FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #13-90-SYS

PAPERLESS ALTERNATE MODULE (PAM)

Date: October 18, 2013	**Subtopic(s):** Welfare Management System (WMS) Data Entry and Transactions
🖳 This procedure can now be accessed on the FIAweb. Valid reasons for using PAM	The purpose of this policy bulletin is to introduce the Paperless Alternate Module (PAM) to Cash Assistance (CA) and Non Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) Center staff as well as all ancillary sites that process CA and SNAP transactions. PAM will be rolled out to Centers in stages. On Monday, October 21, 2013, PAM will initially roll out at Fordham Model Job Center (44), SNAP Center 15 (S15), SNAP Residential Facilities Center (S61), SNAP Centralized Fair Hearing, and the SNAP Centralized Mail Recertification Unit (S66). Other locations will be phased in at later dates. The PAM system is designed to eliminate data entry from printed authorization documents. PAM is <u>only</u> used when case actions <u>must</u> be taken outside of the Paperless Office System (POS). For every transaction processed through PAM, staff will be required to indicate the reason for not processing the action in POS. A list of reasons will be available from a drop down menu in PAM. This list includes: • Medicaid (MA) only Recertification • Single Issue (SI) grants Transferred Case • Change MA authorization date • Reopen a line to AP status • CED Update (Only used when a budget is already clocking down in WMS) • SNAP 15 – TAD • WMS Error Correction TAD (only when original TAD was submitted in PAM) • Multi-Suffix • System Outage • PARIS Match closing

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center Fax* or fax to: *(917) 639-0298*

Distribution: X

- Advised by Help Desk
- Not available in POS (used only for transactions not available in POS)
- POP/ADVENT
- Other (a comment <u>must</u> be entered to detail why the action is not being taken in POS)

Note: Welfare Management System (WMS) actions that previously did not require submission to the Control Unit (i.e. application registration, application modification, worker case update, etc…) will continue to be processed directly through WMS and not through PAM.

The implementation of PAM will eliminate certain Control Unit functions such as batching documents, reconciliation of documents prior to retention and the manual stamping of paper authorization documents. PAM will now systematically be batching the transactions and generating authorization numbers beginning with **50000000** and reducing by 1 for each PAM transaction (**50000000, 49999999, etc…**) to help identify all PAM processed transactions.

PAM will also allow staff to initiate, approve, and process grant data entry transactions without using the Public Assistance (PA) Single Issue Authorization Form (**LDSS-3575**), or the SNAP Single Issue Authorization Form (**LDSS-3574**).

Back-up-documents

Note: If the transaction being processed requires a back-up-document (BUD), the current process of creating a manual **LDSS-3575** and/or **LDSS-3574** and maintaining it in a tickler file must still be followed. On the due date of the document, the JOS/Worker must check WMS to see if the BUD is needed. If the BUD is needed <u>and</u> can now be processed in POS, it should be processed in POS and the paper documents should be discarded properly. If the action still cannot be processed in POS, then a new electronic PAM document must be created and processed.

All other data entry transactions, including the Turnaround Document (TAD), must be completed manually. This includes having the document approved and signed by the appropriate supervisory staff. Once approved, the Data Entry forms must be scanned and indexed into the electronic case record using the case/link number and <u>not</u> the application registration number.

New document type

When indexing the scanned documents, staff must choose **Internal Paper Authorization Document** as the **Document Type**. As PAM is designed to mimic the paper process, any additional screens or documents that would normally be sent to control along with the Data Entry Document must also be scanned and indexed, creating a multiple page document. Staff must then log in to PAM and create a new PAM activity.

Note: New scanners with a larger flatbed will be provided at each location to allow for the scanning of the TAD. These scanners will not replace the other scanners at the locations and are only to be used for the scanning of TADs and if necessary, the accompanying budgets that are being authorized on that TAD.

After implementation of the PAM system is complete, Control Units will no longer accept any paper transactions. If a transaction is in error status as identified on the **WINRO125** or a single issuance grant has purged, as indicated on the **WINRO107**, the Error Correction Supervisor must alert the JOS/Worker of the error. The JOS/Worker must create a new error correction PAM transaction. The **WINRO126** will no longer have to be monitored, as all successfully transmitted TADs are stored in the **Internal Paper Authorization Document** folder of the HRA OneViewer.

User Rights

As PAM is not intended to be a replacement of POS, certain functionalities have not been carried over into the new system. Unlike in POS, where staff can work below their titles, most staff will not be able to function in PAM in any role other than their designated title. For example, a Supervisor will not be able to initiate an eligibility transaction using a Turnaround Authorization Document (TAD). This is a function that is limited to staff identified as JOS/Worker.

The five functionalities in PAM are:

- JOS/Worker
- AJOS/Supervisor
- Data Entry Supervisor
- Data Entry Operator
- D&C Operator (CA Typist)

Exceptions will be made to allow Notice of Intent (NOI) clerks as well as Fair Hearing and Conference (FH&C) staff to initiate actions associated with their functions in PAM.

Note: User rights will be established and maintained through the POS Enrollment System.

PAM link is available in the POS Portal

For ease of access, staff will be able to log in to PAM through a new link in the POS portal. Staff will be required to sign on to PAM using their Network ID and password.

If a PAM user encounters any issues with logging in to PAM or any other usage problems, they should call the MIS POS Help Desk at **718-510-0551** or send an email to helpdesk-pos@hra.nyc.gov.

Screenshots detailing the PAM process are attached to this procedure, separated by the role of each staff member in the process.

Effective October 21, 2013

💻 Please use Print on Demand to obtain copies of forms.

Attachments:

Attachment A: PAM Screens for all users
Attachment B: JOS/Worker Screens
Attachment C: AJOS/Supervisor Screens
Attachment D: Data Entry Supervisor Screens
Attachment E: Data Entry Operator Screens
Attachment F: D&C Operator (CA Typist) Screens

Attachment A: Screens for All PAM Users

A new link to access PAM has been created in the POS Portal.

Clicking on the link will bring up the log in screen. Staff must enter their network ID and password and click the **ENTER** button.

Attachment A: Screens for All PAM Users

After logging in, the first screen that all PAM users will see is their inbox which provides PAM users the ability to see all the activities in his/her queue and what status they are in. To the left of the inbox is the **Navigation Menu** with five different links:

INBOX: Allows PAM users to see all the activities in his/her queue and what status they are in.

NEW PAM ACTIVITY: Opens the PAM Client Search screen (link will <u>only</u> available for PAM users designated as JOS/Worker).

SEARCH PAM ACTIVITY: Opens the PAM Activity Search screen (additional screen shots are on the following pages).

REPORTS: Provides ability to track all requests created by the PAM User and the ability to show the report based on the criteria selected by the PAM user.

OTHER SOURCES: Opens a drop down window with hyperlinks to: <u>WMS</u>, the <u>HRA OneViewer</u> and the <u>Toe Digit Schedule</u>.

Attachment A: Screens for All PAM Users

Search PAM Activity

All PAM users have the ability to search for activities using the following criteria:

- Case No
- Case Name
- SSN
- Activity Type
- Activity ID
- Activity Status

Results of the search will be displayed, in **read only** mode, in a grid at the bottom of the screen with a paging option for easier navigation.

Attachment A: Screens for All PAM Users

Note: If an incomplete case number is used, a listing of all cases containing those digits will be displayed as in the screen below.

