ALBERTA HUMAN SERVICES
MOBIUS SYSTEM
Learner Status – October 2012

Purpose: Learner Status Guide

This guide will assist you in answering Learner's questions regarding the status of their application, queries on their benefits, rationale and payment schedules as well as the status of their Change in Circumstances and the sessions covered by their current application.

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Application Status

As an Authorized Official you will be responsible for providing an assessment of need for training as well as entering the learner's basic information into Mobius. Once your job is complete the learner may complete and send their application for funding into the Learner Income Support Office (LISO). As an Authorized Official, you may also be providing support to the learner with this process.

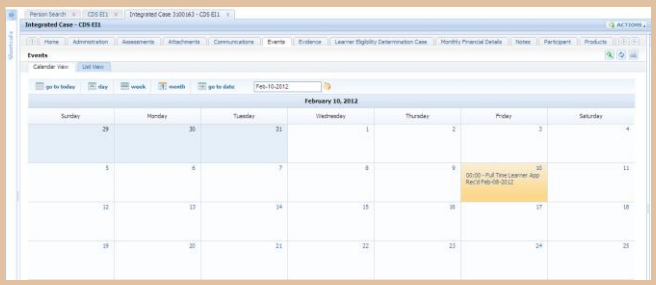
Often the learner will come back to the Authorized Official for support to determine if there are any delays in the application, any interruption in payments, as well as for referrals to support services along the way.

The progress of a Learner's application for funding can be tracked on Mobius as follows:

Events Screen

Applications and Change in Circumstance Forms that have been received by LISO are entered on the **Events** calendar by LISO within 3 working days under normal circumstances, reflecting the date the form was received at LISO.

To view these entries, from the Learner's **Integrated Case Home Page** select **Events** tab on the navigation bar.



- **Status: 00:00- Full-time, Part Time** or **Apprentice** will be entered when the application has been received AND required information appears to be entered into Mobius by the Authorized Official. The time stamp of **00:00** is a default value and will display on all events unless manually changed.
- **Comments** entered into an **Event** will indicate the specific training dates for that application. Comments can be viewed by selecting the link from the calendar, or by using the toggle to expand the event from the **List View** tab.
- **00:00 -CIC received** will be entered when a Change in Circumstance form has been received.
- To see a list of all **Events** recorded for an individual, select the **List View** tab. A complete list of Applications and Change in Circumstance forms received by LISO will be displayed with the date they were received.

Application Status (Continued)

Communications

Letters are sent to learners at key points during the processing of an application. The type of letter generated is an indication of the status of a learner. Select the **Contact** tab from the **Person Home Page** navigation bar. Select **Communications**, toggle to expand the letter you want to review and select the link to the pdf or MS Word document. **Note:** ProForma letters will generate two line items on the **Communications** list with the same name and date. Select the second line item to view the link to the letter. The first line item does not contain a link.

Request for Information
Information missing from the Learner's application will be communicated directly back to the Learner through the use of a **Request for Information (RFI)** letter. The **RFI** letter is generated when additional information is required to continue processing the application. The letter will list the information required to proceed with processing. The learner must provide the requested information before further processing action will be taken by LISO.
When the information is received by LISO, it will be recorded in the **Communications** section as **RFI – Received.** Normally it will show the exact subject heading of the original RFI received (i.e. Schedule 3 – Received).

Funding Decision
If a decision regarding funding eligibility has been made, the **Funding Decision (FD)** letter will be generated and sent to the learner. The letter has the following sections:

- The initial paragraphs confirm the program, training provider, dates and total funding approved.
- Each month of funding is broken down by type of benefit, financial resources used in the calculation and total payment for the month and is displayed in a table format.
- The remaining paragraphs outline how payments will be made (cheque or Electronic Funds Transfer), and to who (learner or school), how tax slips are issued, information on Health Benefits while a student, the process of appealing a decision, and the contact information for the Learner Income Support Office.

Tasks
Information missing from the Authorized Official is sent to the Authorized Official or corresponding Training Provider or site Work Queue in the form of **Task** (a request for action). The **Authorized Official** should be checking their **Inbox** on Mobius for **Tasks** on a daily basis and following up on any missing information as quickly as possible to avoid further delays.

Application Status (Continued)

Tasks that are on the **Available Tasks** list need to be added to the **My Tasks** list before they can be worked on.

