**MEMORANDUM**

**DATE:**      September 23, 1999

**TO:**         All DPA Staff

**FROM:**     Rebecca Eames
                   Chief of Field Services

**SUBJECT:**  EIS Procedure 1999-8 (Replaces EIS Procedure 1994-2)
                   Application Registration and Client Inquiry

## Introduction

Effective September 1999, the application registration system is enhanced.  The enhancement will improve the application registration process in the following ways:

♦  Allow staff to select and save several clients from the CLIENT SHORT LIST (CLIS)
♦  Reduce the creation of duplicate clients

This procedure will discuss:
♦  The application registration screens
♦  The application registration process
♦  The general inquiry process

EIS Procedure 1999-8 replaces EIS Procedure 1994-2.  Please remove EIS Procedure 1994-2 from your EIS Procedure Manual.

## **Table of Contents**

## Application Registration Menu and Screens

### *The CLIENT INQUIRY / REGISTRATION MENU (CLIR)*

Accessing and using the CLIR menu is the first step in application registration.  To access the CLIR menu:

♦  <NEXT> to the CLIR from any EIS menu

```
 EIS CLIR                 CLIENT INQUIRY/REGISTRATION MENU          081899 11:39
                                                                   WORKER B

              1.   INQUIRE ON PERSON
              2.   CREATE AND SAVE CLIENT FOR REGISTRATION
              3.   REGISTER APPLICATION WITH EXISTING CASE NUMBER
              4.   REGISTER APPLICATION WITH NEW CASE NUMBER
              5.   DELETE PREVIOUSLY SAVED PERSONS

                      FUNCTION:

 INQUIRE BY CLIENT DATA:

 SURNAME       :                          ( * )
 GIVEN NAME    :                          ( * )  Remove '*' for direct
 MIDDLE INITIAL:                                 name matches
 DOB (MMDDYYYY):
 SSN           :
 SEX           :


 ENTER EXISTING CASE NUMBER (FOR FUNCTION 3)             :
 ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4):
```

| FUNCTION / FIELD | DESCRIPTION / USE |
|---|---|
| **Functions:** | |
| INQUIRE ON PERSON | Use this function to begin an inquiry. |
| CREATE AND SAVE CLIENT FOR REGISTRATION | Use this function to create and save new clients to EIS. Use this function after completing a full inquiry, and determining that the person does not already exist in EIS. |
| REGISTER APPLICATION WITH EXISTING CASE NUMBER | Use this function to register an application with an existing case number when:<br>♦  The PI (Primary Information person) is the same<br>♦  The program(s) is/are compatible |
| REGISTER | Use this function to register a case with a new case |

| FUNCTION / FIELD | DESCRIPTION / USE |
|---|---|
| APPLICATION WITH A NEW CASE NUMBER | number. |
| DELETE PREVIOUSLY SAVED PERSONS | Use this function to delete all saved clients. |

**Fields:**

| | |
|---|---|
| SURNAME | Enter the last name of the person being inquired on or created. |
| GIVEN NAME | Enter the first name of the person being inquired on or created. |
| MIDDLE INITIAL | Enter the middle initial of the person being inquired on or created.  This is a non-inquiry field. |
| DOB (MMDDYYYY) | Enter the date of birth of the person being inquired on or created. This is a non-inquiry field. |
| SSN | When creating a new person enter the person's Social Security Number in this field. This is a non-inquiry field. |
| SEX | When creating a new person enter the person's sex in this field. This is a non-inquiry field. |
| ENTER EXISTING CASE NUMBER (FOR FUNCTION 3) | When using Function 3 and using an already existing case number, enter the case number in this field. |
| ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4) | When it is necessary to create a new case number enter the caseworkers office number, unit, and caseload number in this field. |

### The CLIENT INQUIRY SHORT LIST (CLIS) Screen

The CLIS Screen is accessed after completing a client inquiry from the CLIR menu.
The CLIS screen displays a list of clients, which met the specified search criteria.

```
 EIS CLIS                  CLIENT INQUIRY SHORT LIST              081899 15:09
                                                                  WORKER B

 SEL    SURNAME           GIVEN NAME    I BIRTHDATE SEX S.S.N.     CLIENT-ID ALIAS

    01 BROWN             A                01101980  F  911111111  0600042848
    02 BROWN             AARON         D  08011990  M  574043955  0600037923
    03 BROWN             ADRIANA       T  11101961  F  574745354  0600037915
    04 BROWN             AIMEE            12311949  F  000000000  0600050654
    05 BROWN             ALLEN         E  06051990  F  998456446  0600042986
    06 BROWN             ALLEN         E  06051990  M  112318879  0600042468
    07 BROWN             AMY              03091963  F  537649528  0600004142
    08 BROWN             ANGELA        U  12291940  F  574140681  0600038054
    09 BROWN             ANNA             03151942  F  933333333  0600042850
    10 BROWN             BAILEY           05201997  M  000000000  0600048277
    11 BROWN             BERT          B  01011951  M  223334445  0600014707
    12 BROWN             BIBBY            09231995  F  000165561  0600044703
    13 BROWN             BOB           B  08011985  M  955111111  0600042979
    14 BROWN             BOBBY            09251994  M  537438444  0600037195
    15 BROWN             BUSTER           05151970  M  457823742  0600036677

    <== INQUIRE ON CLIENT (CLPM)
 PAGE 01 OF 04         PF3=TOP    PF5=CLIR    PF7=SCROLL UP    PF8=SCROLL DN
```

