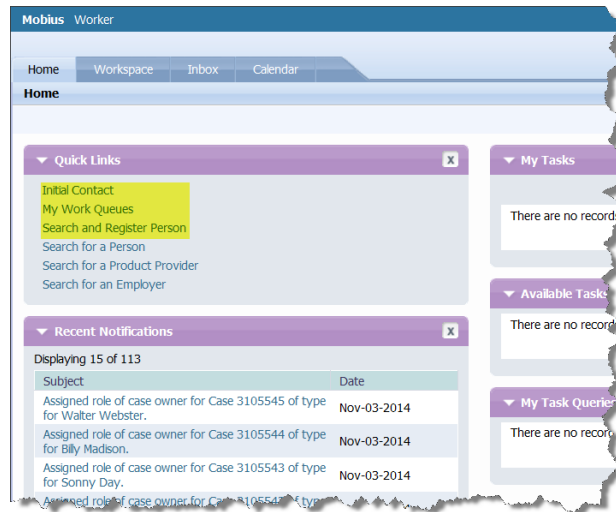


# CCISD R1.1 Mobius Changes

## User Home Page

There is only one minor change to this page. The Quick Links menu has expanded to six links from three. Initial Contact is not fully operational at this time, however My Work Queues and Search and Register Person will provide quick access to these functions.



## Shortcuts Menu

Some items have changed on these menus. Key changes include:



- **Search for an Application** – new to the Searches menu, but is not fully operational in this release. Please do not use this function.
- **Search & Register Person** – New to the Registration menu. This must be used for **ALL** new registrations, and forces a search prior to allowing a registration to proceed.
- **Anonymous NI** and **Initial Contact** – New to the Registration menu, and not fully operational for this release. Please do not use these functions.

# CCISD R1.1 Mobius Changes

## Search

There have been changes to Search within Mobius with this release.

### Screen Changes

- On the Search screen, the **Birth Last Name**, **Show Sounds Like Names** check box, and the **Tab Action** menu have been removed. This means that the **Register** and **Register and Create Case** functions that were available in the Tab Action menu are no longer available from the Search function. **All Registration will need to be done from the Search and Register function on the Shortcut Menu.**

### Search Criteria

With the implementation of CCISD R1.1, the search criteria have changed to accommodate the addition of new programs to Mobius. As not all programs collect the same information, additional flexibility is required when searching for an existing individual in Mobius.

- Internal HS Staff:** Internal HS staff from any program using Mobius can search using one of the following methods:
  - Alternative ID – this can include EIID, SIN, Personal Health Number (PHN), Alberta Student Number, Apprentice ID, Birth Certificate number, Driver's license, File number (LISA), Indian Registration number, Passport number, Student ID number. **Important** – the record will be returned only if the number you are searching by has been entered into Mobius. If no results are returned using this method, search using Name.
  - Last Name and First Name – Partial names may be used, however full name search is recommended to reduce the number of records returned.
  - Last Name and Date of Birth – Search with full last name is recommended.
- External Training Providers and External Service Providers** must use all of the following criteria to search:
  - Last Name **and**
  - First Name **and**
  - Reference Number (see list of Alternative IDs above) **or** Date of Birth

### Search Results

- Search results are displayed based on their Relevancy to the search criteria entered. A relevancy search will display the results that are a closest match at the top of the list. Internal staff will have up to 100 records displayed; externals will have up to 15 records displayed.
- Search results may include records marked as **Duplicate** and/or **Prospect**. These are identified by the presence of icons.

