

**COMPASS**  
**Community Partner**  
**Quick Reference Guide**



## COMPASS Community Partner Overview

COMPASS is Pennsylvania's fast and easy way to apply online for health and human services. Organizations such as hospitals, church groups and other community based groups that help Pennsylvania residents apply for health and human services can apply to become a COMPASS Community Partner. By registering as a COMPASS Community Partner, your organization can initiate and track applications through the COMPASS Community Partner Dashboard.

COMPASS serves as a single access point for the following benefits:

- Health Care Coverage
- Supplemental Nutrition Assistance Program (SNAP)
- Free or Reduced Price School Meals
- Cash Assistance
- Child Care Works
- Low-Income Home Energy Assistance Program (LIHEAP)
- Long Term Living Services – Home and Community Based
- Long Term Living Services – Nursing Home and Related Facilities

**Who to contact for Community Partner login and dashboard issues:** [RA-PWCOMPASSCP@pa.gov](mailto:RA-PWCOMPASSCP@pa.gov)

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**This Quick Reference Guide is designed to assist you in the use of COMPASS online services as a COMPASS Community Partner.**

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## Welcome to COMPASS

### About COMPASS

COMPASS is Pennsylvania's fast and easy way to apply online for benefits for many health and human services programs anytime and anywhere.

Use COMPASS to find out who qualifies for services, apply for new benefits, renew benefits, finish an application or check the status of an application.

By using COMPASS you can apply at any time during the day or night from home, a library or any location with internet access.

### COMPASS Security

COMPASS is secure, private and confidential. Information entered in COMPASS is protected through an encryption process.

A user identification and password ensures confidentiality once the application or renewal is received. Individuals can use their unique user identification and password to check on the status of their application after it is submitted or to save their application for up to six months in order to gather additional information.

## Basic Navigation Tips

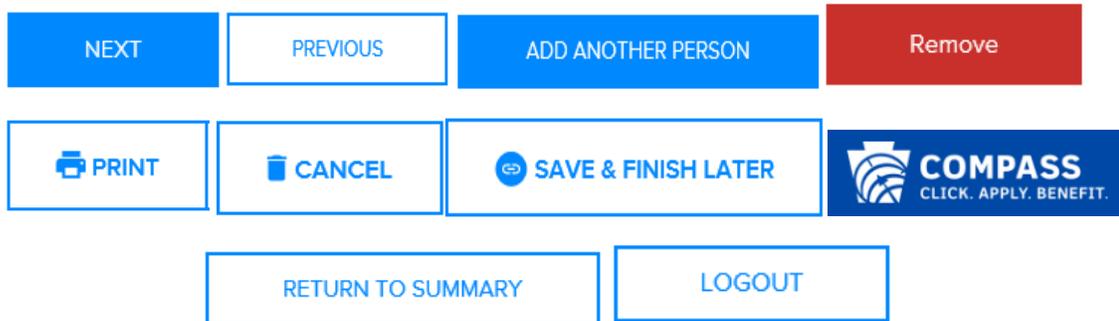
Before you get started, here is some useful information that will help you become familiar with the look and feel of COMPASS.

### Buttons

The most frequently used page elements in COMPASS are buttons.

Frequently used BUTTONS include:

- **Next** – Saves information entered on the page. Takes you to the next page.
- **Previous** – Saves information entered on the page. Takes you back to the previous page.
- **Add Another**– Adds a section to the page for an additional person, employer, income, expense, insurance policy, or insurance.
- **Remove** – Removes a section from the page.
- **Print** – Creates a printable version of your application.
- **Cancel** – Erases the application.
- **Save & Finish Later** – Saves your unsubmitted application for up to six months. Please note: You have six months to complete and submit your saved application before it is erased unless there is a notice on your Community Partner Dashboard indicating a different date.
  - **Keep Working** – If you decide you do not want to stop and save the application you can choose to continue and keep working.
- **CPD Home** – Returns the Community Partner to the Home tab of the Community Partner Dashboard.
- **COMPASS Icon** – Returns the Community Partner to the COMPASS homepage.
- **Return To Summary** – Returns the Community Partner to the Summary section of COMPASS.
- **Logout** – Returns Community Partner to the COMPASS homepage after submitting an application or renewal.