| FIELD | DESCRIPTION / USE |
|---|---|
| SEL (Select) | Use this field to tell the system in what order the clients on this page should be. For example, if Anna Smith is first enter 01 in Anna's SEL field. If Bert Smith is second, enter 02 in Bert's SEL field. <PF5> to save clients selected on this page. |
| SURNAME GIVEN NAME I (Middle Initial) BIRTHDATE SEX SSN | These fields provide a summary of client identifying data. |
| CLIENT – ID | Two or more clients with the same name, DOB, etc. may |

| **FIELD** | **DESCRIPTION / USE** |
|---|---|
| | appear next to each other in the list.  If the Client IDs are different, the client may be a duplicate client or another client.  Be sure to complete full inquiry to determine if there are two separate clients or possibly a duplicate client situation. |
| ALIAS | Two asterisks (**) in this column indicate the client's name is listed as an alias. |
| INQUIRE ON CLIENT (CLPM) | Enter the number (01, 02, 03…) to view the CLIENT PROFILE/MAINTENANCE (CLPM) screen.  <ENTER> |
| PAGE XX OF XX | This field displays the current page number and the total number of pages that make up the short list. |
| PF3=TOP | <PF3> to display the first page of the list. |
| PF5= CLIR | <PF5> to save clients and return to the CLIR or CLIN screens to begin a new search. |
| PF7= SCROLL UP | <PF7> to scroll up one screen in the short list. |
| PF8 = SCROLL DOWN | <PF8> to scroll down one screen in the short list. |

## The CLIENT PROFILE / MAINTENANCE (CLPM) Screen

The CLPM screen displays:
♦ The client's name
♦ Two aliases the client is known by (if more aliases exist use Function 6 to view)
♦ Client identification information (Client ID, Social Security Number, Birth date, Sex)
♦ Client personal alerts
♦ Current and past program involvement

The CLPM screen is used to:
♦ Save clients for registration
♦ Delete clients from a program after their participation is ended
♦ Delete clients from EIS (For Systems Operations use only)
♦ Change identifying data if a client has a name change or incorrect information must be updated
♦ View Sanction and Disqualification information on the WOSA
♦ Maintain client aliases

The CLPM screen is accessed when an inquiry is completed from the CLIR, CLIN, OR CLIA screens. The CLPM screen may also be accessed by using the NEXT window.

***Note:  When accessing the CLPM via the CLIN inquiry only Function 5 – VIEW SANCTION / DISQUALIF (WOSA) is available.***

```
 END OF PROGRAM INVOLVEMENTS
 EIS CLPM                  CLIENT PROFILE/MAINTENANCE              081999 08:44
                                                                   WORKER B
 1.  SAVE FOR REGISTRATION     (CLIR) 4.  CHANGE IDENTIFYING DATA    (CLMA)
 2.  DELETE CLIENT FROM PROGRAM       5.  VIEW SANCTION/DISQUALIF    (WOSA)
 3.  DELETE CLIENT FROM EIS           6.  MAINTAIN ALIAS INFORMATION (ALMA)
                   FUNCTION:
 ENTER FOR FUNCTION 2: CASE NBR:          PROG:     BEN MTH (MMYY):
 CM OFF/UNIT/CSLD:                 AT MTHS USED: 000    FS MTHS USED: 000
 NAME/ALIASES              BA EXEMPT MTHS USED: 000    CLIENT ID: 0600030531
 SMITH , ANNABELLE                              S.S.N.  : 214 55 5555
                                                BIRTHDATE: 01011960
                                                SEX: F     ALERT:

   PGM CASE NBR PART START   END    STAT  FSO   UNIT   CSLD   REL   DEN/CLO ALERT
 01 ME 00021455  IN  030199 033199 CL    083   1      03     PI       OT
 02 FS 00014555  CO  091293 091293 DE    047   1      01     PI       OT


    <== INQUIRE ON INVOLVEMENT (PRIP)
 PAGE 01 OF 01    PF3=TOP   PF4=CLIS   PF5=CLIR   PF7=SCROLL UP   PF8=SCROLL DN
```

## The PROGRAM INVOLVEMENT PERSON LIST (PRIP) Screen

The PRIP screen displays, by program:
♦ All household members who participated on the case
♦ The household member's relationship and participation code
♦ The start and end dates of involvement in the case
♦ The client's identifying data

The PRIP is accessed by placing a numerical entry in the:
**INQUIRE ON INVOLVEMENT (PRIP)** field on the CLPM

```
END OF PERSON LIST
 EIS PRIP                PROGRAM INVOLVEMENT PERSON LIST          081999 09:16
                                                                  WORKER B

        CASE NUMBER: 00014555           FULL      LIMITED
          PGM:    FS            OFF.:    047              ALERT:
          START: 091293         UNIT:   1                DEN/CLO: OT
          END:   091293         CSLD:   01               STATUS   DE

     REL PART START   END     CLIENT NAME                    BIRTHDT  SEX S.S.N.

 01 PI  CO  091293 091293 SMITH , ANNABELLE                  01011960  F 214555555
 02 SP  CO  091293 091293 SMITH , BILL                       01011962  M 214511111
 03 CH  CO  091293 091293 SMITH , CHARO A                    01031988  M
 04 CH  CO  091293 091293 SMITH , DAFFNEY                    01041989  F
 05 CH  CO  091293 091293 SMITH , ELBERT                     01051990  M
 06 CH  CO  091293 091293 SMITH , FABIAN O                   01061991  M
 07 CH  CO  091293 091293 SMITH , GEOFFREY                   01071992  M




    <== INQUIRE ON CLIENT (CLPM)                                  NEXT-->
 PF3=TOP       PF4=CLIS       PF5=CLIN       PF7=SCROLL UP    PF8=SCROLL DN
```

### The REGISTER APPLICATION (REAP) Screen

The REAP screen is used to register applications to a particular program(s) and case number.

