WF1400 - TRACKING FUNCTIONS
<u>Change #2-2012</u>
<u>November 1, 2012</u>

WF1400.01   24/60 MONTH TIME LIMIT TRACKING

From the EIS Update Menu screen, key 'ET' in the SELECTION field and the caretaker's Individual ID number in the KEY field. The ELIGIBILITY TRACKING UPDATE screen appears.

```
EJA996                    ELIGIBILITY TRACKING UPDATE              08/01/05
EJA996S1                         JANE DOE                          PAGE 01
                                123456789P
WORK FIRST TRAK STATUS (Y/N) Y            OVERRIDES (Y/N): 24MTH    60MTH
                                              36MTH END DATE:
 C/D  12  24  60  CCYYMM C/D  12  24  60  CCYYMM  C/D  12  24  60  CCYYMM



ADD NEW ELIGILBILITY                             TOTAL         USED   XFER IN
12  24  60  CCYYMM        12  24  60  CCYYMM      12 MTH        000
                                                 24 MTH        000
                                                 60 MTH        000     000

SELECTION ET KEY 123456789P  PF2=MENU PF5=REFRESH PF7=UP PF8=DOWN
 PF1 FOR HELP ENTER ANY ELIGIBILITY CHANGES
```

Tracking dates on this screen are in CCYYMM format. The months displayed are the months the family is subject to 24/60 month tracking. This screen also displays those months that an individual is exempt from participating with Work First Employment by having been coded a JOBS/WORK REG code of 'S'. These months are indicated by the 'Y' in the 12 month field.

The TRACKING STATUS field shows the current status for the family. A TRACKING STATUS code of 'Y' denotes a family is currently subject to 24/60 month time limit.

I.   Correcting Erroneous Months

If there are months shown in which the family was not subject to the 24/60 month time limit, the information in the tracking data must be corrected.

To delete months, key 'D' in the field to the left of the erroneous month(s). Do not remove the Y's in any of the fields. Press enter until the message UPDATE COMPLETE is displayed in the bottom left hand side of the screen.

To correct months, key 'C' in the field to the left of the erroneous month(s) and remove the Y's that are incorrect. Press enter until the message UPDATE COMPLETE is displayed in the bottom left hand side of the screen.

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II.   **Adding Months**

If there are months that are not displayed in which the family was subject to the 24/60 month time limit, those months must be entered into the tracking data. Key the appropriate month(s), in CCYYMM format, in the NEW ELIGIBILITY field. Key a Y in the 24 and/or 60 month field to indicate this month was subject to the 24/60 month time limit. Future months cannot be entered.

NOTE: Any payment(s) authorized and issued on the DMA-5022 will not create an automatic update to add and track months on the Eligibility Tracking (ET) screen. The months must be manually entered to add the applicable months to be tracked.

III.   **Transferring in Months**

Enter the total number of months transferred in from out-of-state under the XFER IN field. (To be used only when the family has moved here from out-of-state.) DO NOT add these months to the ET screen by keying them in the NEW ELIGIBILITY field.

IV.   **Overrides (Y/N): 24Mth/60Mth**

- Enter 'Y' to stop the transfer of the case to Medicaid at the end of the 24th or 60th month.
- If blank, at the end of the 24th or 60th month, on regular run, EIS will automatically transfer the case to one month Medicaid.
- If the case has been granted an extension by the county and the 24 and/or 60 months have been exhausted, a Y must be keyed in the 24 and/or 60 month field to allow approval of the case.

V.   **36 Month End Date**

- EIS will automatically begin tracking the 36 month off assistance once the 24 month tracking has been reached and there is no 'Y' in the 24 month override field.
- When the first 24 months have been reached the system will replace the 'Y' with '1'. If the client re-applies after the 36 months of ineligibility, the system will automatically replace the first 24 months of Y's with 1's to indicate that these months were the first 24 months used and the client is eligible for a second 24 months.

    NOTE: Press the PF5 key to view another family. Key the Individual ID of the caretaker of the next family in the KEY field.

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VI.   Work First Extension Policy

If a recipient receives a 60 month time limit extension, the eligibility tracking screen allows a page three. The months are displayed in chronological order.

WF1400.02   BENEFIT DIVERSION TRACKING

This tracking function shows information concerning the Benefit Diversion received by a family.

From the EIS Update Menu, key 'BD' in the SELECTION field and the caretaker's Individual ID in the KEY field. The following screen appears.

The information on this screen is entered automatically by EIS.

```
                          BENEFIT DIVERSION INQUIRY

       INDIVIDUAL ID:                                 CASE ID:
       NAME:

       DIVERSION AMOUNT:
       DIVERSION APPROVAL CODE:

       APPLICATION DATE:
       DISPOSITION DATE:

       MEDICAID/FSIS BEGIN DATE:
       MEDICAID/FSIS BEGIN DATE:

       DIVERSION AMOUNT RECOUPED:

       SELECTION      KEY
```

The DIVERSION AMOUNT RECOUPED field is the only field that may be updated.

WF1400.03   WORK FIRST FAMILY VIOLENCE WAIVER TRACKING

I.   General Information

TANF regulations require individuals receiving cash assistance to get and keep a job or participate in some type of training or work related activity within a specified number of weeks. If an individual has been determined a victim of family violence, the individual may be granted a waiver from certain TANF requirements for mandatory Work First recipients.

