Navigation Chapter

A. Basic ACE

1. Introduction

This chapter is an overview of the basic terminology, buttons and other concepts to successfully navigate in ACE.

The **"Standard Path"** was developed to guide you through the appropriate windows, and the tabs in each window. By using the **"Forward"** button, you will travel the Standard Path; this helps ensure that all windows are completed.

To locate the customer in ACE, use **"Find Person"**. Directions for using **"Find Person"** are located later in this chapter.

2. Basic ACE Terminology

Below is a list of terms and definitions that are common to ACE.

- **Directory Tree** — A graphic representation of a filing system used as a way to categorize and store information.
- **Disabled (Protected, Inactive)** — A field, or button, in ACE where information cannot be entered; usually the field appears shaded.
- **Enabled (Active)** — A field, or button, in ACE where information can be entered. The field will appear white.
- **Grid** — A way of dividing the window into different sections. It groups like information together.
- **Field** — A space where specific information is entered, or displayed, in a window.
- **Radio Button** — A field that can be clicked on to make a selection. Only one radio button can be selected in the same field.
- **Scroll Bar** — A bar at the bottom or side of a window, which is used to move through a screen.
- **Standard Path** — A pre-determined path to ensure all tabs/windows are viewed. By using the Forward button found at the bottom of a

window or tab, you automatically follow the standard path.

3. Basic Buttons

The buttons at the bottom of the **window** (found on all windows) do the following:

- **Back** — Saves information entered on that tab/window, and travels back to the previous tab in the standard path.
- **Find** — Allows a search for a new individual.
- **OK** — Saves information entered on that tab/window, and closes the window.
- **Cancel** — Does not save information entered on that tab/window, and closes the window.
- **Forward** — Saves information entered on that tab/window, and opens the next tab or window in the standard path.

It is important to remember that if you click on **"OK"** the window will close. It does not take you to the next tab. To travel from tab to tab using the standard path click on **"Forward"**.

The buttons at the bottom of the **detail window** (found on most detail windows) do the following:

- **Prior** — Saves information entered, and travels back to the previous detail window.
- **Next** — Saves information entered, and travels to the next detail window.
- **New** — Saves information entered and allows you to create an additional detail window. For example, if the individual has three different jobs, you may add the additional jobs while you are in the detail window. By clicking on the **"New"** button, a new or additional detail window will open.
- **Delete** — Eliminates a detail window.

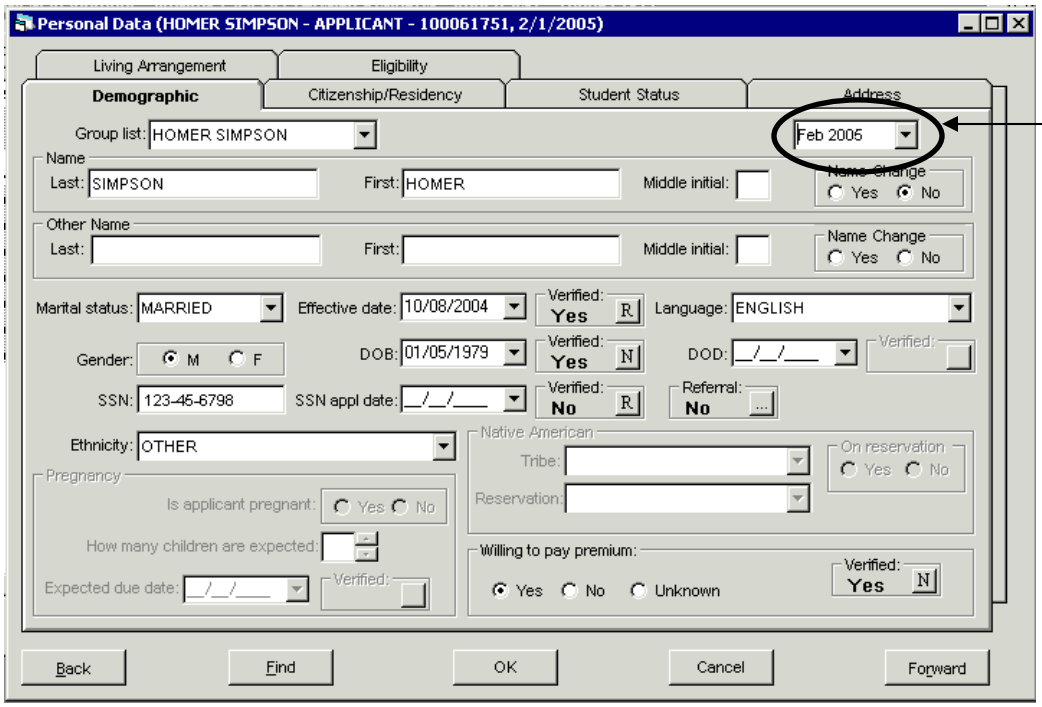
- **OK** — Saves information entered on that tab/window, and closes the window
- **Cancel** — Does not save information entered on that tab/window, and closes the window.