***Note:  The REAP screen is only accessed after saving clients via the CLIR and selecting Function 3 or 4.  After exiting the REAP workers cannot return to the screen.***

```
 EIS REAP                    REGISTER APPLICATION                   083199 10:59
                                                                    WORKER B
 CASE NAME: MILLER , ANNABELLE              CASE NUMBER: 00014555
 CASELOAD:  01 B , WORKER                   FULL SERVICE OFFICE: 047
 UNIT: 1          LIMITED SERVICE OFFICE:           FEE AGENT:
  EXPEDITED FS: N   AF TYPE APPLIED FOR:
  PROGRAMS APPLIED FOR: FS
  APP RECEIVED DATE:    083199
  BENEFIT START DATE:   083199

   CLIENT                       DATE OF                              POSITION
   NAME                         BIRTH      SSN       SEX   RELATION  ON APP

 MILLER , ANNABELLE             01011960 214 55 5555  F       PI       01
 MILLER , DAFFNEY               01041989              F       CH       02
 MILLER , GEOFFREY              01071992              M       CH       03
 MILLER , HERCULES              08201998 000 14 5557  M       CH       04
 JONES , DAVID W                06051978 811 11 0084  M       NN       05




 ADDRESS  INFORMATION TO BE ENTERED ? :     Y      PRINT IVR NOTICE ? : Y
```

| FIELD | DESCRIPTION / USE |
| --- | --- |
| CASELOAD<br>UNIT<br>FULL SERVICE OFFICE | This information is transferred from the CLIR; however, changes may be made to the caseworker's caseload number, unit number, and the Full Service Office number in these fields. |
| EXPEDITED FS | If a food stamp applicant is eligible for expedite service change the **N** to a **Y** |

| **FIELD** | **DESCRIPTION / USE** |
|---|---|
| AF TYPE APPLIED FOR | Enter the appropriate code which indicates the type of Temporary Assistance:<br>♦ **B** (Basic) = One adult with dependents<br>♦ **I** (Incap) = Two parents with one or both parents disabled<br>♦ **U** (Unemployed) = Two parents with one or both parents unemployed |
| PROGRAMS APPLIED FOR | Enter the appropriate code for the corresponding program:<br>♦ **FS** = Food Stamps<br>♦ **AF** = Temporary Assistance<br>♦ **AP** = Adult Public Assistance<br>♦ **IA** = Interim Assistance<br>♦ **ME** = Medicaid (enter the appropriate ME subtype – AB, AD, AF, or OA)<br>♦ **GR** = General Relief Assistance<br>♦ **GM** = Chronic and Acute Medical Assistance<br><br>*Note: To register a second program on the same case number <TAB> to the next field to enter the program code.* |
| APP RECEIVED DATE | Enter the application received date in this field |
| BENEFIT START DATE | Enter the program benefit start date in this field |
| RELATION | Enter the appropriate relationship codes in this field.<br><br>*Note: If the first person listed is not the desired PI, the relationship code can be changed. HOWEVER, NEVER CHANGE THE PI THAT HAS BEEN ASSIGNED TO A PARTICULAR CASE.* |
| POSITION ON APP | This field displays the position the person will have on the SEPA screen. If the household members are not in the desired position, the positions numbers can be changed at this time.<br><br>*Note: After <ENTER> and the REAP is exited changes can only be made by the Help Desk.* |
| PRINT IVR NOTICE | This field defaults to a **Y** for all Full Service Offices except the Denali KidCare office which defaults to **N**. |

# Rules for Application Registration

### *Procedures for Completing a Full Inquiry*

1. Begin inquiring on the person who submitted the application (the Primary Information Person)

2. Input the first 3 letters of the last name, leave asterisk <ENTER>

3. If more detail is needed, input 1-2 more letters of the last name <ENTER>

4. If more detail is needed after completing steps 2 through 4, complete the spelling of the entire last name, and delete the asterisk from the parenthesis. <ENTER>

### *Important Reminders for Application Registration*

A. Failure to complete a full inquiry using the above steps may result in duplicate clients.

B. Never register a client as "JR", "SR", "III", or "IV" etc, or with initials or nicknames.
   <u>Exception:</u>
   In a situation, where two people have the same mailing address and the postmaster is unable to distinguish whose mail is whose, staff can register a client using a suffix ("JR", "III", etc).  This may be required in rural areas where many people use the mailing address GENERAL DELIVERY. In this situation place the suffix with the client's first name **not the surname**.

C. The only punctuation allowed is a hyphen (-) if one exists.  If the hyphenated name exceeds the surname field, ask the client which should be used and set an alias using the other name.