## CCISD R1.1 Mobius Changes

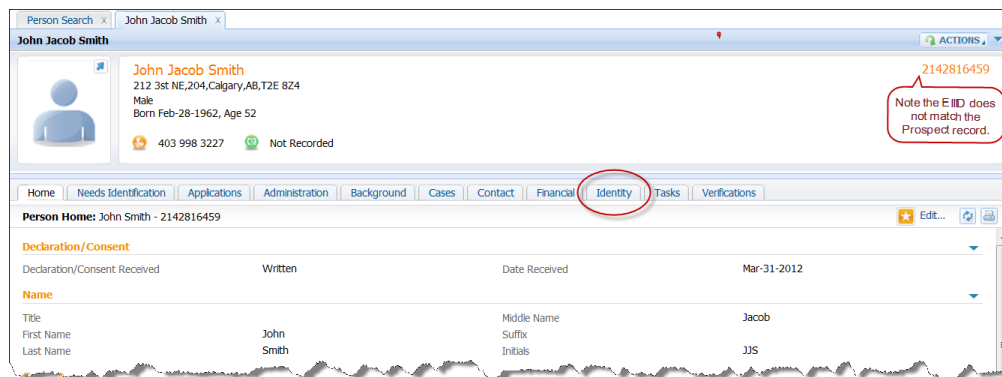
- A **Prospect Person** is created when an individual has submitted an application on line, but full registration processes have not yet been completed. For this release, it will only be PDD applicants who display this icon.



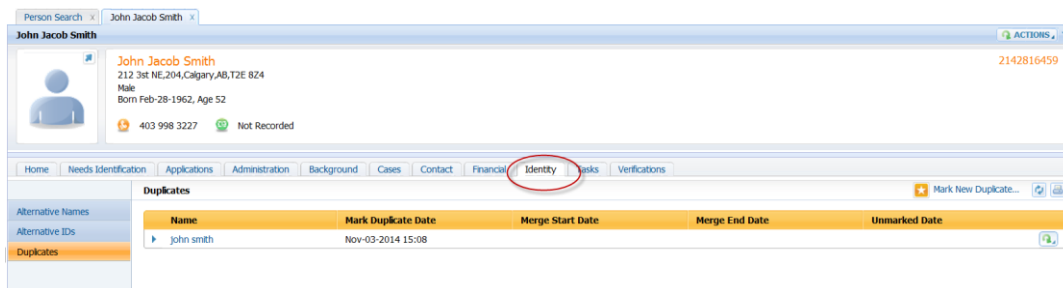
- A **Duplicate** person is an individual who has been registered with more than one EIID number. The record that is being merged is marked with the Duplicate icon. This record cannot be added to. Prospect records can also be marked as duplicate once the application has been processed and associated with a Registered person.



- When the Duplicate link is selected, you will navigate to the record it is a duplicate of (the Keeper record). This is the only record that can be updated. To see all Duplicate records merged, select the Identity tab.

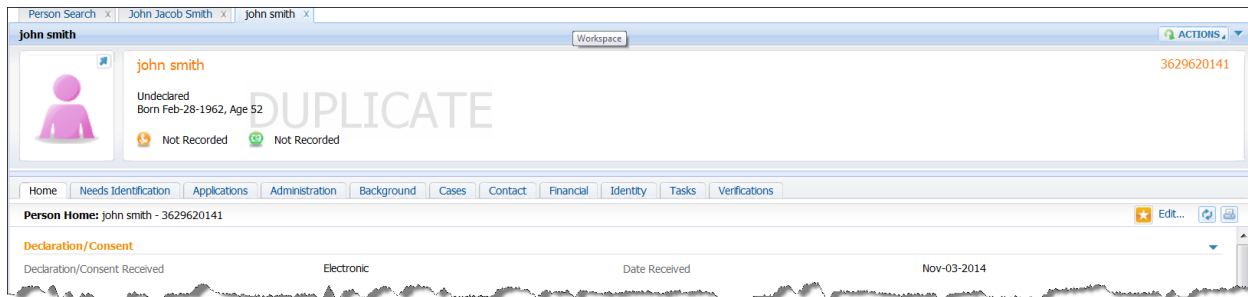


- The Duplicates item on the menu will display all records marked as duplicate.



