>
<td>06/23/2004</td>
<td>880011264</td>
<td>Agent</td>
<td>CU MAIL ADDRESS &quot;1ST UPDATE SCENARIO 1 UPDATE CITY GA 30135&quot; CHG TO &quot;1ST UPDATE SCENARIO 1 UPDATE CITY GA 30135 USA&quot;</td>
</tr>
<tr>
<td>06/23/2004</td>
<td>880011264</td>
<td>Agent</td>
<td>CU BAD ADDRESS INDICATOR &quot;N&quot; CHG TO &quot;N&quot;</td>
</tr>
<tr>
<td>06/23/2004</td>
<td>880011264</td>
<td>Agent</td>
<td>CU MAIL ADDRESS &quot;1ST UPDATE SCENARIO 1 UPDATE CITY GA 30135&quot; CHG TO &quot;1ST UPDATE SCENARIO 1 UPDATE CITY GA 30135 USA&quot;</td>
</tr>
<tr>
<td>06/23/2004</td>
<td>880011264</td>
<td>Agent</td>
<td>CU BAD ADDRESS INDICATOR &quot;Y&quot; CHG TO &quot;N&quot;</td>
</tr>
<tr>
<td>06/22/2004</td>
<td>880011264</td>
<td>Portal</td>
<td>PORTAL: LOCATE - NEW OTHER INFORMATION PROVIDED BY CP</td>
</tr>
<tr>
<td>06/22/2004</td>
<td>880011264</td>
<td>Portal</td>
<td>PORTAL: LOCATE - NEW OTHER CHILD INFORMATION PROVIDED BY CP</td>
</tr>
<tr>
<td>06/22/2004</td>
<td>880011264</td>
<td>Portal</td>
<td>PORTAL: LOCATE - NEW INVESTMENT INFORMATION PROVIDED BY CP</td>
</tr>
<tr>
<td>06/22/2004</td>
<td>880011264</td>
<td>Portal</td>
<td>PORTAL: LOCATE - NEW VEHICLE INFORMATION PROVIDED BY CP</td>
</tr>
<tr>
<td>06/22/2004</td>
<td>880011264</td>
<td>Portal</td>
<td>PORTAL: LOCATE - NEW PROPERTY INFORMATION PROVIDED BY CP</td>
</tr>
</tbody>
</table>

Case Activity

Any case activity during the last 60 days will display.

**Information will display in columns:**

Date
Case Number
Source (Agent/Admin/Portal/
Activity

Case activity displayed will include many things, including
- updates made by the client online, password resets, etc.
- system activity
- user activity
some specific examples follow...
06/22/2004 880011264 Portal  PORTAL: LOCATE - NEW NAME INFORMATION PROVIDED BY CP

06/22/2004 880011264 Portal  CU EMPLOYER CHG FROM "WALMART ASSOCIATES INC PAYROLL TAX #0555 1301 S E 10TH STREET BENTONVILLE AR 727124907 RENEE-PERSONNEL DEPT 0000000000" TO

06/22/2004 880011264 Portal  CU INSURED INDICATOR CHG TO "N"

06/22/2004 880011264 Portal  CU PHONE H/M/W/EMAIL "6789364275/7706191123/1234567890/3214567890/MYBABY@YAHOO.COM"

06/22/2004 880011264 Portal  CU RESIDENCE ADDRESS "4917 SPRING BROOK DRIVE DOUGLASVILLE GA 30135" CHG TO "2ND UPDATE SCENARIO 1 UPDATE CITY GA 30135 USA"

06/22/2004 880011264 Portal  CU MAIL ADDRESS "4917 SPRING BROOK DRIVE DOUGLASVILLE GA 30135" CHG TO "1ST UPDATE SCENARIO 1 UPDATE CITY GA 30135 USA"

06/22/2004 880011264 Portal  CU BAD ADDRESS INDICATOR "Y" CHG TO "N"

06/22/2004 880011264 Portal  CP EFT INDICATOR "Y" CHG TO "N"

06/22/2004 880011264 Portal  CU DEPOSIT INFO "BANK ONE/JACKSONVILLE/LA/C/1111111111/1111111111" CHG TO "WACHOVIA/JACKSONVILLE/FL/C/2222222222/1111111111"

06/22/2004 880011264 Portal  CU DEPOSIT INFO "///051000017/00411111673254" CHG TO "BANK ONE/JACKSONVILLE/LA/C/1111111111/1111111111"

06/01/2004 880011264 Agent  10. NONBULLETIN CAL FOR CP/NCP.

06/01/2004 880011264 Agent  16. NON-BULLETIN CAL FOR CP. SCENARIO 1 RELEASE 3.

