

***WELFARE MANAGEMENT SYSTEM***  
***UPSTATE***  
***SYSTEM REFERENCE MANUAL***

*Volume I – WMS Processing*

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## Access and Exit Procedures

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## Access and Exit

### Overview

This section describes the methods used to initiate and terminate interaction with the Welfare Management System (WMS). Sign-on and Menu Error Messages are also listed.

Also included in this section are the General System Messages that may appear. There are two types:

- System Broadcast Messages - These originate from Enterprise Help Desk and advise the user of the status of the host computer.
- Universal Screen Messages - These provide the user with immediate notification of a general problem not related to a specific WMS or BICS edit.

### Before Access Can Commence

Access to WMS can only succeed once a user's workstation has been properly configured. Configuration includes the installation and set up of the Attachmate terminal emulation software. Additionally, new users must receive login credentials for the Human Services Enterprise Network (HSEN). The login credentials are usually provided by your LDSS Security Administrator.

Please refer to NYS OSEO A-B-C Guide for information on logging into the HSEN Network.

#### [HSEN Access](#)

### Accessing State Applications

The Welfare Management System (WMS) is one of several applications available to users via the New York State Directory Services portal. Through this portal, users can log in, be authenticated, and select a system from those state applications available to them.

Please refer to the NYS OSEO A-B-C Guide for information on:

- Accessing State Applications
- Accessing CentraPort
- Accessing WMS via CentraPort

#### [HSEN Access](#)

## Signing On to WMS

The following section assumes that the user has come into WMS via the CentraPort portal and that the portal has provided the user with access to the WMS application.

Your workstation should have the message "TERMINAL INACTIVE" on line 24. If it does not, see the topic **Other Situations** below. (If a WMS Workstation has no activity for five (5) minutes, the screen will go blank and the user will have to Log onto HSEN after mouse movement is detected.)

Sign on to the computer following these steps:

- Press Enter and wait for the message PLEASE SIGN-ON WITH USERID/PASSWORD.
- Enter your User ID/Password after the word SIGNON in the following format: USERID/PASSWORD. For example, if your User ID is 85A789 and your password is 12345, then the Sign-on entry on the screen will be: 85A789/12345.
- There is one blank space between SIGNON and the User ID/Password.
- A forward slash (/) must be between the User ID and Password.
- No spaces are allowed between the first character of the User ID and the last character of the Password.
- 0's (numeric) and O's (alpha) must be distinguished in the User ID/Password entries.
- 1's (numeric) and l's (alpha) must be distinguished in the User ID/Password entries.
- After entry of the User ID/Password, the cursor is at the end of the password. Press Enter.

After transmission of the Sign-on, the computer examines the User ID/Password. If it is valid, one of the following messages appears:

- SIGN-ON COMPLETE - PLEASE PROCEED if workstation is configured to Production.
- SIGN-ON COMPLETE - TRAINING if workstation is configured to Training.

## Other Situations

You may find the workstation in a status other than TERMINAL INACTIVE. The statuses that may be encountered are:

- The screen displays the message PLEASE SIGN ON WITH USERID/PASSWORD. Follow the procedure above under SIGNING ON.
- If the screen is blank, press the Space Bar. One of three things will happen:
  - The message TERMINAL INACTIVE or PLEASE SIGN ON WITH USERID/PASSWORD will appear. Follow the procedure above under SIGNING ON.

- A screen that was being used by a previous user will appear. Press F6 to sign off. The message TERMINAL INACTIVE will appear. Follow the procedure above under SIGNING ON.
- Only the cursor will return. The user should press Ctrl+F6. The message PLEASE SIGN ON WITH USERID/PASSWORD will appear. Sign on by following the procedure above under SIGNING ON.

**Important: When you finish using a workstation, always press F6 to Sign Off. F6 will return the message TERMINAL INACTIVE.**

## Screen Descriptions

### SIGNON - Terminal Inactive

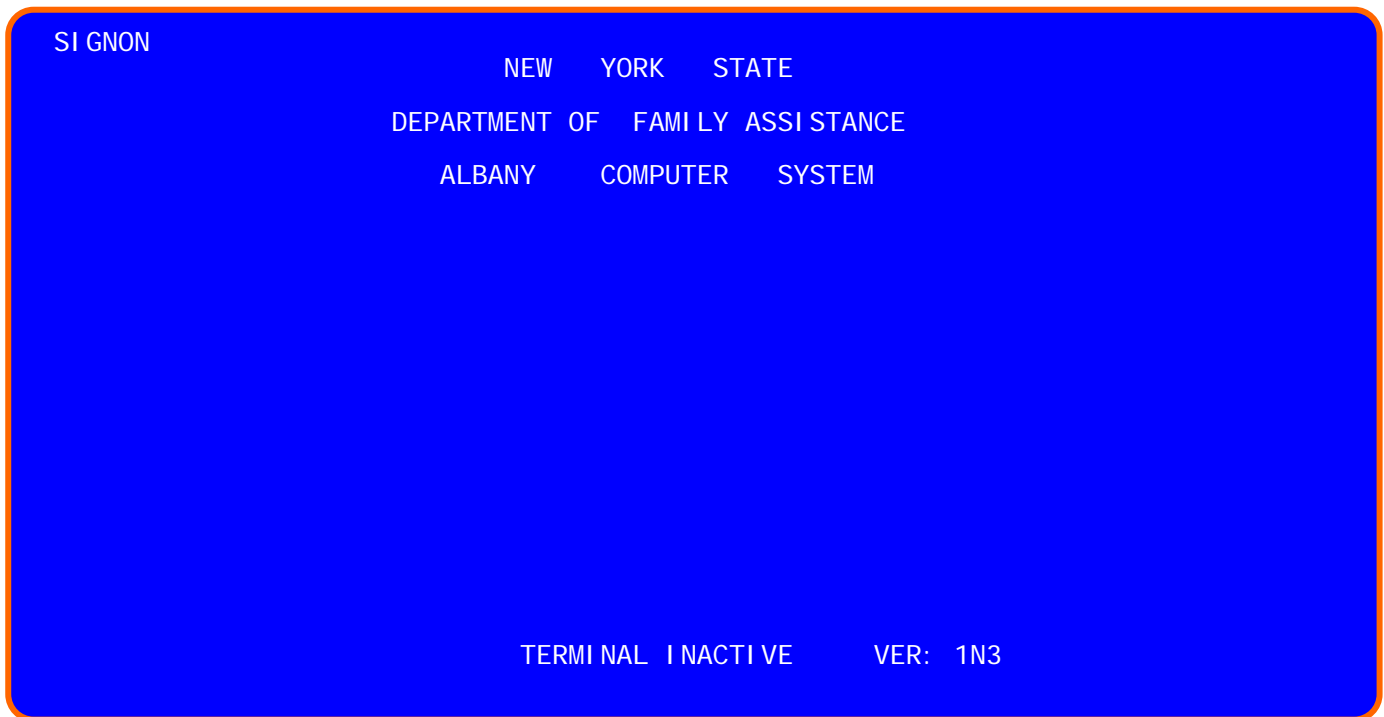


Figure 1 - Terminal Inactive Screen (SIGNON)

#### Purpose

This screen indicates that the workstation is inactive.

#### Access

- This screen is returned when Enter or any Function key has not been pressed for 16 minutes on a workstation (it will be preceded by a **Time Out Warning** at the 15 minute mark), **or**
- F6 from all menus and certain other screens (see **Function Keys** under each screen for details).

#### Screen Response

##### Positive

- If a valid Sign-on is entered, one of the following messages will be displayed on line 24:
  - SIGN-ON COMPLETE - PLEASE PROCEED if workstation is configured to Production System
  - SIGN-ON COMPLETE - TRAINING if workstation is configured to the Training System.



Negative

- A Sign-on Error Message **or** any Universal Screen Message.

Printed Response

None

Function Keys

Key	Description
N/A	None - Ctrl+F6, XMIT and all Function keys return the message PLEASE SIGN-ON WITH USERID/PASSWORD.

Screen Field Description

Not Applicable

## Sign-on Acknowledgment

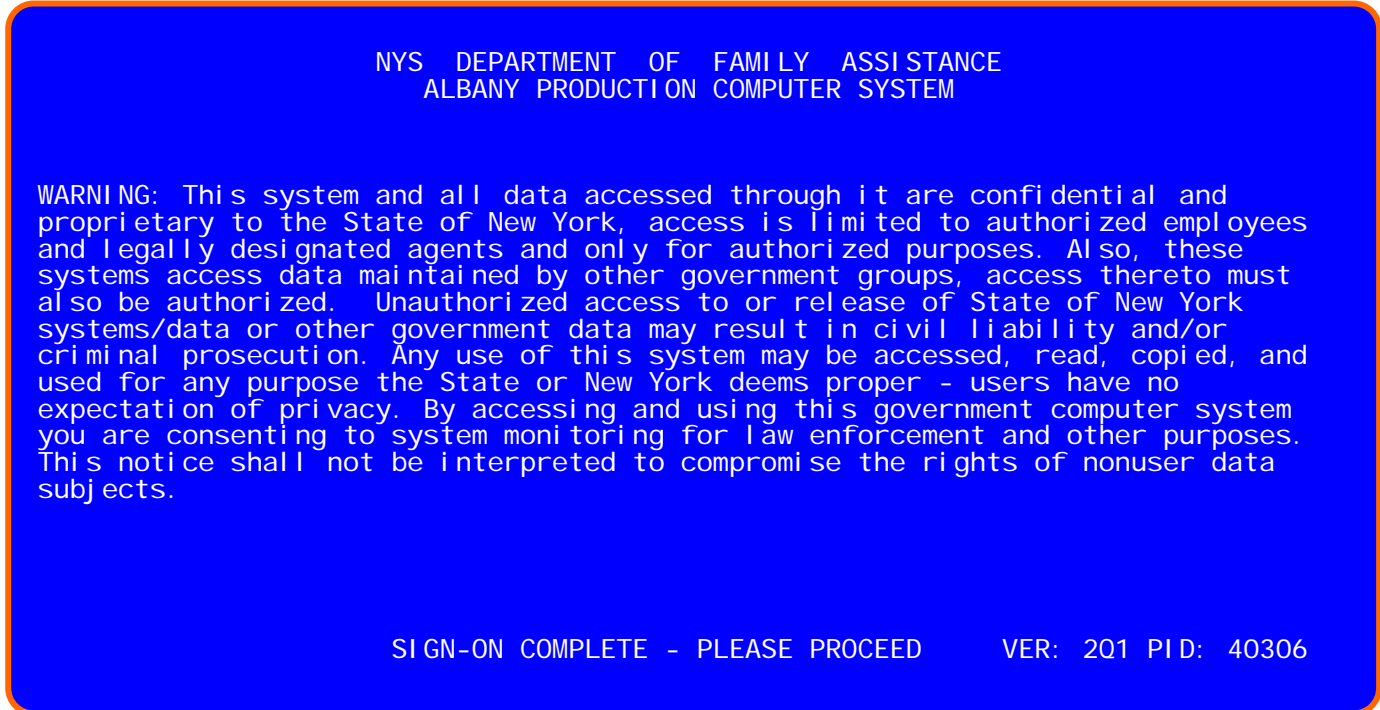


Figure 2 - Sign-on Acknowledgment

### Purpose

This screen acknowledges a successful Sign-on to the Production system. If the workstation is signed on to the training system, the message will be SIGN-ON COMPLETE - TRAINING.

### Access

- Successful transmission of a valid User ID/Password.

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on line 24:
  - UNKNOWN TRANSACTION
  - TRANSACTION NOT ALLOWED

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description

Not Applicable

WMSMNU - WMS Menu

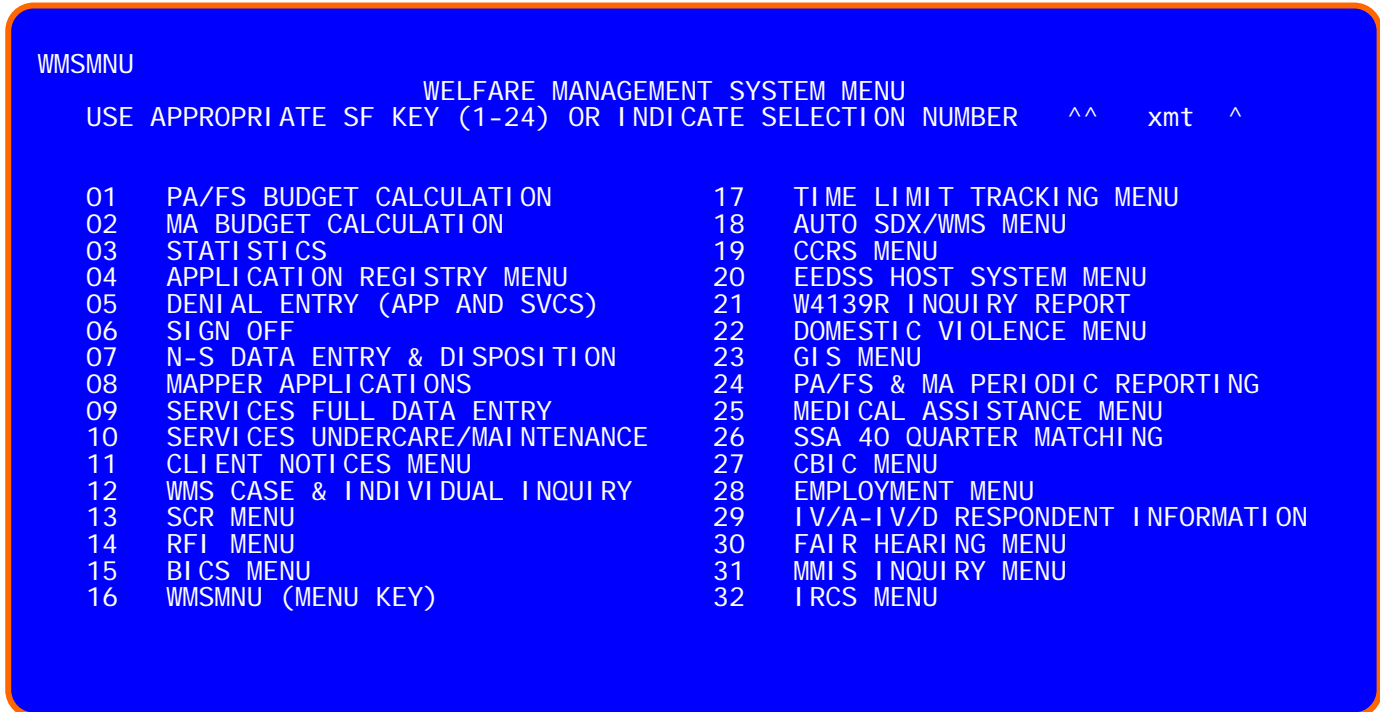


Figure 3 - Welfare Management System Menu (WMSMNU)

Purpose

This screen provides a list of sub-menus or screens from which a user may make a selection.

Access

- Ctrl+F6 after Sign-on, **or**
- Ctrl+F6 from LDMENU - LDMIP Menu, **or**
- Ctrl+F6 from any non-conversational screen and certain other screens.