1. From the **User Home Page,** select **Inbox**. Tasks that have been **Assigned** but not yet **Reserved** will appear under **Available Tasks.**
2. From the Available Tasks screen select the tasks to be worked on and select **Add to My Tasks** to indicate you are ***working*** on the **Task**.
3. When actions have been ***completed***, and comments updated, **Close** the Task, or **Forward** the Task to the originator to notify them of completion and to **Close.**

Note: Any text that is intended as part of the permanent record should be entered in the approriate **Home Page** notes.

Learner Eligibility Decisions

Cases

As an application is being processed, two new types of cases will appear in the **Cases** tab of the **Person Home Page**.

LEDC: The **Learner Eligibility Determination Case** is generated when all evidence has been entered by LISO and is run against the eligibility rules including the Liquid Asset Test. If the Current **LEDC** is listed as **Eligible**, the learner has passed the eligibility rules. If the current **LEDC** is **Ineligible**, either more information is required, or the learner will be advised of the eligibility decision. If a learner is **Ineligible**, check the following areas for more information:

1. **Communications** from the **Person Home Page:** If a **FD** has been generated, the eligibility decision has been made and the learner can follow the appeal instructions if they disagree with the decision. If a **RFI** letter is present, additional information has been requested and must be submitted for further processing of the application.
2. **Tasks:** If the Authorized Official/Work Queue of the Training Provider has been sent a task, this will need to be addressed before further processing occurs.
3. A **Decision Tree** is available to view to obtain further details about the reasons a learner may not be eligible. To view the Decision Tree:
   - From the **Cases** tab on the **Person Home Page** navigation bar, select the **Case Reference** of the **Learner Eligibility Determination Case.**
   - Select the **View** link of the item with the Case Decision Status of **Current**, and applicable decision date.
   - The screen will indicate the eligibility decision (**Eligible** or **Ineligible**) and contain a "tree" on the bottom half of the screen. Click on the "**+**" to expand the tree and show all decisions. An "**x**" indicates that the learner's current information "failed" that eligibility rule.
     Note: Check **Communications** for a new **RFI** or **FD** before taking any action as the information may not be completely processed.

PDC: The **Product Delivery Case** is generated when the learner passes the eligibility rules and the amount of benefit is calculated. This is the area where the Financial Products are managed. The **PDC** is accessed from the **Person Home Page** by selecting the **Cases** tab from the navigation bar, then selecting the **Case Reference** number for **Product Delivery**.

Learner Eligibility Decisions (Continued)

It may also be accessed from the **Integrated Case Home Page** by selecting the **Products** section and selecting the **Case Reference** number of the appropriate **PDC.**
Note: A **PDC** with unique dates is generated for each new learner application that is processed, or when an underpayment to a learner is calculated.

It is the recommended practice to access information regarding the amounts of benefits approved from either the **FAD** letter or **Monthly Financial Details**. An alternative is to view the **Case Financials** for details of the payments. To view the Case Financials:

- From the **Person Home Page** select the **Cases** tab from the navigation bar. Select the **Case Reference** of the **Product Delivery Case.**
- Select **Case Financials** from the navigation bar.
- Toggle each of the Payments to see details including cheque number.

Payment Schedule and Amount

The Authorized Official may assist the learner in managing their budget while attending training. A learner may have questions regarding the amount of their payment, what the payment is for, when payments were sent, or if certain expenses have been included in the calculation.

Payments to learners are scheduled so that the payment for the upcoming month is received by the learner a few days before the end of the current month. In cases of late applications or processing issues, a learner may request the Authorized Official to check the payment status or payment date.
Information about the payments received by the learner can be found in the following areas:

- **FD Letter:** The **Funding Decision** letter breaks down the amount of approved funding by month. It indicates the amounts designated for training costs separately from living costs. An updated **FD** Letter is generated whenever there is a change in circumstance, overpayment or underpayment calculation. It is found in the **Communications** section of the **Contact** tab on the **Person Home Page** navigation menu.
- **PS Letter (Pay Slip):** The learner pay slip is generated for every payment that is processed through the payment system and will indicate the breakdown of the payment for that given month. It is found in the **Communications** section of the **Contact** tab on the **Person Home Page** navigation bar.
- **Monthly Financial Details screen** provides a listing of all payments that have been issued or are scheduled to be issued to the learner. This screen is accessible from the **Person Home Page**. Select **Monthly Financial Details** from the navigation panel on the **Financials** tab. From this screen, click **View Benefit History/Projections** button to see the payment breakdown for the entire **Product Delivery Case.** The following sections will be visible:
  - **Issuance History** will list the amounts that have been issued to date and the date issued.
  - **Outstanding Liabilities** will list any calculated overpayments and the remaining balance.
  - **Projected Issuances** are those payments that have been approved but not yet paid to the learner.