## Links

Links allow you to move directly to a page within COMPASS. Clicking a link opens the page described by that link. Once a link is clicked, it will change color to indicate that the page has been accessed.

[Link to the COMPASS website – for example](#)

## Radio Buttons

Radio buttons allow you to choose only one of the given options.

Sex \*

Male  Female

## Check Boxes

Check boxes allow you to select and deselect multiple options.

What is LAUREN SULL's Race?

- Black or African American
- Native Alaskan or American Indian
- Asian
- Native Hawaiian or Pacific Islander
- White or Caucasian
- Other

## Drop-down Boxes

Drop-down boxes allow you to select only one option from an expandable list.

Drop-down boxes are identified by a down arrow to the right of the box.

--Please Select-- ▼

## Date Fields

Date fields allow you to choose a date by manually entering a date in the format of MM/DD/YYYY, or by selecting the date from the calendar on the right of the date field

Birth Date: \*

01/01/1985 📅

MM/DD/YYYY

## Community Partner Information

### Community Partner Log in

Community Partners (CP) have a separate page dedicated to CP functions. It is the Community Partner Information page and can be accessed by going to the COMPASS homepage, selecting the 'LOGIN/REGISTER' dropdown, and clicking on 'Login/Register' under 'Community Partners'.

Community Partner Login/Registration:

#### Community Partners

Community Partners are community-based agencies, organizations, coalitions, hospitals, church groups, sponsors of the National School Lunch Program (NSLP) and other groups that wish to help Pennsylvanians submit applications for health and human services.

[Login / Register](#)

Community Partner Information Page (CP Landing Page):

### Community Partner Information

#### Welcome Community Partners

Community Partners are community-based agencies, organizations, coalitions, hospitals, church groups, sponsors of the National School Lunch Program (NSLP) and other groups that wish to help Pennsylvanians submit applications for health and human services.

#### Why become a COMPASS Community Partner?

Registered COMPASS Community Partners have access to a centralized location to help them manage their applications. This location is commonly known as the Community Partner Dashboard and allows Community Partners to:

- Submit and track all applications in one location
- E-Sign applications on behalf of applicants
- Access saved and submitted applications for up to 180 days
- View statuses of submitted applications
- Submit documents electronically on behalf of applicants and recipients
- View quick reports of applications
- View detailed reports of applications through search function
- View messages from headquarters
- Access forms, links and other publications

If you are a Medical Assistance (MA) provider, and you use your MA provider number when filing the application, you will receive notices of your patient's eligibility, including their MA ID number for billing purposes.

#### User ID

[Forgot User ID?](#)

#### Password

[Forgot/Change Password?](#)

#### Want to Become a Community Partner?

[Online Self-Registration Guide](#)

1. To register yourself or your organization as a COMPASS Community Partner, please refer to the [COMPASS Community Partner Online Self-Registration Guide](#).
2. To log in to COMPASS as a CP, enter your User ID and Password on the CP Landing Page and click Sign In.

Please note: If you are inactive for an extended period of time after logging in, you will receive a pop-up warning indicating you have a certain amount of time left before you are logged out. You will be logged out if you do not respond to the pop-up. To log back in, return to the CP Landing Page and log in as you normally would.

## Community Partner Dashboard

### [Home](#)

The COMPASS Community Partner Dashboard (CPD) is designed to allow you to save, submit and track COMPASS applications and tickets for your organization.

### [Message Center](#)

## Alerts/Messages

The message center section of the dashboard provides information from the commonwealth about events that may impact your organization, such as system changes or new features. The messages on the dashboard will be displayed based on the posting date and will automatically be deleted when they expire. Read all new messages and take the appropriate actions based on the message.

### [Organizations with Multiple Locations](#)

Organizations are registered based on their Federal Employer Identification Number (FEIN). Each organization can have more than one location under the organization's FEIN if there are different offices, or a need to separate applications submitted between different locations. Users can have access to more than one location, within the same organization. In the top right corner of the CPD there is an arrow beside Select Organization which allows you to switch between different locations.