4. Control Date

A **"Control Date"** is the month created by ACE in which an action is completed. ACE automatically establishes the initial **"Control Date"**. For example, if a customer applies for KidsCare on May 15, 2005, the **"Control Date"** is May 2005. If the Renewal application was received on November 15, 2005, the **"Control Date"** is November 2005.

When conducting the initial eligibility determination, the **"Control Date"** is the application month.

Directions for creating control dates are located in the **Control Date Chapter**.

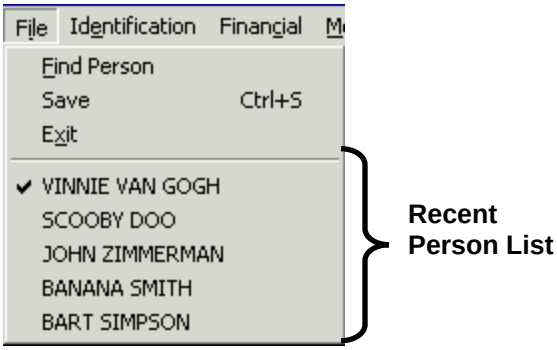


5. Opening Additional Cases

Only one person's record can be open at any given time. This does not mean that only one window may be open at a time; any number of windows for an individual can be open at the same time.

Up to ten names are maintained on the **"File Menu"** drop down list, with the most recent accessed case appearing at the top of the list. Click **"File"**; and select the individual you want to view from the **"File"** drop down menu.

When a new person's record (Vinnie Van Gogh) is requested, and a record for another person (Scooby Doo) is already open, ACE will automatically close all windows for Scooby Doo before opening Vinnie Van Gogh's record. All information is saved through this process.



This list disappears when you exit ACE. The next time you sign-on to ACE all of the names will be gone. As you open and close cases throughout the day the person list for that day will grow up to ten names, before the oldest case drops off.

B. Find Person

1. Introduction

As AHCCCS enrollment continues to grow, you need a method to quickly locate an individual in ACE. The **"Find Person"** function is one of the methods that will assist you in completing a name search to locate an individual. By using **"Find Person",** ACE completes a search of the database attempting to locate a match. With the **"Find Person"** function you can locate a customer, or family member by completing a search using the individual's name, Social Security Number, date of birth, AHCCCS ID, ACE Person Identification or Group ID.

ACE identifies each individual known to a case, and assigns a unique Person Identification number. If an individual (for example, a primary informant) is known to multiple cases, you can locate all of the cases by completing the name search using their name.

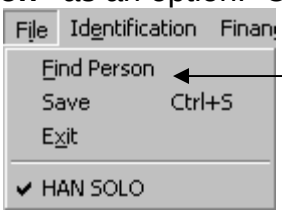
Each time you open ACE, the first window you see will be **"Work Management –Worker Task List"**. You will be able to select individual cases from the task list that you wish to work on; you may not need to use the **"Find Person"**.

2. Locating a Customer

There are three different methods available to locate a customer in ACE. The **"Find Person"** function allows you to search for an individual from almost any window in the ACE system. If an individual is located that matches your request, all the following windows will open to that individual until a new name is requested, or ACE is closed.