Screen Response

Positive

- Selection 01 displays WBPAFS - Budget Calculation Menu,
- Selection 02 displays WBMAMU - MA Budget Calculation Menu,
- Selection 03 displays WST001 - Statistics Menu,
- Selection 04 displays WAR001 - Application Register Menu,

- Selection 05 displays WDENIL - Application/Services Denial Menu,
- Selection 06 displays SIGNOFF Screen,
- Selection 07 displays WDXMNU - Non-Services Data Entry Menu,
- Selection 09 displays WSEMNU - Services Full Data Entry Menu,
- Selection 10 displays WSUMNU - Services/Undercare Maintenance Menu,
- Selection 11 displays WCN000 - WMS/Client Notice Subsystem Menu,
- Selection 12 displays WINQ01/WINQ02 - Case/Individual Inquiry Menu,
- Selection 14 displays WCTMNU - RFI Menu,
- Selection 15 displays LDMENU - BICS Menu,
- Selection 16 displays WMSMNU - WMS Menu,
- Selection 17 displays WTRK00 - Time Limit Tracking Inquiry,
- Selection 18 displays WASI01 - Auto SDX/WMS Interface Menu,
- Selection 19 displays CCXMNU - Child Care Review Services Menu,
- Selection 20 displays WMEEMN - EEDSS Host System Menu,
- Selection 21 displays W4139R - Auto Closings/Case Conflicts Initiator screen,
- Selection 22 displays WDV000 - Domestic Violence Data Collection Menu,
- Selection 23 displays WGIMNU - General Information System Menu,
- Selection 24 displays WMRSDT - PA/FS and MA Periodic Reporting screen,
- Selection 25 displays WMAMNU - Medical Assistance Subsystem Menu,
- Selection 26 displays WQQINP - SSA 40 Quarter Entry screen,
- Selection 27 displays WIDMNU - WMS ID Card Menu,
- Selection 28 displays WEMMNU - Employment Menu,
- Selection 29 displays WSVIVD - Child Support Enforcement Referral screen,
- Selection 30 displays PFMNU - Local District Fair Hearing Menu,
- Selection 31 displays MMIMNU - Medicaid Management Information System Menu, and

- Selection 32 displays WIRCMU - WMS Income and Resource Collection System

#### Negative

- One of the following messages on line 24:
  - FUNCTION NOT SUPPORTED AT THIS TIME (Selection 08)
  - INVALID SELECTION
  - THIS TRANSACTION HAS BEEN DISABLED BY COMPUTER OPERATIONS
  - TRANSACTION CODE INVALID (Selection 13)

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description

Not Applicable

## Time Out Warning

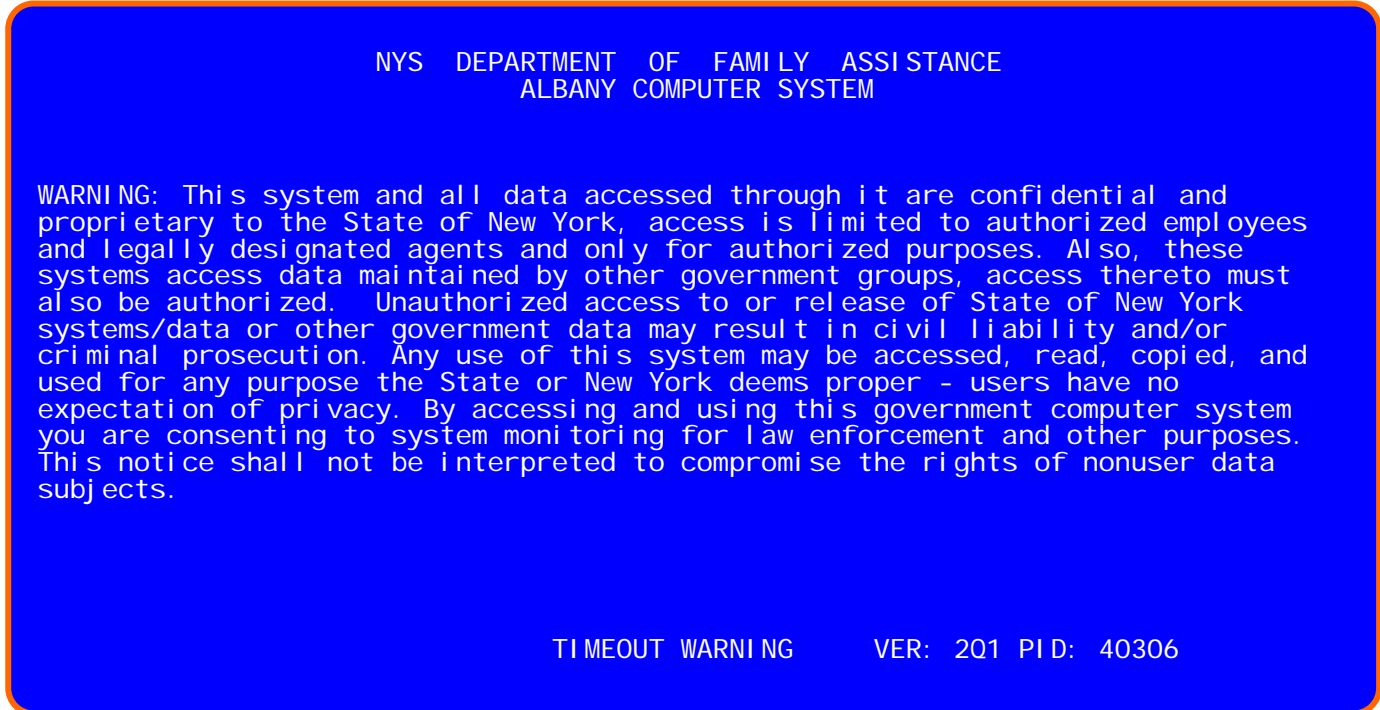


Figure 4 - Time Out Warning

### Purpose

The purpose of time-out is to limit the time a workstation is available, thereby reducing the possibility of access by unauthorized persons to unattended signed-on workstations. *A workstation should always be signed-off when it is necessary to leave it. Under no circumstances should a workstation be left unattended with data displayed.*

### Access

- Time-out is a system security function and can occur in any procedure.

### Screen Response

Positive

None

Negative

- The message TIMEOUT WARNING will appear on the bottom of any data entry or inquiry screen and indicates:
  - One minute of system availability remains; and no activity has occurred on a signed-on workstation for 15 minutes. An activity is defined as:
    - the use of function key (F1 - F10 or Ctrl+F1 - Ctrl+F10)



- the use of the Enter (XMIT) Key
- When any of these activities occur, the time-out clock is automatically restarted.

Printed Response

None

Function Keys

None

Screen Field Description

Not Applicable

## Subsystem Processing

### Error Messages and Edits

#### Signon Errors

(Listing is alphabetical by Message)

##### **SIGNON DENIED - CONTACT SUPERVISOR**

Caused by one of the following:

- A keystroke error while entering the USERID/PASSWORD.
- USERID is not on the Transaction Terminal Security System (TTSS).
- USERID is not allowed on the workstation being used.
- PASSWORD is not the correct one for the USERID entered.
- SIGNON entered was not correct for the computer to which the workstation is connected.

If the reason for this error message cannot be determined by the user or supervisor, contact the LAN Administrator.

##### **SIGNON DENIED - TERMINAL ALREADY ACTIVE**

Caused by a user failing to sign-off a workstation thereby leaving the workstation in an active state, and a second user attempts to sign-on to this active workstation. This message notifies the user that the workstation was abandoned in an active state and requires that the user Sign-off and then Sign-on again.

##### **SIGNON DENIED - USERID ALREADY ACTIVE**

A Sign-on was attempted with a USERID/PASSWORD that is already active on another workstation. If, after checking, there still appears to be a problem, contact the LAN Administrator providing them with the USERID and the PID number of the workstation in question.

##### **SIGNON ERROR - CONTACT NETWORK CONTROL**

Caused by a problem encountered by TTSS while accessing security-related information for the workstation being signed-on. This type of problem is related to a particular workstation. Contact LAN Administration.

System Broadcast Messages advise the user of the status of the WMS computer

(listing is alphabetical by MESSAGE)

**HOST BUSY PROCESSING LAST MESSAGE - PLEASE STAND BY**

This message appears when the ENTER key (or a Function Key) is pressed and the WMS computer responds indicating that it is processing a transaction. The message will disappear when the transaction has completed processing. This message will also appear if the user presses the CTRL+\*(asterisk on Number Pad) keys while the computer is processing a transaction. If the message remains on the screen for a period longer than one minute, press the CTRL+\*(asterisk on Number Pad) keys again.

**HOST SYSTEM UNAVAILABLE - PLEASE STAND BY**

The message indicates that the WMS computer is not able to process a transaction because of temporary problems with the computer.

**LAST INPUT MESSAGE DISCARDED**

This message indicates that the WMS computer is not able to process a transaction because of a temporary condition related to the routing of information within the computer. The last input of information is lost. Wait about 2 minutes then press the CTRL+\*(asterisk on Number Pad) keys. Repeat every 15-30 seconds until a response is received.

**NETWORK OPEN REQUEST FAILED: DESTINATION NOT AVAILABLE**

This message indicates that access to the WMS computer via the WMS User Workstation has failed. The workstation is not configured correctly to access the WMS computer.

**NETWORK OPEN REQ. FAILED: PATH TO DESTINATION IS DOWN**

This message indicates that the WMS computer is down and is not available to process the Sign-on procedure. Contact LAN Administration for information on expected "downtime".

**SESSION PATH DOWN: POSSIBLE LOSS OF INPUT**

This message indicates that the system is down and is not available for processing transactions. The transaction in progress should be considered as lost. Call LAN Administration for information on expected "downtime".

**THIS TRANSACTION HAS BEEN DISABLED BY COMPUTER OPERATIONS**

Problems were encountered with a particular transaction or series of transactions and they have been disabled until problem is solved. The last input of information is lost. Contact the WMS Answer Center for an explanation of the problem and an estimate of when the transaction will be available.

**WAIT - SESSION ESTABLISHMENT IN PROGRESS**

This message indicates that access to the system is not available because of communication problems. Wait 5 minutes and try to Sign-on again. If message is repeated, contact LAN Administration.

Universal Screen Messages appear on the workstation as immediate notification to the user of a problem not related to a specific data element edit. These messages are process-independent  
**(listing is alphabetical by MESSAGE)**

**CURSOR MUST BE IN XMT POSITION - REXMT**

Cursor was not in proper transmit position when the ENTER key was pressed. Cursor has been automatically moved to transmit position.

**DATABASE ERROR ----/---**

Retry. If unsuccessful, document and contact the WMS Answer Center.

**DATA BASE TEMPORARILY UNAVAILABLE - REXMT**

Transaction lost due to data rollback. Retransmit; if unsuccessful, document and contact the WMS Answer Center.

**FILE ERROR**

Retry. If unsuccessful, document and contact the WMS Answer Center.

**SCOP UNSTRING ERROR - REXMT**

Transmission difficulty was encountered when a screen (or partial screen) was transmitted. Cancel transaction.

**SYSTEM-ERROR STATUS ----- (12 digits)**

Retry. If unsuccessful, document and contact the WMS Answer Center.

**SYSTEM ERROR --- (4 digits)**

Retry. If unsuccessful, document and contact the WMS Answer Center.

**SYSTEM RESOURCE ERROR (9999) - REXMT**

System encountered error in reading or writing to terminal control record associated with a particular workstation. Retransmit. If unsuccessful, document and contact the WMS Answer Center and cancel transaction.

**TERMINAL INPUT ERROR - REXMT**

A screen was transmitted with a line deleted or a blank line inserted, or a system error was encountered while processing the transmission. Retransmit. If unsuccessful, document and contact the WMS Answer Center and cancel transaction. May be accompanied by the message IF REPEATS PLEASE CANCEL.

**TRANSACTION NOT ALLOWED**

The transaction attempted is not permitted for this workstation and/or User ID.

**TRANSACTION UNKNOWN**

The transaction code of the screen that was transmitted is not known to the system. Press ENTER to continue.

# Application Registration/Denial

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## Application Registration

### Overview

Application Registration is the process of logging (registering) applications for all types of assistance in the Welfare Management System (WMS).

The Application for Public Assistance, Medical Assistance, Food Stamps, and Services (LDSS-2921) is the input document for these assistance types. A copy of this application is available at [LDSS e-Forms](#). The white portions are completed by the applicant or, and the shaded portions are completed by a local district staff member. For Child Welfare Services the entire application may be completed by a local district worker. Application data is then entered directly into the WMS system or, in the case of Child Welfare Services, application registration, maintenance, and withdrawal is initiated in the CONNECTIONS system and brought into WMS via an interface. For more information about the CONNECTIONS system see [CONNECTIONS](#).

Applications for HEAP can also be entered through the WMS Application Registration process. The input document for this process is the Home Energy Assistance Program Application (LDSS - 3421).

### Functions

The following functions are available on the Application Register Menu screen, WAR001, which can be accessed by selecting 04 from the Welfare Management System Menu, WMSMNU.

#### 1 – Initial Application Register Entry

Entering Function 1 on the WAR001 – Application Register Menu screen and transmitting returns WAPREG – Application Register Entry screen.

Data is entered from the hardcopy application. If there are more than 10 individuals applying, a second page of WAPREG is available by entering Y after MORE PAGES prior to transmitting the screen.

When the WAPREG screen is transmitted, data edits are applied. Errors are returned highlighted and must be corrected. The edits applied to each data entry field are in the Application Entry Error Messages listing of this section.

Successful transmission of the WAPREG entry screen returns the WAR001 screen with a System Acknowledgement showing the Registry Number and Version Number assigned to the Application Register and the messages: TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED. The APP TAD and Clearance Report are automatically printed.

Completion of Initial Application Register Entry creates an Application Record and also a Clearance Match Record for each individual on the Application.

The Application Registry Number is computer-assigned in numerical sequence based on the order of processing. The first five digits are the sequenced number and the last digit is a “check” digit.

For example:	Register Number
First application processed today	013844
Second application processed	013853
Third application processed	013862

The Registry Numbers are unique only within a district, that is, the same Registry Number sequence (from 00001 to 99999, plus check digit) is used in all districts. This means that, eventually, the same Registry Number will appear in more than one district.

#### 2 – Application Register Maintenance

Entering Function 2 with a Registry Number and Version Number on the WAR001 screen and transmitting returns the WAPREG screen with Registry Number, Version Number and application data displayed. Changes, corrections, additions or deletions are made on this screen.

If an individual is deleted, that individual's line number will be returned in any future maintenance transactions with the words LINE DELETED. That line number may not be used again.

Successful transmission of the WAPREG screen returns WAR001 screen with a System Acknowledgement showing the Registry Number, Version Number incremented by one, and the messages: TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED. A new APP TAD and Clearance Report are printed.

Completion of Application Registration Maintenance creates a new Application Record and also a new Clearance Match Record for each individual. These new records replace the previous records.

#### 3 – Application Withdrawal Entry

Entering Function 3 with a Registry Number, Version Number and Withdrawal Date on the WAR001 screen and transmitting returns the WAR001 screen with a System Acknowledgement showing the Registry Number, the Version Number incremented by one and the messages: TRANSACTION ACCEPTED, WITHDRAWAL TO BE PRINTED. The WITHDRAWN APP REPORT is printed.

Completion of Application Withdrawal Entry changes the application status to '4' (withdrawn). The Application Record and all related Clearance Match Records are deleted from the system when the next scheduled "app killer" batch program is run.

#### 4 – Application Turnaround Document

Entering Function 4 with a Registry Number and Version Number on the WAR001 screen and transmitting returns the WAR001 screen with a System Acknowledgement showing the Registry Number, Version Number and message: TRANSACTION ACCEPTED, APP TAD TO BE PRINTED. A duplicate APP TAD only is printed.

This function will not increment the Version Number; however, a cycle number will be generated for each duplicate APP TAD requested for this Registry Number. This cycle number is printed above the Trans Type field.

5 - Clearance Report

Entering Function 5, Registry Number and Version Number on the WAR001 screen and transmitting returns the WAR001 screen with a System Acknowledgement indicating Registry Number, Version Number and messages: TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED. A new Clearance Report only is printed.

The Version Number will not be incremented. This function will remove a Concurrent Application indicator if one has been set on the Application Record.

6 - Create App from Existing Case or App

Entering Function 6 with either a non-services Registry Number and Version Number or a Case Number on the WAR001 screen and transmitting returns the WAR008 screen displaying application/case information for the entered application or case number.

Up to three new Application Registrations can be created at one time from the same application or case. Except for new application information entered on the WAR008 screen, all other information from the existing application or case will be brought forward to the new Application Registration(s).