Welcome Derek of

### Alerts/Messages

02/27/2018	<b>New Message</b> Create CUIT Test Message
02/19/2018	<b>New Message</b> Create CUIT Test Message

AAA1 (Harrisburg) 4211 Union Deposit Road	▼
AAA1 (Harrisburg) 4211 Union Deposit Road	
Anupamtest5 (Dassdas) Dsfsdf	
Apple (Allentown) 562 Do Not Use	
Chicken (Allentown) 566 Do Not Use	
Chips (Camp Hill) 132 Road Lane	
Clips (Allentown) 51 Do Not Use	

For more information on organization locations, and how to register, see the [COMPASS Community Partner Online Self-Registration Quick Reference Guide](#).

### [Saved Applications](#)

- **All Applications:**
  - **Applications Your Organization Recently Saved** – This includes all applications saved by all users in your organization and location listed in the top right-hand side of the screen.
- **My Applications:**
  - **Applications You Recently Saved** – This is all applications you have saved in your organization and location listed in the top right-hand side of the screen.

### [Submitted Applications](#)

- **All Applications:**
  - **Applications Your Organization Recently Submitted** - This includes all applications submitted by all users in your organization and location listed in the top right-hand side of the screen.
- **My Applications:**
  - **Applications You Recently Submitted** - This includes all applications you submitted in your organization and location listed in the top right-hand side of the screen.

**Tickets**

- **Tickets Your Organization Recently Submitted** – This includes all the tickets submitted by all users in your organization and location listed in the top right-hand side of the screen. At this time, tickets can only be submitted by MA Providers that are adding a newborn to a mother’s Medical Assistance case.

**NOTE:** Each list displays the last 20 applications or tickets that meet the list criteria above.

The lists provide the “e-Form #” of the application, the “Applicant” name, the “Last edit date”, and which user the application was “Last edited by”. You can select an application by clicking on the row.

W999999990589	Suss, Steve	03/01/2018	B-DWARKE
W709999994187	Surr, Ryan	03/01/2018	B-DWARKE
W769999997888	Supp, Mrs	03/01/2018	B-DWARKE

Once an application is selected, there are additional options that can be performed.

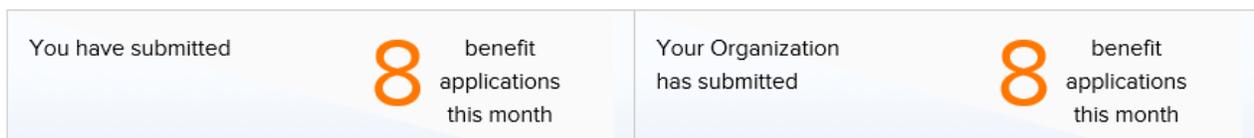
- **For Saved Applications:**
  - Continue Application – Allows the CP user to continue processing the application.
  - Summary – Allows the CP to see the application information currently entered in a summary format.
- **For Submitted Applications:**
  - Summary – Provides all the information submitted in the application in a summary format.
  - Status & Verification – Lists the verification that the system determined is needed to process the application. Note the caseworker may have additional required information and contact the applicant to request this information.
  - Signature –Allows the CP user to print the signature page for the applicant to send into the CAO, or to e-Sign for the applicant.
  - Attach – Allows the CP user to attach documents to that application by selecting a document that has been saved to the computer.
  - Scan – Allows the CP user to scan documents to the application.

If you cannot find the application you are looking for, use the “Search Applications” function, located on the left-hand side of the screen.

**Statistic Boxes**

The statistic boxes show how many applications have been submitted by you and your organization in the current month.

1. **Submitted by You** – Indicates how many applications you have individually submitted in the current month.
2. **Submitted by Your Organization** – Indicates how many applications have been submitted by your organization in the current month.



**New Applications**

Click on the NEW APPLICATION button to start a new application on behalf of an individual and you will be routed to the getting started section of the application.

1. Getting Started
  - a. **What to Expect** – Explains what information you need from the individual prior to completing the application.



**IMPORTANT:**

You may need the following information from the individual to complete the application:

- Household income from jobs, child support and other income
- Social Security numbers and birth dates of household members
- Current or recent health insurance information
- Housing and utility expense information
- Resource information, such as bank accounts, vehicles, homes, property, life insurance, etc.  
Please note: Some health and human services, including LIHEAP and Child Care Works, do not need resource information. Also, resources are not needed if you are applying for health care only and you meet one of these exceptions: pregnant; child under age 21; have a dependent child under 21 living with you; you do not have a disability and are under age 65.
- Proof of citizenship and identity if you are a U.S. citizen (for example: birth certificate, driver's license or state ID)
- Non-citizens must provide documentation showing lawful presence in the U.S.