D. **NEVER** change the Primary Information (PI) person that has been assigned to a particular case number. If the edit, THIS PERSON WAS NOT THE 'PI' PREVIOUSLY ON THIS CASE, is displayed, <PF9> from the REAP and investigate who is the PI for the case number selected.

E. Add any aliases a client may have via the CLPM.

*Application Registration Example*

**Example:**
Annabelle Miller is in the office applying for food stamps.  On her application she lists the following people:
♦ Annabelle Miller DOB January 1, 1960. SSN 214 55 5555
♦ Daffney Miller (her daughter) DOB January 4, 1989, SSN 000 14 5555
♦ Geoffrey Miller (her son) DOB January 7, 1992, SSN 000 14 5556
♦ Hercules Miller (her son) DOB August 20, 1998, SSN 000 14 5557
♦ David Jones (her nephew) DOB June 5, 1978, SSN 811 11 0084

**Step 1:**
<NEXT> to the CLIR menu

**Step 2:**
On the CLIR Menu:
1. In the FUNCTION field input 1
2. In the SURNAME field input the first three letters of Annabelle's last name – MIL
3. <ENTER>

```
 EIS CLIR                  CLIENT INQUIRY/REGISTRATION MENU        083199 09:10
                                                                  WORKER B

               1.   INQUIRE ON PERSON
               2.   CREATE AND SAVE CLIENT FOR REGISTRATION
               3.   REGISTER APPLICATION WITH EXISTING CASE NUMBER
               4.   REGISTER APPLICATION WITH NEW CASE NUMBER
               5.   DELETE PREVIOUSLY SAVED PERSONS

                        FUNCTION: 1

 INQUIRE BY CLIENT DATA:

 SURNAME       : MIL                   ( * )
 GIVEN NAME    :                       ( * )  Remove '*' for direct
 MIDDLE INITIAL:                              name matches
 DOB (MMDDYYYY):
 SSN           :
 SEX           :


 ENTER EXISTING CASE NUMBER (FOR FUNCTION 3)           :
 ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4):
```

*Note: If more than 150 clients matched the initial search criteria the edit:*
**OVER 150 CLIENTS MATCH SPECIFIED CRITERIA - PLEASE RESPECIFY** *will appear  When this happens add additional information to the search such as the full last name and first initial of the client's first name.*

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**Step 3:**
On <ENTER> the CLIS will appear.  The CLIS for the initial search shows there are
seven pages of clients who fall within the inquiry.

```
 EIS CLIS                   CLIENT INQUIRY SHORT LIST               083199 09:17
                                                                    WORKER B

 SEL    SURNAME             GIVEN NAME   I BIRTHDATE SEX S.S.N.    CLIENT-ID ALIAS

    01 MILAN                JOE            02061984  M  811117246  0600030384
    02 MILK                 HERSHEL     M  12121952  F  000000000  0600019492
    03 MILK                 MILLIE      S  12121985  F  000000000  0600019493
    04 MILKYWAY             MELVIN      L  05261972  M  503920048  0600038662
    05 MILL                 ADRIENNE       04171968  F  000000000  0600051321
    06 MILL                 JASON          11201990  M  000000000  0600051322
    07 MILL                 SHARON         05211997  F  000000000  0600051333
    08 MILL                 SHARON         05201997  F  000000000  0600051323
    09 MILLE                MARION         08031950  F  000000000  0600051338
    10 MILLE                MICHAEL        07191990  M  000000000  0600051339
    11 MILLER               AARIA          08211968  F  438479382  0600042815
    12 MILLER               ALBERT         09021966  M  438478931  0600042816
    13 MILLER               ALEENA         03291996  F  348729832  0600042818
    14 MILLER               ALIA           06191976  F  478387474  0600048494
    15 MILLER               ANDY           07221994  M  438478921  0600042817

    <== INQUIRE ON CLIENT (CLPM)
 PAGE 01 OF 07        PF3=TOP    PF5=CLIR    PF7=SCROLL UP    PF8=SCROLL DN
```

**Step 4:**
<PF8> to scroll to PAGE 2. Annabelle's name appears as client 03.  On PAGE 2:
1.  In the INQUIRE ON CLIENT (CLPM) field enter 03
2.  <ENTER>

```
 EIS CLIS                    CLIENT INQUIRY SHORT LIST                083199 09:37
                                                                     WORKER B

 SEL    SURNAME            GIVEN NAME    I BIRTHDATE SEX S.S.N.      CLIENT-ID ALIAS

    01 MILLER             ANNA          Y  01231940  F   575489731  0600038190
    02 MILLER             ANNA             09151968  F   748729487  0600046268
    03 MILLER             ANNABELLE        01011960  F   214555555  0600030531
    04 MILLER             ARNOLD           11031959  M   648274898  0600046269
    05 MILLER             BARNEY           05271930  M   000000000  0600043342
    06 MILLER             BILL             01011991  M   874116547  0600033662
    07 MILLER             BONNIE        A  06281998  F   427165480  0600046829
    08 MILLER             CHRIS            02121982  M   471980208  0600036074
    09 MILLER             CHRISSY          04041944  F   954165795  0600033661
    10 MILLER             DAFFNEY          01041989  F   000000000  0600030534
    11 MILLER             DAVID         J  05151990  M   427183216  0600046830
    12 MILLER             DIANE            04051925  F   000000000  0600050667
    13 MILLER             FLAGUE        J  02081989  M   484892389  0600042874
    14 MILLER             FRAZIER       H  03271967  M   329823985  0600042873
    15 MILLER             GEOFFREY         01071992  M   000000000  0600030537


 03 <== INQUIRE ON CLIENT (CLPM)
 PAGE 02 OF 07          PF3=TOP     PF5=CLIR     PF7=SCROLL UP    PF8=SCROLL DN
```