Responsible Center	Case #	Suffix	Case Name	ActivityType	Grant #	E-Check	Activity Status	Activity ID	Assigned To	Created On	Perm
053	00030008214G	01	SPEARS, BRITNEY	CA	1		Data Entered	3201	Jia Lin	10/10/2013 3:33:13 PM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1	MANUAL E	Failed Data Entry	3203	Jia Lin	10/10/2013 3:33:50 PM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1		Pending Data Entry	3264	Sharma Megha	10/12/2013 9:13:28 AM	Y
053	00030008211C	01	SMALL, JENIFFER	CA	1	AUTO E	Failed Data Entry	3271	Jia Lin	10/12/2013 4:12:34 PM	N
053	00030008214G	01	SPEARS, BRITNEY	SNAP	1		Data Entered	3276	Jia Lin	10/14/2013 8:31:53 AM	N
053	00030008215D	01	DOORS, WALTER	CA	36		Pending Approval	3278	Duggirala Neeha	10/14/2013 9:58:25 AM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1		Cancelled	3279	SYSTEM SYSTEM	10/14/2013 10:00:42 AM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1	AUTO E	Cancelled	3148	SYSTEM SYSTEM	10/10/2013 9:19:28 AM	N
053	00030008211C	01	SMALL, JENIFFER	TAD	0		Failed Data Entry	3153	Jia Lin	10/10/2013 10:05:37 AM	N
053	00030008211C	01	SMALL, JENIFFER	TAD	0		Data Entered	3165	Jia Lin	10/10/2013 11:12:14 AM	N
053	00030008214G	01	SPEARS, BRITNEY	CA	2	MANUAL E	Cancelled	3194	SYSTEM SYSTEM	10/10/2013 2:29:50 PM	N
053	00030008214G	01	SPEARS, BRITNEY	TAD	0		Pending Approval	3200	Duggirala Neeha	10/10/2013 3:21:42 PM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1	MANUAL E	Pending Data Entry	3202	Sharma Megha	10/10/2013 3:28:53 PM	Y
053	00030008214G	01	SPEARS, BRITNEY	CA	1	MANUAL E	Pending Data Entry	3209	Sharma Megha	10/11/2013 9:14:01 AM	Y
053	00030008214G	01	SPEARS, BRITNEY	CA	1	AUTO E	Complete	3230	SYSTEM SYSTEM	10/11/2013 3:01:47 PM	N
053	00030008211C	01	SMALL, JENIFFER	CA	1	AUTO E	Complete	3149	SYSTEM SYSTEM	10/10/2013 9:22:12 AM	N
053	00030008214G	01	SPEARS, BRITNEY	CA	1	MANUAL E	Failed Data Entry	3266	Jia Lin	10/12/2013 9:30:30 AM	N
053	00030008214G	01	SPEARS, BRITNEY	CA	1		Data Entered	3273	Jia Lin	10/12/2013 6:24:32 PM	N
053	00030008211C	01	SMALL, JENIFFER	SNAP	1		Data Entered	3275	Jia Lin	10/13/2013 10:18:43 PM	N
053	00030008211C	01	SMALL, JENIFFER	SNAP	4		Pending Approval	3284	Duggirala Neeha	10/14/2013 12:15:23 PM	N

Total Records : 37/37 1 2

Additional Functions

In addition to the **Navigation Menu**, there are three tabs across the top of PAM:
Activity Details, **Comments**, **Activity History**.

Attachment A: Screens for All PAM Users

Activity Details Tab: Allows PAM users to process activities on a selected PAM transaction based on their designated functionality (i.e. Submit for Approval, Return to JOS/Worker, etc…).

Attachment A: Screens for All PAM Users

Comments Tab: Allows any PAM user to:

- Type notes (maximum 500 characters) in the Notes Box (click **SAVE** to commit notes to PAM)

- Review previous notes in read-only mode

Activity History Tab: Allows all PAM users to see the PAM Activity on a certain case.
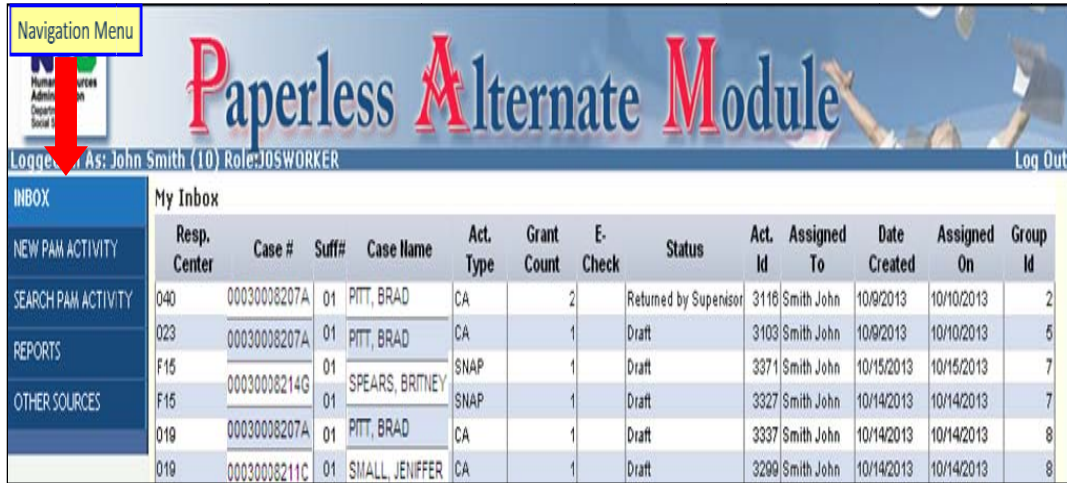
Attachment B: JOS/Worker Screens

After logging on to PAM the JOS/Worker's **Inbox** (My Inbox) will be the first screen he/she sees. This screen provides a listing of all the actions taken by a user that still require processing.

To initiate a new transaction click on the **NEW PAM ACTIVITY** button in the Navigation Menu.

Attachment B: JOS/Worker Screens

The **Client Search** screen will open up:

- Enter the case number or SSN and click on search. PAM will connect with WMS and return case information which will be displayd in the **Client List** section.
- Click on the case number (#) which will act as a hyperlink to import more WMS data for the case and bring up the **Activity Details** tab.

Note: For application cases, use the link number and <u>not</u> the application registration number.

Creating a Supplemental Nutrition Assistance Program (SNAP) Grant (LDSS-3574)

After selecting the case to be worked on, the **Activity Details** screen will open. To initiate a SNAP grant the JOS/Worker must:

- Select a reason for taking the action in PAM. If "Other" is selected, a text box will appear and the JOS/Worker <u>must</u> explain why the action is not being processed in POS.

Attachment B: JOS/Worker Screens

- Select **SNAP Grant** as the Activity Type
- Answer **Yes** or **No** to **Is there an eligibility TAD transaction associated with this Grant?**
- Click **Add New Grant** to proceed

Attachment B: JOS/Worker Screens

In the **Grant Details** section, the JOS/Worker must:

- Enter the grant information
- Click the **Save Grant** button

Note: The authorization number will be generated by PAM unless the issuance type requires the reuse of a prior authorization number.

Attachment B: JOS/Worker Screens

The **Summary Section** will open up:

- If additional SNAP grants are required staff can add additional SNAP grants by clicking on the **Add New Grant** button

Attachment B: JOS/Worker Screens

After the initiation of all the SNAP grants for a specific case:

- Click on the **Submit for Approval** button
- A new screen will pop up, select the Supervisor to submit the grants to for approval and click the **Select** button. A confirmation window will pop up
- Click **OK** to proceed

Note: The default will be the AJOSI/Supervisor identified as the JOS/Worker's supervisor in POS. Staff will have the ability to select a different AJOSI/Supervisor to submit the work to, if necessary.