- b. **Set Up** – Choose the option that represents your organization. If you are enrolled with DHS as a MA or non-MA provider and are applying on behalf of a client, select the type of medical service, enter your MA or non-MA provider number, and enter the date of first admission or treatment. If you are a community-based organization applying on behalf of a client, enter the Type of Community Based Organization you are in the required field.
- c. **Returning User** – Complete this screen only if the applicant has given you permission to submit a pre-populated application on their behalf.
- d. **Password** - Choose a password for the application that can be provided to the user. Hint questions are not required for a CP submitted application.
- e. **Family Safety** - This page provides information and resources for victims of domestic violence.



**IMPORTANT:**

- If you are providing the e-Form number and password to the individual so they can check the status of their application on their own, be sure to write down the individual's e-form number and password and keep them in a safe place.

2. **Household** – Enter the head of household information. Click the ADD ANOTHER PERSON button to add each additional household member. Be sure to include members of the household who are currently away from home (for example: students) as well as members who are part of the tax household for MA eligibility determination. After adding all household members, confirm the head of household and enter the mailing address.
3. **Benefits** – Select all the benefits for which the household is applying. Then select each household member who is applying for each benefit.
4. **Individual Details** - Answer questions about the household and each individual household member. The Head of Household will have the opportunity to select if he/she is interested in registering to vote or changing information on his/her Pennsylvania voter registration.
5. **Additional Details** - Answer questions about the household to see if anyone in the household is eligible to apply for additional benefits.
6. **Income** – Answer income questions about the household. Depending on the answer to these questions, you may have to answer income questions about individual household members.
7. **Expenses** - Answer expense questions about the household. Depending on the answer to these questions, you may have to answer expense questions about individual household members.
8. **Insurance** - Answer insurance questions about the household, depending on the benefit(s) requested. Depending on the answer to these questions, you may have to answer insurance questions about individual household members
9. **Resources** – Provide resource information for all household members, such as bank accounts, vehicles, homes, property and life insurance.
10. **Completion Check** – This process will review the application to determine if there are any remaining questions. Answer all required questions in order to move forward in the application process.

- a. **Benefits** – Benefits you and/or someone in your household may qualify for based on information given in the application.
- b. **Summary** – All the information provided will be displayed and you must review the entire application. Click the CHANGE THIS INFORMATION button to make updates to the application.

11. **Next Steps**

- a. **Routing & Provider Information** – Describes which department the application will be routed to and the benefits for which the household has applied.
- b. **Managed Care Organization** – Provides managed care information.
- c. **Additional Information** – Provide additional information such as language preference as well as your contact information in case the caseworker needs more information. The answers to these questions will not affect eligibility.

12. **Submit e-Form**

- a. **Signature Options** – If the Social Security Number of the Head of Household was entered, you can e-Sign on behalf of the individual.
- b. **Rights and Responsibilities** – Make sure the applicant reads and understands the rights and responsibilities.
- c. **Identity Verification** – You may be asked to verify the applicant’s identity by answering questions that pertain to their credit report history. This process allows their application to be processed more quickly and ensures that the information provided in the application remains secure. This is optional for Community Partners to complete and the Community Partner must have the applicant’s permission to do so.
- d. **Certification/Authorization** – Ensure the applicant has read, certifies and agrees to the items listed, then enter the Community Partner’s initials
- e. **Submit** - Choose whether you would like to “View and/or print the e-form for my records”, “View and/or print the e-signed signature page” or “Do not have a printer”.

**Note: Once you “Submit” the application, no information can be changed.**

- f. **Confirmation** – Congratulations, your application has been completed and submitted. Click on the “View Summary” button to review the summary of the application you submitted. Click on the “View Required Items” button to review verification you may need to submit for this application. If the list is blank, COMPASS does not recognize that any verification is needed. Click on the “Attach A File” or “Scan Documents” button to submit the verification documents electronically. Please see the [Attach Scanned Documents](#) section for instructions.