**Step 5:**
On <ENTER> the CLPM for Annabelle Miller will appear.  On the CLPM:
1. Review for any past program involvements and Annabelle's participation.  The CLPM shows Annabelle had a previous food stamp case in which she was the PI (00014555).  **PRINT THIS SCREEN**
2. <PF4> to return to the CLIS

```
 END OF PROGRAM INVOLVEMENTS
 EIS CLPM                   CLIENT PROFILE/MAINTENANCE                083199 09:47
                                                                     WORKER B
 1.  SAVE FOR REGISTRATION     (CLIR) 4.  CHANGE IDENTIFYING DATA     (CLMA)
 2.  DELETE CLIENT FROM PROGRAM       5.  VIEW SANCTION/DISQUALIF     (WOSA)
 3.  DELETE CLIENT FROM EIS           6.  MAINTAIN ALIAS INFORMATION (ALMA)
                       FUNCTION:
 ENTER FOR FUNCTION 2: CASE NBR:          PROG:      BEN MTH (MMYY):
 CM OFF/UNIT/CSLD:              AT MTHS USED: 000    FS MTHS USED: 000
 NAME/ALIASES            BA EXEMPT MTHS USED: 000    CLIENT ID: 0600030531
 MILLER , ANNABELLE                                  S.S.N.   : 214 55 5555
                                                     BIRTHDATE: 01011960
                                                     SEX: F     ALERT:


   PGM CASE NBR  PART  START   END    STAT   FSO   UNIT   CSLD   REL   DEN/CLO ALERT
 01 ME 00021455  IN   030199 033199 CL     083   1      03    PI       OT
 02 FS 00014555  CO   091293 091293 DE     047   1      01    PI       OT


    <== INQUIRE ON INVOLVEMENT (PRIP)
 PAGE 01 OF 01    PF3=TOP    PF4=CLIS    PF5=CLIR    PF7=SCROLL UP    PF8=SCROLL DN
```

**Step 6:**
On the CLIS:
1. <TAB> to Annabelle (03)
2. Input 01 in the SEL field
3. Since Daffney and Geoffrey appear  as clients 10 and 15 on the CLIS <TAB> to the SEL field by Daffney and input 02
4. <TAB> to the SEL field by Geoffrey and input 03

```
 EIS CLIS                    CLIENT INQUIRY SHORT LIST                083199 09:55
                                                                     WORKER B

 SEL    SURNAME            GIVEN NAME    I BIRTHDATE SEX S.S.N.      CLIENT-ID ALIAS

    01 MILLER             ANNA          Y  01231940  F  575489731  0600038190
    02 MILLER             ANNA             09151968  F  748729487  0600046268
 01 03 MILLER             ANNABELLE        01011960  F  214555555  0600030531
    04 MILLER             ARNOLD           11031959  M  648274898  0600046269
    05 MILLER             BARNEY           05271930  M  000000000  0600043342
    06 MILLER             BILL             01011991  M  874116547  0600033662
    07 MILLER             BONNIE        A  06281998  F  427165480  0600046829
    08 MILLER             CHRIS            02121982  M  471980208  0600036074
    09 MILLER             CHRISSY          04041944  F  954165795  0600033661
 02 10 MILLER             DAFFNEY          01041989  F  000000000  0600030534
    11 MILLER             DAVID         J  05151990  M  427183216  0600046830
    12 MILLER             DIANE            04051925  F  000000000  0600050667
    13 MILLER             FLAGUE        J  02081989  M  484892389  0600042874
    14 MILLER             FRAZIER       H  03271967  M  329823985  0600042873
 03 15 MILLER             GEOFFREY         01071992  M  000000000  0600030537


    <== INQUIRE ON CLIENT (CLPM)
 PAGE 02 OF 07          PF3=TOP     PF5=CLIR     PF7=SCROLL UP    PF8=SCROLL DN
```

**Step 7:**
♦  <PF8> to access the next CLIS screen to see if Hercules is also known to EIS.

**Step 8:**
Hercules was not found on the CLIS.
♦  <PF5> to return to the CLIR to save the 3 selected clients and start an inquiry on Hercules

**Step 9:**
A full inquiry on Hercules revealed he was not known to EIS.  EIS will display the edit **NO CLIENTS FOUND ON CLIR**.