The following Family Violence screens have been developed to inquire about or add waiver time periods for an individual who has been granted a waiver due to the presence of violence in their household.

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In order for an individual to be granted the Family Violence waiver, the individual must have a family status code of 'I', 'P' or 'S'. The waiver period can be 1-6 months. Additional waiver periods can be granted following another assessment. The Work First case must be active for the time period a waiver is granted.

Dates entered for waivers can be past, present, or future months. Dates must be keyed in **CCYYMM** format. Dates prior to November 1999 cannot be entered.

While in effect, the waiver will also be displayed on the Individual Profile screen.

Once a waiver is entered, it cannot be changed or deleted.

A.   **Accessing the Family Violence Update Screen**

From the EIS Update Menu, key 'FA' in the SELECTION field and the INDIVIDUAL ID number in the KEY field. The following screen appears:

```
EJA071          NC DEPT OF HEALTH AND HUMAN SERVICES        DATE: 08/25/05
                 ELIGIBILITY INFORMATION SYSTEM             TIME:  11:23:18
                    FAMILY VIOLENCE ADD OPTION

      INDIVIDUAL  121200010Q                  TEST DOE

  CODE      BEGIN DATE (CCYYMM)         END DATE (CCYYMM)
   O             200508                      200508

  SEL                     KEY
  MSG:
  PF2/14 INQUIRY MENU PF3/15 FAMILY VIOLENCE INQUIRY
```

To add/indicate the type of requirement to be waived with Begin/End date, the following codes may be entered in the CODE field:

1.   'W' – to indicate waiver is due to Work.

2.   'O' – to indicate waiver is due to Other.

3.   The Begin and End date must be entered as (**CCYYMM**).

Press ENTER. The message: "ADD COMPLETE - PRESS ENTER TO REFRESH SCREEN" is displayed. This updates both the FAMILY VIOLENCE INQUIRY screen as well as the INDIVIDUAL PROFILE screen (see below).

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Warning messages are displayed when the date is not keyed in the correct format, or the BEGIN or END date has already been used in another waiver period.

ENTER also refreshes the screen so additional waiver periods can be entered.

Press PF2/14 to return to the inquiry menu. Press PF3/15 to move to the Family Violence Inquiry screen.

B.   Accessing the Family Violence Inquiry Screen

From the EIS Inquiry Menu, key 'FV' in the SELECTION field and the INDIVIDUAL ID number in the KEY field. The following screen appears:

```
EJA071        NC DEPT OF HEALTH AND HUMAN SERVICES     DATE: 08/25/05
              ELIGIBILITY INFORMATION SYSTEM           TIME: 14:04:53
                   FAMILY VIOLENCE INQUIRY


   INDIVIDUAL - 0000125125P                     JOE BLUE

      CODE          BEGIN DATE        END DATE
       O              200507           200509



SEL           KEY
MSG
PF2/14 INQUIRY MENU   PF7/19 BACK    PF8/20 FORWARD   PF3/15 ADD
```

This screen displays Individual ID, Name and a history of waiver periods for the Work First individual based on the information keyed through the Family Violence Update Screen. Waivers are shown in chronological order with the most recent one listed at the top. The screen displays up to ten waivers.

Press PF2/14 to return to the inquiry menu. Press PF7/19 to move back to the first screen. If more than ten waivers have been granted, press PF8/20 to display the additional waivers. Press PF3/15 to move to the Family Violence Add screen.

II.   Individual Profile (IP) Screen

This screen displays the Family Violence Waiver Code, Begin and End date for the individual.

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```
EJA067                INDIVIDUAL PROFILE        DATE: 08/26/2005

ID 123123000M       NAME       JANE DOE
                                              CURRENT IE
IVD SANC BEG DTE        CROSS REF IDS     HIST FROM     08/01/2005
IVD SANC END DTE                          AUTH FROM     08/01/2005
MRA SANC BEG DTE                          HIST TO       99/99/9999
MRA SANC END DTE                          AID PROG      AAF
WF JOB BONUS BEG                          MED CLASS     C
WF JOB BONUS END                          SSI           N
MA JOB BONUS BEG                          CTY           06
MA JOB BONUS END        SPECIAL USE       PAY TP        S
STATUS IN CASE     R                      CASE ID       23087249
TEEN PARENT                               DB/PML CD
TOT 12 MTHS USED   006                    DB/PML AMT
TOT 24 MTHS USED                          SPEC COV
TOT 60 MTHS USED   007                    AMB CAP
TOT MTHS XFER IN                          LIV ARR       10
BENEFIT DIVERSION                          SPECL NEED
FV O   BEGIN DATE     200508              PCHP IND
       END DATE       200508              CA/HMO PVDR   891118R
WF JQ  BEGIN DATE                         AUTO ASSGN    N
WF JQ  END DATE                           PVDR CHG
DISABILITY IND                            DIST > PVDR   L