## CCISD R1.1 Mobius Changes

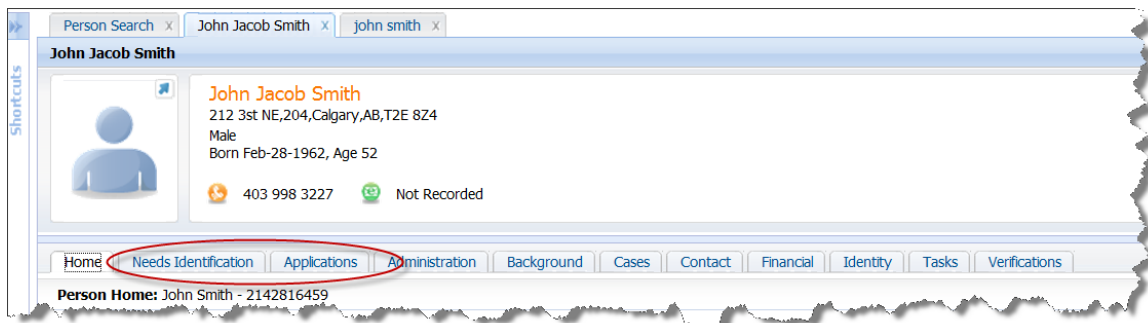
- When a link is selected, the original record will display with a watermark.



### Person Home Page

#### Screen Changes

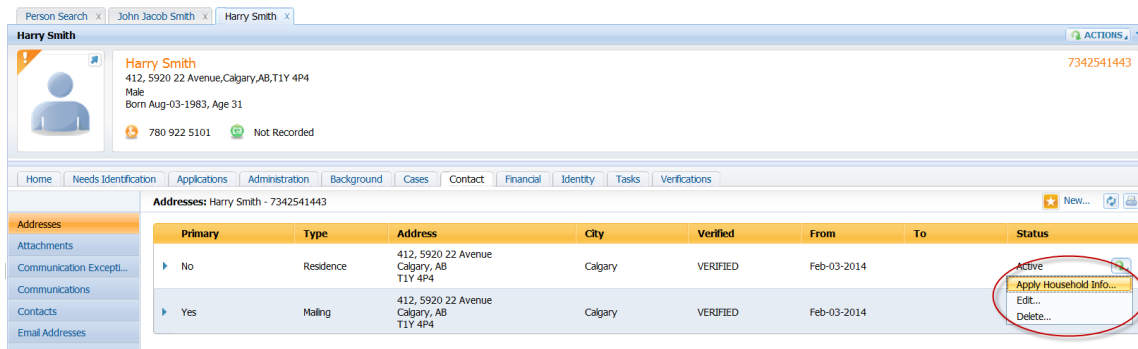
- Two new tabs will be found on the Person Home Page. **Needs Identification** and **Applications** allow for tracking of needs identification activities, and electronic application submission. These areas are not fully operational for all at this time, and **only** PDD is using the Applications function to trigger information to be transferred to the Consolidated Services System (CSS) used by PDD. No other areas will be using the Applications or Needs Identification tabs at this time.



- **Alternative Names** have been streamlined. The options available are now Alias, Birth Certificate Name, and Legal Name Change. Maiden and Previous Name are no longer available.

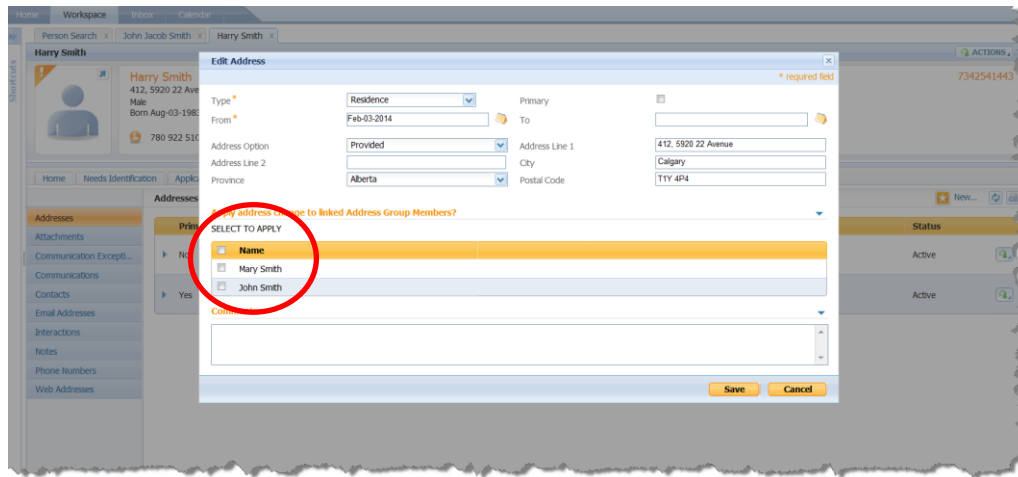
### Updating Household Address

There is a new feature to assist in updating the addresses of the household members. In the Address section, there is a new "Apply Household Info" item on the Action menu of each address listed.



