FDSH/EQUIFAX INTERFACE ACTION GUIDE

FDSH is the Federal Data Services Hub. It allows for MA programs to receive verification of income either through FDSH or Equifax/Work Number. CDHS programs do not utilize FDSH to receive information for employment; CDHS only utilizes Equifax/the Work Number.

RESEARCHING THE RESULT IF A RECORD IS FOUND

Equifax can be accessed for MA, SNAP, and Cash programs. The most common way to receive information for Equifax is when the interface is called automatically when certain actions take place. If an interface is not received by FDSH or Equifax, CBMS will call CDLE to verify income

CDHS Programs Verification of Income

Receives information for employment with Equifax/the Work Number (not from FDSH)

Two buttons used to manually call Equifax:

- CBMS Work Number Employment Verification, on the Earned Income Screen
- Employment Verification, on the CDHS Work Number Screen in Follow-Up Activities
  - This screen displays unconfirmed Equifax/Work Number information.

Medical Assistance (MA) Programs Verification of Employment

Receives verification of income either through FDSH (The Federal Data Services Hub) or Equifax/Work Number

Equifax is automatically called:

- During Application, Auto Re-Enrollment, and RRR.
- When the frequency of income changes.
- When a new employer is entered.
- When manually entered wages don't match the current interfaced record.

IF THE INCOME INTERFACES

CDHS Programs

Review the Earned Income Screen within the Paycheck Summary section. This lists all income received through Equifax and allows you to determine if income is accurate.

- CDHS Work Number source value = income has interfaced with Equifax. You now have the option to change the Paycheck Type.

- If the income is incorrect, you can delete the record from the Paycheck Summary Screen by selecting a deletion reason from the drop down menu, but you will not be able to delete an interfaced record under the Self-Attested Earned Income screen.

Medical Assistance (MA) Programs

1. Information can be reviewed on the MA Interfaced Income table at the bottom of the Earned Income Screen and on the Paycheck Summary section.

2. Only the effective end date can be updated for MA-interfaced income in this section.

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IF THE INCOME DOESN'T INTERFACE

CDHS Programs

1. To get to the CDHS Work Number Screen and manually call the interface:
   - Navigate to Follow Up Activities and select CDHS Work Number in Interfaces.
   - Enter the member's SSN and select Search
   - All income sources will populate
2. To utilize the button located on the Earned Income Employment Details section:
   - Navigate to the II queue.
   - Ensure income has been added on Case Questions.
   - Navigate to the Earned Income tab under the Income chevron.
   - Select an individual to check Work Number and click on the **CDHS Work Number Employment Verification** button under the Earned Income Employment Details Summary Section.
   - Complete the **To Date** and **From Date** fields on the Pop-Up window. No future dates are accepted as these are limited to the Employment Begin Date (EBD) and the date the record is being pulled.
   - If results are found, and there is a matching FEIN, paychecks will automatically post.
   - If there is unconfirmed Work Number information, a notification will appear at the top of the screen. This will navigate to the CDHS Work Number page under Follow-Up Activities.
   - Confirm the employment. If you see any new employment, you must contact the client to confirm it is correct before confirming it in CBMS. If you can't reach the client, you will mark the Case-Wrap Data Entry Complete button to 'Yes' and run EDBC to send a VCL.
3. If you request a manual call but CBMS cannot post paychecks, you'll receive one of two error messages:
   - If all records have been posted to Interactive Interview (II), the following message will be displayed: All the records were previously posted to II. There are no new paychecks available.
   - If there are no new paychecks for the searched time frame, the following message will be displayed: There are no paychecks found in Work Number for this client during the searched time period.

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IF THE INCOME DOESN'T INTERFACE continued

Medical Assistance (MA) Programs

1. Navigate to Follow-Up Activities and select **MA Interface Income**
2. Enter the member's SSN and select **Search**
3. All income sources will be populated
   - The source of that income record will reflect where the income verification was received from (CDLE, FDSH, Equifax).
   - You will be unable to update these records on the MA Interface Income Screen.
   - You can update the Effective End Date (EED) under the MA Interface Earned income table in Interactive Interview (II).
   - The EED should only be used if the client is no longer working for that employer, or if the record is incorrect for the client and the record should be nullified.
   - The EED is always the **last day of the month** that the income was terminated. If the record was interfaced incorrectly, the EED can be updated to match the Effective Begin Date (EBD) and CBMS will not read that record for income.
4. The income interfaced for Medical Assistance will be utilized in the reasonable compatibility check for the case.