SEL:        KEY 123123000M  MSG:
INQUIRY IS COMPLETE        PF2=INQUIRY MENU PF9=INDV INQUIRY
```

III.   Reports

Waivers will appear on the Case Management Report 2 months prior to expiration, 1 month prior to expiration, and current month of expiration with the message: "FAMILY VIOLENCE WAIVER END MMM" (with MMM representing the month in which the waiver expires).

WF1400.04 JOB BONUS TRACKING

I.   General Information

The Job Bonus Tracking Screen is used to track a Job Bonus for an individual and/or to view the history of individuals that have used the Job Bonus. This screen displays all Job Bonus periods for an individual in Work First and/or Medicaid. The Job Bonus Tracking Screen is created from the saved Automated Budget that contains a 100% Job Bonus period and processed on the DSS-8125. This screen is automatically updated by the system each night or from the direct entry on the screen.

Use the Job Bonus Tracking Screen to determine if the Job Bonus can be applied. The following three situations apply to the Job Bonus:

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A.   If no Job Bonus exists, then the Job Bonus can be applied to a Medicaid or Work First recipient.

B.   If a Medicaid (MAF) Job Bonus exists, then only a Work First Job Bonus can be applied.

C.   If a Work First (AAF) Job Bonus exists, then no other Job Bonuses can be applied and the automated budget displays an online message: JOB BONUS ALREADY USED FOR THIS INDIVIDUAL.

II.   Job Bonus History Screen

Use the following instructions to access the Job Bonus History screen.

From the EIS Update Menu, key "JB" in the selection field and the Individual ID in the key field. Press ENTER. The following screen displays:

```
EJA065                    ELIGIBILITY INFORMATION SYSTEM      FORM:   1043602V
EJA065S1                      JOB BONUS HISTORY               DATE:   08/06/05
                                                             TIME:    14:02:36
   ID:  123456789B       NAME: IAM      C  EMPLOYED

      CASE       AID    CTY    BEGIN DATE         END DATE      DATE POSTED
       ID        CAT    NUM    (MM/CCYY)          (MM/CCYY)
     12345678    MAF    92     07/2005            09/2005       06/07/2005
     00024536    AAF    60     10/2005            12/2005       09/25/2005


       AUTHORIZATION OF NEW JOB BONUS




   SEL: JB  KEY 123456789B  MSG:  INQUIRY COMPLETE
   PRESS ENTER TO UPDATE     PF2/14 INQUIRY MENU EJA
```

NOTE: The NAME is automatically brought forward from the case. If history is already posted for the individual, this data is displayed.

If a DSS-8125 is entered, but the Job Bonus information was not entered and saved on the Automated Budget, this screen will not update and will not display the Job Bonus period.

III.   Authorization of New Job Bonus

Use this option only when a retroactive period is needed per Work First policy rules. Enter AID PROGRAM/CATEGORY, County Number, Job Bonus Begin Date, Job Bonus End Date and press ENTER. The screen immediately updates and displays Job Bonus dates entered. Follow the function keys displayed at the bottom of the screen.

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IV.   **Online Job Bonus Edits**

The Job Bonus screen displays error messages for the following reasons:

A.   **CASE ID must be existing Case ID in case database.**

The Case ID entered must be or have been a valid Case ID in EIS.

B.   **AID CAT must be 'MAF' or 'AAF'.**

The Aid Program/Category must be either MAF or AAF.

C.   **CTY NUM** must be the county number in individual database.

D.   **BEGIN DATE must be valid month/year.**

The BEGIN DATE must be in the format of MMCCYY. This date can be the ongoing month, the current month or a retroactive month.

E.   **END DATE must be valid month/year.**

The END DATE must be in the format of MMCCYY. This date must be the BEGIN DATE plus 2 months.

WF1400.05 WORK FIRST FAMILY ASSISTANCE SANCTION TRACKING

This screen is used to view any sanctions imposed on the family as a result of failure to comply with *Work First Family Assistance* requirements.

I.   **Accessing the Sanction Inquiry Screen**

From the EIS Update Menu, key "SA" in the SELECTION field and the caretaker's Individual ID in the KEY field. Press Enter.

The Sanction Data Inquiry screen appears.

```
 EJA993                 SANCTION DATA INQUIRY              DATE: 09/01/09
 EJA993S1                                                  TIME:  14:29:51