When the new case information is entered and WAR008 is transmitted successfully, a confirmation message which includes the new Registry number(s) and Version Number(s) will be displayed on this screen. A Clearance Report and an App Tad will be printed for each new Application Registration created.



WAR001 – Application Register Menu

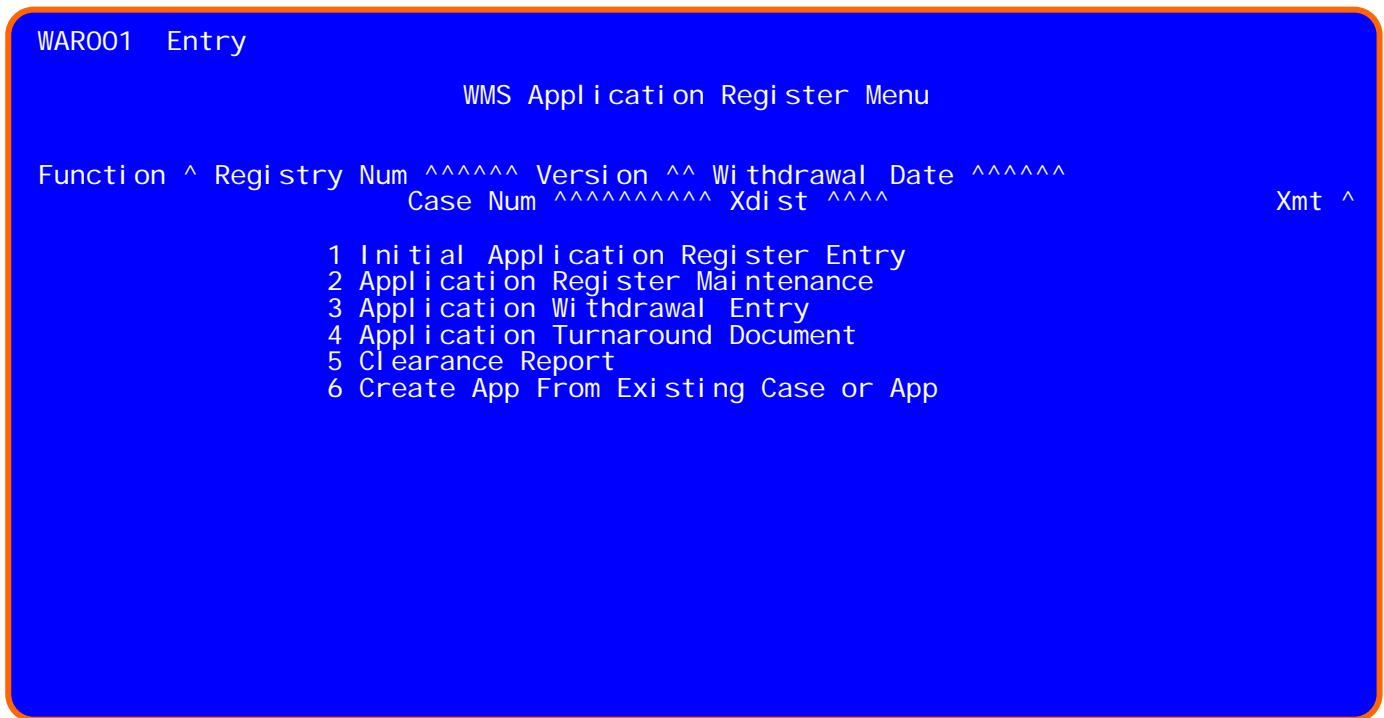


Figure 1 – Application Register Menu Screen (WAR001)

Purpose

This screen is used to select Application Registration, maintain or change the Application Register, withdraw an Application, generate a Duplicate APP TAD - Application Turnaround Document, generate a Clearance Report, or create a new Application Registration from an existing Case or Application.

Access

- Entering 04 on (or F4 from) WMSMNU – WMS Menu, or
- F4 from SIGNON COMPLETE screen, or
- F4 from all Menus except
  - WSEMNU – Services Full Data Entry,
  - WSUMNU – Services Undercare/Maintenance Menu,

Screen Response

Positive

- Function 1 displays WAPREG – Application Entry,
- Function 2 displays WAPREG – Application Entry with Registry No., Version No. and Application Data,

- Function 3 displays WAR001 – Application Register Menu System/Acknowledgement With Registry Number displayed, Version Number incremented by 1 and messages TRANSACTION ACCEPTED, WITHDRAWAL TO BE PRINTED,
- Function 4 displays WAR001 – Application Register Menu System Acknowledgement With Registry and Version Number displayed (Cycle No. on APP TAD increases by 1) and messages TRANSACTION ACCEPTED, APP TAB TO BE PRINTED (Function 4 not allowed for Services Cases)
- Function 5 displays WAR001 – Application Register Menu System Acknowledgement with Registry Number and Version Number displayed and messages TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED.
- Function 6 displays WAR008 – App Generation From Case or App with either the Registry Number or the Case Number (based on WAR001 entries) and the associated registry or case information displayed.

#### Negative

- Fields in error return highlighted. One or more of the messages on line 24 as shown on the Application Register Menu Error/Messages pages,
- The following message on Line 24:
  - SF99 KEY NOT SUPPORTED (99 = 8, 13)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- Withdrawn Application Report if Application Withdrawal Entry is selected.
- Duplicate APP TAD if Application Turnaround Document is selected,
- A new Clearance Report if Clearance Report is selected.

##### Negative

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>

Key	Description
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WAR001

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Functions 1- 6
REGISTRY NUM	01046 - REGISTRY NUMBER (6)	Functions 2 - 6
VERSION	01047 - VERSION NUMBER (2)	Functions 2 - 5
WITHDRAWAL DATE	01100 - AUTHORIZATION PERIOD (12)	Function 3, Withdrawal Date is required.
CASE NUM	01050 - CASE NUMBER (10)	Function 6
XDIST	01010 - TRANSACTION DISTRICT (2)	Function 6, Mnemonic - first four letters of district name

WAPREG – Application Entry

```

WAPREG Entry      CType      District STLA  01/29/2007      Page 1 Of 1
Ctr AppDat Unit Worker T CNX Case #      Case Name
Language Spa _ Eng _ Phone _ _ _ _ _ H I I _ APP SRC _
Street Address      City      St      Zip
Res Addr _____
Mail Addr _____
Ln First      MI Last      MMDDYYYY Sx SSN/RRN      Race
H I ABPW      CIN
01 _____ - _____ - _____ - _____ - _____ - _____
02 _____ - _____ - _____ - _____ - _____ - _____
03 _____ - _____ - _____ - _____ - _____ - _____
04 _____ - _____ - _____ - _____ - _____ - _____
05 _____ - _____ - _____ - _____ - _____ - _____
06 _____ - _____ - _____ - _____ - _____ - _____
07 _____ - _____ - _____ - _____ - _____ - _____
08 _____ - _____ - _____ - _____ - _____ - _____
09 _____ - _____ - _____ - _____ - _____ - _____
10 _____ - _____ - _____ - _____ - _____ - _____
_____ - _____ - _____ - _____ - _____ - _____
_____ - _____ - _____ - _____ - _____ - _____
More Pages? _ Xmt _
    
```

Figure 2 – Application Entry (WAPREG)

Purpose

This screen is used to register an application in WMS.

Access

- Successful transmission of Function 1 on WAR001 – Application Register Menu

Screen Response

Positive

- WAR001 – Application Register Menu with Registry Number and Version Number assigned and messages TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED,
- WAR001 screen – Application Register Menu with Registry Number and Version Number assigned and messages TRANSACTION ACCEPTED, APPLICATION REGISTER, CLEARANCE TO BE PRINTED,
- If Y is entered after MORE PAGES?, then WAPREG – Application Entry screen with page 2 with Line Numbers 11-20.

Negative

- One of the following messages displayed on line 24:

- ERRORS MUST BE CORRECTED PRIOR TO PAGING
- EXAMINE BLINKING FIELDS (fields in error will be highlighted)
- MUST TRANSMIT SCREEN PRIOR TO PAGING
- PAGE 2 IS THE HIGHEST PAGE ALLOWED
- SF99 KEY NOT SUPPORTED (99 = 4-5, 7-14, 16)
- STATE REGISTRY NUMBER EXISTS – RE-XMT TO RE-ASSIGN REGISTRY NUMBER (This message occurs when the next scheduled Registry Number to be assigned by the system is still being used by a previously entered application. Retransmitting causes the system to assign the next available Registry Number to the application.)
- UNACCEPTABLE: NO APPLICANTS ON APPLICATION
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- Clearance Report and APP TAD if Non-Services and Initial Application Register Entry are selected.
- Clearance Report and Application Register if Services and Initial Application Register Entry are selected.

#### Negative

- Application Register Abort Notice.

### Function Keys

Key	Description
F1	If on Page 1, returns message MUST TRANSMIT SCREEN PRIOR TO PAGING. If on Page 2, displays Page 1 and Individual Data entered on Page 2 is lost.
F2	If on Page 1, returns message MUST TRANSMIT SCREEN PRIOR TO PAGING. If on Page 2, displays Page 2 with only Case Data from Page 1. If Case Data is changed on Page 2, the changes are automatically made on Page 1 also.
F3	Same as F1
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Cancels the entire transaction and presents WAR001 – Application Register Menu with message TRANSACTION CANCELLED BY OPERATOR

### Screen Field Description – WAPREG

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CTYPE	01060 – CASE TYPE (2)	Mnemonic, Protected, The Case Type entered in T during Initial Application Register Entry returns in this field.
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic, Protected
MM/DD/YYYY	02020 - TRANSACTION INPUT DATE (8)	Protected
PAGE X of X	NONE	Protected
CTR	01020 - LOCAL OFFICE NUMBER (3)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
APP DATE	01090 - APPLICATION DATE (6)	Required
UNIT	01030 - UNIT IDENTIFIER (5)	Required if worker is blank
WORKER	01040 - WORKER IDENTIFIER (5)	Required if unit is blank
T	01060 - CASE TYPE (2)	Required
CNX	23490 - CCRS INDICATOR (1)	Protected; For services cases, indicates the status of the companion CONNECTIONS case.
CASE #	01050 - CASE NUMBER (10)	
CASE NAME	01070 - CASE NAME (28)	
LANGUAGE SPA ENG	04002 - LANGUAGE OF NOTICE FLAG (1)	Required for all Case Types except 40
PHONE	01085 - TELEPHONE NUMBER (10)	
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	Code that denotes why a case does not have 3 <sup>rd</sup> party health insurance; can only be entered for case types 20 and 24. Required for Case Type 24.
APP SRC	01066 - APPLICATION SOURCE (1)	
<b>RES ADDR</b>		
STREET ADDRESS	01080 - RESIDENCE STREET (35)	Required
CITY	01082 - RESIDENCE CITY/TOWN (15)	Required
STATE	01083 - RESIDENCE STATE (2)	Required
ZIP	01084 - RESIDENCE ZIP (5)	Required
<b>MAIL ADDR</b>		
STREET ADDRESS	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
LN	01045 - APPLICATION REGISTER LINE NUMBER (2)	Protected, 01-10 on Page 1, 11-20 on Page 2
FIRST	03030 - NAME (10)	10 occurrences per page
MI	03030 - NAME (1)	10 occurrences per page
LAST NAME	03030 - NAME (17)	One Required, 10 occurrences per page
MMDDYYYY	03060 - DATE OF BIRTH (8)	10 occurrences per page
SX	03050 - SEX (1)	Required, 10 occurrences per page
SSN/RRN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 Occurrences per page
<b>RACE</b>		
H	03059 - INDIVIDUAL CODE TO DENOTE HISPANIC OR LATIN ETHNICITY (1)	10 Occurrences per page
I	03054 - INDIVIDUAL RACE CODE FOR AMERICAN INDIAN OR ALASKAN NATIVE (1)	10 Occurrences per page
A	03055 - INDIVIDUAL RACE CODE FOR ASIAN (1)	10 Occurrences per page
B	03056 - INDIVIDUAL RACE CODE FOR BLACK OR AFRICAN AMERICAN (1)	10 Occurrences per page
P	03057 - INDIVIDUAL RACE CODE FOR HAWAIIAN OR PACIFIC ISLANDER (1)	10 Occurrences per page
W	03058 - INDIVIDUAL RACE CODE FOR WHITE OR CAUCASIAN (1)	10 Occurrences per page
CIN	03010 - CLIENT IDENTIFICATION (8)	10 occurrences
<b>OTHER NAME INFORMATION</b>		
These captions do not appear on the screen, but the data entry positions are below the Application Register Line Number 10 on Page 1 and 20 on Page 2. The cursor will stop to allow entry of data in these fields.		
LN	01045 - APPLICATION REGISTER LINE NUMBER (2)	4 occurrences per page

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CODE	03040 - OTHER NAME CODE (1)	4 occurrences per page
FIRST NAME	03041 - OTHER NAME (10)	4 occurrences per page
MIDDLE INITIAL	03041 - OTHER NAME (1)	4 occurrences per page
LAST NAME	03041 - OTHER NAME (7)	4 occurrences per page

WAPREG – Application Registration Maintenance

```

WAPREG Entry      CType FA          District STLA  03/01/2007      Page 1 Of 1
                REGISTRY NUM 574989  VERSION 01
Ctr AppDat Unit Worker T CNX Case #   Case Name
010 022507 0005 TURNC 11
Language Spa Eng X Phone 518 7782221 H I I APP SRC
                Street Address          City          St Zip
Res Addr 785 RIVER STREET CANTON NY 13654
Mail Addr 785 RIVER STREET CANTON NY 13654

                Race
Ln First MI Last MMDDYYYY Sx SSN/RRN H I ABPW CIN
01 PAULA R TAYLOR 08221978 F 236754444 N NNNNY
02 MAGGI E M TAYLOR 01091997 F N NNNNY
03 AUGUSTA K TAYLOR 07251999 F N NNNNY
04 BILL B TAYLOR 06132002 M N NNNNY
05 BARRY L TAYLOR 12152004 M N NNNNY
06
07
08
09
10
                More Pages? _ Xmt _
  
```

Figure 3 – Application Registration Maintenance (WAPREG)

Purpose

This screen is used to make changes or corrections to the Application Record. Data Entry fields are the same as for WAPREG – Application Entry.

Access

- Successful transmission of Function 2 on WAR001 – Application Register Menu

Screen Response

Positive

- WAR001 – Application Register Menu with Registry Number and Version Number incremented by 1, and messages TRANSACTION ACCEPTED, CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED, or
- WAR001 – Application Register Menu with Registry Number and Version Number and messages TRANSACTION ACCEPTED, APPLICATION REGISTER, CLEARANCE TO BE PRINTED, or
- If Y is entered after MORE PAGES?, then WAPREG – Application Entry Screen page 2 with line numbers 11-20.



### Negative

- One of the following messages displayed on line 24:
  - ERRORS MUST BE CORRECTED PRIOR TO PAGING
  - EXAMINE BLINKING FIELDS (fields in error will be highlighted)
  - MUST TRANSMIT SCREEN PRIOR TO PAGING
  - PAGE 2 IS THE HIGHEST PAGE ALLOWED
  - SF99 KEY NOT SUPPORTED (99 = 4-5, 7-14, 16)
  - STATE REGISTRY NUMBER EXISTS – RE-XMT TO RE-ASSIGN REGISTRY NUMBER (This message occurs when the next scheduled Registry Number to be assigned by the system is still being used by a previously entered application. Retransmitting causes the system to assign the next available Registry Number to the application.)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- Clearance Report and APP TAD if initial Application Register entry or Application Register Maintenance is selected.
- Application Register and Clearance Report if Initial Application Register entry is selected and the entry is a Services case.

#### Negative

- Application Register Abort Notice.