Attachment B: JOS/Worker Screens

Creating a Cash Assistance Grant (LDSS-3575)

To initiate a CA Grant:

- Select a reason for not taking the action in POS
- Select **CA Grant** as the activity type
- Indicate if an eligibility TAD is associated with this activity
- Indicate if the CA grant is an E-Check and if it is an Auto E or a Manual E-Check
- Click the **Add New Grant** button

Attachment B: JOS/Worker Screens

The **Grant Details** screen will appear:

- Select the appropriate pick up code from the drop down menu
- Select the appropriate Issuance Category from the drop down menu
- Select the appropriate Issuance Code from the drop down menu
- Enter the:
  - Amount of the grant in the **Amount** field
  - **From** and **To** dates in the respective fields
- Select the Restriction Indicator from the drop down menu
- Click the **Save** button

Note: PAM will only allow for the entry of Payee Information if the Restriction Indicator requires it.

Attachment B: JOS/Worker Screens

The **Summary Section** will open up. If additional CA grants are needed, staff must click on the **Add New Grant** button.

After all CA Grants are entered for a case

- click the **Submit for Approval** button

Attachment B: JOS/Worker Screens

The **Submit for Approval** button will bring up the **Select Supervisor** screen where the appropriate supervisory staff will be selected

- Click the **Select** button and a confirmation window will pop up
- Click **OK** to proceed
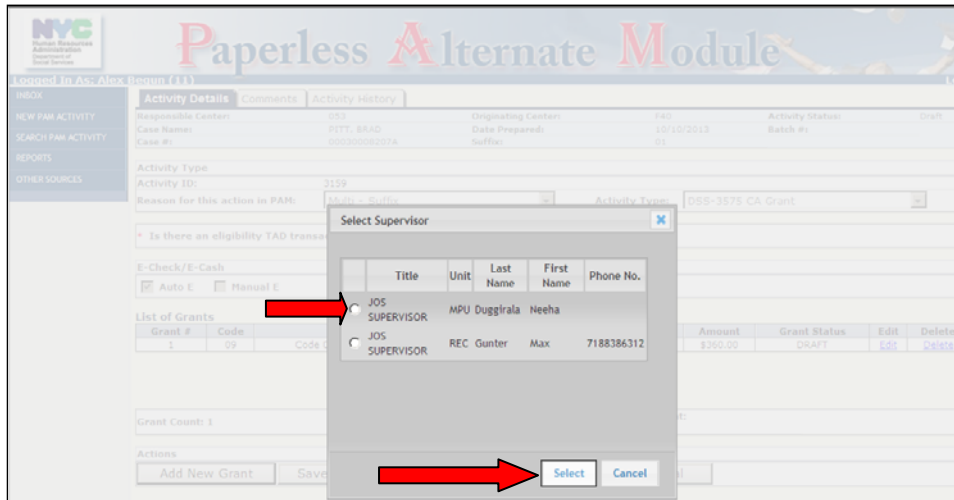
Attachment B: JOS/Worker Screens

Authorizing Paper Turnaround Document (TAD)

To initiate a PAM activity involving a TAD:

- Select the reason for using PAM from the drop down menu
- Select the **Activity Type** from the drop down menu
- Select the **Batch Type** from the drop down menu

Attachment B: JOS/Worker Screens

- Select the TAD to associate with the activity (a check will appear in the small box adjacent to the **Doc Type ID** field
- Enter a brief description of the action being taken
- Click on **Save Activity**

Attachment B: JOS/Worker Screens

- Click on the **Submit for Approval** button

- Select the appropriate supervisory staff and click the **Select** button

Authorizing All Other Data Entry Documents

When the reason, **Not Avialable in POS**, is selected as the reason for taking an action in PAM the **Activity Type** drop down will allow the JOS/Worker to select one of the data entry documents that is currently not available in POS.

Activity Type:	---Please Select--- ▼
	---Please Select---
	DSS-3573 Recoupment
	DSS-3652 Transaction Cancellation
	DSS-3722 Fair Hearing Update
	DSS-3774 EBT Pulled
	DSS-4962 Infraction Deletion

- Select the appropriate **Activity Type** and the **Activity Details** section will display all of the data entry documents related to the selected activity that have been scanned and indexed into the **Internal Paper Authorization Document** folder
- Click on the **Preview** link to view the scanned image(s)
- Select that document by checking off the box next to the document being authorized
- Click on the **Save Activity** button

Attachment B: JOS/Worker Screens

- When completed, click on the **Submit for Approval** button

Attachment B: JOS/Worker Screens

- Select the appropriate supervisory staff
- Click the **Select** button

Grouping

When multiple PAM Activity Types (SNAP Grant, CA Grant, TAD, etc…) are being processed on a specific case, staff will be able to group the activities together. Each Activity Type in a group will share a common, group ID.

Attachment B: JOS/Worker Screens

Clicking on the **Group** button will open a pop-up window listing all the actions initiated on a particular case by the JOS/Worker.

If the activity was not previously grouped, only the current activity will be displayed