The three methods to locate a customer are:

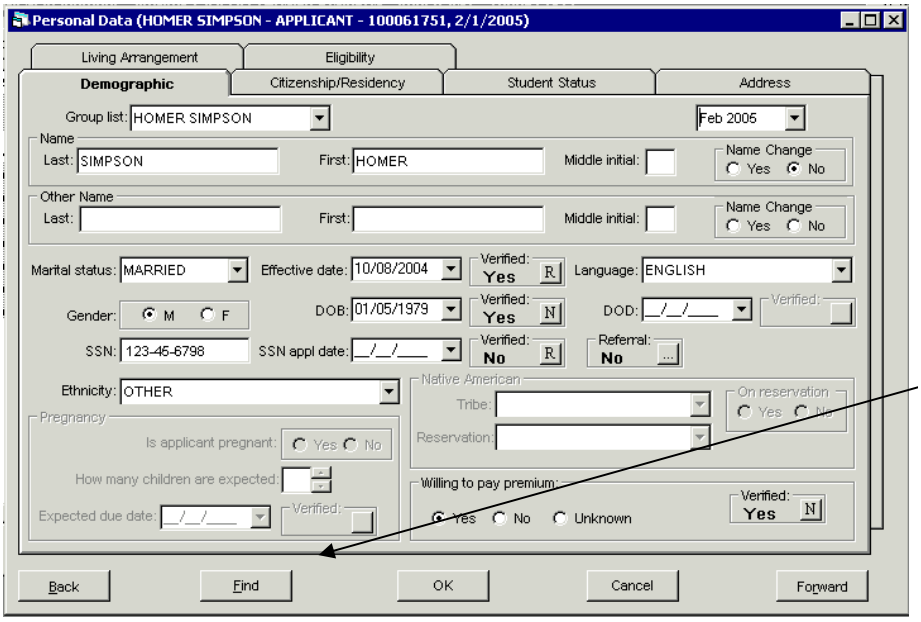
1. Click on the menu item **"File".** A drop down list will appear with **"Find Person"** as an option. Click **"Find Person"**.



Find person

2. The second method is to use the **"Find Person Binoculars"**. Click the binoculars icon.

3. The third method to find a person is the **"Find"** button located on the bottom of each window.



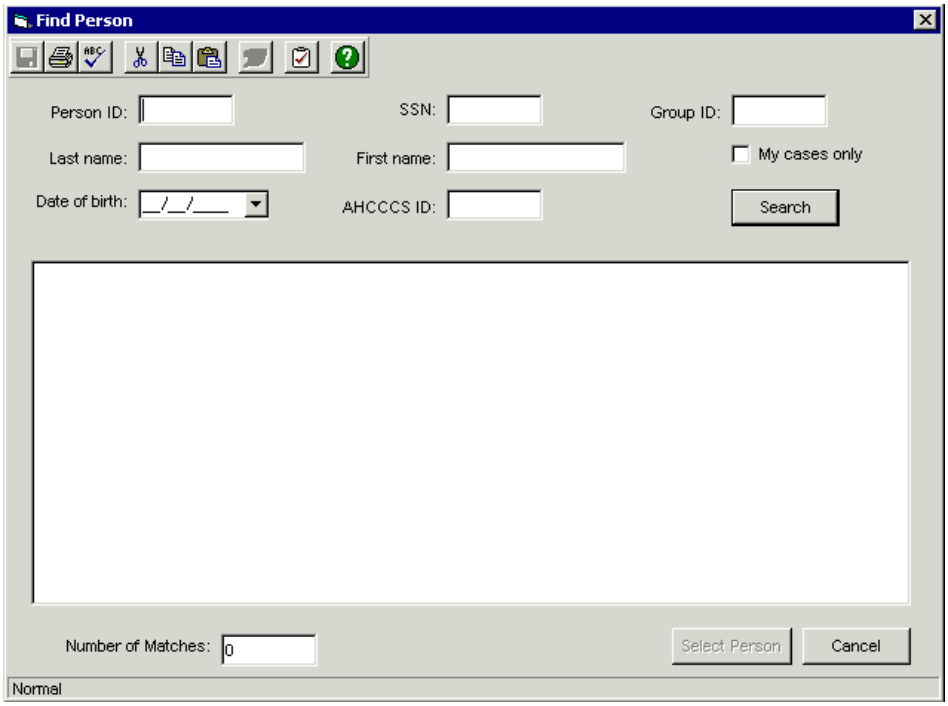
The Find button is the second button from the left.

Any of the methods described will result in the **"Find Person"** window opening.

Entering more demographic information on an individual narrows the search. If the full name, date of birth, Social Security Number, and gender are entered into ACE, the search is limited to that specific information. If a name is misspelled, or the date of birth is entered incorrectly, ACE may not locate the individual because of the limited search requested.