### Function Keys

Key	Description
F1	Page 1
F2	Page 2 (If Case Data is changed on page 2, the changes are automatically made on Page 1 also)
F3	Same as F1
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Cancels the entire transaction and presents WAR001 – Application Register Menu with message TRANSACTION CANCELLED BY OPERATOR

### Screen Field Description – WAPREG

See screen field descriptions for WAPREG - Application Entry.

WAR001 – WMS Application Register Menu with System Acknowledgement

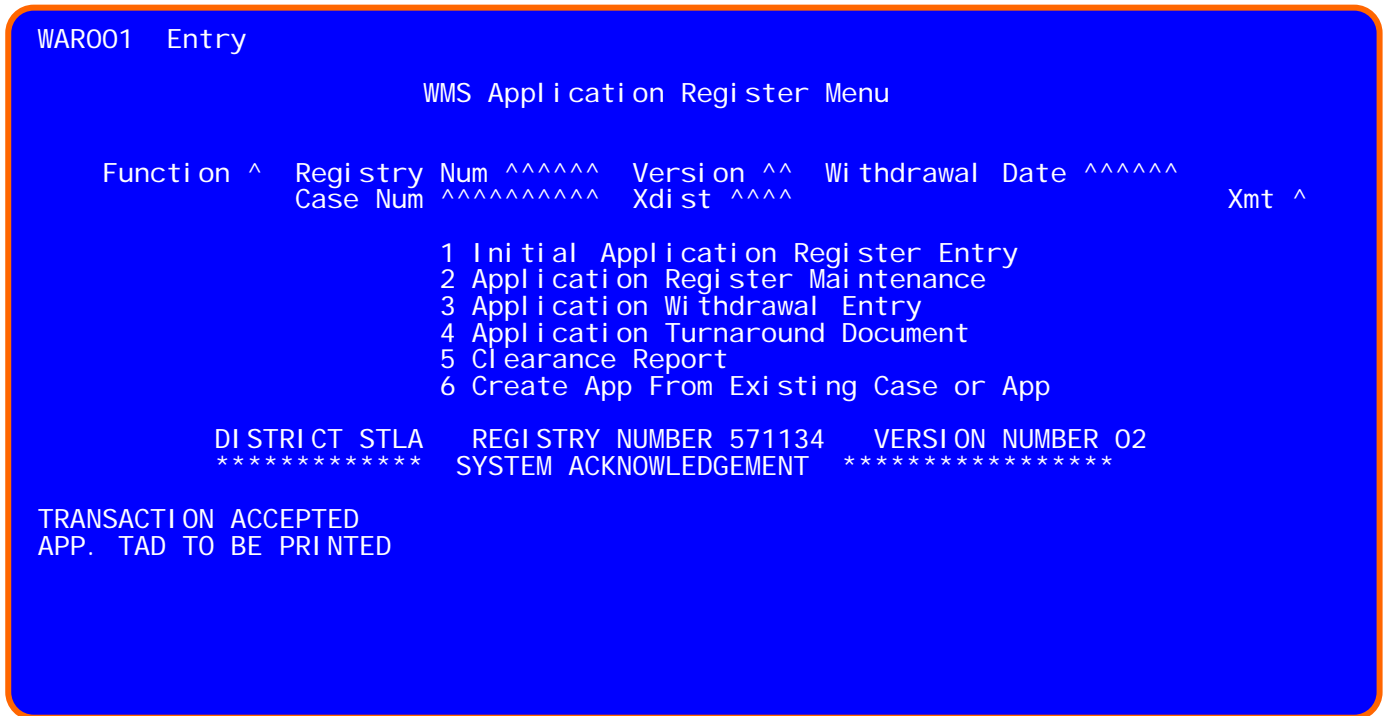


Figure 4 – WMS Application Register Menu with System Acknowledgement (WAR001)

Purpose

This screen is the System Acknowledgement for Initial Application Registry Entry, Application Register Maintenance, Application Withdrawal, Application Turnaround Document, or Clearance Report. The top portion of this screen is used to select one of the functions listed. See WAR001 – Application Register Menu for a description of the Data Entry portion of this screen.

Access

- Successful transmission of WAPREG – Application Entry Screen Response, or
- Successful transmission of Functions 3, 4 or 5 on the WAR001 – Application Register Menu

Screen Response

Positive

- The System Acknowledgement portion of the screen will contain the message TRANSACTION ACCEPTED accompanied by one or more of the following messages:
  - APPLICATION REGISTER, CLEARANCE TO BE PRINTED
  - APPLICATION REGISTER, CLEARANCE TO BE PRINTED, RFI DATA EXISTS
  - APP TAD TO BE PRINTED

- APP TAD TO BE PRINTED, UNRESOLVED RFI DATA EXISTS
- CLEARANCE REPORT TO BE PRINTED
- CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED
- CLEARANCE REPORT TO BE PRINTED, APP TAD TO BE PRINTED, UNRESOLVED RFI DATA EXISTS
- CLEARANCE REPORT TO BE PRINTED, UNRESOLVED RFI DATA EXISTS
- TRANSACTION CANCELLED BY OPERATOR
- WITHDRAWAL TO BE PRINTED
- WITHDRAWAL TO BE PRINTED, UNRESOLVED RFI DATA EXISTS

#### Negative

- The following message displayed on line 24:
  - SF99 KEY NOT SUPPORTED (99 = 08)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

See Function Keys table for WAR001 - WMS Application Register Menu.

#### Screen Field Description – WAPREG

See screen field descriptions for WAR001 - WMS Application Register Menu.

WAR008 – App Generation From Case or App

```

WAR008  Dist STLA  Date 02/07/2007
                App Generation From Case or App
REGISTRY Num 574569
                Default Case Information
                Street Address          City          St Zip
Res Addr 578 RIVER STREET             MAYFIELD      NY 12044
Ctr AppDat Unit Worker T Case #      Case Name
  012607 07755 TURNC                  LESTER, ROBERT

                New Case Information
                Ctr AppDat Unit Worker T Case #      Case Name
                _____
                _____
                _____

Next Case Num _____ Next Registry Num _____ Xdist _____ Xmit _____
    
```

Figure 5– App Generation From Case or App (WAR008)

Purpose

This screen is used to create up to three new Application Registers from an existing Application Register or Case. All information from the existing application registration or case is brought over to the new application registration with the exception of data entered in the New Case Information fields. This New Case Information will overwrite those fields from the existing application registration or case.

If either the Next Case Num or the Next Registry Num fields is entered and transmitted, a new WAR008 screen is presented for data entry. Default Case Information fields will display data for the Case or Registry Number that was entered in the Next Case Num or Next Registry Num fields, respectively.

An application registration or case from a district other than the one to which the logged-on worker is assigned can be used to create a new application registration in the worker's own district. To do this the worker must enter the district of the existing application/case in the Xdist field when accessing this window.

Access

- Successful transmission of Function 6 on WAR001 – Application Register Menu
- Entering either the Next Case Num or the Next Registry Num (and optionally Xdist) on this screen, WAR008, and transmitting.

Screen Response

Positive

- Acknowledgement message, REG NO IS:999999 VER NO IS:01, APP TAD, CLEARANCE TO BE PRINTED, will be displayed below the line where new case information was entered. The REG NO is the registration number assigned to the new Application Register.

Negative

- PLEASE ENTER CASE OR APP, OR HIT MENU KEY
- One of the following messages on Line 24:
  - APP INTERNAL STATUS NOT NUMERIC ON APPL
  - FUTURE APP DATES ARE PROHIBITED
  - CASE NOT FOUND
  - SERVICES CASES BEGIN WITH S
  - SF99 NOT SUPPORTED – REXMT (99 = 1-5, 7-22)

Printed Response

Positive

- Clearance Report and App TAD for new Application Registration.

Negative

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WAR001 – Application Registry Menu

Screen Field Description – WAR0008

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic, Protected
DATE MM/DD/YYYY	02020 - TRANSACTION INPUT DATE (8)	Protected
REGISTRY NUM	01046 - REGISTRY NUMBER (6)	Protected
<b>RES ADDR</b>		
STREET ADDRESS	01080 - RESIDENCE STREET (35)	Modifiable
CITY	01082 - RESIDENCE CITY/TOWN (15)	Modifiable
ST	01083 - RESIDENCE STATE (2)	Modifiable
ZIP	01084 - RESIDENCE ZIP (5)	Modifiable
CTR	01020 - LOCAL OFFICE NUMBER (3)	Protected
APP DATE	01090 - APPLICATION DATE (6)	Protected
UNIT	01030 - UNIT IDENTIFIER (5)	Protected

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
WORKER	01040 - WORKER IDENTIFIER (5)	Protected
T	01060 - CASE TYPE (2)	Protected
CASE #	01050 - CASE NUMBER (10)	Protected
CASE NAME	01070 - CASE NAME (28)	Protected
<b>NEW CASE INFORMATION</b>		
CTR	01020 - LOCAL OFFICE NUMBER (3)	3 Occurrences
APP DATE	01090 - APPLICATION DATE (6)	3 Occurrences
UNIT	01030 - UNIT IDENTIFIER (5)	3 Occurrences
WORKER	01040 - WORKER IDENTIFIER (5)	3 Occurrences
T	01060 - CASE TYPE (2)	3 Occurrences
CASE #	01050 - CASE NUMBER (10)	3 Occurrences
CASE NAME	01070 - CASE NAME (28)	3 Occurrences
NEXT CASE NUM	01050 - CASE NUMBER (10)	Entered to create App Registers from a different case or more from the same case
NEXT REGISTRY NUM	01046 - REGISTRY NUMBER (6)	Entered to create App Registers from a different App Reg or more from the same App Reg
XDIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first four letters of district name

## Non-Services Application Denial

### Overview

Non-Services Application Denial is the process of denying an application for assistance after Application Registration, but prior to Full Data Entry. This process is not available for Food Stamp case types 31 and 32. These cases must be processed through Full Data Entry Denial.

The Application is the input document. The Application Denial process requires that Case Number, Case Name, CIN field (based on an evaluation of the Clearance Report), Date of Denial and Reason Code for Denial be completed on the Application. The WMS Application/Services Denial Process screen (WDENIL) is the first screen of the application denial process. It can be used to deny both non-services and services applications; however, only the denial process for non-services cases is addressed in this document, and only the fields for non-service application denial are listed in the screen elements section.

For denial of a non-services application enter the Registry Number, Version Number and Case Number (and Reuse Indicator, if necessary) on the first entry line. It appears under the screen caption WMS NON-SERVICES APPLICATION DENIAL and that has a TRANS.CODE of WANDEN. The remaining fields on this window are for denial of services applications and are not described in this document.

Successful transmission of the WDENIL screen returns the WAPNDE screen displaying the data entered during Application Registration. The Denial Date, Case Name, and CIN fields require entry on the WAPNDE screen. Except for Case Types 13, 18, 31 or 32, the Denial Reason Code must also be entered. (Certain edits do not apply to the CIN field when either a valid CIN or Application Registry/Line Number-AR/LN is entered in the Application Denial process. See the "Completing the CIN Field" in **SRM Standards, Conventions, and General Information – Charts 2 and 3.**)

Successful entry of these required elements is acknowledged by a System Acknowledgement screen showing the Authorization Number and the message TRANSACTION ACCEPTED. An Authorization may be printed depending on the local District option. The Transaction Type on the Authorization is 01 for Application Denial.

Completion of Application Denial establishes a Partial Case Record and a Pending Record with a status of AT/DEN. After Batch Update a Case Record is established with a Case Status of Denied. This Pending Record cannot be accessed for Error Correction/Change Pending except that screen 08 can be selected for Error Correction/Change Pending via F7 from the System Acknowledgement screen or from WDXMNU (see **SRM Establishing a Non-Services Case**). The Pending Record created by the Application Denial process can be cancelled (see **SRM Transaction Disposition**).

Errors on WAPNDE are returned highlighted. If Y is entered after ACCEPT BLINKING FIELDS, the System Acknowledgement screen is returned with the message TRANSACTION REJECTED – FATAL ERROR DETECTED. A list of the error numbers appears on the WSYSAK screen. Since all errors in Application Denial are fatal, none of the denial data is retained in the system. All the required elements previously mentioned must be re-entered error-free for the transaction to be accepted. See **SRM Standards, Conventions, and General Information** for details of the WSYSAK screen and system acknowledgement.

WDENIL – Non-Services Application Denial Menu

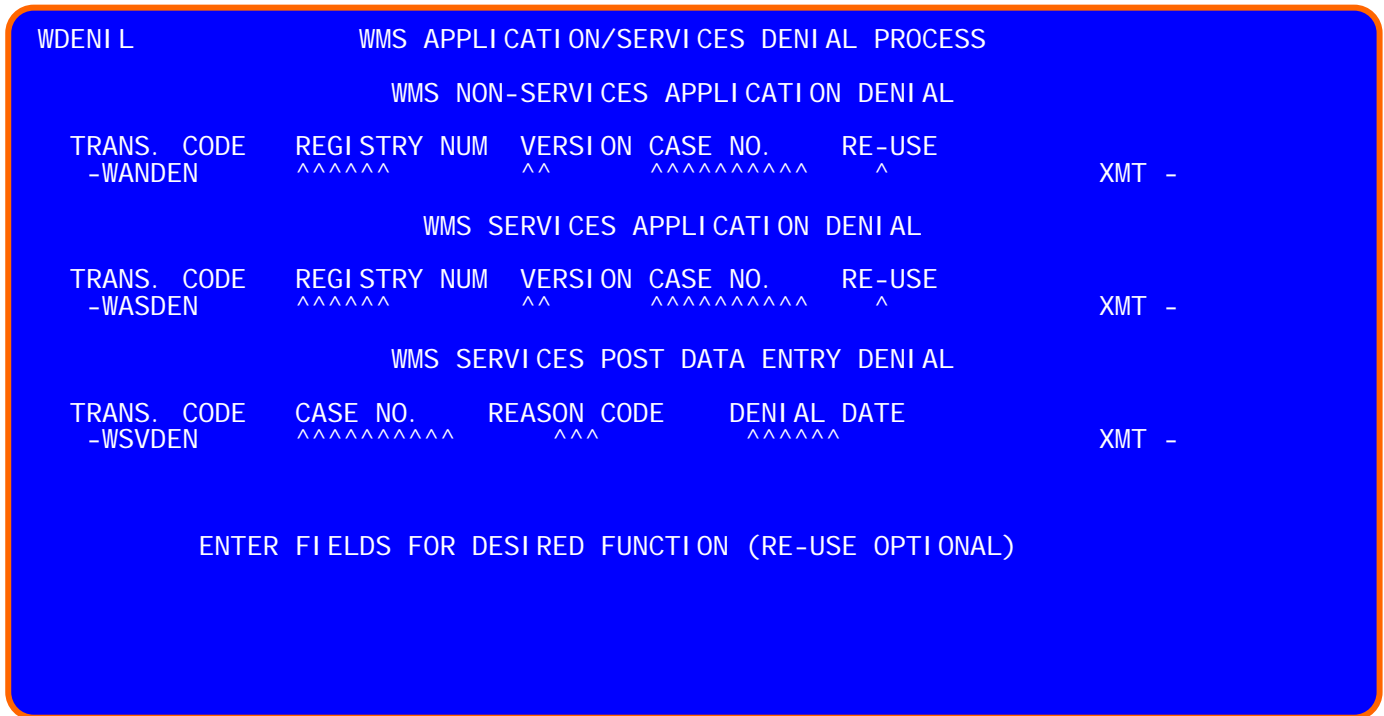


Figure 6 – Non-Services Application Denial (WDENIL)

Purpose

The WANDEN section of this screen is used by the end user to initiate a transaction to deny a Non-Services Application prior to Full Data Entry.

Access

- Entering 05 on (or F5 from) WMS Menu – WMSMNU, or
- F5 from SIGNON COMPLETE screen, most menus and sub-menus and certain other screens. See FUNCTION KEYS under each screen for details.

Screen Response

Positive

- WAPNDE – WMS Non-Services Application Denial Entry screen.