Payment Schedule and Amount (Continued)

- **Training Period Calculation Summary** includes the amount of the Income Support Disbursements, Financial Resources used to calculate disbursements, Training Disbursements and Decisions regarding overpayments. It is accessible from the **Product Delivery Case**. To navigate to the **Training Period Calculation Summary:**
  - From the **Person Home Page** select the **Cases** tab.
  - Select the reference number for the **Product Delivery Case**.
  - On the **PDC** navigation bar, select **Decisions** and **View** the applicable month.
  - Select **Training Period Calculation Summary** tab from the navigation bar to display the Financial Summary and Income Support disbursements for the entire training period.

- **Transactions** provides a detailed list of information that has been sent to the payment system to generate payments. **Transactions** is accessible from the **Financials** tab of the **Person Home Page.** The screen will default to **All Transactions**; each line can be toggled to reveal further details:
  - **Type**: This indicates if it is a **Payment** to a learner, an overpayment (**Liability**), or a repayment of an overpayment (**Payment Received**)
  - **Status**: There are three statuses you may see in this area:
    - The default status will be **Issued.** This means the information has been sent to the payment system.
    - A status of **Cancelled** indicates that the payment has been cancelled as the funds were not received.
    - A status of **Created (Write off)** indicates that the learner debts have been transferred to the Recoveries system as there has been no Learner activity for 90 days.
  - **Nominee**: The nominee is the person or provider to whom the payment was made.
  - **Processed Date**: The date that the transaction was processed in Mobius.
  - **Covers Period**: The dates to which the payment is attributed.
  - **Cheque Number**: The number assigned to the cheque or EFT payment.

Details of any of the payments are listed in the Payment Items section. The type of payment (Income Support, tuition, books, etc.) and the amount for each type will be listed.

Method of Payment (Continued)

- If the method is **Cheque**, the learner will have the payments mailed to their **Primary** address listed in the **PDC Home Page** This address can be viewed by
  - Selecting **Cases** tab from the **Person Home Page**
  - Select the **Reference** number of the **Product Delivery Case**
  - Select **Nominees** tab from the navigation bar
  - Toggle to expand the view for the individual. The address will be displayed.

- If the method is **EFT**, the payment will be sent to the active bank account the learner has provided.

- If no **Method of Payment** is entered, no payment will be issued to the learner. Contact the **Learner Income Support Office** for further direction.

To verify the account the funds have been sent to, from the **Person Home Page,** select **Bank Accounts** from the **Financial** tab on the navigation bar. The account information will be available to view.

Note: If the required documentation (i.e. direct deposit form):

- is not legible at the time of processing
- is not signed and dated
- is not submitted with the funding application
- or if the EFT is rejected at the bank,

the **Method of Payment** will be entered as **Cheque** by LISO, and the remainder of payments for that learner will be disbursed by Cheque to the learner's mailing address.

Change of Address

If a learner is receiving a future payment and reports a change in address, it is **essential** that this information is relayed to LISO as soon as possible. To report a change in address:

- The Authorized Official updates the learner's address on the **Person Home Page**.
- The Authorized Official must send a **Task** to the ***LISO Learner Benefit Coordinator Work Queue*** with the new address information and date of address change.
- If there has been a change in type of housing (i.e. private to social) that may impact the learner budget or eligibility, a **Change in Circumstance** (CIC) form must also be completed by the learner and submitted for processing to LISO.

Method of Payment

Learners are able to receive funds via Electronic Funds Transfer (EFT) or by cheque. To determine how a learner is going to be paid, on the **Person Home Page,** check the **Method of Payment** indicated at the bottom right of the screen. The information in this field is entered by LISO and must not be altered as it will cause a disruption in benefits for the learner.

Overpayments and Underpayments

When information regarding a learner's circumstances has changed, and this information is processed through LISO, it may result in an adjustment in the amount of funding the learner is eligible to receive. This can generate an Overpayment or Underpayment to the learner, which is reflected in either a **Liability Case** or **Product Delivery Case**.