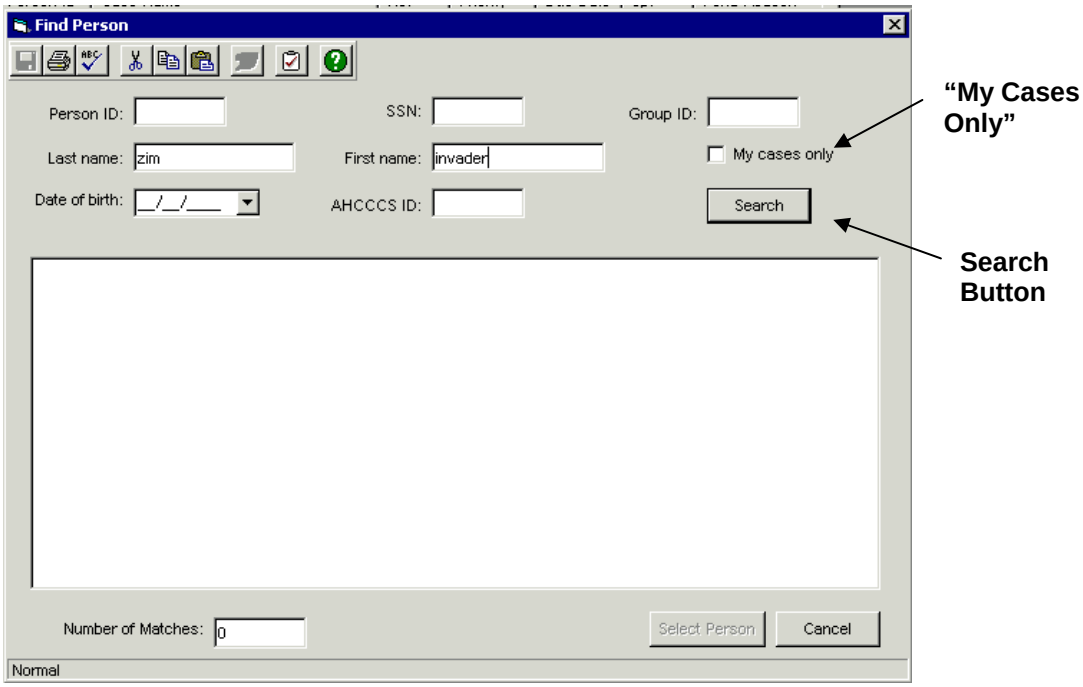
The following information may be entered on the **"Find Person"** window:

- **Person ID (if known)**
- **Social Security Number**
- **Group ID**
- **Last name**
- **First name**
- **Date of birth**
- **AHCCCS ID**



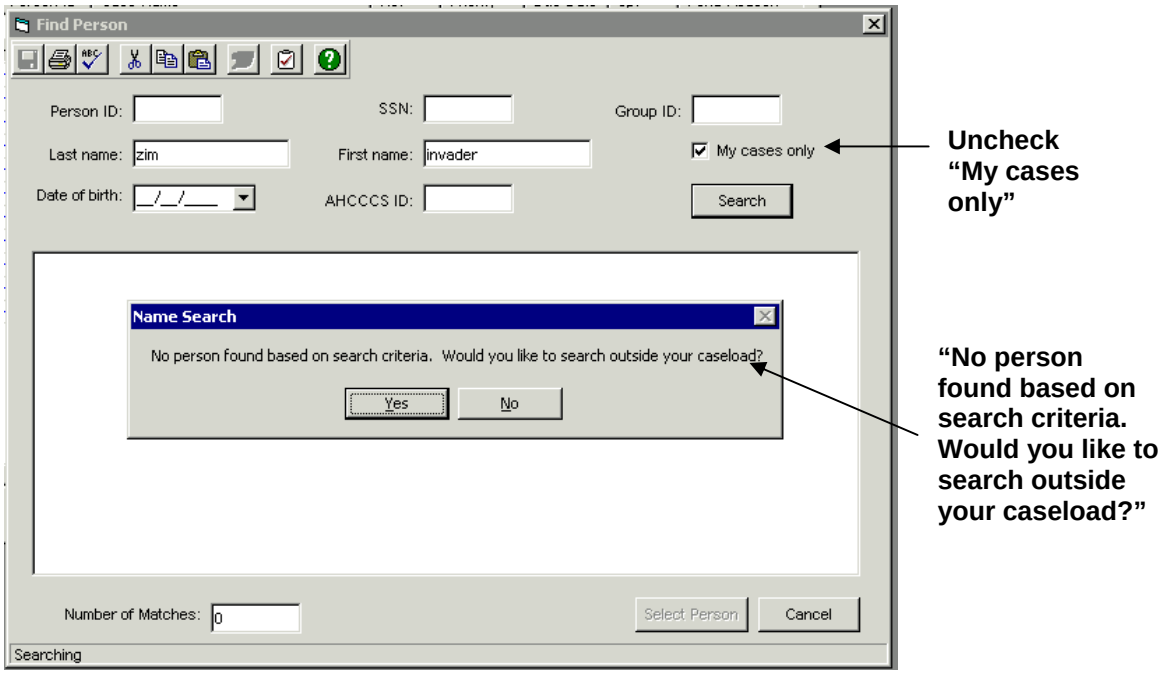
When you open the **"Find Person"** window, the **"My cases only"** field will not contain a check mark to limit the search to your caseload only. If you wish to search inside of your caseload, simply click on the box to add the check mark.