 INDIVIDUAL ID: 123456789P  JANE DOE

 ACT  TYPE CTY RSN  %  AMT  BEG DT END DT   ISS DT   UPDT DT   CASE ID  OVR

  SEL SA   KEY 123456789P

  MSG:  INDIVIDUAL NOT ON SANCTION DATABASE

 PF2/14 INQUIRY MENU
```

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If no sanction exists for the individual ID number keyed, the screen will appear with message at the bottom of the screen stating: **MSG: INDIVIDUAL NOT ON SANCTION DATABASE**. To return to the inquiry menu, Press PF2/14.

II.   **Viewing the Sanction Data Screen**

If a sanction exists for the individual ID, the Sanction Data screen appears with the individual ID number and Case head name along with all sanction information relevant to this individual ID. The sanction data displayed is based on the sanction information keyed on the automated budget and the sanction change code processed on the EIS FORM 8125 as follows:

ACT	Activity - This field is reserved for state office use only. No entry can be made at the county level.
TYPE	Type of sanction, MRA (Mutual Responsibility Agreement), IVD (Child Support Enforcement) or SUB (Substance Abuse)
CTY	County in which the sanction was initiated
RSN	Two digit sanction change code processed on the EIS FORM 8125.
AMT	Sanction amount subtracted from the Work First payment. The amount may be zero if the sanction is Pay-After-Performance.
BEG DT	Beginning date of the sanction period (ccyymm)
END DT	End date of the sanction period (ccyymm). For a current sanction, this will be displayed as 0000/00
ISS DT	The date notice is mailed to family (ccyy-mm-dd)
UPDT DT	The date system posted the sanction information to the Sanction Tracking Screen(ccyy-mm-dd)
CASE ID	The Work First case associated with the individual ID # and sanction.
OVR	Blank or Y. 'Y' is displayed **only** when an 'N' is keyed on the automated budget under SANCTIONS to indicate do not apply the active sanction.

WF1400.06   TEEN PARENT TRACKING

This screen is used to track the teen parent in a particular case.

From the EIS Update Menu, key 'TE' in the SELECTION field and the teen parent's Individual ID in the KEY field. The Teen Parent Data Update screen appears.

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```
EJA994                    TRACKING DATABASE                        08/01/05
EJA994S1              TEEN PARENT DATA UPDATE                       14:40:05

   CASE ID: 00000000          TEEN PARENT NAME          DOB: 00/00/0000

   DEL      CHILDS ID        CHILDS NAME                DATE OF BIRTH

          000000000X      XXXXXXXXXX X XXXXXXXXXXXXXXX     00/00/0000
          000000000X      XXXXXXXXXX X XXXXXXXXXXXXXXX     00/00/0000
          000000000X      XXXXXXXXXX X XXXXXXXXXXXXXXX     00/00/0000
          000000000X      XXXXXXXXXX X XXXXXXXXXXXXXXX     00/00/0000
          000000000X      XXXXXXXXXX X XXXXXXXXXXXXXXX     00/00/0000

   SELECTION                 KEY
```

Keying the Teen Parent Data

Any data keyed on the screen overwrites the previous data in this tracking function. Individuals may be added and deleted from this screen. Deleting an individual on this screen does not affect the case data.

Key all the information on the teen parent's child on this screen. After updating the screen:

- Press ENTER to update;
- Press PF5 to start over; **or**
- Press PF2 to exit this function, and return to the EIS Update Menu.

WF1400.07 WORK FIRST/TRANSITIONAL QUARTERLY REPORTING

I.   General Information

A.   The Eligibility Information System (EIS) automatically produces a Quarterly Work First Eligibility Report (DSS-8127) or a Quarterly Transitional Benefit Report (DMA-5082) for certain system selected cases. EIS automatically selects quarterly reporting cases using the information entered on the DSS-8125. The DSS-8125 must be completed accurately and in a timely manner to ensure that quarterly reporting cases are selected correctly.

The Work First/Transitional Quarterly Reporting is generated based on the following criteria:

- Families with earned and unearned income. (Families whose only income is Social Security will not receive a Work First/Transitional Quarterly Report).
- Families with recent work history.
- Two parent families.
- Families that contain a minor parent or a 16 or 17 year old child.
- Families that contain a child(ren) age 18 who is expected to graduate from high school by the 19th birthday.

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B. Cases that are selected for Work First/Transitional Quarterly reporting are displayed on the screen listed below.

```
EJA933          WORK FIRST/TRANSITIONAL QUARTERLY REPORTING       FEBRUARY
                                                                  03/24/2006

 COUNTY:    DISTRICT:    CASE ID:     LAST NAME:                TYPE:
                                                                  QR


 STATUS  RPT  CASE ID  DIST CO CASE  LAST NAME     FIRST NAME MI FSIS TYPE


 ENTER = UPDATE    PF7/19 KEY = PAGE BACK    PF8/20 KEY = PAGE FORWARD
 SELECTION         KEY
```

C. The Work First/Transitional Quarterly Reporting Screens are available in EIS the first workday following the Work First/Transitional Reporting Selection Cycle. Each selected Work First/Transitional reporting case is listed on the screen with a STATUS CODE of 'S', System Selected, and a REPORT NUMBER of '1'.

After the close of business on the deadline established in the Work First/Transitional Quarterly Reporting Schedule, EIS compares the information on the Quarterly Reporting Screens to the information in the Case Database. The Quarterly Reporting Database is then updated before the second quarterly reports and second transitional benefit reports are produced. This ensures the information printed on the second report is the most current information available.

The Work First/Transitional Quarterly Reporting Screens are updated in IMS the night the Second Quarterly Report Cycle is run. The updated screens are on-line in IMS the following workday. A REPORT NUMBER of '2' is displayed for each selected Work First quarterly reporting case or transitional case mailed a second report form.

The Work First/Transitional Quarterly Reporting Screen is updated again the night the Work First/Transitional Quarterly Reporting Case Termination Cycle is run. The updated screens are on-line in IMS the following workday. A REPORT NUMBER of '3' is displayed for each Work First/Transitional reporting case that is transferred by EIS in the transfer cycle.

The Work First/Transitional Quarterly Reporting deadline is set by the Division of Medical Assistance and the Division of Social Services. The Work First/Transitional Quarterly Reporting schedule is located on the Dear County Director Letters website at http://www.dhhs.state.nc.us/dss/dcdl/.

II.   **Inquiry/Update of Work First/Transitional Quarterly Reporting Screen**

Use the following instructions to access the Work First/Transitional Quarterly Reporting Screens. Refer to the Work First User's Manual, section 100.02, for instructions to logon to IMS.