- JOS/Worker must select the activity and click on the **Select** button

Attachment B: JOS/Worker Screens

If other activities for a particular case were previously selected for grouping, they will be displayed in the list.
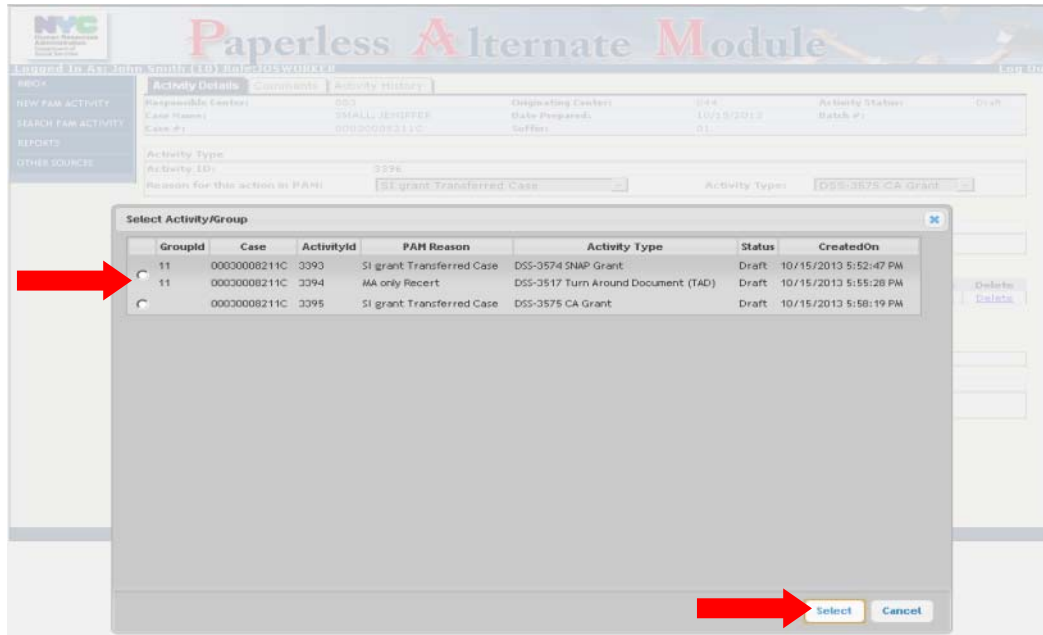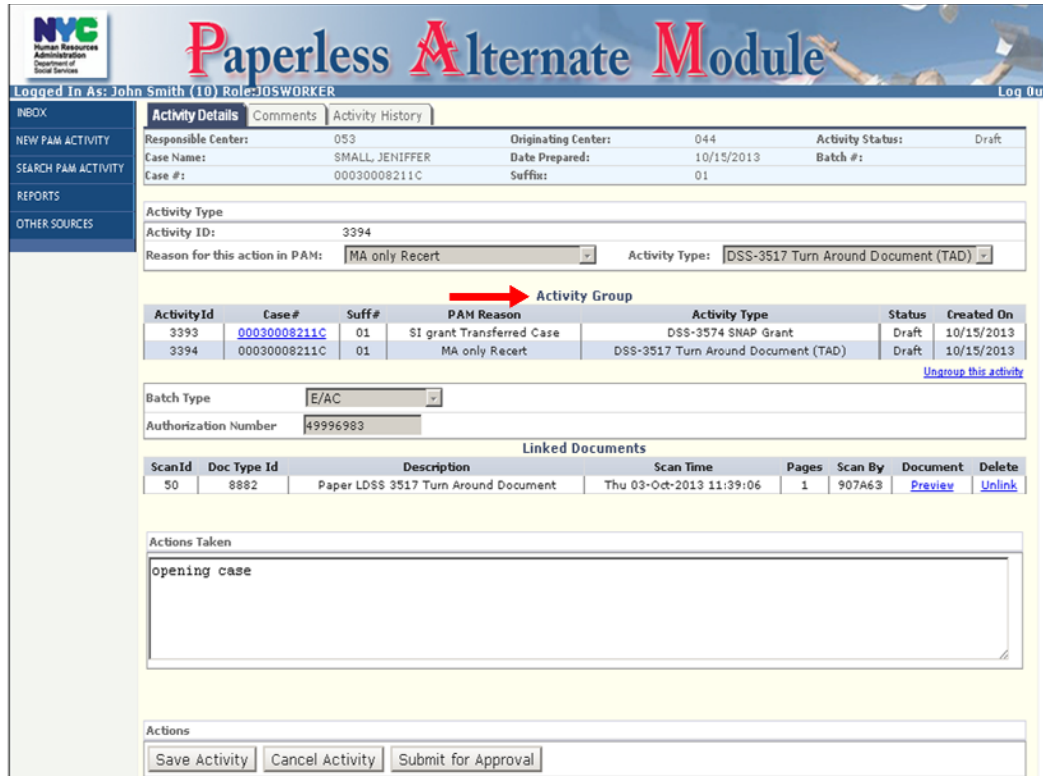
After selecting the group to associate the activity to, a confirmation pop-up window will open. Click **OK** to proceed.
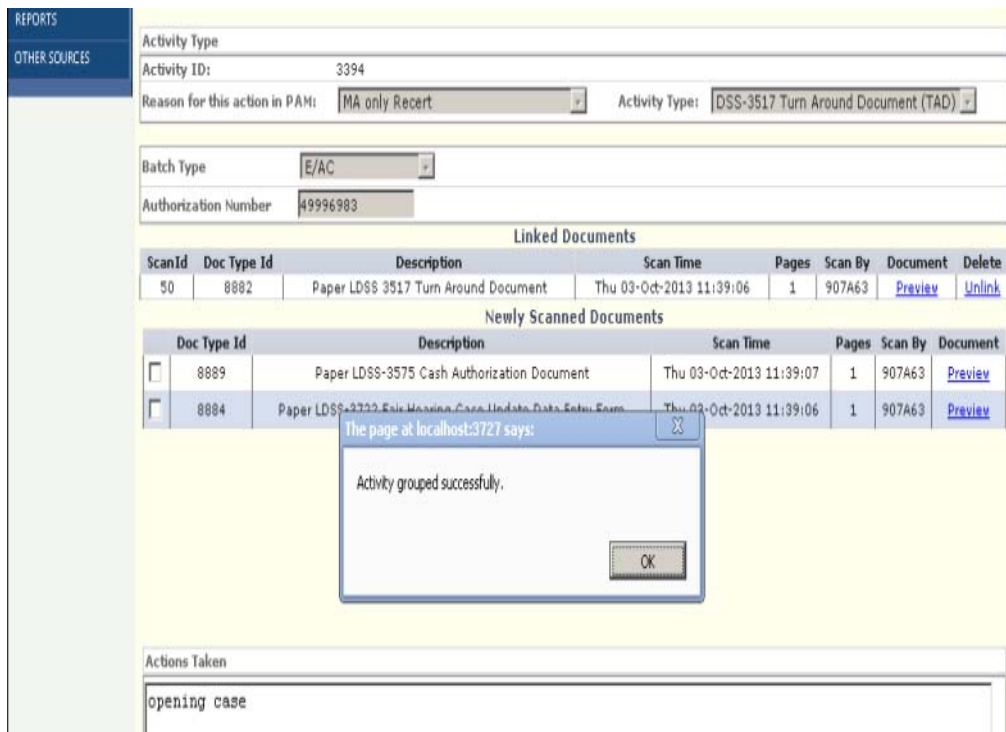
Attachment B: JOS/Worker Screens

The **Activity Details** screen will now display the activity group for a selected case.

If it is determined that an activity was grouped in error, staff will also have the ability to ungroup an activity from a selected group. To unselect an activity from a group, from the **Activity Details** screen for a specific activity, click on the **Ungroup** link. A pop-up window will open asking the user to verify the ungrouping.

Note: If more than two activities are in a group, the remaining activities will remain in the group while the ungrouped activity will become its own individual activity.

Attachment B: JOS/Worker Screens

After ungrouping the activity, it will be displayed in the **Activity Details** screen as an individual activity. Staff can continue to process the activity as needed.
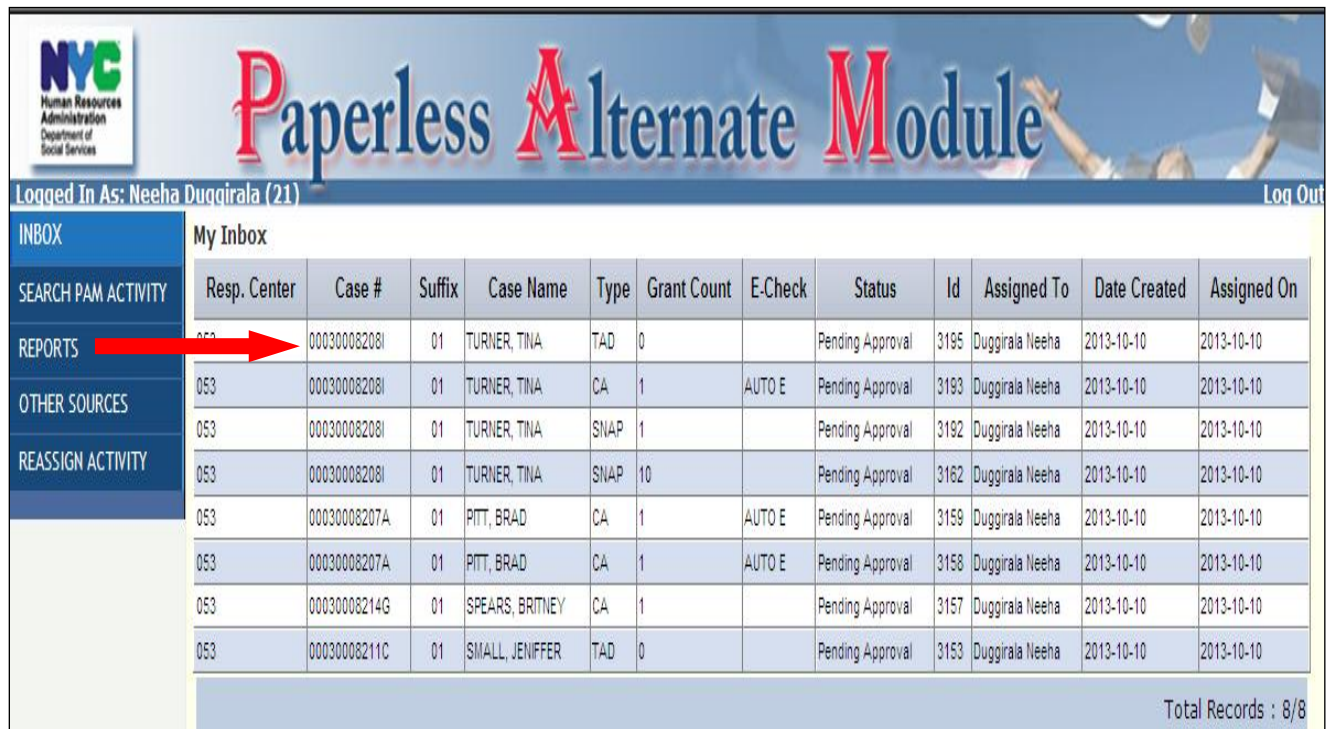
Attachment C: AJOS/Supervisor Screens