After entering the information, click **"Search"**.

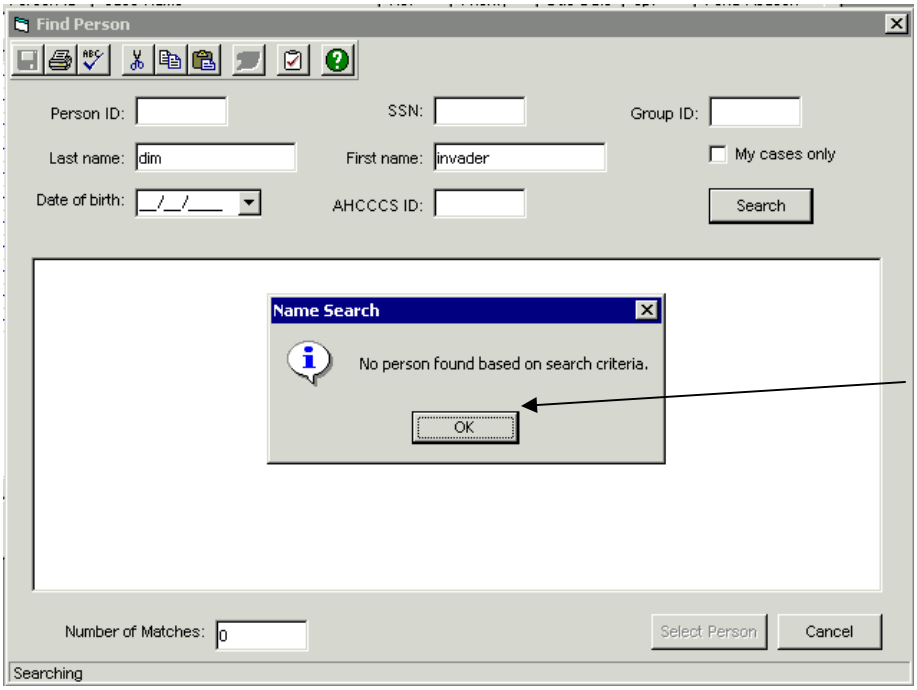


In this example, a search for **"Zim, Invader"** was requested. After entering the information on the **"Find Person"** window, and clicking the **"Search"** button, the **"Name Search"** window appeared with the following message, **"No person found based on search criteria. Would you like to search outside your caseload?"** This indicates ACE searched the database for that caseload and did not find any names matching the request.

To search the entire database, click the **"Yes"** button on the **"Name Search"** window.