## CCISD R1.1 Mobius Changes

When this is selected, you will be able to search for another member of the household and select them to be added to this address. When saved, the second person will have the address information added on their own Person Home page. When editing the information on the Person Home Page, the option will be provided to edit that same information on the other household members as well.



If an address is end dated, and a new one added, the household members address can all be end dated from the Edit screen, and need to be added to the new address using the **Add Household Info** function as described.

Phone numbers can be updated in the same manner as addresses.

### **Representatives**

With the addition of Persons with Developmental Disabilities clients, there is a need to record the individual's Representative as part of the client record. A Representative may be a Guardian, Trustee, or Supporter. A full list of Representatives and their Authority is posted on the Current Mobius Projects site. Representatives are recorded as a Relationship on the Person Home Page.

Public Representatives (e.g. Public Guardian or Public Trustee) are all recorded using the "Golden Record" for the Office of the Public Guardian and Trustee. This record should **not** be edited in any way, and is recorded in Mobius as:

**First Name** – Office of the Public Guardian and Trustee

**Last Name** – (OPGT)

### **Search and Register**

The Search and Register function on the Shortcuts menu is how all new individuals will be registered in Mobius. The Search and Register will not allow a registration to proceed unless a search has been conducted. Once the search has been completed, there are three possible options for registration depending on whether there is a matching record already registered, no matching record, or a matching record that is not registered.

#### **Matching Record Found – Registered in Mobius**

A matching record that is found in Mobius will be displayed with the Registered flag set at Yes. Select the hyperlink for the individual, and update the record as per current practices.

## CCISD R1.1 Mobius Changes

**Search and Register Person**

**1 Registered Person Check** **2 Registration**

**Step 1: Registered Person Check**  
Perform this search to check if the client is already registered as a person.

**Search Criteria**

Reference

**Additional Search Criteria**

Last Name   
First Name   
Date of Birth  Gender   
Address Line 1  City

**Search Results (Number of Items: 72)**

<input type="checkbox"/> Person	Address	Date of Birth	Registered?
<input type="checkbox"/> John Smith - 2142816459		Feb-28-1962	Yes
<input type="checkbox"/> John Smith - 1927098747		Apr-10-1955	No
<input type="checkbox"/> John Smith - 7874503332		Feb-09-1995	No
<input type="checkbox"/> John Smith - 5210894330			No

### No Matching Record Found

If a search does not return a matching record or does not return any records, then a new registration can be completed. Select the Next button at the bottom of the screen without selecting any records and the Registration screen will display. Continue the registration as you do currently.

**Search and Register Person**

**1 Registered Person Check** **2 Registration**

**Step 1: Registered Person Check**  
Perform this search to check if the client is already registered as a person.

**Search Criteria**

Reference

**Additional Search Criteria**

Last Name   
First Name   
Date of Birth  Gender   
Address Line 1  City

**Search Results (Number of Items: 1)**

<input type="checkbox"/> Person	Address	Date of Birth	Registered?
<input type="checkbox"/> Baby Blu - 6086080410		Aug-05-1982	No

## CCISD R1.1 Mobius Changes

### Matching Record Found – Not Registered in Mobius

If a matching record is returned in the Search Results, but the Registered flag is set to **No**, then the third option to register is followed. Toggle to view the records, then check the box of the matching record; select **Next**.