06/01/2004 880011264 Agent  14.00 CAL BULLETIN FOR NCP/SCENARIO 1/RELEASE 3.

06/01/2004 880011264 Portal  #13. CAL BULLETIN FOR CP. SCENATION 1/RELEASE 3.

Case Activity - Continued
If the CP is viewing the appointment page, any appointment scheduled for him/her will say 'FOR YOU'
Request Case Closure

Only available to CPs at MY CASE->CLOSE MY CASE.
If the case is ineligible for closure (example: Active TANF or Non-IVD), a message will display advising the CP that the case is ineligible for closure, and the reason will be provided.
If the case is eligible for closure, a message will display that explains the requirement to change the case from a IV-D to a Non-IVD case, and that should the CP decide to apply for services in the future, application fees will apply.

The CP must select which case to close.
Click on NEXT...
Close My Case - Confirmation - active TANF not eligible for closure
Close My Case

By clicking submit you are electing to discontinue child support services for Case 460001220.

When a case is closed, the Office of Child Support Enforcement will no longer pursue locate action, order establishment actions, or enforcement actions against J.LANE. If payments are being received via wage withholding, these payments will continue to be paid to the Family Support Registry and distributed to you.

Once a case has been closed, a new application and $25 application fee are required to reopen the case.

Helpful Information
Locate actions include attempts to identify the other parent’s address and employer.

Enforcement actions include establishing wage withholding, license revocation, passport denial, and tax refund offset.

To terminate a wage withholding, a court order must be obtained.

CANCEL X  SUBMIT

Close My Case - Cancel or Submit
Case Managers began receiving prompts on July 12, 2004 based on information the CP or NCP provided concerning the NCP via the CSPP. Currently a prompt is generated for each data type submitted, however, a change request has been made to only submit one prompt per case. A case action log is also generated to indicate that information was provided from either the CP or the NCP.

Information that the CP provides about herself is automatically updated in $TARS and a case action log is generated. There are no prompts sent to the case managers. However, information that the CP provides about the NCP or the NCP provides about herself, will update the NCP IVA Details screen. The following are instructions on viewing the information and moving the information to the appropriate $TARS screens if needed.

Go to the Case Management, NonCustodial Parent, NCP IVA Detail Screen in $TARS.

The IVA Detail Screen previously only contained information provided from SUCCESS. Now you can select the information you want to see by selecting the appropriate source code. Selecting IV-A (A) will list any information provided via the SUCCESS interface, selecting CSPP CP (N) will list information provided by the CP, and selecting CSPP NCP (P) will list information provided by the NCP.
The prompt and case action log currently will indicate the type of information that the CP provided. It will indicate NCP Information, NCP Address, NCP Employer etc. Once the change is made to only receive one prompt per day, the CAL will indicate the type of information. However, you can view the IVA-Detail screen and easily see the information displayed. In the example below the CP provided all the information that is displayed other than the NCP Client ID and Name.

CSPP - NCP Information 01

CSPP - NCP Information 02
The CSPP NCP Address lists the current information provided. To see what was previously submitted, the select the arrow on the Address Selection to select previous address. If you want to move the address to $TARS, select the Sequence Number that you want to move it to. Instructions on actually moving to $TARS will be later in this document.

Employer selection works similar to address. To see other employer information select the Employer Selection (this case does have any). To move employer information to $TARS, select the sequence number that you want to move it to and again how to actually move it will be discussed later in this document.
CSPP - NCP Status

CP or NCP can provide status information. The status information lists beside the box and is a 1 letter code that is the same as in the $TARS screen.

CSPP - NCP Insurance

Insurance Information can also be provided.
IVA - Other Children / IVA - Financial Institute Information

Information about other children or Financial Information will display here:

IVA - NCP Relatives

Information provided on the NCP relatives will display here.
Reject CSPP Information

All or just part of the information provided can be moved to $TARS. For example the address will be moved to the NCP Address screen in $TARS to the sequence number that you have selected. If you want to move it all to $TARS just click on Select All and Submit. If you want to accept some of the information but not all, then click on the items that you do not want to move to $TARS, click reject. Then click select and submit to submit the remaining items to $TARS.
GEORGIA DHR

OFFICE OF CHILD SUPPORT ENFORCEMENT

Constituent Service Portal Project
Release 4

October, 2004
Prepared by:
Judy Carnes and Cindy Moss
1.0 Make A Payment

The OCSE now has the ability to accept credit card and debit card payments online via the CSPP site. Validation of the credit card is done to insure that the person submitting the payment has an active credit/debit card account and that the card balance is not over It's limit. Child support payments, rev/mod fees, application fees, and paternity test fees can be made via the CSPP. Child support payments can be paid without being registered onto the CSPP. Application fees can only be paid at the end of the online application process. To pay a Rev/Mod fee or to pay a paternity test fee the payor must be a registered user of the CSPP.