Overpayments and Underpayments (Continued)

Liability Case: A liability case is generated when a learner's eligibility is reassessed due to a Change in Circumstance or a change in evidence and it is determined that the learner was overpaid. A Liability Case contains information about the total amount the learner has been overpaid and the amounts that have been applied to that debt from Income Support deductions. To view the **Liability** case:

- From the **Person Home Page**, select **Cases** tab from the navigation bar.
- Select the Reference for the **Liability** case**.**
- Select **Financials** tab from the navigation bar.
- Select **Transactions** from the navigation bar. The total amount of overpayment will be listed under the **Liability** tab, and any Deduction Payments that have been applied to this amount will be listed with the date the transactions took place under the **Allocations** tab.

Product Delivery Case: When new information is received and it is determined that the learner was underpaid, an additional **Product Delivery Case** is generated and is listed in the **Cases** tab of the **Person Home Page**. Any payments to the learner will be reflected in the **Monthly Financial Details** section on the **Person Home Page**.

Withdrawals and No Shows

The Learner has an obligation to report changes in their household circumstances to LISO which includes but is not limited to changes in income, a withdrawal or no show from an approved program.

The Authorized Official has the **primary** responsibility for notifying HS of the Learner's no show/withdrawal dates and reason, so that funding can be terminated and unused funds be reallocated as soon as possible. Training Providers are responsible for notifying the Learner's Authorized Official of any withdrawals or no shows.

When an Authorized Official becomes aware that the Learner has Withdrawn, had training cancelled, or was a No Show for training, the steps outlined in the **Training Benefit Overpayments Policy** at http://www.employment.alberta.ca/AWonline/ETS/4421.html must be completed in order to stop further benefits from being paid to the learner.

LISO will enter the withdrawal information in Mobius and notify the Authorized Official once this action has been completed. Do not update the Service Plan items until LISO confirms the withdrawal or no show evidence has been entered.

Training Benefit Evidence Screen
Withdrawal, cancellation and no show information will be entered into the Training Benefit Evidence screen by LISO. Learners who were a **No Show** will have a withdrawal date of the day before the first day of training. Learners who have **withdrawn** will have the last day of attendance as the withdrawal date.

NOTE: Do not close the **Service Plan** as it may lock LISO out from completing other functions such as tuition refunds.

Employment Insurance Update
The Training Information Cluster on the **Employment Insurance Status** screen must be updated by the Authorized Official if the learner is in full time training, the Client Funding type is EI, Claim Type is **Active** and Claim Status is **Regular**:

- From the **Background** tab on the **Person Home Page** select **Employment Insurance Status.**
- On the **Employment Insurance Status** screen toggle to view details of the Employment Insurance Claim. Select **Edit** from the **List Action** menu to modify training program information.
- Modify the withdrawal/cancellation/no show date as below:
  - Withdrawals – Enter the last day of attendance as the **Program End Date**
  - No Shows and Cancellations – Enter the **Program End Date** to match the **Program Start Date**
- Add the appropriate **Change Reason** from the drop down menu.

Taxation

Mobius records the amount paid to CRA on behalf of the learner for the appropriate funding type. The amount paid can be viewed per taxation year.

- From the **Person Home Page**, select **Taxation** from the **Financial** tab on the navigation bar.
- Enter the taxation year that you want to view.
- The Benefit Amount, Overpayment Recovered, Child Care Costs and Tax amount are displayed on a monthly basis for the calendar year.

The appropriate tax slip is mailed in February to the learner at their address recorded in Mobius. If a learner does not receive their tax slips, the Learner Income Support Office can be contacted at 780-427-3722 (Edmonton) or 1-800-222-6485 to request a reissue of the tax slip.

If you Need More Information

If you are unable to assist the learner using the information in this guide, you may contact your Learner Specialist, Learner Consultant, Contracted Services Coordinator, or the Learner Income Support Office.

Learner Income Support Office
In Edmonton: 780-427-3722
Toll Free: 1-800-222-6485
Additional information is also available at:

Mobius Quick Reference Guide 2012
http://www.employment.alberta.ca/documents/AWonline/MobiusQuickRefGuide2012Final.pdf

Training Benefits – Payments and Refunds
http://www.employment.alberta.ca/AWonline/ETS/4380.html

Training Benefit Overpayments Policy
http://www.employment.alberta.ca/AWonline/ETS/4421.html

AW On Line Manual
http://employment.alberta.ca/AWonline/4202.html