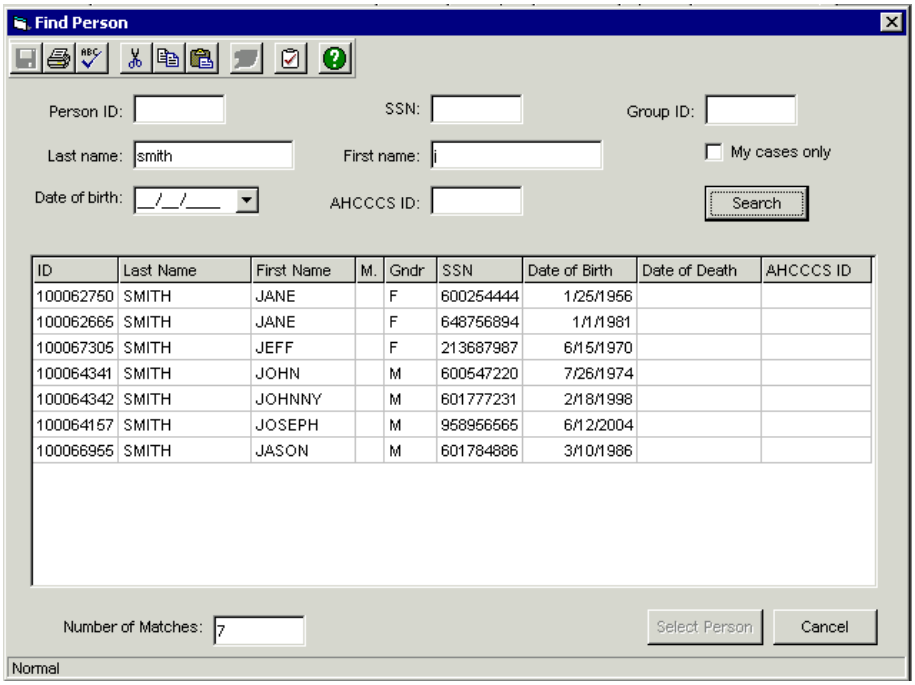
If the search of the entire database does not result in a match, the **"Name Search"** window will appear with the message **"No person found based on search criteria."**



"No person found based on search criteria."

If you are uncertain of the spelling of the name, you can use a portion of the name and search again.

If the search of the database results in a match, the name or names, are listed on the **"Find Person"** window. In this example, the last name **"Smith"** was entered with the first name initial **"J"**, and a search was requested. ACE located many individuals that matched the requested search.

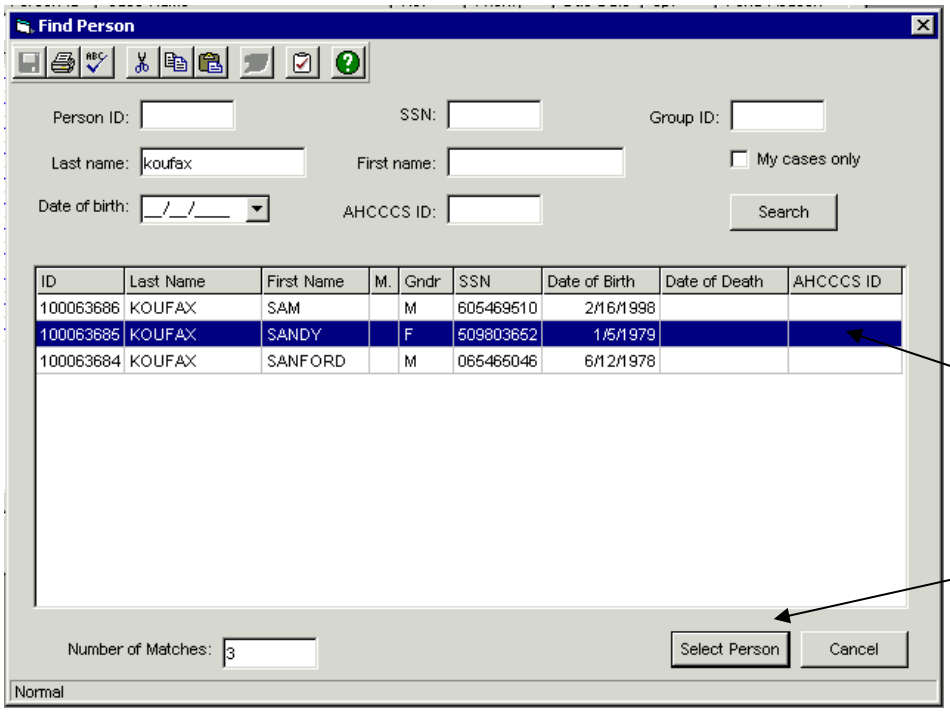


A careful review is needed to determine if any of the persons listed match the person you are looking for.

During the search, if it is determined that the person is not known to the system, click on the **"Cancel"** button.

This will close the **"Find Person"** window.

However, if the person you are looking for is listed, click on the person's name to highlight it. Click **"Select Person"**.



Highlight person that you are looking for

Click "Select Person"

The **“Find Person”** window will close, and you will return to the window where you initiated the search. For example, if you were in the **“Personal Data”** window prior to the search, you will return to the **“Personal Data”** window, but with the new customer’s information showing.

If you were not in a window, but had a blank window with just the main menu showing, you will return to the blank window. You may then select from the main menu the window you would like to open. The window you open will show the information of the customer you selected.