Grant Approvals

After logging on, the **Supervisor's Inbox** will open with activities in **Pending Approval** status displaying.

- Click on the case number (#) hyperlink to begin the approval process

Note: The **Navigation Menu** will not have the **NEW PAM ACTIVITY** button as AJOS/Supervisors cannot initiate PAM activities.

Paperless Alternate Module

Logged In As: Neeha Duggirala (21)   Log Out

	Resp. Center	Case #	Suffix	Case Name	Type	Grant Count	E-Check	Status	Id	Assigned To	Date Created	Assigned On
INBOX	053	00030008208I	01	TURNER, TINA	TAD	0		Pending Approval	3195	Duggirala Neeha	2013-10-10	2013-10-10
SEARCH PAM ACTIVITY	053	00030008208I	01	TURNER, TINA	CA	1	AUTO E	Pending Approval	3193	Duggirala Neeha	2013-10-10	2013-10-10
REPORTS	053	00030008208I	01	TURNER, TINA	SNAP	1		Pending Approval	3192	Duggirala Neeha	2013-10-10	2013-10-10
OTHER SOURCES	053	00030008208I	01	TURNER, TINA	SNAP	10		Pending Approval	3162	Duggirala Neeha	2013-10-10	2013-10-10
REASSIGN ACTIVITY	053	00030008207A	01	PITT, BRAD	CA	1	AUTO E	Pending Approval	3159	Duggirala Neeha	2013-10-10	2013-10-10
	053	00030008207A	01	PITT, BRAD	CA	1	AUTO E	Pending Approval	3158	Duggirala Neeha	2013-10-10	2013-10-10
	053	00030008214G	01	SPEARS, BRITNEY	CA	1		Pending Approval	3157	Duggirala Neeha	2013-10-10	2013-10-10
	053	00030008211C	01	SMALL, JENIFFER	TAD	0		Pending Approval	3153	Duggirala Neeha	2013-10-10	2013-10-10

Total Records : 8/8

Attachment C: AJOS/Supervisor Screens

The PAM action associated with that case will open. If multiple actions are being taken on a case they will be identified as part of an **Activity Group**.

Note: Each activity in a group must be approved individually and will continue to be displayed as part of the **Activity Group**, with an updated status.

To begin the approval of a grant:

- Click on the **View Grants Details**

Attachment C: AJOS/Supervisor Screens

The **Grant Details Screen** will open up:

- Review each grant and **Approve** or **Disapprove**
- Enter a comment into the **Comments Box**, indicating the decision
- If all associated grants are approved, click on the **Submit** button
- If any of the grants are disapproved, click on the **Return to Worker** button.

Note: The **Return to Worker** button will only appear if any grant is disapproved.

Grant Id	Code	Description	From Date	To Date	Amount	Grant Status
1948	G02	Code 02 - Regular Allowance for Recurring Needs	10/1/2013	10/5/2013	100	PENDING

Grant Count: 1

Total Amount: $100.00

View Grant Details

Grant # 1		Grant # 1 Payee Information	
Pick-Up Code	9	Name	
Issuance Category	G	Street Address	
Issuance Code	G02	City	
Amount	100	State	
From Date	10/1/2013	Zip	
To Date	10/5/2013	Recoupment Indicator	
Restriction Indicator	1		
Fair Hearing #			
Replaces Benefit			
Routing Location			
Authorization Number	49999661		

Grant # 1 Action

○ ○
Approve Disapprove

Comments

Action

Submit   Return To Worker

v1.01 Oct 3 2013 9:57AM

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Attachment C: AJOS/Supervisor Screens

Approval of all other Data Entry Documents

To approve any other Data Entry Documents:

- Click on the selected case number (#) hyperlink

- Verify that the reason for taking the action outside of POS is valid

Attachment C: AJOS/Supervisor Screens

- Click the **Preview** link to view the attached PDF Document in the **Linked Documents Section**
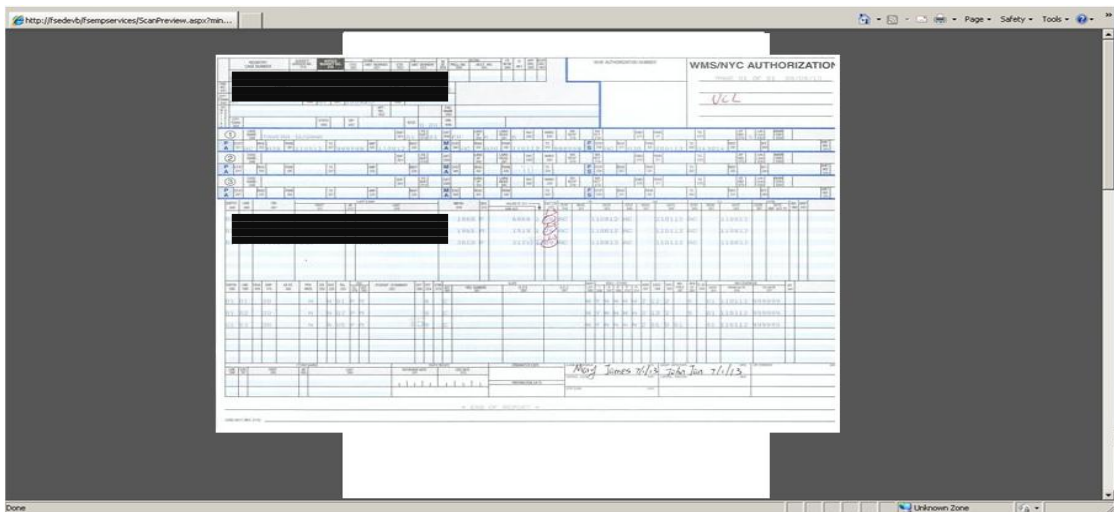
Attachment C: AJOS/Supervisor Screens

After reviewing the image:

- Select **Approve** or **Disapprove**

- Review the <u>JOS/Worker</u> notations in the **Actions Taken** text box

Actions Taken

Case being closed. Test.
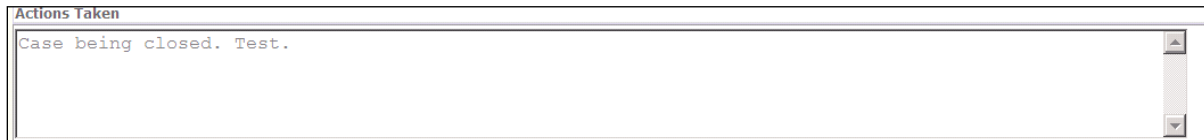
- Enter Supervisory Comments in the **Comments** box

Comments

Approve
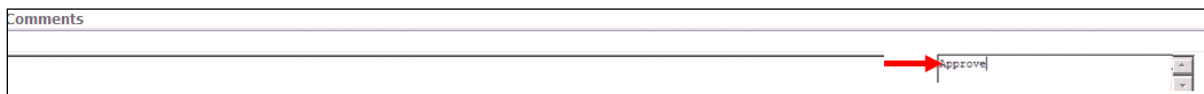
- Click on the **Submit** button to forward PAM Activity to the Data Entry Supervisor's **Inbox**

Submit
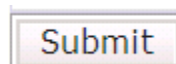
Attachment C: AJOS/Supervisor Screens

Reassign Activity

To reassign an activity:

- Click on the **REASSIGN** link from the Left Navigation Menu to display the **Reassign Grid**

Attachment C: AJOS/Supervisor Screens

The **Reassign Grid** can be filtered by different variables and be displayed in either **Ascending** or **Descending** order:

Activity Status
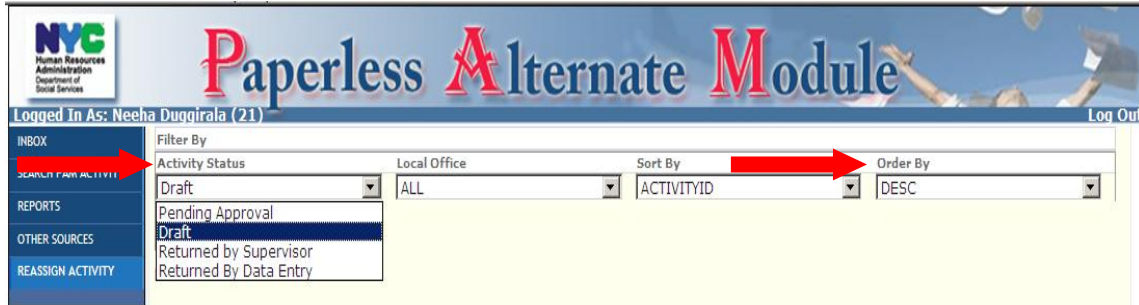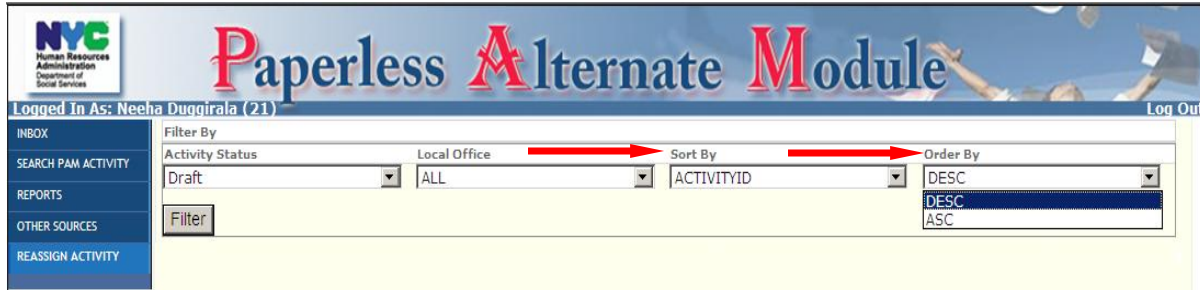
Local Office
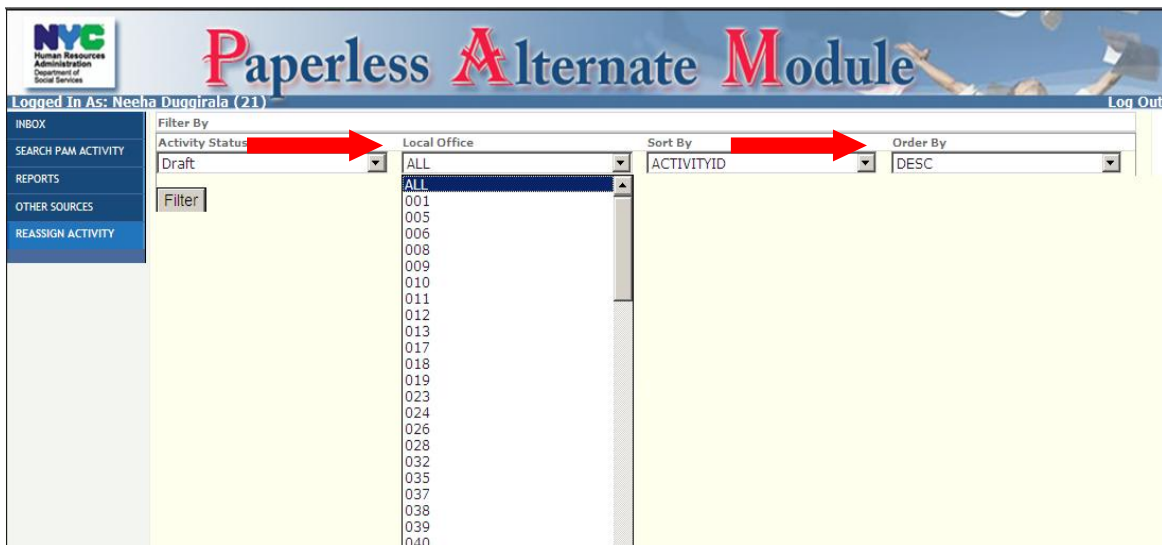
Attachment C: AJOS/Supervisor Screens

Sort By
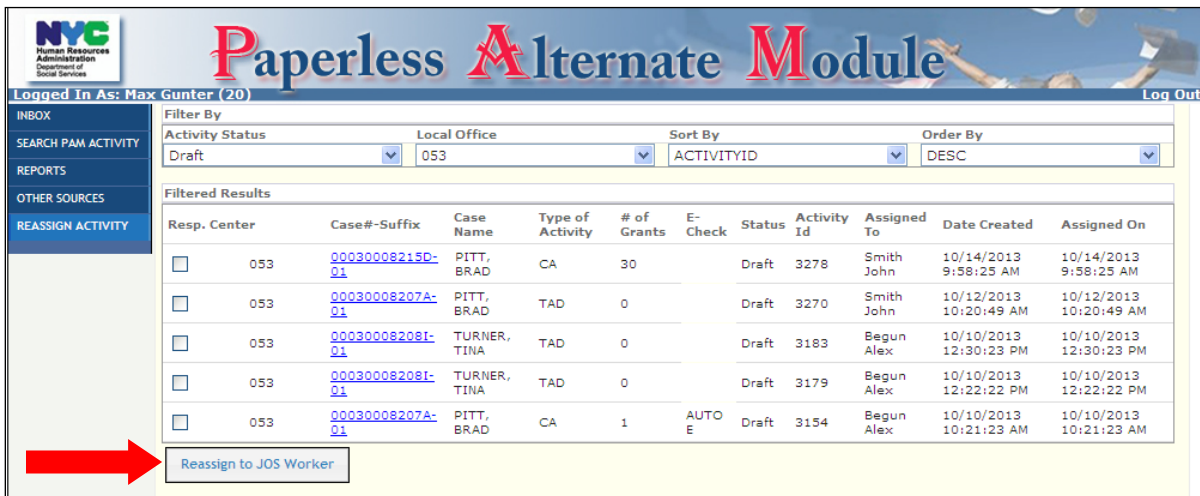
Based on the **Activity Status**, either the **Reassign to JOS/Worker** or the **Reassign to Supervisor** button will be displayed.