**Step 10:**
Remaining on the CLIR:
1.  In the FUNCTION field enter 2 to create and save
2.  Enter all of Hercules identifying data
3.  <ENTER>
4.  After <ENTER> the edit: **CLIENT 04 – MILLER, HERCUL SAVED FOR REG**.  will display

```
 CE071-E NO CLIENTS FOUND
 EIS CLIR              CLIENT INQUIRY/REGISTRATION MENU        083199 10:43
                                                              WORKER B

             1.   INQUIRE ON PERSON
             2.   CREATE AND SAVE CLIENT FOR REGISTRATION
             3.   REGISTER APPLICATION WITH EXISTING CASE NUMBER
             4.   REGISTER APPLICATION WITH NEW CASE NUMBER
             5.   DELETE PREVIOUSLY SAVED PERSONS

                     FUNCTION: 2

 INQUIRE BY CLIENT DATA:

 SURNAME       : MILLER                ( * )
 GIVEN NAME    : HERCULES              ( * )   Remove '*' for direct
 MIDDLE INITIAL:                               name matches
 DOB (MMDDYYYY): 08201998
 SSN           : 000145557
 SEX           : M


 ENTER EXISTING CASE NUMBER (FOR FUNCTION 3)          :
 ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4):
```

**Step 11:**
Remaining on the CLIR:
♦   Inquire on David Jones

**Step 12:**
David Jones appears on the first page of the CLIS for clients fitting the search criteria.
Remaining on the CLIS:
1. <TAB> to David Jones (13)
2. In the SEL field enter 01
3. <PF5> to save the client and return to the CLIR

```
 EIS CLIS                   CLIENT INQUIRY SHORT LIST              083199 10:48
                                                                  WORKER B

 SEL    SURNAME             GIVEN NAME    I BIRTHDATE SEX S.S.N.    CLIENT-ID ALIAS

    01 JONES               AMELIA        T  01011965  F  821348743  0600044911
    02 JONES               ARNOLD           08081934  M  694030495  0600023342
    03 JONES               ARTHUR           10011980  M  433119980  0600024482
    04 JONES               BABETTE          06031960  F  000000000  0600050639
    05 JONES               BABYEBT          01021996  F  000000000  0600043565
    06 JONES               BARBARA          02291948  F  000000000  0600050640
    07 JONES               CASEY            08161970  M  000000000  0600050229
    08 JONES               CASEY            09091950  M  693030495  0600023254
    09 JONES               CHERYLE          12111971  F  395050687  0600023340
    10 JONES               CHRIS            03131985  M  574961131  0600042705
    11 JONES               DAVID            08081908  M  359403058  0600023337
    12 JONES               DAVID         R  03131985  M  574339000  0600036882
 01 13 JONES               DAVID         W  06051978  M  811110084  0600036659
    14 JONES               DEE           D  04041940  F  654678485  0600042725 **
    15 JONES               DIANE                      F  000000000  0600045342

    <== INQUIRE ON CLIENT (CLPM)
 PAGE 01 OF 08      PF3=TOP    PF5=CLIR    PF7=SCROLL UP    PF8=SCROLL DN
```

**Step 13:**
On the CLIR the following edit will appear:
**CLIENT 05 – JONES, DAVID SAVED FOR REG.**

**Step 14:**
Remaining on the CLIR:
1. In the FUNCTION field enter 3 to register an application with an existing case number
2. <TAB> to the ENTER EXISTING CASE NUMBER field and enter case number 00014555
3. <ENTER>

```
 CLIENT 05 - JONES, DAVID SAVED FOR REG.
 EIS CLIR              CLIENT INQUIRY/REGISTRATION MENU          083199 10:55
                                                                WORKER B

              1.   INQUIRE ON PERSON
              2.   CREATE AND SAVE CLIENT FOR REGISTRATION
              3.   REGISTER APPLICATION WITH EXISTING CASE NUMBER
              4.   REGISTER APPLICATION WITH NEW CASE NUMBER
              5.   DELETE PREVIOUSLY SAVED PERSONS

                     FUNCTION: 3

 INQUIRE BY CLIENT DATA:

 SURNAME       :                     ( * )
 GIVEN NAME    :                     ( * )  Remove '*' for direct
 MIDDLE INITIAL:                             name matches
 DOB (MMDDYYYY):
 SSN           :
 SEX           :


 ENTER EXISTING CASE NUMBER (FOR FUNCTION 3)          : 00014555
 ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4):
```

**Step 15:**
On <ENTER> the REAP screen will appear.  On the REAP:
1. Change the CASELOAD and UNIT fields if a new caseworker is assigned
2. Annabelle's application revealed she is eligible for expedite food stamp services. <TAB> to the EXPEDITED FS field and change the **N** to **Y**
3. Annabelle is not applying for Temporary Assistance so <TAB> past the AF TYPE APPLIED FOR field
4. <TAB> to the PROGRAMS APPLIED FOR field and enter FS
5. <TAB> to the APP RECEIVED DATE field enter the date the application was received
6. <TAB> to the BENEFIT START DATE field enter the correct benefit start date **_Note: If the Benefit Start Date is different from the Application Received Date enter the correct Benefit Start Date in this field; otherwise leave this field blank._**
7. <TAB> to the RELATION field and enter the appropriate relationship codes between Annabelle and the other household members.
8. <ENTER> to register the application and access the ADDRESS (ADDR) screen

