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## General Information Memorandum

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ISD-GI 14-15

**TO:** ISD Employees  
**FROM:**  Marilyn Martinez, Acting Director, Income Support Division  
**RE:** Case Comments Documentation in ASPEN  
**DATE:** March 12, 2014

This GI rescinds previous GI 13-14 regarding "Preparation of ASPEN," and serves to outline case comments documentation in ASPEN as listed below:

- 1) **Special Accommodations Statement:** Begin an entry in ASPEN case comments with a statement regarding any barriers or needs that should be addressed including disabilities, hearing impaired, translation necessary, transportation, age and any other barriers as the situation warrants; or state that the client indicated none.
- 2) **Standard Case Comments for Narratives:** Included with this GI is the guide to follow when narrating the case in the ASPEN case comments. It is important that case comments in ASPEN be entered which allow any user to follow the case development. The guide has been provided for intake, customer service, processing, semi-annual/interim reports and recertifications/redeterminations.
- 3) **Telephone and Phone-Free Messages:** ASPEN is driven by a case or individual identification number. Please ensure that the language on all phone messages state that the applicant/recipient leaves their name, date of birth or case/individual identification number. Any contact with applicant/recipient by phone should be narrated in the case comments in ASPEN.
- 4) **Client Contact:** Any type of client contact must be narrated in the case comments in ASPEN. This will ensure the case comments can be referenced and followed for the case development and processing.

**NOTE:** Always enter the Office Name, not the GEO/ADM codes, and the date and time on any ASPEN case comments. ASPEN does not add the Office Name or date and time to case comments automatically.

If you have any questions regarding this GI, please contact Debbie Black at [deborah.black@state.nm.us](mailto:deborah.black@state.nm.us) or 505-827-7233.

**ASPEN CASE COMMENTS NARRATIVE GUIDE**

<p><b><u>INTAKE:</u></b> All case comments in ASPEN for intake must contain the following:</p> <ol style="list-style-type: none"> <li>1. Interview Mode (Phone Interview =PI; Face to Face=FTF; No Interview required=NO)</li> <li>2. Categories of Eligibility (COEs)</li> <li>3. Household Comp (indicate relationship &amp; student status)</li> <li>4. Address</li> <li>5. Indicate case status and explain reason (what was requested)</li> <li>6. Indicate that NVRA was offered verbally</li> </ol> <p><b>Additional information that needs to be noted if applicable:</b></p> <ol style="list-style-type: none"> <li>7. Resources</li> <li>8. Name of Absent Parent</li> <li>9. Work Program Requirement &amp; Status (E&amp;T and TANF)</li> </ol>	<p><b><u>SEMI-ANNUAL REPORTS/INTERIM REPORTS:</u></b></p> <ol style="list-style-type: none"> <li>1. Month of SR</li> <li>2. Programs Reviewed</li> <li>3. Significant changes: such as household comp or address</li> <li>4. Other eligibility criteria/Non-financial</li> <li>5. Voter registration if “yes” selected or left blank, what was done</li> <li>6. Processing status and reason (including what’s requested)</li> </ol>
<p><b><u>CUSTOMER SERVICE:</u></b></p> <ol style="list-style-type: none"> <li>1. Reason for visit (specific questions)</li> <li>2. Outcome of visit (specific responses)</li> <li>3. Verification received (details)</li> <li>4. Indicate that NVRA was offered verbally</li> <li>5. If documents/verifications dropped off, where were they routed</li> </ol>	<p><b><u>RE-VERIFICATIONS/REDETERMINATIONS</u></b></p> <ol style="list-style-type: none"> <li>1. Interview mode: FTF, PI, NO – Elderly/Disabled</li> <li>2. Programs renewed</li> <li>3. Significant changes: such as household comp or address</li> <li>4. Other eligibility criteria/Non-financial</li> <li>5. Indicate that NVRA was offered verbally</li> <li>6. Processing status and reason</li> </ol>
<p><b><u>PROCESSING:</u></b></p> <ol style="list-style-type: none"> <li>1. Categories of Eligibility (COEs) processed</li> <li>2. Indicate status and reason (include what’s requested)</li> <li>3. Date, if untimely, indicate why</li> <li>4. Allotment if approved</li> </ol>	<p align="center"><b><u>ABBREVIATIONS</u></b></p> <p>The only permissible abbreviations are as follows:</p> <ul style="list-style-type: none"> <li>➤ FTF = Face-to-Face</li> <li>➤ PI = Phone Interview</li> <li>➤ NO = No Interview required</li> <li>➤ C/S = Client States</li> </ul>

**NOTE:** If you are working on a case, all case comments should indicate what you did with the case.

Intake

New Application: Special Accomadations/Barriers: [ ]. Type of Interview: [ ]. Categories of Eligibility: [ ]. Household Comp: [ ]. Address: [ ]. Phone # : [ ]. Case status and reason to process: [ ]. Voter Registration verbally offered: [ ]. Office Name: [ ].

Additional information that needs to be noted if applicable:

Authorized Rep: [ ]. MCO [ ] Resources [ ]

TANF: AP Information: [ ]. Work Program requirement & status: [ ].

LIHEAP: [ ]. Vendor Contact Information: [ ]

GA: GA Packet completed: [ ]. Date sent to IRU [ ].

IC/Waiver: PFOC: [ ]. Acute Care: [ ].

PR'S

RECERT: Type of Interview: [ ]. Programs Reviewed: [ ]. Significant changes: [ ]. Other eligibility criteria/Non financial [ ]. Voter Registration: [ ]. Processing status and reason: [ ]. Office Name [ ]

SR'S

INTERIM REPORTS: Month of IR: [ ]. Programs Reviewed: [ ]. Significant changes: [ ]. Other eligibility criteria/Non financial [ ]. Voter Registration verbally offered : [ ]. Processing status and reason: [ ]. Office Name: [ ].

CUSTOMER SERVICE

CUSTOMER SERVICE: Reason for Visit: [ ] Outcome of Visit: [ ] Verification reviewed: [ ] Voter Registration verbally offered: [ ] Documents dropped off: [ ] Office Name: [ ].

SERVICE

PROCESSING

PROCESSED: COE's processed: [ ] Status and reason: [ ] Allotment if approved: [ ] Office Name: [ ]