On the EIS Menu screen, key 'QR' for Work First/Transitional Quarterly Reporting in the SELECTION field. Press ENTER.

The Work First/Transitional Quarterly Reporting screen is displayed.

```
EJA933              WORK FIRST/TRANSITIONAL QUARTERLY REPORTING       FEBRUARY
                                                                     03/24/2006

 COUNTY:    DISTRICT:      CASE ID:          LAST NAME:               TYPE:
                                                                        QR

 STATUS  RPT  CASE ID   DIST CO CASE   LAST NAME     FIRST NAME MI FSIS TYPE


 ENTER = UPDATE    PF7/19 KEY = PAGE BACK    PF8/20 KEY = PAGE FORWARD
 SELECTION        KEY
```

From a blank Work First/Transitional Quarterly Reporting Screen, use the following instructions to view Work First/Transitional case information.

A.   **Case ID**

     1.   **Enter the CASE ID number and press enter. The Case inquiry screen appears.**

     2.   **If the case was not selected for quarterly reporting, the CASE ID entered is highlighted and the following message is displayed at the bottom of the screen: CASE-ID NOT FOUND.**

     3.   **If the case was selected for quarterly reporting, this selection returns the information for the single CASE ID requested.**

           "INQUIRY COMPLETE" is printed at the bottom of the screen.

     4.   **A sample of the CASE ID format is displayed below.**

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```
EJA933            WORK FIRST/TRANSITIONAL QUARTERLY REPORTING          FEBRUARY
                                                                       03/24/2006


   COUNTY:     DISTRICT:      CASE ID: 12345678 LAST NAME:DOE               TYPE:
                                                                             QR

REPORT
STATUS  RPT  CASE ID   DIST     CO CASE    LAST NAME      FIRST NAME  MI   FSIS  TYPE
  S      2   12345678  101      123456     Doe            John        S           5



ENTER = UPDATE      PF7/19 KEY = PAGE BACK          PF8/20 KEY = PAGE FORWARD
SELECTION    KEY
INQUIRY COMPLETE
```

B. County Number

1. Enter the two-digit COUNTY NUMBER.

   a. To view Work First quarterly reporting cases, enter 'A' in the TYPE field. The Work First quarterly reporting cases for the specified county number will be displayed alphabetically by payee name.

   b. To view transitional benefit reporting cases, enter 'T' in the TYPE field. The transitional benefit reporting cases for the specified county number will be displayed alphabetically by payee name.

   c. To view Work First quarterly reporting and transitional benefit reporting cases, leave the TYPE field blank. The Work First and transitional benefit reporting cases for the specified county number will be displayed alphabetically by payee name. Press ENTER.

2. If no quarterly reporting cases were selected for the specified county, the COUNTY NUMBER is highlighted and the following message is displayed: COUNTY NOT FOUND.

3. If cases are found, EIS returns the first 75 quarterly reporting cases for the county keyed in last name, first name, sequence.

4. Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.

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5. **Press the PF8/20 key to move forward one screen at a time. When the first 75 cases have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the specified county is displayed.**

6. **Press the PF7/19 key to move back one screen at a time. After moving backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.**

   Press PF8/20 to view a second group of 75 cases. The PF7/19 key will not allow user to go back to the original group of 75. Enter 'QR' in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting Screen is returned. Rekey the COUNTY NUMBER and the TYPE entry (if necessary) at the top of the screen and press ENTER to display the original group of 75.

7. **When all the quarterly reporting cases for the specified county have been displayed, the following message is printed at the bottom of the screen: INQUIRY COMPLETE.**

8. **A sample of the COUNTY NUMBER format is displayed below.**

   The screen looks like the screen for Case ID inquiry. However, there are up to 15 cases displayed on each screen. The cases are listed in alphabetical order by payee name.

```
EJA933      WORK FIRST/TRANSITIONAL QUARTERLY REPORTING      FEBRUARY
                                                             03/24/2006
  COUNTY: 00 DISTRICT:    CASE ID:     LAST NAME:            TYPE:
                                                               QR
  STATUS RPT CASE ID   DIST CO CASE LAST NAME  FIRST NAME MI FSIS TYPE
     C    2  12345618  225          BUCHANAN   BUCKY       S       1
     C    1  11235891  225          BURKE      DRAKE       R       5
     S    2  35123111  126  017045  FRYAR      TEE         I       5
     C    1  89891205  250  016153  GARY       TEENA               5
     C    2  78542130  123  012645  STUMP      BLUE        A       5