**_Note:  If the allocated positions for the household members is not correct (for example of David Jones should have position 02 as opposed to 05), staff can change the position numbers on the REAP screen.  This will change the position of the clients on the SET-UP PARTICIPANTS (SEPA) screen._**

```
 EIS REAP                    REGISTER APPLICATION                083199 10:59
                                                                  WORKER B
 CASE NAME: MILLER , ANNABELLE                  CASE NUMBER: 00014555
 CASELOAD:  01 B   , WORKER                     FULL SERVICE OFFICE: 047
 UNIT: 1           LIMITED SERVICE OFFICE:          FEE AGENT:
  EXPEDITED FS: Y   AF TYPE APPLIED FOR:
  PROGRAMS APPLIED FOR: FS
  APP RECEIVED DATE:     083199
  BENEFIT START DATE:

   CLIENT                        DATE OF                             POSITION
   NAME                          BIRTH       SSN        SEX  RELATION ON APP

 MILLER , ANNABELLE              01011960 214 55 5555   F      PI       01
 MILLER , DAFFNEY                01041989               F      CH       02
 MILLER , GEOFFREY               01071992               M      CH       03
 MILLER , HERCULES               08201998 000 14 5557   M      CH       04
 JONES  , DAVID W                06051978 811 11 0084   M      NN       05




 ADDRESS  INFORMATION  TO BE ENTERED ? :     Y     PRINT IVR NOTICE ? : Y
```

## Unique Application Registrations

### *Registering a Third Trimester Temporary Assistance Case*
**<u>Step 1:</u>**
<NEXT> to the CLIR

**<u>Step 2:</u>**
Inquire on the expectant mother.
♦ If the mother is known in EIS save the mother for registration
♦ If the mother is not known, create and save the mother for registration

**<u>Step 3:</u>**
Register the unborn:
1. In the FUNCTION field enter 2
2. In the SURNAME field enter the PI's surname, unless instructed differently by the client
3. In the GIVEN NAME field enter UNBORN as the first name
4. In the DOB field enter the estimated date of delivery                    ***<u>Note:</u>***
   ***This date must be in the future.***
5. <TAB> past the SSN field
6. In the SEX field enter **U** (unknown)

**<u>IMPORTANT REMINDER:</u>**
**The only time an unborn baby is registered to EIS is in a Third Trimester Temporary Assistance case.  Upon the birth of the baby, it is extremely important to complete a full inquiry using the original surname and estimated date of delivery.  After finding the correct unborn change the identifying data via the CLPM.**

### *Quick Registrations*

The Quick Registration may be used if all the following conditions are met:
1. The applicant was the PI on the case number, and
2. The case has been closed or denied within the last 5 months, and
3. There is similar household composition, and
4. The program is compatible with the case number

To complete a Quick Registration:
1. On the CLIR Menu select function 3
2. <TAB> to the ENTER EXISTING CASE NUMBER field and enter the case number
3. <ENTER>

## Client and Case Maintenance

### *The CLIENT INQUIRY / ADD TO CASE MENU (CLIA)*

The CLIA screen is used to add clients to already existing or new case.  The CLIA functions the same as the CLIR requiring full client inquiries and accessing the CLIS.

```
 EIS CLIA                  CLIENT INQUIRY/ADD TO CASE MENU            083199 15:14
                                                                       WORKER B

         1.   INQUIRE ON PERSON         3.   ADD NEW CLIENT TO CASE
         2.   RESTART CLIENT INQUIRY    4.   ADD EXISTING CLIENT TO CASE

                          FUNCTION:

 INQUIRE BY CLIENT DATA:              - OR -        INQUIRE BY CLIENT IDENTIFIER:


 SURNAME       :                       ( * )      SSN          :
 GIVEN NAME    :                       ( * )      CLIENT NUMBER:
 MIDDLE INITIAL:               Remove '*' for direct
 DOB (MMDDYYYY):                   name matches
 SEX           :

                          ENTER FOR FUNCTIONS 3 AND 4:
                          CASE NUMBER                  :
                          PROGRAM TYPE                 :
                          BENEFIT PERIOD START (MMDDYY):
                          BENEFIT PERIOD END     (MMYY):
```

| FUNCTION / FIELD | DESCRIPTION / USE |
|---|---|
| INQUIRE ON PERSON | Use this function to begin an inquiry and access the CLIS |
| RESTART CLIENT INQUIRY | Use this function to delete a previously saved client and begin a new inquiry |
| ADD NEW CLIENT TO CASE | Use this function to create, save, and add a person previously unknown to EIS to a case |
| ADD EXISTING CLIENT TO CASE | Use this function to add a known client to a case |
| SSN; SURNAME; GIVEN NAME; MIDDLE INITIAL; | ♦ If a client is known to EIS these fields will display the client's identifying data after a complete inquiry from |

| **FUNCTION / FIELD** | **DESCRIPTION / USE** |
|---|---|
| DOB; SEX; CLIENT NUMBER | CLPM. |
| | ♦ If the client is not known and must be created enter all client identifying data in the appropriate field. |
| CASE NUMBER | In this field enter the case number the client is being added. |
| PROGRAM TYPE | In this field enter the program type of the corresponding case number. |
| BENEFIT PERIOD START | In this field enter the client's benefit start date or the month the client will start benefits. |
| BENEFIT PERIOD END | Only use this field if a client is added for a single month or a specified sequential number of months. |

### *Maintaining Alias Information*

It is very important to maintain, in EIS, all aliases a client may be known by.  Failure to do this may result in many duplicate clients.  To maintain alias information, follow the steps below:

**Example:**  Annabelle Miller (SSN 214 55 5555) recently finalized her divorce and has changed her last name to her maiden name – Franklin