The back end of the credit card process is very complicated and will require some high level work by the CSCA.

- When a credit card payment is made the SSN or case number entered are validated on $TARS (except for application fee payments)
- Only MasterCard and Visa cards are accepted
- There is a $1.77 fee for each credit/debit card transaction submitted and this fee is paid by the submitter
- The $1.77 transaction fee will be sent to OCSE via the ACH (this is the federal reserve process for transferring money and is the same thing used for EFT and the debit card) from the Merchant Bank, First Data
- Once per month OCSE will receive an invoice to pay First Data the transaction fees received for the month
- $TARS will generate a fee check at the beginning of each month
- Only the child support payment amount will be posted to the $TARS case
- Child support payments will be posted by SSN unless the NCP enters the case number
  - If someone wants to pay via credit card to settle a contempt action, license suspension, lien etc, be sure that they enter the case number on the make a payment screen
  - If you are going to release someone from jail, make them provide you a copy of their confirmation which will be their receipt
  - If you want to confirm the transaction prior to releasing someone from jail, contact CSCA (we will let you know who to call) and they will be able to look up the transaction prior to the receipt being created in $TARS
- Fee payments require the SSN
- The CSPP will gather all the credit/debit card payments and once per day send the batch to $TARS
- Upon receipt of the CSPP batch, $TARS will create a batch and individual receipts for each credit/debit card payment submitted.
  - The batch will be assigned to CSCA
  - Child support payments and fee payments will all be in the same batch
  - CSCA staff will be required to validate each payment and reconcile the payments with First Data and GTA reports
- The credit card batch will be held until the ACH is received
  - First Data must settle with the credit card companies
    - Settlement takes place the day after the payment is made via credit/debit
  - On the day of settlement, the ACH is sent and is expected to be received 48 hours after settlement (this is business days, so if settlement is on Friday, then the money is expected on Wed)
What to do if a payor states that the payment was made in error or for the wrong amount?
- If no payment showing on $TARS:
  - Require that the payor provide a written statement of why they want to cancel the payment
  - Require the payor to provide a copy of the confirmation

### 2.0 Apply Now

Online applications are now available via the CSPP. The applicant must pay the application fee or they will not be able to apply online. With release 5 of the CSPP due in December 22, 2004, the local OCSE Agent will be allowed to override the application fee. This will allow those that do not have a credit/debit card to apply online.

The applicants will be required to read what child support can and cannot do, check off the items on “agreement” and if they do not then they will not be allowed to submit and begin the application process. Therefore, if someone who applies online says that they were not told any of the items in our application, we can positively say that you were required to read this information prior to applying for services.

The questions the applicants receive/display during the application process will relate to how they responded to the previous question. To view this application in detail, please go to the site and go through the steps. You will be able to do everything but submit the application.

If the applicant state they have received Medicaid or TANF they will not be allowed to apply online.

At the point that the applicant submits the application, they are given confirmation. By submitting they are providing their electronic signature. They are also advised that they must provide certified copies of orders, birth certificates, driver's license, arrears affidavits, and paternity affidavits if required. They are given links to the OCSE website for arrears affidavits and paternity affidavits. They are notified that their case will not be processed until all required documents are received.

Applicants can save their applications to work on at a later time. In December with Release 5, we can have applicants that do not have credit or debit cards save their applications and then come to the office where the local agent will be able to override the application fee requirement.

It is suggested that local offices provide computer access for those that visit the office for an application. This will enable the applicant to do the majority of the data entry and will free our staff of this tedious task.
Case Initiation - Referrals

2.1 Electronic Referrals

The employee in each office that receives IVA referrals will also begin receiving NTANF electronic “applications”. These referrals will appear in the same area as the IVA referrals. The referral type will be listed as “Q” for Constituent Services Portal:
Registration will be similar to IVA registration. Use the same screening process required for IVA/NTANF applications. Additional information can be found in the NCP IVA Detail Screen. Go to this screen and select the source code of T - CSPP NCP Application. This will allow you to select or reject data to input into the $TARS table. You can select all the data provided by clicking on Select all or you can check the data that you do not want to accept and then click submit.

The full application can be found in View Direct called SIDI01PR CSPP Constituent Application Report. If you are required to bring the application to court then you will need to print it out. If your court doesn't require you to bring the application then you may not wish to print it out. There are data elements in the application that are not on $TARS and therefore only available via the viewdirect report.