  ENTER = UPDATE   PF7/19 KEY = PAGE BACK   PF8/20 KEY = PAGE FORWARD
  SELECTION         KEY
  INQUIRY COMPLETE
```

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C.   **County Number and District Number**

1.   **Enter the two-digit COUNTY NUMBER and the three-digit DISTRICT NUMBER.**

   a.   To view Work First Quarterly reporting cases, enter 'A' in the TYPE field. The Work First quarterly reporting cases for the specified county and district number will be displayed alphabetically by payee name.

   b.   To view transitional benefit reporting cases, enter 'T' in the TYPE field. The transitional benefit cases for the specified county and district number will be displayed alphabetically by payee name.

   c.   To view Work First and transitional reporting cases, leave the TYPE field blank. The Work First and transitional reporting cases for the specified county and district number will be displayed alphabetically by payee name**.**

2.   **If no quarterly reporting cases were selected for the specified county and district, the COUNTY NUMBER and DISTRICT NUMBER keyed is highlighted and the following message is displayed: COUNTY/DISTRICT NOT FOUND.**

3.   **If quarterly reporting cases are found, EIS returns the first 75 quarterly reporting cases for the county and district keyed in last name, first name, sequence.**

4.   **Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.**

5.   **Press the PF8/20 key to move forward one screen at a time through the 75 selected cases. When the first 75 have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the 75 specified county and district is displayed.**

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6.   **Press the PF7/19 key to move back one screen at a time. After moving backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.**

Press PF8/20 to view a second group of 75 cases. The PF7/19 key will not allow user to go back to the original group of 75. Enter 'QR' in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting Screen is returned. Rekey the COUNTY NUMBER, DISTRICT NUMBER, and the TYPE entry (if necessary) at the top of the screen

7.   **When all the quarterly reporting cases for the specified county and district have been displayed, the following message is printed at the bottom of the screen: INQUIRY COMPLETE.**

8.   **A sample of the COUNTY and DISTRICT NUMBER format is displayed below.**

The screen looks like the screen for Case ID inquiry. Only cases for the specified district and county are displayed. The cases are listed in alphabetical order by payee name.

```
EJA933      WORK FIRST/TRANSITIONAL QUARTERLY REPORTING      FEBRUARY
                                                             03/24/2006
 COUNTY: 00  DISTRICT:   CASE ID:      LAST NAME:            TYPE:
                                                              QR
 STATUS RPT CASE ID   DIST CO CASE  LAST NAME    FIRST NAME  MI FSIS TYPE
  C      2  12536812  125           BUCHANAN     RACHEL       S       1
  C      1  28962010  225           BROWN        TEDDY        R       5
  S      2  99901259  225  017045   FRENCH       FRIES        G       5
  C      1  25896413  253  016153   GREENI       GRASS        L       5
  C      2  22220500  225  018156   MIXER        BOWL         T       5
  S      2  23587502  223  016144   PRINCE       LUCKY        D       5
  C      2  23051066  224  014204   SILVERS      SLIPPERS             5
  C      2  33607095  224  012645   SMITH        BOO                  5
  C      1  22491602  224  014076   WRIGHT       COCOA        K

 ENTER = UPDATE   PF7/19 KEY = PAGE BACK    PF8/20 KEY = PAGE FORWARD
 SELECTION     KEY
 INQUIRY COMPLETE
```

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    D.   **County Number, District Number and Last Name**

      1.   **Enter the two-digit COUNTY NUMBER, the three-digit DISTRICT NUMBER, and up to fifteen characters of the payee LAST NAME. ENSURE THAT THE LAST NAME IS SPELLED CORRECTLY.**

        a.   To view Work First Quarterly reporting cases, enter 'A' in the TYPE field. The Work First quarterly reporting cases for the specified county, district, and last name will be displayed alphabetically by payee name.

        b.   To view transitional benefit reporting cases, enter 'T' in the TYPE field. The transitional cases for the specified county, district, and last name will be displayed by payee name.

        c.   To view Work First and transitional reporting cases, leave the TYPE field blank. The Work First and transitional reporting cases will be displayed alphabetically by payee name. Press ENTER.

      2.   **If no quarterly reporting cases were selected for the specified county, district and last name, those fields are highlighted at the top of the screen and the following message is displayed: NAME NOT FOUND.**

      3.   **If cases are found, EIS returns the first 75 quarterly reporting cases for the county, district and last name keyed, in last name and first name sequence.**

      4.   **Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.**

      5.   **Press the PF8/20 key to move forward one screen at a time through the 75 selected cases. When the first 75 have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the specified county, district and name is displayed.**

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6.   **Press the PF7/19 key to move back one screen at a time. After moving backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.**

Press PF8/20 to view a second group of 75 cases. The PF7/19 key will not allow user to go back to the original group of 75. Enter 'QR' in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting

Screen is returned. Rekey the COUNTY NUMBER, DISTRICT NUMBER, LAST NAME, and the TYPE entry (if necessary) at the top of the screen and press ENTER to display the original group of 75.

7.   **When all the quarterly reporting cases for the specified county, district and name have been displayed, the following message is printed at the bottom of the screen: INQUIRY COMPLETE.**

8.   **A sample of the COUNTY NUMBER, DISTRICT NUMBER, and LAST NAME format is displayed below.**

The screen looks like the screen for Case ID inquiry. However, there are up to 15 cases displayed on each screen. Only cases for the specified district and last name are displayed. The cases are listed in alphabetical order by the payee's first name.