**Note:** You may receive eligibility results on the Confirmation page. Review your results with the applicant and inform them that they will receive a notice regarding their eligibility shortly.



**IMPORTANT:**

- **Do not forget to submit the verification documents**
- **To review those documents, click the “View Required Items” button**

**Renew Benefits**

Click on the RENEW BENEFITS button on the CPD to renew benefits on behalf of an individual. Programs require recipients to renew benefits to determine if they are still eligible to receive those benefits. Please note: The following benefits cannot be renewed through COMPASS: Free or Reduced Price School Meals and Low-Income Home Energy Assistance Program, LIHEAP. The system will list the Department and benefits that you can renew.

1. Choose one of the following to renew: “Department of Human Services” including MA, SNAP, Cash, HCBS Waiver, or LTC benefits, or “Children’s Health Insurance Program (CHIP)”. You’ll also need to receive approval from the individual to renew on their behalf, and click on the check box indicating you have permission to do so.
2. To renew MA, SNAP, Cash, HCBS Waiver, or LTC benefits, enter the individual’s Social Security number, case/county record number and renewal date. To renew CHIP benefits, enter the individual’s Unique Form Identifier (UFI), member ID (UCI), and renewal month.
3. **Getting Started**
  - a. **What to Expect** – Explains what information you need from the individual prior to completing the application.



**IMPORTANT:**

**You may need the following information from the individual to complete the renewal:**

- **Household income from jobs, child support and other income**
- **Social Security numbers and birth dates of household members**
- **Current or recent health insurance information**
- **Housing and utility expense information**

- **Resource information, such as bank accounts, vehicles, homes, property, life insurance, etc. Please note: Some health and human services, including LIHEAP and Child Care Works, do not need resource information. Also, resources are not needed if you are applying for health care only and you meet one of these exceptions: pregnant; child under age 21; have a dependent child under 21 living with you; you do not have a disability and are under age 65.**
  - **Proof of citizenship and identity if you are a U.S. citizen (for example: birth certificate, driver's license or state ID)**
  - **Non U.S. citizens must provide original documentation indicating lawful residence in the U.S.**
- b. **Set Up** – Choose the option that represents your organization. If you are enrolled with DHS as a MA or non-MA provider and are applying on behalf of a client, select the type of medical service, enter your MA or non-MA provider number, and enter the date of first admission or treatment. If you are a community based organization applying on behalf of a client, enter the Type of Community Based Organization you are in the required field.
  - c. **Password** – Choose a password and three hint questions and answers. Hint questions are not required for a CP submitted renewal.
  - d. **Family Safety** - This page provides information and resources for victims of domestic violence.



**IMPORTANT:**

- **If you are providing the e-Form number and password to the individual so they can check the status of their renewal on their own, be sure to write down the individual's e-form number and password and keep them in a safe place.**
4. **Household** – Review and update all household and mailing address information.
  5. **Benefits** – Select the benefits for which the household is renewing. Then select each household member that is renewing each benefit.
  6. **Individual Details** – Review and update all household and individual household member information. The Head of Household will have the opportunity to select if he/she is interested in registering to vote or changing information on his/her Pennsylvania voter registration.
  7. **Additional Details** – Review and update all additional details questions about the household members.
  8. **Income** – Review and update all income information.
  9. **Expenses** – Review and update all expense information.
  10. **Insurance** – Review and update all insurance information.
  11. **Resources** – Review and update all resource information.
  12. **Summary**
    - a. **Completion Check** - Answer all required questions in order to move forward in the renewal process.
    - b. **Review Application** - Review the entire renewal application. Click the “Change This Information” button to make updates to the renewal application.
  13. **Next Steps**
    - a. **Routing and Provider Information** – Describes which department the renewal application has been routed to and the benefits for which the household has applied to renew.
    - b. **Additional Information** – Provide additional information such as language preference as well as your contact information in case the caseworker needs more information. Answer additional optional questions. The answers to these questions will not affect eligibility.
  14. **Submit E-form**
    - a. **Signature Options** – If the Social Security Number of the Head of Household was entered, you can e-Sign on behalf of the individual.
    - b. **Rights and Responsibilities** – Make sure the applicant reads and understands the rights and responsibilities.
    - c. **Identity Verification** – You may be asked to verify the applicant's identity by answering questions that pertain to their credit report history. This process allows their application to be processed more quickly and ensures that the information provided in the application remains secure. This is optional for Community Partners to complete and the Community Partner must have the applicant's permission to do so.
    - d. **Certification/Authorization** – If you choose to e-sign the application, enter your initials in the box at the bottom of the page.
    - e. **Submit** – Choose whether you would like to “View and/or print the e-Form for your records”, “View and/or print the e-Signed signature page” or “Do not have a printer” at this time.
    - g. **Confirmation** – Congratulations, your application has been completed and submitted. Click on the “View Summary” button to review the summary of the application you submitted. Click on the “View Required Items” button to review verification you may need to submit for this application. If the list is blank, COMPASS does not recognize that any verification is needed. Click on the “Attach A File” or “Scan Documents” button to submit the verification documents electronically. Please see the [Attach Scanned](#)