EMPLOYER DETAILS AND FREQUENCY

Work Number information should only be confirmed when the client has previously reported the employment or after you have contacted the client to confirm their employment. When you confirm an interfaced record, the following will occur:

1. Select if the paychecks are for a new or existing employer.
2. If you select an existing employer, CBMS will check to see if the frequency from Work Number matches what data is entered.
3. If the frequency does not match, you will receive an error message. You will need to go to the existing record and update frequency before trying again to confirm.
4. If the frequency does match, the paychecks from Work Number will be posted to the Paycheck Summary for that employer.
5. If a new employer is chosen, CBMS will create the Employer Details and Frequency records, and post the paychecks in the the Paycheck summary.
   - Work Number paychecks will only be used for CDHS programs, so you must still gather the client's income statement for MA.

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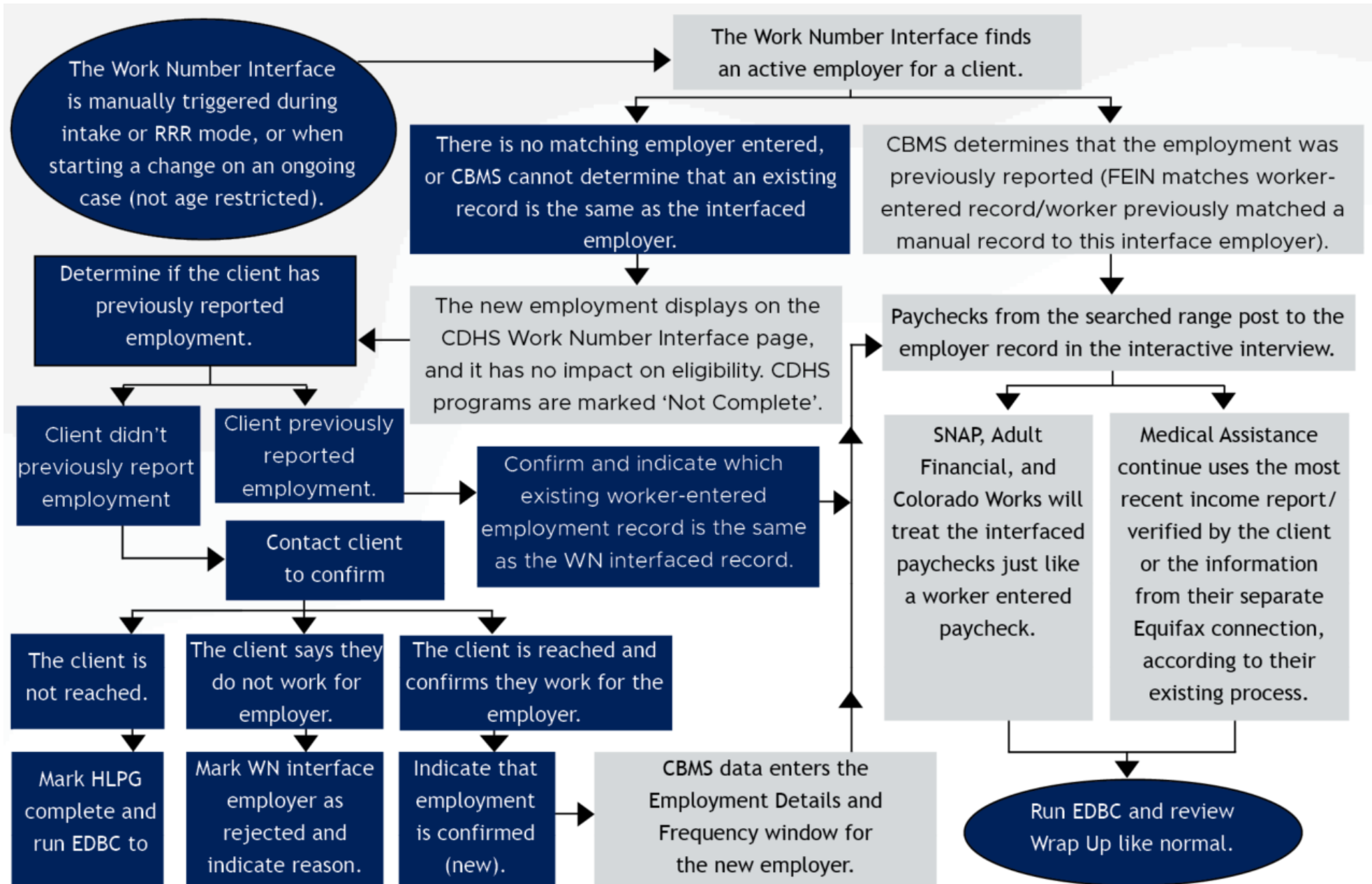## THIS IS A TEXT VERSION OF THE FLOWCHART BELOW