```
EJA933       WORK FIRST/TRANSITIONAL QUARTERLY REPORTING      FEBRUARY
                                                              03/24/2006
COUNTY: 00  DISTRICT:   CASE ID:      LAST NAME:             TYPE:
                                                                QR
STATUS RPT CASE ID   DIST CO CASE  LAST NAME   FIRST NAME MI FSIS TYPE
  C     2  12536812 125            BUCHANAN    RACHEL      S        1
  C     1  28962010 225            BROWN       TEDDY       R        5
  S     2  99901259 225  017045    FRENCH      FRIES       G        5
  C     1  25896413 253  016153    GREENI      GRASS       L        5
  C     2  22220500 225  018156    MIXER       BOWL        T        5
  S     2  23587502 223  016144    PRINCE      LUCKY       D        5
  C     2  23051066 224  014204    SILVERS     SLIPPERS             5
  C     2  33607095 224  012645    SMITH       BOO                  5
  C     1  22491602 224  014076    WRIGHT      COCOA       K

ENTER = UPDATE    PF7/19 KEY = PAGE BACK    PF8/20 KEY = PAGE FORWARD
SELECTION     KEY
INQUIRY COMPLETE
```

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III.   **Status Codes**

The following codes may be entered in the STATUS field.

A.   C = Complete. The payee returns a complete Work First quarterly report or transitional benefit report form.

B.   I = Incomplete. The payee returns an incomplete Work First quarterly report or transitional benefit report form.

C.   G = Good Cause. The payee does not return a transitional benefit report but has established good cause.

D.   M = Aid Program/Category or Benefit Transfer Pending the Ten Workday Notice Period.

   1.   The Work First payee is issued a timely notice indicating the Work First case will be transferred to Medicaid effective the first day of the next month.

   2.   The transfer may be from Work First to Medicaid (MAF, MIC, or MPW) or to Continuation Benefits (AAF - Payment Type 4).

E.   S = System Selected. EIS selected this Work First or Transitional case for quarterly reporting.

   This code is system generated for all cases but it may be necessary to key an 'S' to correct a miskeyed STATUS CODE.

F.   T = Terminated. The Work First or Transitional case was terminated by the caseworker.

G.   X = Transferred. The Work First case has transferred to another aid program/category or to continuation benefits. The transitional case has transferred to another aid program/category or to continuation benefits or has been reapproved for Work First (Payment Type '1', '2' or 'S').

   Do not key over a STATUS CODE of 'X' or 'T'. These are system generated codes.

   EIS does not produce second quarterly reports for cases with a STATUS CODE of 'T'.

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IV.   **Report Number**

The number displayed in the REPORT TYPE column indicates the Payment Type on the Work First/Transitional case at the time the case was selected for Work First/Transitional Quarterly reporting. The REPORT TYPE will be 1 or 2.

A.   1 = A first quarterly report or transitional benefit report form was mailed to the payee.

B.   2 = A second quarterly report or transitional benefit report form was mailed to the payee.

C.   3 =A Work First case or transitional reporting case that is transferred by EIS in the transfer cycle.

V.   **QR Type**

The number displayed in the 'QR TYPE' column indicates the Payment Type on the Work First or transitional case at the time the case was selected for quarterly reporting. The QR TYPE will be '1', '2', '5' or 'S'.

VI.   **Moving To Other IMS Functions**

A worker may return to the EIS Inquiry Menu or move to another authorized IMS function at any time. To return to the Inquiry Menu, enter 'I' in the SELECTION field at the bottom of the screen and press ENTER. The EIS Inquiry Menu is displayed.

Use the same procedure to move to other IMS functions or to move back to the Quarterly Reporting function.

VII.   **Work First Quarterly Reporting Register**

The Work First Quarterly Reporting Register is available in NCXPTR the first workday following the Work First/Transitional Quarterly Reporting Selection. The report title is DHREJ WF QTRLY REPORTING REG and the report name is WF/TRANS QUARTERLY REPORTING REGISTER. This register lists all payees mailed a Work First quarterly report or a quarterly transitional benefit report. The STATUS CODE for each case is 'S', System Selected and the REPORT NUMBER is '1' or '2'.

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```
X 1 B02:          DHREJ WF QTRLY REPORTING 03/07/2006          Index is DISTIX0
Command ===>                                                   Scroll ==> FULL
WF422               NC DEPARTMENT OF HUMAN RESOURCES           PAGE  1
RUN DATE: 03/07/2006    ELGIBILITY INFORMATION SYSTEMS
RUN TIME: 21:22:39   WF/TRANS QUARTERLY REPORTING REGISTER
                          AS OF: 03/07/2006


CO 00 YANCEY     DIST 123  AFDC   REPORT MONTH     FEBRUARY

1ST DEADLINE 03/06/2006  2ND DEADLINE  03/17/2006  TRANSFER DATE  03/24/2006

RETENTION --THREE YEARS OR UNTIL AUDIT CLEARS, WHICHEVER OCCURS LATER

                                                           QR     CASE
STATUS RPT  CASE-ID  CO-CASE  LAST NAME     FIRST NAME MI FSIS TYPE   TYPE
   S    2  29511360            DOE            JANE       S       1      1


************************************** End of page **********************************
```

WF1400.08 JOB QUIT TRACKING

I.   General Information

The Job Quit Tracking Screen is used to track a Job Quit penalty for an individual and/or to view the history of individuals who have been put into a Job Quit penalty. This screen displays all Job Quit periods for an individual in Work First. This screen is updated from the direct entry on the screen. Use the Job Quit Tracking Screen to determine if an individual is currently in a Job Quit penalty.

II.   Job Quit Tracking History Screen

Use the following instructions to access the Job Quit History screen.