Negative

- WSYSAK – System Acknowledgement screen with one or more of the System Acknowledgement Messages listed. See **SRM Full Data Entry and Undercare Error Messages** for details of the WSYSAK screen.
- One or more of the following error messages on line 24:



- CURSOR MUST BE IN XMT POSITION - REXMT
- SF99 KEY NOT SUPPORTED (99 = 08, 13, 18)
- Any of the **Application Denial Menu Error Messages** listed under **Subsystem Processing** later in this section.
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - Welfare Management System Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F9	CCXMNU - Child Care Services Review (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WDENIL

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>WMS NON-SERVICES APPLICATION DENIAL</b>		
REGISTRY NUM	01046 - REGISTRY NUMBER (6)	
VERSION	01047 - VERSION NUMBER (2)	
CASE NO.	01050 - CASE NUMBER (10)	
RE-USE	01051 - CASE NUMBER RE-USE INDICATOR (1)	

WAPNDE – Application Denial Entry

```

-WAPNDE ENTRY CTYPE MA          DI STRI CT STLA  11/02/06          PAGE 1 OF 1
  CODE      DATE
CTR APPDAT UNIT WORKER T CCR CASE #    CASE NAME          CODE TELE
010 110206 WRTS  JJK   20   MA45671    POWERS WILLI AM    518 4023729
RACE ID
RES  ADDR 1 STREET ADDRESS          CITY          ST ZIP
MAIL ADDR  AVE B                    PORT          NY 12207

LN  FIRST      MI LAST NAME          MMDDYYYY SX   SSN/RRN          CIN
01  WILLI AM    T  POWERS          01011942 M    652454714
02  JILL        Q  POWERS          12151949 F    524514521
03
04
05
06
07
08
09
10

          ACCEPT BLINKING FIELDS          XMIT
  
```

Figure 7 – Application Denial Entry (WAPNDE)

Purpose

This screen is used to deny a Non-Services Application. Required is an entry for (reason) Code and the (denial) Date, and the CIN field must also be entered for each participant.

Access

- Successful transmission of WANDEN

Screen Response

Positive

- System Acknowledgement Screen – WSYSAK – TRANSACTION ACCEPTED with any System Acknowledgement Messages and Warning Numbers. See **SRM Full Data Entry and Undercare Error Messages** for details of the WSYSAK screen.
- Page 2 if Application has more than 10 individuals.

Negative

- One of the following messages on Line 24:
  - CURSOR MUST BE IN XMT POSITION - REXMT

- EXAMINE BLINKING FIELDS (fields in error are highlighted)
- SF99 NOT SUPPORTED – REXMT (99 = 1-14, 16)
- System Acknowledgement screen – WSYSAK -TRANSACTION REJECTED – FATAL ERROR DETECTED with any Error Number listed (see Error Number and Message Listing) or with any System Acknowledgement message listed. See **SRM Full Data Entry and Undercare Error Messages**.

Printed Response

Positive

- AUTHORIZATION depending on District option. See **SRM Standards, Conventions and General Information**.

Negative

None

Function Keys

Key Description

- Ctrl+F5 Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See **SRM Full Data Entry and Undercare Error Messages** for details of the WSYSAK screen.

Screen Field Description – WAPNDE

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CTYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic; Protected
MM/DD/YY	NONE	System Supplied
PAGE X OF Y	NONE	
CODE	02050 - REASON CODE (3)	Required
DATE	01100 - AUTHORIZATION PERIOD (6)	Required
CTR	01020 - LOCAL OFFICE NUMBER (3)	Protected
APP DATE	01090 - APPLICATION DATE (6)	Protected
UNIT	01030 - UNIT IDENTIFIER (5)	Protected
WORKER	01040 - WORKER IDENTIFIER (5)	Protected
T	01060 - CASE TYPE (2)	Protected
CCR	23490 - CONNECTIONS CASE INDICATOR	Protected
CASE #	01050 - CASE NUMBER (10)	Protected
CASE NAME	01070 - CASE NAME (28)	Protected
CODE	01085 - TELEPHONE NUMBER AREA CODE (3)	Protected
TELE	01085 - TELEPHONE NUMBER (7)	Protected
RACE ID	03170 - RACE/ETHNIC AFFILITAION (1)	No Longer Used
<b>RES ADDR</b>		
STREET ADDRESS	01080 - RESIDENCE STREET (35)	Protected
CITY	01082 - RESIDENCE CITY/TOWN (15)	Protected
ST	01083 - RESIDENCE STATE (2)	Protected
ZIP	01084 - RESIDENCE ZIP (5)	Protected

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>MAIL ADDR</b>		
STREET ADDRESS	05120 - MAILING STREET (35)	Protected
CITY	05130 - MAILING CITY/TOWN (15)	Protected
ST	05140 - MAILING STATE (2)	Protected
ZIP	05150 - MAILING ZIP (5)	Protected
LN	01045 - APPLICATION REGISTER LINE NUMBER (2)	Protected, 01-10 on Page 1, 11-20 on Page 2
FIRST	03030 - NAME (10)	Protected, 10 occurrences
MI	03030 - NAME (1)	Protected, 10 occurrences
LAST NAME	03030 - NAME (17)	Protected, 10 occurrences
MMDDYYYY	03060 - DATE OF BIRTH (8)	Protected, 10 occurrences
SX	03050 - SEX (1)	Protected, 10 occurrences
SSN/RRN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected, 10 occurrences
CIN	03010 - CLIENT IDENTIFICATION (8)	Protected, 10 occurrences

## Subsystem Processing

### Error Messages and Edits

#### Application Register Menu Errors

(listing is alphabetical by Message)

##### **APPLICATION WORKER WITHDRAWN**

The Application Record has been previously withdrawn and is no longer available.

##### **APPLICATION SYSTEM WITHDRAWN**

The Application Record has been withdrawn by the system because of inactivity.

##### **APPLICATION STATUS: UNDERGOING CLEARANCE**

The Application Record is going through the clearance process. Access to the record is not allowed until Clearance has been completed.

##### **APPLICATION STATUS: UNDERGOING MAINTENANCE**

The Application Record is going through the maintenance process. A Clearance Report may not be requested until maintenance is completed.

##### **APP MAINT NOT ALLOWED WHEN CCRS IS Z**

CNX = Z indicates that this is a Services case known to the CONNECTIONS system. Updates to the Application are done through CONNECTIONS.

##### **CAN ONLY WITHDRAW THROUGH CONNECTIONS**

CNX cannot equal 'Z' or 'Y'.

##### **CASE NOT FOUND**

There was no case found matching the entered case number.

##### **CROSS DISTRICT NOT FOUND**

There was no match found for the district code entered XDIST.

##### **DATA ENTERED INCOMPATIBLE WITH FUNCTION**

When Function = 1, then Reg. No., Version No., Withdrawal Date, Case Num, and Xdist must be all blank.  
When Function = 2, 4 or 5, the Withdrawal Date, Case Num, and Xdist must be blank.

##### **ENTER EITHER REG NO OR CASE NO NOT BOTH**

If Function 6, enter only one of the following: Registry Number or Case Number.

##### **EXISTING CASE TYPE IS INVALID**

For Function 6, Case Type cannot be 13, 21, or 40.

**INITIAL LOAD APPLICATION - COMPLETED FDE**

Application record internal status is 'A' (IL-FDE).

**FULL DATA ENTRY COMPLETED #: XXXXXXXXXXXX 999999**

The Application Record has completed Full Data Entry. The X's represent the Case No. entered during FDE and the 9's represent the Registry No. of the Application.

**INVALID FUNCTION SELECTED**

Entry in FUNCTION field must be either 1, 2, 3, 4, 5, or 6.

**INVALID REGISTRY NUMBER**

Registry Number check digit not valid.

**INVALID VERSION NUMBER**

Version Number must be numeric.

**INVALID WITHDRAWAL DATE**

Withdrawal Date must be a valid calendar date, and not later than today's date.

**NO APP TAD DOCUMENT ALLOWED FOR SERVICES CASE**

Function 4 is not allowed for Case Type 40.

**NO REGISTRY # MATCH**

A valid Registry Number was entered but no Application Record was found for that number.

**NO VERSION # MATCH**

The Version Number entered on the Menu does not equal the Version Number on the Application Record.

**NOT AUTHORIZED TO CANCEL APP**

The logged-on worker does not have the security to withdraw the application.

**REGISTRY NUMBER REQUIRED**

If Function is 2, 3, 4 or 5, then Registry Number must be entered.

**REGISTRY OR CASE NUMBER REQUIRED**

If Function 6, then either Registry or Case Number must be entered.

**REGISTRY RECORD – CASE # IS: XXXXXXXXXXXX 999999**

The Application Record has completed Full Data Entry and Batch Update and is now a Registry Record. The X's represent the Case No. entered during FDE and the 9's represent the Registry No. of the Application.

**SERVICES CASE NOT ALLOWED**

Function 6 cannot be used with a services case.

**USE APP REG NO INSTEAD OF FDE CASE NO**

The entered case number for Function 6 has a case status = '1' (New) or an archive indicator = 'R'.

**UNDERGOING FULL DATA ENTRY**

Function 2 is not allowed when the application is undergoing Full Data Entry

**VERSION NUMBER REQUIRED**

If Function is 2, 3, 4 or 5, then Version Number must be entered.

**WITHDRAWAL DATE PRIOR TO APPLICATION DATE**

Withdrawal Date must not be earlier than Application Date.

**WITHDRAWAL DATE REQUIRED**

If Function is 3, then Withdrawal Date must be entered.

WAPREG - Application Entry Edits

Screen Captions	Edit
CTR	None
APPPDATE	Required. Must be a valid calendar date of 6 digits (MMDDYY), no later than today's date and no earlier than one year from today's date (day and month).
UNIT	Required if WORKER is blank. Must have at least one alpha or numeric character if WORKER field is blank.
WORKER	Required if UNIT is blank. Must have at least one alpha or numeric character if UNIT field is blank
T	Required. A valid Case Type must be entered.
CNX	If Case Type is 40 (Services), values may be Z - open CONNECTIONS case, Y - closed CONNECTIONS case, or R - reopened CONNECTIONS case. All values except, R, are system generated. If Case Type is <u>not</u> 40, this field is blank.
CASE #	If entered, must have at least one non-zero numeric character.
CASE NAME	None
LANGUAGE SPA ENG	Required for all Case Types except 40. An X must be entered in either the SPA field or the ENG field.
PHONE	If entered, area code field must be 3 digits. If entered, telephone number field must be 7 digits.
HII	May be entered only if Case Type is 20 or 24. If entered, must be one digit, 0 - 9. Required for Case Type 24.
APP SRC CODE	Indicates the source of the application, E – Auto App, E – Food Stamp electronic application, B – electronic Auto App and blank – standard WMS application registration.
<b>RES ADDR</b>	
STREET ADDRESS	Required. Must have at least one alpha or numeric character entered.
CITY	Required. Must have at least one alpha or numeric character entered.
ST	Required. Must have a valid State entered.
ZIP	Required. If entered, must be 5 digits.
<b>MAIL ADDR</b>	
STREET ADDRESS	If entered, must have at least one alpha or numeric character entered, and Associated City and State must be entered
CITY	If entered, must have at least one alpha or numeric character entered, and Associated Street and State must be entered.
ST	If entered, must be a valid State, and Associated Street and City must be entered.
ZIP	If entered, must be 5 digits, and Associated Street, City and State must be entered.
LN	None



FIRST	If entered, then Last Name must be entered.
MI	If entered, then Last Name must be entered.
LAST NAME	One Required. At least one alpha or numeric character must be entered.
MMDDYYYY	If entered, it must be a valid calendar date of 8 digits (MMDDYYYY) with Year not prior to 01011847 and not later than today's date and Last Name must be entered.
SX	Must be entered for at least one participant. Values can be "M", "F" or "U". For Unborns, if Sex is "U", then First Name must be UNBORN, Last Name must be entered, Date of Birth and SSN/RRN must be blank, and Case Type must be 11, 12, 16, 17, 19 or 20.
SSN/RRN	If entered, must be 9 digits.
<b>RACE</b>	
H	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
I	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
A	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
B	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
P	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
W	If entered, must be Y or N. For MA Case Types (20, 21, 22, 24) may also be U.
CIN	If entered, must be a valid CIN currently on the database.

***The captions below do not appear on the screen, but are positions below Application Registration Line Number 10 on Page 1 and 20 on Page 1 and 20 on Page 2. The cursor will stop to allow entry of data in these fields.***

LN	If entered, must be 2 digits and correspond to the Line Number showing on the screen for which the Other Name is to be entered. Other Name Code and Other Last Name must be entered.
CODE	If entered, must be "M" or "A" and Other Name Line Number and Other Last Name must be entered.
FIRST NAME	If entered, must be at least one alpha or numeric character and Other Name Line Number, Other Name Code and Other Last Name must be entered.
MIDDLE INITIAL	If entered, must be at least one alpha or numeric character and Other Line Number,
LAST NAME	Last Name must be entered. Must be at least one alpha or numeric character and Other Name Line Number and Other Name Code must be entered.

Application Denial Menu Error Messages

(listing is alphabetical by error message; these error messages occur as a result of menu processing)

**APPLICATION CANNOT BE DENIED WITH UNRESOLVED RFI DATA – RFI FLAG ON**

If at least one individual on an application has unresolved RFI data, then application denial is not allowed.

**CASE MARKED FOR MIGRATION**

Data for this Case Record has been flagged for data migration. Case may not be accessed until after data migration has been run. (See **SRM Transaction Disposition**.)

**CASE # CANNOT BE REUSED WHEN PENDING DATA EXISTS**

Reuse Indicator entered but Case Number cannot be reused because a pending record exists for this case. (38)

**CASE # HAS MA EXT AND/OR SEP DET PENDING – XXXXXX, XXXXXX**

The Case Number is for a closed case that has a Pending Record created by the MA Extension and/or Separate Determination processes. (In the message, the first XXXXXX is the Case Number of the closed case and the second XXXXXX is the Case Number of the Pending Record.)

**CASE # KNOWN TO SYSTEM**

Reuse Indicator not entered and Case Number already exists in system.

**CASE # NOT KNOWN TO SYSTEM**

Reuse Indicator entered, but Case Number entered not known to system.

**CASE # TO BE ASSIGNED REQUIRED**

Case Number must be assigned and entered.

**CASE STATUS INDICATES CASE # CANNOT BE REUSED**

Case Number referenced does not identify a previously inactive case (Case Status 14, 15, 22, 23).

**CNS DISTRICTS MUST USE FDE DENIAL FOR THIS APPLICATION**

Applications with a Case Type of 31 or 32 can only be denied through Full Data Entry Denial, Transaction Type 03. (Note: All districts now are CNS districts.)

**INVALID CASE # FOR CASE TYPE**

For Non-Services Application Denial, Case # must not begin with "S".

**INVALID REGISTRY NUMBER**

Registry Number is missing.

**INVALID TRANSACTION FOR CASE TYPE**

Case Type must not equal 40 for a Non-Services Application Denial Transaction.

**INVALID VERSION #**

Version Number is missing, incomplete or incorrect.

**NO REGISTRY # MATCH**

Application Register not found.

**NO VERSION # MATCH**

Version Number not found.

**REUSE INDICATOR INVALID**

If entered, Reuse Indicator must be "X".

Note: Application Denial processing error messages that are displayed on the System Acknowledgement screen, WSYSAK, can be found in the first two sections (0001-0100 and 0101-0199) of the [WMS ERROR LIST INDEX](#).

Internal Processing

System Withdrawal Process

After a certain period of time, the Application Internal Status (D.E. 24020) of any Application Record that has had no maintenance activity or has not completed Full Data Entry is changed to 8 (System Withdrawn). For MA Case Types (20, 21, 22, 24), this occurs after 180 days have elapsed since the date of the last transaction on that Application Record. The period is 90 days for all other case types. Applications for which a pending record is created after Full Data Entry are not withdrawn by this process and will remain on the system as long as the pending record exists. If a pending record is canceled, the 90 or 180 system withdraw clock is started on the day the pending record is canceled.