**Step 1:**
♦ <NEXT> to the CLIA

**Step 2:**
On the CLIA:
♦ Complete a full inquiry using function 1

**Step 3:**
1. From the CLIS screen select the correct Annabelle Miller (if more than one exists) by entering the identifying client number in the INQUIRE ON CLIENT field
2. <ENTER> to access the CLPM

**Step 4:**
On the CLPM:
1.  Select Function 4 CHANGE IDENTIFYING DATA
2.  <ENTER>

**Step 5:**
On <ENTER> the CLIENT MAINTENANCE (CLMA) screen will appear.  On the CLMA:
1.  <TAB> to the SURNAME field and change Miller to Franklin
2.  <ENTER>

```
 EIS CLMA                   CLIENT MAINTENANCE                  090199 08:41
                                                               WORKER B

            SURNAME: FRANKLIN
            GIVEN NAME (OR INITIAL): ANNABELLE      MIDDLE INITIAL:
            SSN: 214 55 5555
            BIRTHDATE (MMDDYYYY): 01011960
            SEX: F

            DUP CL ID NUMBER:                      SEND TO DMA:

          PF4=CLIS       PF5=CLIA
```

**Step 6:**
On <ENTER> EIS will return to the CLPM.  On the CLPM:
1.  Select Function 6 MAINTAIN ALIAS INFORMATION
2.  <ENTER>

**Step 7:**
On <ENTER> the ALIAS MAINTENANCE (ALMA) screen will appear.  On the ALMA:
1. In the ALIAS  field input Annabelle's previous last name and first name.  Her SSN and Date of Birth will automatically be entered.                    ***Note: If a client uses a different SSN and/or Date of Birth enter this information on the alias maintenance screen.***
2. <ENTER>

```
 EIS ALMA                      ALIAS MAINTENANCE                    090199 08:51
                                                                    WORKER B
 CLIENT NAME: MILLER , ANNABELLE
                                                                    DATE OF
           SURNAME            GIVEN NAME   INITIAL      SSN          BIRTH
 ALIAS 1: MILLER             ANNABELLE                214 55 5555   01011960

 ALIAS 2:

 ALIAS 3:

 ALIAS 4:

 ALIAS 5:

 ALIAS 6:

 ALIAS 7:

 ALIAS 8:

 ALIAS 9:
            PF4=CLIS        PF5=CLIA
```

**Step 8:**
The CLPM will display the current name and two aliases

```
 END OF PROGRAM INVOLVEMENTS
 EIS CLPM                 CLIENT PROFILE/MAINTENANCE              090199 09:07
                                                                  WORKER B
 1.  SAVE FOR MAINTENANCE     (CLIA) 4.  CHANGE IDENTIFYING DATA   (CLMA)
 2.  DELETE CLIENT FROM PROGRAM      5.  VIEW SANCTION/DISQUALIF   (WOSA)
 3.  DELETE CLIENT FROM EIS          6.  MAINTAIN ALIAS INFORMATION (ALMA)
                      FUNCTION:
 ENTER FOR FUNCTION 2: CASE NBR:          PROG:    BEN MTH (MMYY):
 CM OFF/UNIT/CSLD:              AT MTHS USED: 000   FS MTHS USED: 000
 NAME/ALIASES          BA EXEMPT MTHS USED: 000    CLIENT ID: 0600030531
 FRANKLIN , ANNABELLE                             S.S.N.  : 214 55 5555
 MILLER , ANNABELLE                               BIRTHDATE: 01011960
                                                  SEX: F    ALERT:


   PGM CASE NBR PART START   END    STAT  FSO  UNIT  CSLD  REL   DEN/CLO ALERT
 01 FS 00014555  CO  083199          RE   083   1    03   PI
 02 ME 00021455  IN  030199 033199 CL   083   1    03   PI      OT
 03 FS 00014555  CO  091293 091293 DE   083   1    03   PI      OT




    <== INQUIRE ON INVOLVEMENT (PRIP)
 PAGE 01 OF 01    PF3=TOP   PF4=CLIS   PF5=CLIA   PF7=SCROLL UP   PF8=SCROLL DN
```

## General Client Inquiries

### *The CLIENT INQUIRY (CLIN) Screen*

The CLIN screen is an **Inquire Only** screen.  To access the CLIN:
♦  <NEXT> from any EIS screen

The CLIN screen has two options for inquiring on a client:
1.  Inquire by client identifying information (SSN, Name, DOB, etc)
2.  Inquire by the 10-digit client identification number

After an inquiry from the CLIN the CLIS will appear.  To return to the CLIN <PF5> from the CLIS.

```
 EIS CLIN                        CLIENT INQUIRY                     090199 09:10
                                                                   WORKER B


 INQUIRE BY CLIENT DATA:            - OR -        INQUIRE BY CLIENT IDENTIFIER:

 SSN         :                                       CLIENT NUMBER:
 SURNAME     :                      ( * )
 GIVEN NAME  :                      ( * )  Remove '*' for direct
 DOB (MMDDYYYY):                           name matches
 SEX         :


```

## Helpful Hints for Client Inquiries

1.  Deletion of the asterisk (*) is required for a full surname search

2.  Deletion of the asterisk (*) is required for a full given name search

3.  The DATE OF BIRTH (DOB) field with a MMDDYYYY format, provides

    ♦  a one (1) year variance for individuals who are age 0 through 20 years

    ♦  A 5% variance for individuals age 21 and older