**Search and Register Person**

1 Registered Person Check 2 Registration

**Step 1: Registered Person Check**  
Perform this search to check if the client is already registered as a person.

**Search Criteria**

Reference:

**Additional Search Criteria**

Last Name:  First Name:  Date of Birth:  Gender:  Address Line 1:  City:

**Search Results (Number of Items: 37)**

Person	Address	Date of Birth	Registered?
<input type="checkbox"/> brad pitt - 1167402625		May-31-1965	No
<input type="checkbox"/> Brad Pitt - 4493053476		Feb-01-1961	No
<input type="checkbox"/> Brad Pitt - 4100145244		May-16-1988	No
<input checked="" type="checkbox"/> Brad Pitt - 5385241897		Sep-06-1971	No
<b>Name</b>			
Title		First Name	Brad
Middle Name		Last Name	Pitt
Suffix		Initials	
<b>Contact</b>			
Address		Phone Number	
<b>Details</b>			
Marital Status		Preferred Language	
Birth Last Name		Employer	
Gender		Special Interest	
Date of Birth		Date of Birth Verified	No
Sep-06-1971			
<input type="checkbox"/> Brad Pitt - 5172444167		Apr-14-1980	No
<input type="checkbox"/> Brad Pitt - 7331784343			No
<input type="checkbox"/> Brad Pitt - 9144404648		Mar-14-1962	No
<input type="checkbox"/> Bradley Pitt - 5025405795		May-01-1970	No
<input type="checkbox"/> Bradley Pitt - 3937051831		Feb-10-1960	No
<input type="checkbox"/> Bradley Pitt - 2647605647		Jan-01-1970	No
<input type="checkbox"/> Brad Pittman - 7966837614		Mar-18-1981	No
<input type="checkbox"/> William Pitt - 3744846829		Dec-19-1963	No
<input type="checkbox"/> Brad Pete - 5165954669		May-02-1952	No

The Registration screen will display with the information from the Enterprise Database (EDB) populating the fields. Confirm that this is the record you want to use and Save the record. This will register the individual in Mobius. Once the record is saved, edit and update the information as required.

## CCISD R1.1 Mobius Changes

The screenshot shows the 'Search and Register Person' web application interface. At the top, there are two tabs: 'Registered Person Check' and 'Registration', with 'Registration' being the active tab. Below the tabs, it says 'Step 2: Registration'. The form is divided into several sections:

- Declaration/Consent:** Includes 'Declaration/Consent Received' (set to 'Electronic') and 'Date Received' (set to 'Nov-12-2014').
- Name:** Includes fields for 'S.I.N.', 'First Name' (set to 'Brad'), 'Last Name' (set to 'Pitt'), 'Initials', 'Gender' (set to 'Undeclared'), 'Title', 'Middle Name', 'Suffix', and 'Birth Last Name'.
- Details:** Includes 'Date of Birth' (set to 'Sep-06-1971'), 'Registration Date' (set to 'Nov-12-2014'), 'Date of Death', 'Marital Status' (set to 'Unknown'), 'Special Interest', 'Service Location', 'Preferred Language', 'Preferred Communication', and 'Aboriginal Status'.
- Primary Address:** Includes 'Address Option' (set to 'Unknown'), 'Address Line 1', 'Address Line 2', 'City', 'Province' (set to 'Alberta'), and 'Postal Code'.
- Mailing Address:** Includes a note 'Please enter a mailing address if different from primary address.', 'Address Option' (set to 'Unknown'), and 'Address Line 1'.

At the bottom of the form, there are three buttons: 'Back', 'Cancel', and 'Save'. The 'Save' button is circled in red.

### Workarounds

Some workarounds previously required to ensure payment to learners are not stopped are no longer required. This allows accurate information to be retained on the Person Home Page. Changes have been made so that only a change of evidence will impact the Product Delivery Case. When changes that could impact the Learner budget are made on the Person Home Page, an Exception Report is sent to LISO for investigation. This is done daily. The affected workarounds are:

#### Addresses:

- Update the address by end dating the current address and adding the new address. Dates do not have to be “adjusted” to match PDC dates.
- A change of address no longer requires a task to be sent to LISO as changes of address will not stop payments. Learners are responsible to report all changes to LISO.
- Mailing address no longer needs to be set as Primary for Learners as validations are done against Mailing or Residence, not Primary.
- A change from an Alberta address to an out of province address will be listed on the exception report.
- A change to or from a high cost or isolated community will be listed on the exception report.
- The high cost community information is now captured on the Core Shelter Evidence screen with a new drop down menu.