When the monthly deletion program (App Killer) runs, it will delete all Application Records with a status of 8. Because the deletion program is run only once a month, some applications may exist on the system for another 30 days beyond their 180 or 90 day deletion date.

App Killer

The program that deletes applications from the WMS system is affectionately referred to as "App Killer". It is run monthly and deletes the following records:

- 1) When FDE for an application has been completed, the next Batch Update processing changes the Application Registry Record to a Registry Record. These Registry Records have an Application Internal Status (D.E. 24020) of 7 (Registry). Each month all Registry Records that are 90 days or older are deleted from the system.
- 2) Each month all Application Records that have an Application Internal Status of 4 (Application Withdrawn) or have had an Application Internal Status 8 (System Withdrawn) for 90 or more days are deleted from the system. All budget data associated with the applications is also deleted.

WMS report, WINR4111 - "Applications Registered - list of Overdue Applications", contains multiple parts. Part III of this report - "Applications To Be Systematically Deleted in 30 Days" list applications by Unit/Worker that will be deleted in 30 days because no activity has taken place. Part IV – "Applications Systematically Deleted" lists all Applications that have been system deleted. See **SRM Operational Information and Management Reports** for a sample of this report.

### WMS Name Compression

The WMS Name Compression process is automatically applied by the system to all first and last names entered on Line Number 1 through 20 when the WAPREG Entry screen is transmitted after Initial Application Register entry or when Application Register Maintenance is completed error-free. Other Names (Maiden names or Aliases) are not subjected to the Name Compression process.

This process consists of two steps:

1. First, all special characters in the first name and last name fields are removed and the name is compressed. (A special character is any keyboard character other than A - Z or 0 - 9).
2. Next, beginning with the First Name field and moving from left to right, all single blank spaces in the First Name field are removed and the name is compressed. However, at the first occurrence of two consecutive blank spaces, step 2 stops. Any subsequent blank spaces to the right are ignored.

This step is then repeated for the Last Name field. The second example below (SMITH etc.) illustrates step 2. The Name Compression process stopped in the Last Name field after encountering the two consecutive blank spaces following SMITH. The step 2 process also stopped in the First Name field when it encountered the two blank spaces preceding PAUL, thus leaving the single blank space between PAUL and JO.

Some examples:

<u>Names As Entered on WAPREG ENTRY Screen</u>		<u>Names as Retained by System After Name Compression</u>	
<u>First</u>	<u>Last</u>	<u>First</u>	<u>Last</u>
M A R Y = A N N ?	S T . J A M E S	M A R Y A N N	S T J A M E S
_ _ P A U L _ _ J O	S M I T H _ _ J R .	_ _ P A U L _ J O	S M I T H _ _ J R
_ M A X	L O N G _ _ 3 R D	M A X	L O N G 3 R D

The compressed name, as retained by the system, is printed on the APP TAD and Clearance Report and is used in all further processing of that name.

### Application Reports

Number	Title	Freq	Description/Processing
WINR1240	Application/Registry Processing Report	Monthly	Provides State and District management with summary totals and percentages on application processing that occurred during the reporting period.
WINR4111	Application Register - List of Overdue Applications, Applications Due for Processing, Applications to be Deleted, Applications Systematically Deleted	Monthly	Provides workers and/or units with a four part listing of all pending applications. <ul style="list-style-type: none"> <li>▪ Overdue 30+ Days Since Application Date</li> <li>▪ Overdue 7+ Days Since Application Date</li> <li>▪ Applications to be Systematically Deleted in 30 Days</li> <li>▪ Applications Systematically Deleted</li> </ul>
WINR4112	Pending Data Status Report Applications and Cases Pending Error Correction - Supervisory Signal - Other Data Status SFED/T Entry	Bi-weekly	Provides workers and supervisors with a list of applications and cases which have had a pending data status for more than 7 days.

Number	Title	Freq	Description/Processing
WINR4113	Application Register - Summary of Application Activity by Local Office, Unit, Worker & Case Type	Monthly	Provides local unit supervisors and district management with a summary of each worker's application workload and the application activity that has occurred during the month covered by the report.

## External Processing

### Auto-App

Auto-App is a web enabled program that allows workers to enter new Application Registrations and do Application Maintenance. The worker enters the same information in Auto-App that is entered on the WAPREG screen in WMS. When all required data has been entered and passed Auto-App data validity edits, the application is sent to WMS. WMS has additional edits and conditions that can generate error messages. The WMS messages are returned to the user with an indication that the error was generated in WMS processing.

Existing WMS applications can be retrieved and loaded into Auto-App where Application Maintenance can be performed. Changes to the application are sent back and stored in WMS. Other features of Auto-App include the functionality to withdraw applications and to create new applications from existing WMS application registrations or cases.

Auto-App can be accessed on the Centraport website from the Application menu in the Links portion of the webpage. More information on Auto-App can be found at [WMS Auto App](#).

### HEAP Web Application

The application for HEAP (LDSS - 3421) is available to the public on the OTDA Internet website. It can be printed from the website, filled in, and submitted to the applicant's county Social Services office or other HEAP Certifier. The HEAP application can also be submitted electronically if the applicant meets all of the following conditions:

1. Lives in a participating county as listed on the OTDA website
2. Received a HEAP benefit for the previous year
3. Resides in the same county as in the previous year

**If this is a client's initial application, an LDSS worker must enter the application in WMS through the Application Registration process.**

The electronically submitted data can be retrieved by LDSS workers via the eHeap Workbook, a web application that workers can access on the Internet. The eHEAP Workbook allows workers to update demographic data, create and store HEAP and ABEL budgets, create payment lines, and invoke Client Notice Subsystem (CNS) transactions. Data entered or modified in the eHEAP Workbook updates the WMS database. The eHEAP Workbook does not retrieve data directly from the WMS database but instead retrieves it from the WRTS database. More information on the eHEAP Workbook can be found in **SRM Budget Calculation**.

### Resource File Integration (RFI)

Each person in WMS, both applicants and recipients, who has a social security number, or who has had a social security number added or changed, is included in the RFI process if they have a Case Type of 11 - 13, 16 - 21, 24, 31, or 32. The purpose of the RFI process is to obtain information on income (both earned and unearned) and resources that may impact the ABEL or MBL budget calculation. Files with identification and demographic data are

sent to the NYS Department of Labor (DOL), the NYS Department of Taxation and Finance, and the Social Security Administration (SSA.) for matching. Matching data is returned to and stored in the WMS system.

Matching is also done against the New Hires file. This file, which is generated by the NYS Department of Taxation and Finance, consists of all persons in New York State who completed a W-4 for the month. The Child Support Management System (CSMS) receives this file and stores it in their database. WMS obtains this New Hire data from CSMS and processes it daily for applicant matches and monthly for recipient matches. Matching data is stored in WMS.

Data from these matching processes is available in WMS through the Resource File Integration subsystem. See **SRM Resource File Integration** for further information about RFI. This data is also used to generate the monthly report, WINR9161 - "New Hires Match Report". See the **SRM Operational Information and Management Reports** for more information on the WINR9161.

### WMS Application Data To Welfare Reform Tracking System (WRTS) and Sidney on SQL (SOS)

Each workday night Upstate WMS creates one file of application data that is sent to both WRTS and SOS. This file contains three records: Application, Applicant, and Application Disposition, with the following data elements:

#### Application Record

FIELD NAME	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE TYPE INDICATOR	none	1 – Non Services, 2 - Services
REGISTRATION NUMBER	01046 - REGISTRY NUMBER (6)	
JUR TRNSCTNL RESP	01010 - TRANSACTION DISTRICT (2)	
RECORD TYPE	none	A - Application
NEW APP OR MAIN APP	none	1 – Initial App, 2 – Maintenance App
VERSION-NUMBER	01047 - VERSION NUMBER (2)	
CASE-TYPE	01060 - CASE TYPE (2)	
APPLCNT-DATE	01090 - APPLICATION DATE (6)	
TX-DATE	02020 - TRANSACTION INPUT DATE (8)	MAINTENANCE DATE
LOCAL-OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
RESP-UNIT	01030 - UNIT IDENTIFIER (5)	
RESP-WORKER	01040 - WORKER IDENTIFIER (5)	
CASE-NUMBER	01050 – CASE NUMBER (10)	
CASE-NAME	01070 – CASE NAME (28)	
LANGUAGE-IND	04002 – LANGUAGE OF NOTICE FLAG (1)	
R-STREET	01080 - RESIDENCE STREET (35)	
R-CITY	01082 - RESIDENCE CITY/TOWN (15)	
R-STATE	01083 - RESIDENCE STATE (2)	
R-ZIP	01084 – RESIDENCE ZIP (5)	
ASSOC-STREET	05120 - MAILING STREET (35)	
ASSOC-CITY	05130 - MAILING CITY/TOWN (15)	
ASSOC-STATE	05140 - MAILING STATE (2)	
ASSOC-ZIP	05150 - MAILING ZIP (5)	
PHONE	01085 - TELEPHONE NUMBER (10)	
ETHNIC-AFL	03170 - RACE/ETHNIC AFFILIATION (1)	

**Applicant Record**

FIELD NAME	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE-TYPE-INDICATOR	none	1 – Non Services, 2 - Services
REG-NO	01046 - REGISTRY NUMBER (6)	
JUR-TRNSCTNL-RESP	01010 - TRANSACTION DISTRICT (2)	
RECORD-TYPE	none	A - Application, B = APPLICANT
APP-REG-LINE-NO	01045 - APPLICATION REGISTER LINE NUMBER (2)	
RECIP-ID	03010 – CLIENT IDENTIFICATION NUMBER (8)	CIN
ACCT-NO	03201 – SOCIAL SECURITY ACCOUNT NUMBER (9)	SSN
SEX	03050 – SEX (1)	
NAME	03030 - NAME (28)	
SURNAME	03030 – NAME (10)	
GIVNAME	03030 - NAME (1)	
MIDINIT	03030 – NAME (17)	
DOB	03060 – DATE OF BIRTH (8)	
INDIVIDUAL-STATUS	03120 - INDIVIDUAL STATUS (2)	
INDIV-ETHNIC-AFL	09303 - INDIVIDUAL RACE/ETHNIC AFFILIATION (1)	
AI-AN	03054 - INDIVIDUAL RACE CODE FOR AMERICAN INDIAN OR ALASKAN NATIVE (1)	
ASIAN	03055 - INTIVIDUAL RACE CODE FOR ASIAN (1)	
BLACK-AFR-AMER	03056 - INDIVIDUAL RACE CODE FOR BLACK OR AFRICAN AMERICAN (1)	
HAWAIIAN-P-ISLDR	03057 - INDIVIDUAL RACE CODE FOR HAWAIIAN OR PACIFIC ISLANDER (1)	
WHITE	03058 -INDIVIDUAL RACE CODE FOR WHITE OR CAUCASIAN (1)	
HISP-LATN	03059 - INDIVIDUAL CODE TO DENOTE HISPANIC OR LATIN ETHNICITY (1)	

**Disposition Record**

FIELD NAME	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE-TYPE-INDICATOR	none	1 – Non Services, 2 - Services
REG-NO	01046 - REGISTRY NUMBER (6)	
JUR-TRNSCTNL-RESP	01010 - TRANSACTION DISTRICT (2)	
RECORD-TYPE	none	A - Application, B = Applicant
DISPOSITION-TYPE	none	01 - Application Denial 02 - Opening 03 - Denial 04 - Worker Withdrawn 09 - Open/Close 10 - Reopening 99 - System Withdrawn
WITHDRAWAL-DATE	01921 - APPLICATION WITHDRAWAL DATE (6)	
TX-DATE	02020 - TRANSACTION INPUT DATE (8)	
VERSION-NUMBER	01047 - VERSION NUMBER (2)	
CASE-TYPE	01060 - CASE TYPE (2)	
APPLCNT-DATE	01090 - APPLICATION DATE (6)	

FIELD NAME	D.E. NUMBER - NAME (SIZE)	REMARKS
LOCAL-OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
RESP-UNIT	01030 - UNIT IDENTIFIER (5)	
RESP-WORKER	01040 - WORKER IDENTIFIER (5)	
CASE-NUMBER	01050 – CASE NUMBER (10)	
CASE-NAME	01070 – CASE NAME (28)	
LINE-NO and CIN	01045 - APPLICATION REGISTER LINE NUMBER (2) 03010 – CLIENT IDENTIFICATION NUMBER (8)	Populated only if client has gone through Full Data Entry (FDE); field can accommodate up to 20 clients (200 characters)
CINTRAK-RSRC-IND	01010 - TRANSACTION DISTRICT (2)	
CCRS-IND	23490 - CCRS INDICATOR (1)	Now referred to as CNX
APP-INT-STATUS	24020 - APPLICATION RECORD INTERNAL STATUS (1)	
BUDGET-IND	24380 - BUDGET INDICATOR (1)	
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
APP-SRC-CD	01066 – Application Source Code (1)	
LIFE-LN-IND	01063 - LIFE-LINE PARTICIPATION (1)	
LANGUAGE-IND	04002 - LANGUAGE OF NOTICE FLAG (1)	
CONCURRENT-APP	01095 - CONCURRENT APPLICATION (1)	
APP-TAD-CYCLE-NO	24751 - APPLICATION TURNAROUND CYCLE NUMBER (2)	
PHONE-NO	01085 - TELEPHONE NUMBER (10)	
TX-DATE-Y2K	02020 - TRANSACTION INPUT DATE (6)	
APP-REG-DATE-Y2K	01048 - APPLICATION REGISTRATION DATE (6)	
R-STREET	01080 - RESIDENCE STREET (35)	
R-CITY	01082 - RESIDENCE CITY/TOWN (15)	
R-STATE	01083 - RESIDENCE STATE (2)	
R-ZIP	01084 – RESIDENCE ZIP (5)	
ASSOC-STREET	05120 - MAILING STREET (35)	
ASSOC-CITY	05130 - MAILING CITY/TOWN (15)	
ASSOC-STATE	05140 - MAILING STATE (2)	
ASSOC-ZIP	05150 - MAILING ZIP (5)	

Application and individual data that is new (initial registration), has changed (application maintenance), is withdrawn (application withdrawal entry), or has been otherwise disposed of (became a case) is included in this file.

Data in the Disposition Record is from the Application Registry Record after Full Data Entry is complete.



### **WRTS**

WRTS loads data from this file into 2 WRTS tables, NY Applications and CIN Apps, where it is available for reporting and tracking purposes.

### **SOS**

For SOS purposes this file broken down by district and each local district receives its file via the BICS print file system. The SOS server for the district then extracts this file and re-formats the data for loading to the BICS server. This data is then available for the Local District for district specific processing needs.

# Budget Calculation

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## Budget Calculation Overview

Budget Calculation in WMS includes two separate but similar processes. For PA and FS the budget calculation process has the mnemonic ABEL which stands for Automated Budget and Eligibility Logic. The budget calculation process for Medical Assistance has the mnemonic MABEL standing for Medicaid Automated Budget and Eligibility Logic. These processes are used to calculate the financial eligibility for PA, FS, and MA cases and can be accessed by separate selections from the WMS Menu Screen.

In some situations a system calculated ABEL or MABEL budget may not be appropriate. In these instances workers may by-pass automated budget calculation and just enter results calculated outside of WMS. This process is referred to as Bottom-Line budget entry. A case or application may have both system calculated and bottom-line budgets associated with it.

WMS can also calculate budgets for the Home Energy Assistance Program (HEAP). HEAP budget calculation is accessed from PA/FS Budget Calculation Menu.