[Documents](#) section for instructions.



**IMPORTANT:**

- Do not forget to submit the verification documents
- To review those documents, click the “View Required Items” button.

**Quick Reports**

The Quick Reports tab provides the number of e-Forms you, and your organization, submitted by county and the number of e-Forms submitted by benefit for the previous month. For more detailed reports, use the Search page.

**Submitted E-Forms by County** – Lists, by county, how many applications have been submitted by you individually, and by your organization.

**Submitted E-Forms by Benefit** – Lists, by benefit, how many applications have been submitted by you individually, and by your organization.

**Information**

The Information tab provides links to information on benefits, downloadable forms and other helpful links. Click on a link to open the desired page. The page/form will open in a new tab, or window.

**School Meals**

The School Meals tab provides links to information on the Free or Reduced Price School Meals Program. Click on a link to open the desired page. This tab is viewable based on the Community Partner’s National School Lunch Program COMPASS access. Not all Community Partners will see this tab.

**Administration**

The Administration tab provides information and links on user/organization management. This tab is viewable based on the Community Partner’s Delegated Administrator access. Not all Community Partners will see this tab. For more information on administrative functions, see the [COMPASS Community Partner Online Self-Registration Guide](#).

**Search Applications**

Click on the ‘Search Applications’ button in the sidebar of your CPD to search for applications saved or submitted by your organization. Enter one or more of the search criteria and click “Search”. You can export your search to excel, or view it in a PDF as well. When exported to Excel or PDF, the following information is available:

- e-Form #
- Applicant Name
- Created Date
- Created By
- Last Update Date
- Last Updated By
- Submitted Date
- Applied Benefits
- Status
- County
- District

e-Form #	Applicant	Created Date	Created By	Last Updated Date	Last Updated By	Submitted Date	Applied Benefits	Status	County	District
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### Renewal Date Search

Click on RENEWAL DATE button on homepage. This will take you to the renewal screen where you are able to look up renewal dates for:

1. MA, SNAP, Cash, HCBS Waiver, or LTC benefits - to look up a renewal date for one of these categories, the user must enter the Head of Household's Social Security Number or MCI # / Medicaid ID/ EBT Card # as well as the County and Case Record number.
2. CHIP benefits - to look up a renewal date for CHIP benefits, the user must enter the individual's UFI and Head of Household's Social Security Number.

### MA Inmate Release

This gives all correctional facilities the opportunity to apply for MA benefits for individuals being released from incarceration using a shortened application.

### Report Changes

This gives all correctional facilities the opportunity to submit changes to release applications they or someone in their organization has submitted.

### PE Worksheet

Click on PE Worksheet button, on the main CPD page, to determine if an individual is presumptively eligible for MA. A valid MA Provider Number is required to access the PE Worksheet. After information is entered and the PE Worksheet has been submitted, you will be able to determine if the individual is Eligible or Ineligible for PE.

1. If individual is eligible for PE:
  - a. Submit a COMPASS PE application or PE/ongoing MA application, if the PE applicant wishes to apply for ongoing MA.
  - b. Give the PE applicant a copy of the PE Worksheet.
2. If the individual is ineligible for PE:
  - a. Assist the applicant in submitting a COMPASS MA application, if the applicant wishes to apply for ongoing MA.
  - b. Give the PE applicant a copy of the PE Worksheet.