## CCISD R1.1 Mobius Changes

Modify Core Shelter Evidence: Integrated Case - 3100984 - CDS Non EI13 - 5734453656

\* required field

**Details**

Received Date \* Aug-30-2013

Change Reason Change in Circumstances

Effective Date

Note: leave Effective Date blank if making a correction

**Core Shelter Type**

Core Shelter Type \* In Private Housing

Documentation Included ☒

Pay Full Month ☐

Documentation Included for Core Shelter Exception ☐

Community Other

**Power/Electricity**

Actual Amount per Month \$0.00

Documentation Included ☐

Start Date \* Jan-09-2014

End Date Aug-17-2014

Save Cancel

### Relationships

- A change in a relationship that results in a mismatch with the Household Member evidence will be listed on the daily exception report.
- Relationship dates no longer have to be “adjusted” to match the dates within evidence.

### Citizenship and SIN

- A change in Citizenship status during training will be listed on the daily exception report if it results in a mismatch with the evidence.
- Citizenship dates do not need to be “adjusted” to match the evidence.
- A change in SIN during training will be listed on the daily exception report.
- To change the SIN on the Person Home page, end date the old number and enter the new number with a start date for the day after the previous end date. The previous record no longer needs to be cancelled.

### Education

- Changes to the K-12 Education record during training will no longer impact payments.
- A checkbox has been added to the Training Benefit Evidence screen to indicate “Met out of School Requirements”. This box must be checked when entering evidence if the requirements have been met. The dates within the Education record will be validated when the evidence is Activated.

## CCISD R1.1 Mobius Changes

**Modify Training Benefit Evidence: Integrated Case - 3100416 - John Smith - 2142816459**
\* required field

Received Date \*

Change Reason

Effective Date

Note: leave Effective Date blank if making a correction

**Referral Details** ▼

Student Health Plans must not be reflected in training costs. To make a cost adjustment go to the Training Benefit Cost Adjustment screen.

Action	Household Member	Provider	Program/Service Name	Referred by	Referral Date	Referral Status
<a href="#">View...</a>	John Smith	Lakeland College	Pre Employment Instrumentation Technician FT	T047	Apr-14-2014 15:53	Committed

**Client Funding Type Details** ▼

Action	Household Member	Start Date	End Date	Client Funding Type
<a href="#">View...</a>	John Smith	Sep-03-2014	Dec-20-2014	Full Time EI

**Acceptance and Approval Details** ▼

Accepted by Provider ☒

Recommended for Training ☒

Date of Acceptance

Date of Recommendation

Accepted by

Recommended by

**Withdrawal Details** ▼

Withdrawn ☐

Reason for Withdrawal

Date of Withdrawal

**Renewal Details** ▼

Continuing Learner ☐

Satisfactory Progress Documented ☐

Met Out of School Requirement ☐

- If the Learner has not met the out of school requirements, leave the check box blank and follow the current process to Waive Out Of School Requirements.
- This box must be checked for each TBE screen entered.

## **CCISD R1.1 Mobius Changes**

### **Business Processes**

#### **Identity Validation**

With the addition of new programs to Mobius, it is important to have standardized and consistent processes so that we can all confidently work with all client groups as needed. One of the first standardized business processes is for Identity Validation. Identity Validation is an in-person or call-in action taken by a worker to substantiate that the existing client (or representative) they are working with can provide the same information collected during verification to confirm their identity. Authentication can include checking the personal identification documents as well as information shared between the client (or representative) and the ministry as part of program delivery.

Processes for validating individuals must be followed every time an individual contacts through phone or in person. The full processes are attached to this document and outline steps to be taken when dealing with an individual or their representative, either in person or on the phone.

#### **Merging and Unmerging Duplicates**

There is now functionality in place to merge duplicate records. The Merge is done by the Merge Specialist (Mobius Support), however there is a business process in place that outlines how the duplicates are communicated to Mobius Support and how the research is completed.

Once a Duplicate has been identified and Marked as Duplicate, it can no longer be added to. It can, however, have items closed. Once marked, the Duplicate icon will appear next to the name in the Search results.

If a record has been merged in error, it is possible to unmerge the record. This process is also completed by a Merge Specialist.