## Stored Budgets

System calculated PA, FS, MA, and HEAP as well as bottom-line PA, FS, and MA budgets can be stored on the data base in association with an Application or Case record by pressing Ctrl+F3 on the calculated budget screens, WBGTPA, WBGTF5, WBGTMMA, and WBGTHP, or on the bottom-line budget screens, WBGTLB and WBMABL. Each time a budget is stored the budget version number is increased by one, and the date the budget was stored is saved.

The current version (the most recently stored version) of any budget type can be accessed for modification and recalculation if necessitated by changes in the case. In addition workers are able to view, but not modify, limited data for up to two historical budgets each for PA, FS, and bottom-line PA/FS budgets on the WMS Budget History screen. Only the current version of an MA or HEAP budget is available for viewing in WMS.

A complete view of all PA, FS, and HEAP current and historical budgets for a case is available using the Budget History web enabled application. This application is described under the External Systems section of this chapter.

If a case is found to be ineligible for benefits after a budget is calculated, it is important to store this surplus budget. The surplus budget is compared to the last eligible budget in order for the Client Notices System to determine the budget language necessary to be included in the appropriate notices sent to the client.

The differentiation between a stored budget and a budget that has been calculated (budget data entered and transmitted but not stored) should be noted. Data for a calculated budget that has not been stored (using F13) will be lost when the user leaves a budget screen except under circumstances described in the Function Keys section of this document.

## Scratchpad Budgets

This functionality allows a worker to calculate a budget that is not associated with a case or application. A worker may want to use Scratchpad Budgets to get a general idea of whether or not a client may be eligible for a grant or to test "what if" scenarios.

For PA and FS, Scratchpad budgets are available for functions 01 - Input Entry and 09 - Cross District Calculation. For MA Scratchpad budgets are available for function 01 - Budget Calculation. To calculate a Scratchpad Budget the word SCRATCHPAD must be entered in the Case Number field on either the WBPAFS - PA/FS Budget Calculation Menu screen or the WBMAMU - MA Budget Calculations screen. Scratchpad budgets cannot be stored.

## Function Keys

Function keys play an important and useful role in budget processes. Specific details of the Function Keys available for each screen are included in the individual screen descriptions. However, because several Function Keys operate in a similar manner on the various budget screens, a general description of the most common Function Key operation follows.

- F1** If pressed on a budget entry or a budget display screen, the budget entry screen is displayed. If the budget on the entry or display screen has been stored or at least been calculated, F1 will return a budget entry screen with the Case Name, Case Number/Registry Number, Office, Unit, and Worker ID fields populated. All other screen fields will be blank.
- If the budget has not been stored or has not been calculated only the Registry or Case Number will be populated. All other fields will be blank. Note: If F1 is pressed from a budget display screen displaying a calculated budget that has not been stored, data for that budget will be lost.
- F2** If pressed on a budget entry or a budget display screen, the budget entry screen is displayed. If the budget on the entry or display screen has been stored or at least been calculated, F2 will return a budget entry screen with all fields populated with data from the displayed stored or calculated budget. If there is no calculated or stored budget, all fields except the Registry or Case number will be blank.
- F3** If pressed on a budget entry or a budget display screen, the budget entry screen is displayed. All fields will be populated with the data which was used to calculate the current stored budget. If there is no stored budget, all fields except the Registry or Case number will be blank. Note: If there is a calculated budget that has not been stored, data for that budget will be lost.
- F4** Pages to and from MA Income Average screen (MBMAIA) and the MA Budget Record screen (MBMAWB). Averaged incomes and deductions are transferred to the MA Budget Record screen. From MA budgets, F4 pages back to MA Income Average screen. F4 is not supported on PA, FS, and HEAP budget screens.
- F5** For MA, PA and FS, returns the WMS Income/Resource Record from a stored or pending Budget (not Bottom-Line).
- F8** For PA and FS pages to and from PA input and/or budget screens and FS input and/or budget screens. In MA F8 is used to page forward through the MA budget screen sequence.
- F9** For PA and FS displays the Budget History Screen.
- F11** For PA and FS displays the Direct Reauthorization screen if all edits are passed after storing the budget.

- F12** For PA and FS, from the ABEL Menu or Budget History Screens, displays WINQ01/WINQ02 - Case/Individual Inquiry Menu.
- F13** Stores a budget(s) on the data base from an error-free budget screen. To store PA or FS budgets the budget effective FROM Date must be the same month or later than the month the budget is stored. Exceptions to this Date edit are Bottom-Line Budgets, Surplus Budgets or Budgets for Case Type 13. These Budgets can have FROM Dates is the past. F13 is not activated for SCRATCHPAD budgets.
- F15** For PA and FS returns the PA/FS Menu screen with Registry Number/Case Number/Dist displayed.

### Budgets in Other Districts

For PA and FS cases, stored Budgets, Bottom-Line Budgets, and Budget History screens for applications/cases in other districts may be viewed by entering the Case Number or Registry Number and the first four letters of the of the district in which the application/case resides.

For MA cases, budget screens for cases in other districts may be viewed by entering Case Number and the first four letters of the district in which the case resides.

## PA/FS Budget Calculation

PA and/or FS budgets must be calculated and stored before recurring payment lines can be entered and Full Data Entry (FDE) can be completed. PA Budgets may be calculated for Case Types 11-13, 16-19. FS Budgets may be calculated for Case Types 11-13, 16-18, 31 and 32.

### Stored PA/FS Budgets

Generally, a system calculated or bottom-line PA or FS budget may be stored by using Ctrl+F3 if the month of the budget Effective FROM Date is the same as or later than the month in which the budget is stored. Exceptions to this rule are surplus PA budgets, surplus FS budgets, and budgets for Case Type 13 (ADC-FC). These budgets can be stored with a past period Effective FROM Date entered. Any budget may be stored with a past period Effective FROM Date.

### Direct Reauthorization

Normally, when payment lines need to be changed based on a newly calculated and stored budget, the worker must go through Undercare/Maintenance and manually enter new payment lines on the WKBK06 screen. Direct Reauthorization, also called Direct Budget Reauthorization (DBR), is a process which allows stored PA and/or FS Budgets with income changes to be used for automatic system-generation of new Payment Lines.

The DBR process is very restricted and is limited to PA and FS budgets with a Transaction Type of 05 - change. The case cannot have a Pending Record and cannot be in "Clockdown Closing" status. Also, districts may choose not to have this functionality available.

Pressing F11 on the WBGTPA – PA Budget or WBGTFSS – FS Budget screens for an updated and stored budget starts the DBR process. The budget is edited to make sure it meets the DBR criteria. Any DBR Budget errors are displayed as Error Numbers on line 24.

If there are no errors, the WBGTO6 - Direct Reauthorization screen is returned with the new payment lines displayed. A reason code must be entered by the user. If errors are encountered when the screen is transmitted, the System Acknowledgment screen is returned with the message TRANSACTION REJECTED.

If the WBGTO6 screen is transmitted successfully, all the following occur:

- the System Acknowledgment screen is returned with the message TRANSACTION ACCEPTED
- a new Authorization is created and printed depending on the local district option (see **SRM Standards, Conventions, and General Information**)
- a Pending Record is created with a Pending Data Status of AT/DBR

The Pending Record created by the DBR process may not be accessed for correction or changes. If corrections or changes are necessary, the Pending Record must be canceled, and changes to payment lines must be made via Undercare/Maintenance.

The following Reason Codes (DE #02050) are the only ones allowed for the Direct Reauthorization Process:



**Loss or Reduction in Earned Income as a Result of:**

- 900 Illness or incapacity
- 905 Lay-off, discharge or other reason for loss of earned income

**Loss or Reduction in Unearned Income as a Result of:**

- 910 Death of spouse, parent or other contributor
- 911 Leaving of parent or spouse and reducing or stopping of support
- 912 Exhaustion of UIB or other reason

**Increased Need:**

- 915 Family member returned home
- 917 Living expense increased for other reason - including newborns

**Non-Financial Reasons:**

- 924 Change in State law or Agency policy
- 925 Other Non-Financial

**Employment or Increased Earnings:**

- 930 Recipient
- 932 Other person in home

**Receipt of or Increase in Unearned Income:**

- 935 Support from absent parent
- 936 Support from other person
- 937 Other unearned income

**Decreased Need:**

- 940 Other financial reason not related to income.

**TA and FS Budget Reason Codes:**

- B20 New budget authorized.
- B22 New budget authorized (For TA: QR/CW - no ten day requirement; For FS: Decrease from written client-provided information)

- B24 New budget authorized; October allotment increase (ALL; FS)
- B25 New budget authorized; COLA adjustment (January; FS)
- Y99 Other manual notice required

### Mass Rebudgeting/Reauthorization

The WMS functionality to calculate new budgets and authorize the resulting new payment lines automatically based on changes which affect a large number of budgets is referred to as Mass Rebudgeting/Reauthorization (MRB/A).

MRB/A runs at scheduled times throughout the year but is also run anytime it is necessary to implement a mass budget change. The regularly scheduled MRB/A's with their associated reason code are:

- Cost of living adjustments in January (JAN)
- Changes in the percentage of Earned Income Disregard in June (EID)
- Adjustments to Food Stamp allotments in October (ALL)

MRB/A is a three part automated process:

1. Case Identification

The MRB/A sorts all cases potentially affected by a change (PA and/or FS) into "eligible" and "exception" files.

2. Rebudgeting

The MRB/A executes a new ABEL calculation for eligible cases to produce a new PA cash grant and/or FS allotment amount.

3. Reauthorization

The MRB/A reauthorizes new PA and FS payment amounts if the re-budgeted case passes a series of reauthorization edits.

Results of MRB/A can be viewed on-line through Mass Rebudgeting Inquiry.

### IV-D Mass Rebudgeting/Reauthorization

The IV-D Mass Rebudgeting/Reauthorization process (IV-D MRB/A) affects PA cases which are reported in the monthly Automated Support Collection Unit (ASCU) "Current Support Collected" file. This process occurs in the following sequence:

1. Case Identification

ASCU provides WMS with a monthly file of potentially affected PA cases for the IV-D support disregard including eligibles and exceptions.

## 2. Rebudgeting, IV-D Payment Line

WMS consolidates the two most recent ASCU files to obtain a previous and current IV-D payment amount to identify MRB/A eligible cases. MRB/A writes a new IV-D disregard payment line for eligible PA cases and calculates a new FS budget where appropriate.

## 3. Reauthorization

The IV-D MRB/A reauthorizes new payment amounts if the re-budgeted case passes a series of reauthorization edits.

Results of IV-D MRB/A can be viewed on-line through IV-D Payment Inquiry.

## Budget Calculation with Cross District Standards - XCALC

It is possible to calculate and store ABEL budgets for Case Types (11-13, 16 - 17, 19) using the benefit standards for needs (such as shelter, fuel, child care, etc.) from a district different from the Transaction District (the district that has responsibility for the case). This functionality is called Cross District Calculation, or XCALC for short, and is accessed by entering Function 9, the Registry Number or Case Number and the first four letters of the cross district (the district whose benefit standards will be used to calculate the budget) on the WBPAFS - PA/FS Budget Calculation Menu screen and transmitting.

If there is no current budget, WBPAPB, the PA Input screen, will be displayed for entry; otherwise, the current PA budget will be displayed on the WBGTPA screen in which case the function keys, F1, F2, or F3, can be used to navigate back to the WBPAPB to enter new or change budget data.

When the budget data has been entered and transmitted successfully, the calculated cross district budget will be displayed on the PA Budget screen, WBGTPA, and the label XCALC will appear on the first line followed by the four letter mnemonic of the cross district used in the calculation. Like any other budget, XCALC budgets can be stored using Ctrl+F3.

If an XCALC budget is the current budget, it will be retrieved and displayed on WBGTPA if this screen is accessed using either Function 9 or Function 1. If WBGTPA is accessed using Function 9, any new calculations will be performed using the standards of the cross district (XCALC) entered on the menu screen. If WBGTPA was accessed using Function 1, any new calculations will be performed using the standards of the Transaction district, and when the new budget is displayed on the WGTGA screen, the XCALC label and field will no longer appear.

The associated food stamp budget must be calculated using the same district standards as the PA budget. To prevent calculation in different districts the error message, XCALC MUST MATCH ON MENU AND PA BUDGET FOR SF8, will be displayed if the worker attempts to access the FS budget for possible calculation in a different district.

## Deletion of Budgets

PA, FS, and HEAP budgets may be manually deleted using Function 4. All stored FS budgets for a case are automatically deleted if, as a result of a WMS transaction, the PA/FS Code is changed to 02, 03, 04, 06 or 09.

## PA/FS Budget Functions

The following functions are available on the PA/FS Budget Calculation Menu screen, WBPAFS.

### 1 – Input Entry

Access to the PA/FS Budget Calculation screens is obtained by entering Function 1 along with either a case number or a registry number (for cases which have not completed FDE and Batch Update) on the WBPAFS – PA/FS Budget Calculation Menu screen and transmitting.

If there is no current stored budget for the case or application record, the WBPAWB - PA Input screen is returned. The eligibility examiner enters the appropriate data and transmits. If the transmission is successful, a calculated budget is returned.

If there is a stored budget, the calculated budget screen, WBGTPA, is returned when the Budget Calculation Menu is transmitted displaying the current PA/FS budget for the case. If changes are necessary, pressing the proper function key (F1, F2, or F3) returns the WBPAWB - PA Input screen where modifications to the current budget or a new budget can be entered.

A successful budget input transaction is acknowledged by the return of the calculated budget screen, WBGTPA. Pressing Ctrl+F3 stores the new calculated budget and presents the Line 24 message: UPDATE MM/DD/YY: BGT99 for PA/FS where MM/DD/YY is the “store” date and 99 is the budget version number which is 01 for the first stored budget. Each time the budget is stored, the Version Number is incremented by 1. The next time the calculated budget screen, WBGTPA, is accessed, the new version number and "Date Stored" will be displayed.

### 2 – Bottom Line Entry

Bottom-Line Entry is a mechanism for storing budgetary information for those budgets that are not calculated using ABEL. The amounts entered on the Bottom-Line screen are those which are the results of a budget calculated outside WMS.

The WBGTLB - PA-FS Bottom-Line screen is returned when Function 2 is selected. If there is no current bottom-line budget stored for the case or application record, all budget fields will be blank. If a current stored bottom-line budget exists for the case or application, WBGTLB is returned with the current budget data displayed. Pressing F1 will clear the fields but it is not necessary before entering or modifying the budget data. A successful bottom-line budget input transaction is acknowledged by the message INPUT DATA IS ERROR FREE displayed on line 24.

Pressing Ctrl+F3 stores the bottom-line budget and presents the Line 24 message: BUDGET 99 UPDATED MM/DD/YY for PA/FS where MM/DD/YY is the “store” date and 99 is the budget version number which is 01 for the first stored budget. Each time a new bottom-line budget is stored, the Version Number is incremented by 1. The next time the calculated bottom-line budget screen, WBGTLB, is accessed, the new version number and "Date Stored" will be displayed.

### 3 – Budget History

Historical budgets are budgets that have been stored prior to the storage of the current budget. For example, if a case had three stored budgets with version numbers 01, 02, and 03, Budget 03 would be the current budget, and Budgets 02 and 01 would be historical budgets.

The Budget History screen, WBPFT, is accessible only if there are existing historical budgets. For each budget type PA, FS, or Bottom-line (BL), limited data for at most two historical budgets (the two immediately prior to the current budget) is displayed on this screen.

#### 4 - Deletions

Stored PA, FS, BL, and HEAP budgets can be deleted using the WBPFDL - Budget Record Deletion screen where the type(s) of budgets to be deleted can be selected. When a selection is made and the screen is successfully transmitted, the message, XX RECORD(S) DELETED (where XX is PA, FS, MA, or HP), acknowledging the deletion is returned. All budgets stored in WMS, current as well as historical, are deleted for the selected budget type(s).

#### 5 - Authorization Report Request

Function 5 is used to request a printed WMS Authorization Report (DSS-3209). If transmission is successful, the WBPFAFS - WMS PA/FS Budget Calculation Menu is returned with the message AUTHORIZATION REPORT SCHEDULED. (See **SRM Standards, Conventions, and General Information** for more information on Authorization Reports.)