### Add Newborn

Click on Add Newborn button, on the main CPD page, to add a newborn to an active MA case record. A valid MA Provider Number is required to access the Newborn Add functionality. Enter identifying information to locate the mother's active case record and to add the newborn. Once this information is submitted, the CP will not have to submit the MA112 form.

## **COMPASS Attach Scanned Documents (ASD)**

Community Partners have the option to scan and/or attach verification documents via COMPASS Attach Scanned Documents (ASD). Community Partners can access COMPASS ASD through the following COMPASS locations:

1. **Apply/Renew for Services Confirmation Screen** – click 'ATTACH A FILE' or 'SCAN DOCUMENTS' on the Application/Renewal Confirmation screen. The option is available immediately following successful submission of an application/renewal.
2. **Applications You Recently Submitted Panel** – select the application and click on 'Status & Verification'. In the right-hand corner of the Application Status screen, you can select 'ATTACH' or 'SCAN'.
3. **Applications Your Organization Recently Submitted Panel** - select the application and click on 'Status & Verification'. In the right-hand corner of the Application Status screen, select 'ATTACH' or 'SCAN'.
4. **Search Applications screen** – after searching for applications, select the application needed and click on 'Status & Verification'. In the right-hand corner of the Application Status screen, select 'ATTACH' or 'SCAN'.

## Submitting Verification Documents for an Application

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After accessing COMPASS ASD ('Scan Documents' or 'Attach a File' buttons) from one of the access points described above, follow these steps to submit one or more verification documents:

### To Scan Documents using a scanner:

1. Click 'Select A Scanner'
  - a. In the resulting pop-up window, select your scanner
2. Repeat the following steps for each document you wish to scan:
  - a. Verify that the pre-populated e-Form# is correct
  - b. Select your scanner from the list
  - c. Click 'Add' and select the document from the Document Category dropdown list
  - d. Scan the document by selecting 'Add'
    - o To Scan a document, place the document in the scanner and click 'Scan Flat' to scan in simplex mode or 'Scan Feeder' to scan in duplex mode
  - e. Each page/image captured by the scanner or imported will be added as a page in the middle thumbnail panel
  - f. Rotate/Delete the document, as needed
3. Click 'I am Finished' to upload the document(s)  
NOTE: You must click on 'I am Finished' to send all documents to the County Assistance Office (CAO).
4. You will be directed to a Scan Confirmation page once documents have been successfully submitted. To scan or upload additional documents, click 'Scan Documents' or 'Attach a File'.

### To Upload images using the 'Attach a File' button:

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1. Select the 'Attach a File' button
2. Make sure the e-form # is correct
3. Click 'Add'
  - a. In the resulting pop-up window, select the document from the Document Category
4. Select 'Add' and choose the correct file
5. Place a check next to the file and select 'I Am Finished' to upload the document (s)

NOTE: If you choose to scan documents, you will still have the option to attach a file from the Confirmation Page and vice versa.

## Submitting Verification Documents to a Case Record

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Community Partners can also assist clients who are current recipients in submitting documents through the 'Attach a File for a Recipient' or 'Scan Documents for a Recipient' button located on the sidebar of their Community Partner Dashboard. To upload documents for a specific case record number, follow the steps below:

### To Scan Documents using a scanner:

1. Enter a valid case record number
2. Click 'Select Scanner'. In the resulting pop-up window, select your scanner
3. Click 'Add' and select the document from the Document Category and Sub-Category dropdown list
4. Place document in scanner
  - a. Scan or Import the document
    - o To Scan the document, place the it in the scanner and click 'Add'
  - b. Each page/image captured by the scanner or imported will be added as a page in the middle thumbnail panel
  - c. Rotate/Delete the document, as needed
5. Click 'I am Finished' to upload the document(s)  
NOTE: You must click on 'I am Finished' to send the document to the County Assistance Office (CAO).
6. You will be directed to a Scan Confirmation page once document has been successfully submitted. To scan and submit an additional document, click 'Scan Documents'. To attach an additional image, click 'Attach a File'

### To Upload images using the 'Attach a File for a Recipient' button:

1. Enter a valid case record number
2. Click 'Add' and select document from Document Category and Sub-Category dropdown list
  - a. Select 'Add' and choose the correct file

- b. Rotate/Delete the document, as needed
- 3. Click 'I am Finished' to upload the document(s)  
NOTE: You must click on 'I am Finished' to send the document to the County Assistance Office (CAO).
- 4. You will be directed to a Scan Confirmation page once document has been successfully submitted. To upload and submit an additional document, click 'Attach a File'. To scan and submit an additional image, click 'Scan Documents'.