From the EIS Update Menu, key "JQ" in the selection field and the Individual ID in the key field. Press ENTER. The following screen displays:

```
                ELIGIBILITY INFORMATION SYSTEM       FORM:  1043602V
                     JOB QUIT HISTORY                DATE:   01182011
                                                     TIME:   14:02:36
     ID:  123456789B      NAME: IAM    C  EMPLOYED

         CASE       AID   CTY   BEGIN DATE      END DATE      DATE POSTED
          ID        CAT   NUM  (MM/CCYY)       (MM/CCYY)

         00024536   AAF   60    01/2011          03/2011       01/18/2011


         AUTHORIZATION OF NEW JOB QUIT


     SEL: JQ  KEY 123456789B  MSG:  INQUIRY COMPLETE
     PRESS ENTER TO UPDATE     PF2/14 INQUIRY MENU EJA
```

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NOTE: The NAME is automatically brought forward from the case. If history is already posted for the individual, this data is displayed.

III.   Authorization of New Job Bonus

Enter AID PROGRAM/CATEGORY, County Number, Job Quit Begin Date, Job Quit End Date and press ENTER. The screen immediately updates and displays Job Quit dates entered. Follow the function keys displayed at the bottom of the screen.

IV.   Online Job Quit Edits

The Job Quit screen displays error messages for the following reasons:

A.   CASE ID must be existing Case ID in case database.

The Case ID entered must be or have been a valid Case ID in EIS.

B.   AID CAT must be 'AAF'.

The Aid Program/Category must be AAF.

C.   PYMT TYPE must be '2'.

D.   CTY NUM must be the county number in the individual database.

E.   BEGIN DATE must be valid month/year.

The BEGIN DATE must be in the format of MMCCYY. This date can be the ongoing month, the current month or a retroactive month.

F.   END DATE must be valid month/year.

The END DATE must be in the format of MMCCYY. This date must be the BEGIN DATE plus 2 months.

WF1400.09 DISABILITY TRACKING

I.   General Information

The Disability Tracking screen is used to track disability information for individuals who are or who have stated that they are disabled. This screen displays all disability data for each individual who has been coded disabled in EIS via the DSS 8124 and DSS 8125. The Disability Tracking screen is updated from the direct entry on the screen. Use this screen to determine if an individual has been coded disabled and what accommodations are being provided.

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II.   Disability Tracking History Screen

Use the following instructions to access the Disability Tracking History screen.

From the EIS Update Menu, key "DT" in the selection field and the Individual ID in the key field. Press ENTER. The following screen displays:

```
EJA031          DISABILITY TRACKING SCREEN      FORM:
EJA031S1        ELIGIBILITY INFORMATION SYSTEM   LAST CHNG:

ID:        NAME:

ASSESSMENT: (Y/N/P)   DATE:(MMDDCCYY)
 FORMAL   COMPLETED              REASONABLE ACCOM REQUESTED
 FORMAL   DECLINED               REASONABLE ACCOMMODATION PROVIDED:
 INFORMAL COMPLETED              ASSISTIVE DEVICE
 INFORMAL DECLINED                INTERPRETER
                                 TRANSPORTATION
DISABILITY:                      HOME VISIT
 01(Y/N)                         CHANGE OF APPOINTMENT
 02(Y/N)                         MODIFICATION OF WORK ACTIV
 03(Y/N)                         INFORMATION IN BRAILLE
 04(Y/N)                         INFORMATION IN LARGE PRINT
 05(Y/N)                         OTHER:
 06(Y/N)                         REASONABLE ACCOM DECLINED




SEL: DT KEY:
MSG: PLEASE ENTER INDIVIDUAL ID IN KEY FIELD
PF1/13=MAIN MENU  PF2/14=8124 CONT  PF3/15=CLEAR
```

NOTE: The NAME is automatically brought forward from the case. If data has already been entered for the individual, this data is displayed.

III.   Online Disability Tracking Edits

The Disability Tracking screen displays error messages for the following reasons:

A.   Disability Tracking must be keyed for all AAF cases. If the category of assistance (CAT) is not AAF, EIS will display the message AID PRGM CAT MUST BE AAF.

B.   Either a 'Y' or 'N' must be entered in the Disability (D) field for each individual age 18 or older before the DSS-8124 will process. If the 'D' field is blank, the error message DIS FIELD MUST BE 'Y' or 'N' will appear.

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C.   Do not allow the DSS 8125 to process if at least one field on the Disability Tracking Screen has not been keyed.

D.   Do not allow a completed date to be keyed when "P" has been entered in the Formal Assessment Completed field on the Disability Tracking Screen.

E.   If "Y" is keyed in the Formal Assessment Completed field, then at least one "Y" must be keyed under the Disability and at least one "Y" in the Reasonable Accommodations Provided field. If not, the DT screen should not be updated successfully.

F.   If "Y" is keyed in the Informal Assessment Completed field, then at least one "Y" must be keyed under the Disability and at least one "Y" in the Reasonable Accommodations Provided field. If not, the DT screen should not be updated successfully.

G.   Edit: If "N" is keyed under the Assessment category nothing should be required to be keyed under the Disability category and Reasonable Accommodations requested, provided and declined fields all together in order for the DT screen to update successfully, but if "Y" is keyed in any of these fields still allow the DT screen to update successfully.

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