Note: All PAM Activities in **Draft**, **Returned by Data Entry** and **Returned by Supervisor** status can only be reassigned to a JOS/Worker. PAM Activities in **Pending Approval** status can only be reassigned to an AJOS/Supervisor.

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Attachment D: Data Entry Supervisor Screens

After logging on, the **Data Entry Supervisor** inbox is displayed. The Data Entry (DE) Supervisor can filter activities by:

- Activity Status (Pending Assignment is the default)
- Local Office
- Sort By
- Order By

Assigning to Data Entry Operator

Based on the filtered criteria (e.g. Pending Assignment):

- Select the local office
- Select the cases for assigning to Data Entry Operator by checking off boxes
- Click on the **Assign to Data Entry Operator** button

1

Attachment D: Data Entry Supervisor Screens

The **Select Data Entry Operator** window pops up:

- Select the appropriate DE Operator's name
- Click the **Select** button
- Click **OK** on the confirmation window pop-up to proceed
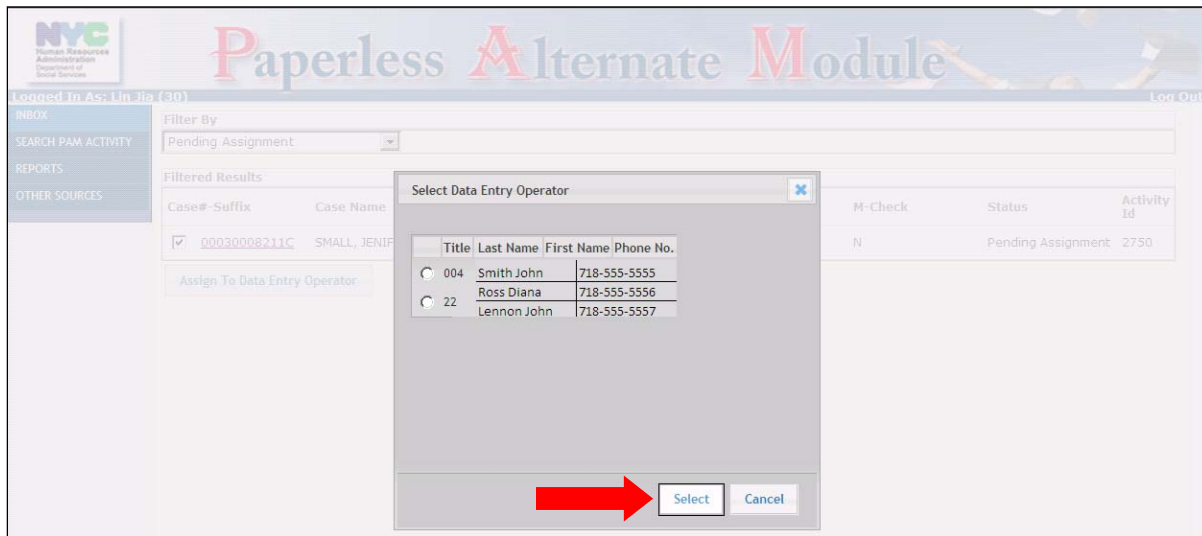
Note: If multiple activities have been identified as part of a group (indicated by the group ID), assign all activities in the group to the same Data Entry Operator, when possible.
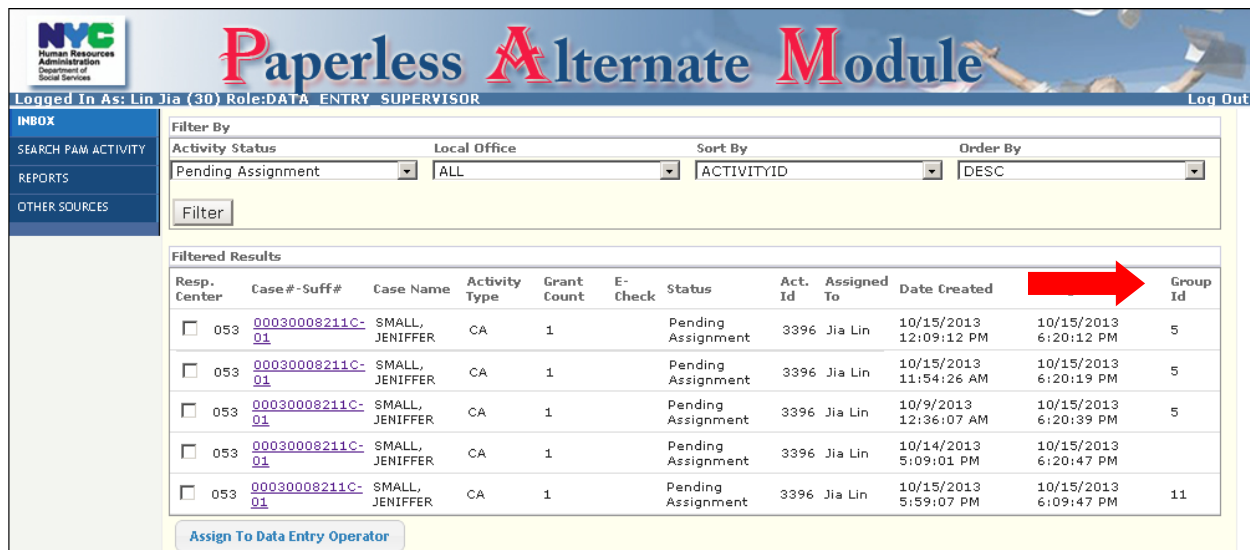
Attachment D: Data Entry Supervisor Screens

Data Entry Supervisor's Other Responsibilities in PAM

If work needs to be reassigned from one Data Entry Operator to another:

- Filter the inbox to display the batches that are Pending Data Entry

- Select the batches to be reassigned

- Click on the **Assign to Data Entry Operator Button** to open **Select Data Entry Operator** screen

- Select appropriate Data Entry Operator

- Click the **Select** button

- Click **OK** on the confirmation pop-up to continue

Attachment D: Data Entry Supervisor Screens

If Data Entry fails and work must be returned to the JOS/Worker:

- Filter the inbox to display activities in **Failed Data Entry** status
- Select the activities to be returned to the JOS/Worker

The Activity Details for that PAM activity will open:

- Enter comments into the **Actions Taken** box
- Click on the **Return to JOS/Worker** button

Attachment E: Data Entry Operator Screens

Grant Data Entry

After logging on to PAM the Data Entry (DE) Operator's **Inbox** screen will open.