NOTE: If you choose to scan documents, you will still have the option to attach a file from the Confirmation Page and vice versa.

## Frequently Asked Questions

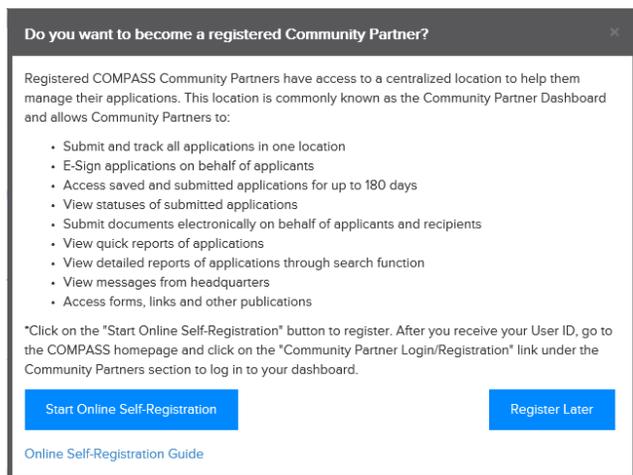
### Q: May I still apply for benefits on behalf of a citizen without signing up to become a Community Partner?

A: It is recommended that an organization that applies on behalf of someone else registers to become a Community Partner, though you can apply on behalf of another individual without becoming a Community Partner. On the Set Up screen under Getting Started during the application process, select "I am a community based organization, applying on behalf of a client" (MA provider number not required).

Please choose one of the following

- I am applying for myself, for a family member, for someone in my household, and/or for a non-family member.
- I am enrolled with DHS as a MA or non-MA provider and I am applying on behalf of a client (I can provide a valid MA or non-MA provider number).
- I am a community based organization, applying on behalf of a client (I do not have a valid MA or non-MA provider number).

Once you select the 3<sup>rd</sup> radio button shown above, the pop-up below will appear. You will be able to register as a Community Partner by clicking "Start Online Self-Registration" or you can click "Register Later" to continue completing the application without registering as a Community Partner.



### Q: Why do the numbers of submitted applications in the statistic boxes not match the number of listed applications submitted by myself and my organization?

A: The difference between the numbers in the statistic boxes and the number of listed applications is the date range. The statistic boxes include only the current month, but the list of applications includes all that were submitted within the past 30 days.

### Q: How long will it take to apply for benefits on behalf of a citizen using COMPASS?

**A:** It will take at least 25 minutes to complete an application. The exact length will depend on the benefits selected and the number of people in the household.

**Q: Which benefits may be applied for using COMPASS?**

**A:** The following benefits may be applied for using COMPASS: Health Care Coverage, Supplemental Nutrition Assistance Program (SNAP), Free or Reduced Price School Meals, Cash Assistance, Child Care Works, Low-Income Home Energy Assistance Program (LIHEAP), Long Term Living Services– Home and Community Based and Long Term Living Services – Nursing Home and Related Facilities.

**Q: Once I submit an individual's application and receive the confirmation page do I need to take any additional steps?**

**A:** Yes, you must submit the household's required verification documents for the application to be processed. Also, remember to provide the applicant with the Summary page of the application.

**Q: Will Community Partners be able to use COMPASS ASD to submit verification documents for all programs?**

**A:** No, the ASD functionality is currently only available for the following programs: Health Care (Medical Assistance), SNAP, LIHEAP, Cash Assistance, Long Term Living Services – Home and Community Based and Long Term Living Services – Nursing Home and Related Facilities.

**Q: How do I register as a COMPASS Community Partner?**

**A:** To register yourself or your organization as a COMPASS Community Partner, please refer to the [COMPASS Community Partner Online Self-Registration Guide](#).