1. The Work Number Interface is manually triggered during intake or RRR mode, or when starting a change on an ongoing case (not age restricted).

2. The Work Number Interface finds an active employer for a client.

3. If there is no matching employer entered already, or CBMS cannot determine that an existing record is the same as the interfaced employer, proceed to **step 4**. If CBMS determines that the employment was previously reported by the client (FEIN matches worker entered record / worker previously matched a manual record to this interface employer) then jump to **step 7**.

4. The new employment "lands" in the CDHS Work Number Interface page. While here, it has no impact on eligibility and CDHS programs are marked 'Not Complete'. Determine if the client has previously reported employment.

5. If The client did not previously report employment, proceed to **step 6**. If The client previously reported the employment, confirm and indicate which existing worker-entered employment record is the same as the WN interfaced record and jump to **step 7**.

6. Contact client to confirm employment.
   a. If the client is not reached, mark HLPG complete and jump to **step 8**.
   a. If the client is reached and says they do not work for the employer, mark WN interface employer as rejected and indicate reason. **Stop Here!**
   a. If the client is reached and confirms they work for the employer, indicate that employment is confirmed (new). CBMS data enters the Employment Details and Frequency window for the new employer. Proceed to **step 7**.

7. Paychecks from the searched range post to the employer record in the interactive interview. Proceed to **step 8**.
   - **SNAP**, **Adult Financial**, and **Colorado Works** will treat the interfaced paychecks just like a worker entered paycheck.
   - **Medical Assistance** will continue to use the most recent income report/verified by the client or the information from their separate Equifax connection, according to their existing process.

8. Run EDBC and review Wrap Up like normal.

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FDSH/EQUIFAX INTERFACE ACTION GUIDE FLOW CHART

The Work Number Interface is manually triggered during intake or RRR mode, or when starting a change on an ongoing case (not age restricted).

The Work Number Interface finds an active employer for a client.

There is no matching employer entered, or CBMS cannot determine that an existing record is the same as the interfaced employer.

CBMS determines that the employment was previously reported (FEIN matches worker-entered record/worker previously matched a manual record to this interface employer).

Determine if the client has previously reported employment.

The new employment displays on the CDHS Work Number Interface page, and it has no impact on eligibility. CDHS programs are marked 'Not Complete'.

Paychecks from the searched range post to the employer record in the interactive interview.

Client didn't previously report employment

Client previously reported employment.

Confirm and indicate which existing worker-entered employment record is the same as the WN interfaced record.

SNAP, Adult Financial, and Colorado Works will treat the interfaced paychecks just like a worker entered paycheck.

Medical Assistance continue uses the most recent income report/ verified by the client or the information from their separate Equifax connection, according to their existing process.

Contact client to confirm

The client is not reached.

The client says they do not work for employer.

The client is reached and confirms they work for the employer.

Mark HLPG complete and run EDBC to

Mark WN interface employer as rejected and indicate reason.

Indicate that employment is confirmed (new).

CBMS data enters the Employment Details and Frequency window for the new employer.

Run EDBC and review Wrap Up like normal.

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