To start data entry activities:

- Click on the case number (#) hyperlink

The **Activity Details Screen** will open up:

- Click on the **View Grant Details** button

Attachment E: Data Entry Operator Screens

The grant information will be displayed:

- Data enter the information displayed in PAM into WMS (visible on the dual monitor)

Attachment E: Data Entry Operator Screens

For each grant:

- Answer **Yes** or **No** for the **Data Entered in WMS**? question
- Click on the **Submit** button

Attachment E: Data Entry Operator Screens

All Other Data Entry

To start data entry activities:

- Click on the case number (#) hyperlink

The **Activity Details Screen** will open up:

- Click on the **Preview** link to open up an image of the Data Entry Document (TAD is being used as an example, but would apply to all non-grant related Data Entry Documents)

Attachment E: Data Entry Operator Screens

Note: Data Entry Operators will have the ability to zoom in and out the image to view all the requested changes and annotations.
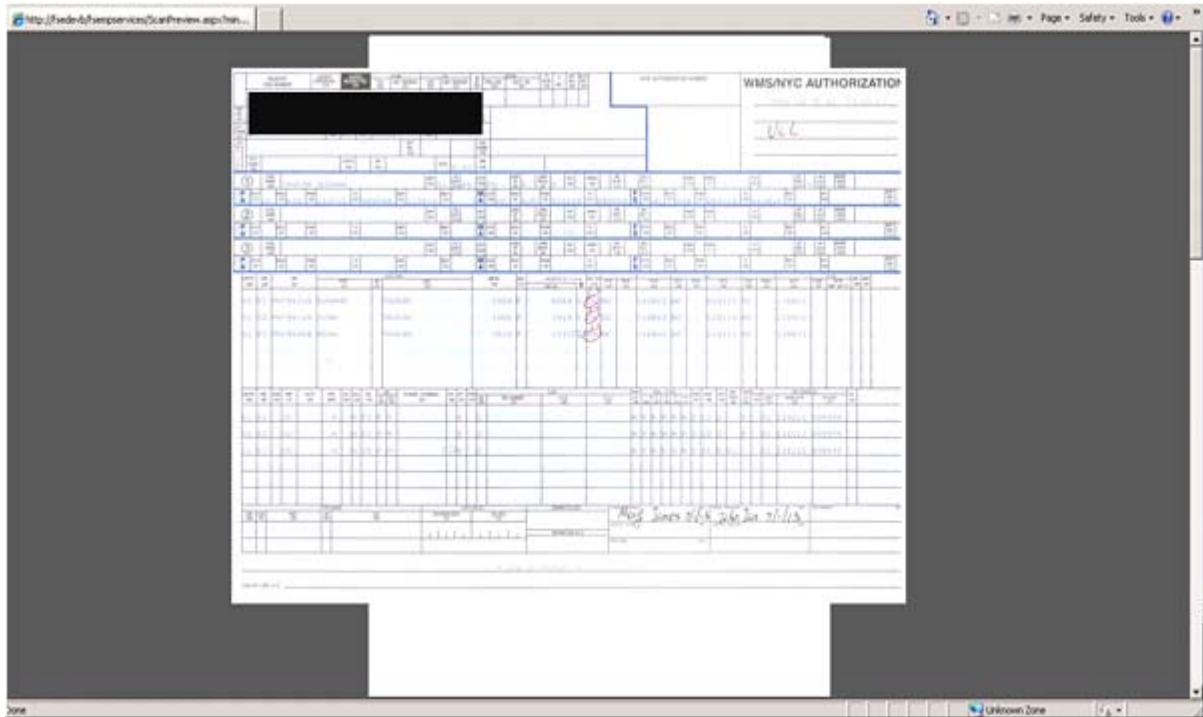
Attachment E: Data Entry Operator Screens

- Data enter changes or annotations into WMS
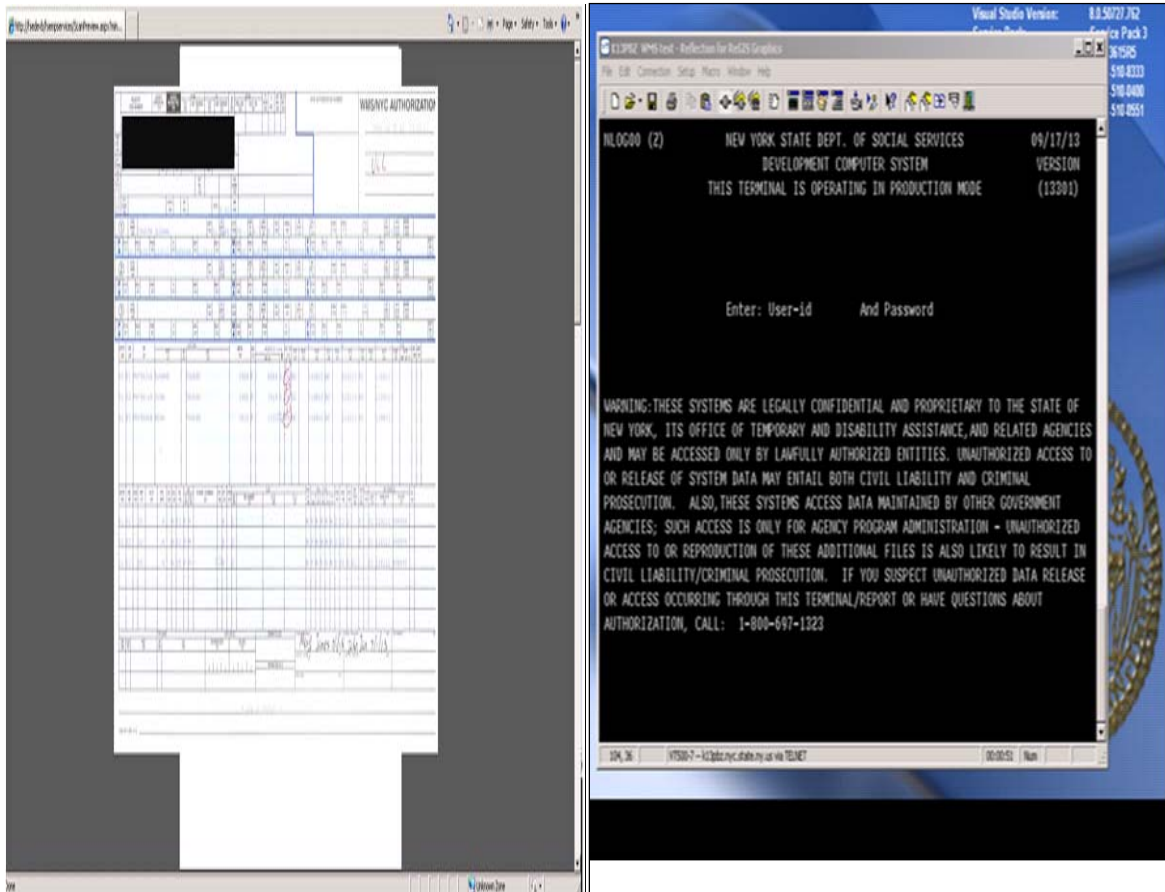
Attachment E: Data Entry Operator Screens

- Close out the imaged document
- Answer **Yes** or **No** for the **Data Entered in WMS** question
- Click on the **Submit** button

Attachment F: D&C Operator (CA Typist) Screens

After logging on, the **D&C Operator's Inbox** Screen opens with activities in **Pending Issuance** status

- Click on the case number (#) hyperlink to begin the activity

The **Grant Details Screen** opens

- Click on the **View Grant Details** button to see the detailed grant information

Attachment F: D&C Operator (CA Typist) Screens

The **Grant Details** Screen opens

- Answer **Yes** or **No** to the **Check Issued** Question
- Issue the check and record the EPA Check number (for manual checks only)
- Click on the **Submit** button