#### 6 - Mass Rebudget Inquiry

The WMRINQ - Mass Rebudgeting Inquiry Menu screen is accessed by entering Function 6. Results of MRB/A can be accessed from WMRINQ. Two file types, Eligibles and Exceptions are available for view.

The Eligible file is composed of cases that have been successfully mass rebudgeted (though not necessarily reauthorized). The Exceptions file is composed of cases that were not rebudgeted. On WMRINQ the desired file must be selected (Eligible or Exception) along with entry in the Office, Unit, and Worker fields (exactly as on the affected budgets), and the particular three letter MRB/A Reason Code entered. Transmission of WMRINQ produces Page 1 of the selected file.

A series of screens, also accessed from WMRINQ, presents district totals for the various major categories of MRB/A action and edits. These screens are: (1) Eligible Totals; (2) Exception Totals; (3) Exception Subtotals; (4) MRA Edit Subtotals; (5) Alert Subtotals.

#### 7 - IV-D Payment Inquiry

The IV-D Payment Inquiry selection provides access to the WIVINQ - WMS IV-D Payment Inquiry Menu. This screen operates in a manner similar to that of the Mass Rebudgeting Inquiry screen except that a Reason Code is not a required entry on the WMS IV-D Payment Inquiry Menu screen.

In addition to the IV-D Eligibles list and the IV-D Exceptions lists, three screens presenting district figures for the various major categories of MRB/A actions and edits: (1) Eligible Totals; (2) Exception Totals; (3) IV-D Exception Subtotals, are available for view.

#### 8 - IRCS Inquiry Screen

If a case or application has IRCS data, the WIRCIQ - Inquiry/History screen can be accessed from the WBPFAFS - PA/FS Budget Calculation Menu screen by entering Function 8 along with the case or registry number. Certain types of resources from MA Stored Budgets and Wages, Unemployment Insurance Benefits and IRS pension funds from MA, PA and FS stored budgets are automatically transferred to the IRCS system. The Resources and Income are

associated with the line number as entered on the budget input screens. For more information see **SRM Income and Resource Collection System**.

#### 9 – Cross District Calculation

Cross district budget calculation (XCALC) functionality is available by entering Function 9, a Registry or Case Number, and the first four letters of the cross district on the menu screen and transmitting. If there are no stored budgets, the PA Input screen, WBPAPB, will be displayed. If there is a current stored budget, regardless of whether or not it is an XCALC budget, it will be displayed on the WBGTPA screen. The WBPAPB screen can be accessed from the WBGTPA screen for entry of new budget data by pressing F1, F2, or F3.

#### 10 – HEAP Entry

The Home Energy Assistance Program (HEAP) is a federally funded program that provides assistance to individuals and families to meet their home energy needs. The HEAP program is comprised of Regular Benefit, Emergency Benefit, Furnace Repair/ Replacement, and Weatherization components.

Function 10 provides access to the HEAP Benefit calculation screen. HEAP budgets can be calculated for a specific case or application registration. A Scratchpad HEAP budget can be calculated by entering the word SCRATCHPAD in the Case field when accessing function 10 from the WBPAPB - PA/FS Budget Calculation Menu. Only one HEAP Budget can be stored at a time.

WBPAFS – PA/FS BUDGET CALCULATION MENU

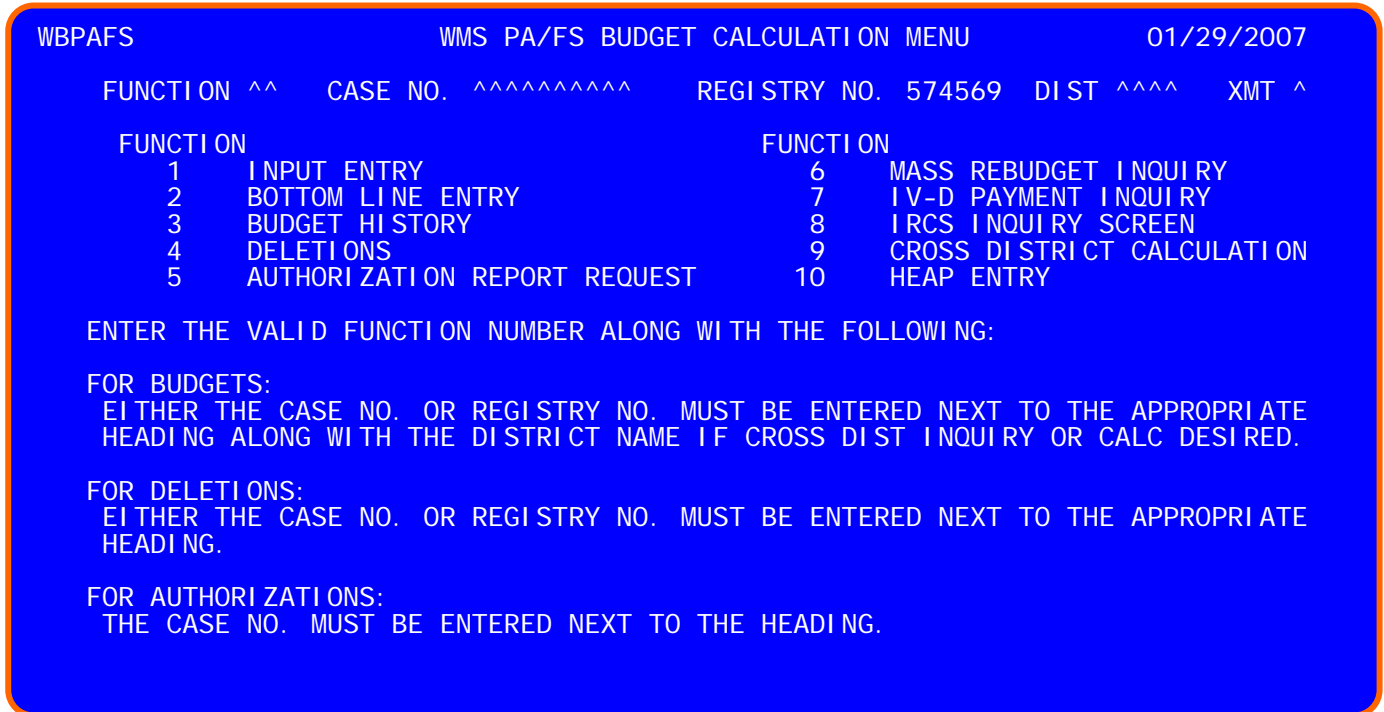


Figure 1 – PA/FS Budget Calculation Menu Screen (WBPAFS)

Purpose

This screen is used to select the desired PA/FS function. Instructions for accessing functions are displayed on the screen.

Access

- Entering 01 on WMSMNU – WMS Menu, **or**
- F1 from SIGNON COMPLETE screen, **or**
- F11 from WBGT06 - Direct Budget Reauthorization screen, **or**
- Ctrl+F6 from WBGTPA - PA Budget screen, **or**
- Ctrl+F5 from WBPFHT - Budget History Screen, WBPAWB - PA Input, and WBFSWB - FS Input (The Reg. No./Case No./Dist fields will be populated with previously entered data.)

Screen Response

Positive

- Function 1 - Displays WBGTPA - PA Budget if PA budget is stored, or WBGTF5 - FS Budget if only FS budget is stored, else WBPAWB - PA input

- Function 2 - Displays WGBTBL - Bottom-Line Entry
- Function 3 - Displays WBPFFT - Budget History Screen
- Function 4 - Displays WBPFDL - Budget Record Deletions
- Function 5 - Displays WBPAFS - PA/FS Budget Calculation Menu with the message:  
AUTHORIZATION REPORT SCHEDULED
- Function 6 - Displays WMRINQ - WMS Mass Rebudgeting Inquiry Menu
- Function 7 - Displays WIVINQ - WMS IVD Payment Inquiry Menu
- Function 8 - Displays WIRCIQ - WMS Income/Resource Record
- Function 8 and an entry in DIST field displays WIRCIQ - WMS Income/Resource Record in the selected district.
- Function 9 - Displays WBGTPA - XCALC PA Budget - if PA Budget is stored, else WBPAPB - PA Input for XCALC District
- Function 10 - Displays WBGTHP - HEAP Budget if there is a stored HEAP budget; else displays WBHPWB - HEAP Input
- Functions 1, 2, 3 or 9 and an entry in DIST field displays stored budgets and Budget History screens in the selected District

#### Negative

- Fields in error return highlighted. One of the messages on Line 24 as shown on the Menu Error Message Pages or shown below:
  - SF99 KEY NOT SUPPORTED - REXMIT (99 = 8, 13)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- If Function 5 is selected, an Authorization Report is printed.

##### Negative

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu



Key	Description
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSNMU - Welfare Management System Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - AutoSDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Services
Ctrl+F10	WMEEMN - EEDSS Host Menu System
Ctrl+F11	W4139R - Auto Closings/Case Conflict Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WBPAFS

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Functions 1-10
CASE NO.	01050 - CASE NUMBER (10)	Must be entered for cases which have completed Batch Update. The word 'SCRATCHPAD' may be entered for Function 1, 9, OR 10.
REGISTRY NO.	01046 - REGISTRY NUMBER (6)	Must be entered for cases which have not completed Batch Update. Entry for Functions 1- 4, 8 - 10
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic: first 4 letters of district name. Can be entered for Functions 1-3, 8, 9.

WBPAWB – PA Input

```

WBPAWB      ** PA INPUT **          VERSION
CASE NAME   REG. NO.   OFC UNIT  WKRK  TRAN  EFFECTIVE DATE  CASE
              574569
-NEEDS- NO:  HH CA FS DP-HH DP-CA  CAP  HC  LF  PSP  PSF  FUEL:  TY RES  UTIL/RES  IVD
----- SHELTER  EXPENSES  ----- 1ST  MONTH  --WATER--- PA ADDITIONAL ALLOWANCES
TY PRO IND RES  FRQ ACTUAL  ALLOW  PAID  SRC RES AMOUNT  R TY AMOUNT  R TY AMOUNT
-----
--EARNED INCOME--
LN I  M SRC F D HRS  GROSS  EXEMPT  MMYT  T AMOUNT  MMYT  T AMOUNT  MMYT  T AMOUNT  R
-----
--OTHER INCOME--
LN SRC FRQ AMOUNT EXEMPT  LN SRC FRQ AMOUNT EXEMPT  LN SRC FRQ  AMOUNT EXEMPT
-----
--RECOUPMENT--  RECALC  TY  BALANCE  PRCNT  AMOUNT  TY  BALANCE  PRCNT  AMOUNT
                  -      TY  BALANCE  00.0  AMOUNT  TY  BALANCE  00.0  AMOUNT
                  -      TY  BALANCE  00.0  AMOUNT  TY  BALANCE  TY  BALANCE
FS CASE NO. _____ DATA SCREEN _ _ _ _ _ XMT
    
```

Figure 2 – PA Input (WBPAWB)

Purpose

This screen is used to input or change PA budget data.

If there are no stored budgets and one or more individuals on the case has resource data that has not been resolved, the message “UNRESOLVED RFI DATA - RFI FLAG ON” will be displayed on line 23. See **SRM Resource File Integration** for more information.

Access

- Selecting Function 1 on WBPAFS – WMS PA/FS Budget Calculation Menu and there is no stored budget, **or**
- F1 from WBGTPA – PA Budget; only the Case Name, Reg. or Case No., OFC, Unit and WKRK fields will be populated, **or**
- F2 from WBGTPA– PA Budget; data fields will be populated with data associated with the budget displayed on WBGTPA regardless of whether or not it is has been stored, **or**
- F3 from WBGTPA – PA Budget; data fields will be populated with data from the current stored budget (if one exists) regardless of whether or not the budget displayed on WBGTPA has been stored. If there is no stored budget, only the Reg. or Case No. field will be populated, **or**

- F8 from WBFSWB – FS Input Screen and there is no stored PA Budget, **or**
- F8 from WBGTFB – FS Budget Screen and there is no stored PA Budget, **or**
- Selecting 9 in Function on WBPAPB – WMS PA/FS Budget Calculation Menu and there is no Cross District Stored budget, **or**
- Transmitting from WBPADC - PA Input (page 2)

### Screen Response

#### Positive

- WBGTPA – PA Budget displaying calculated budget based on values entered on WBPAPB

#### Negative

- Fields in error returned highlighted with the message EXAMINE BLINKING FIELDS on Line 24.
- One of the following messages on Line 24:
  - SF99 KEY NOT SUPPORTED - REXMIT (99 = 4-5, 10-12, 14, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAPB - PA Input with budget data fields empty except for Reg. No. or Case No. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBPAPB - PA Input; if the budget displayed on WBPAPB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. No. or Case No.
F3	WBPAPB - PA Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. No. or Case No.
F6	<i>Renders Workstation Inactive</i>
F7	WBHPWB - HEAP Input
F8	WBFSWB - FS Input if there is no stored FS budget, or WBGTFB - FS Budget if there is a stored FS budget
F9	WBPFFT - Budget History Screen
Ctrl+F3	Stores a budget that was transmitted successfully.

Key	Description
Ctrl+F5	WBPAFS - PA/FS Budget Calculation Menu with previously entered Reg. No./Case No./Dist appearing in appropriate fields.
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WBPABW

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	Protected
CASE NAME	01070 - CASE NAME (28)	Required
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	System Generated From WBPAFS - PA/FS Budget Calculation Menu
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	Required if Worker ID is not entered
WRKR	01040 - WORKER IDENTIFIER (5)	Required if Unit ID is not entered
TRAN	02010 - TRANSACTION TYPE (2)	Required
<b>EFFECTIVE DATE</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATESS (12)	Required 1st occurrence - From Date - MM/DD/YY
TO	01300 - PA BUDGET EFFECTIVE DATESS (12)	Required 2nd occurrence - To Date - MM/DD/YY
CASE	01060 - CASE TYPE (2)	Required
<b>- NEEDS - NO:</b>		
HH	01150 - NUMBER OF PERSONS IN HOUSEHOLD (2)	Required
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	Required
FS	24722 - PA SANCTIONED NUMBER (2)	
DP-HH	01155 - NUMBER OF DEPENDENT PERSONS IN HOUSEHOLD (2)	
DP-CA	01156 - NUMBER OF DEPENDENT PERSONS IN PA CASE (2)	
CAP	01421 - CAP INDICATOR (2)	
HC	01006 - HUD CHILD COUNT (2)	Required if Shelter Type is 39 or 40
LF	01015 - LEARNFARE DELIQUENT COUNT (1)	
PSP	01016 - SHARE LIVING COUNT (2)	
PSF	01019 - PRORATA SANCTION COUNT - PA AND FS (1)	
<b>FUEL:</b>		
TY	11130 - FUEL FOR HEATING TYPE (1)	Required
RES	11048 - FUEL RESTRICTED (1)	
UTIL/RES	11060 - RESTRICTED AMOUNT (7)	
IVD	07043 - IV-D CHILD SUPPORT NON-COMPLIANCE CODE (1)	
<b>SHELTER EXPENSES</b>		
TY	11120 - SHELTER TYPE (2)	Required
PRO	11029 - SHELTER PRORATION INDICATOR (1)	
IND	14020 - TOTAL SHELTER IN ONE (1)	No Longer Supported
RES	11028 - SHELTER RESTRICTED (1)	
FRQ	11007 - SHELTER FREQUENCY CODE (1)	If field is left blank, "M" will be system generated

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ACTUAL	11025 - TOTAL ACTUAL SHELTER COST (7)	Required for all shelter types except 10, 15-17
ALLOW	11020 - SHELTER ALLOWANCE (7)	Required for shelter types 02, 04
<b>1<sup>ST</sup> MONTH</b>		
PAID	11008 - PAID SHELTER AMOUNT (7)	Required if FROM day is <u>not</u> the 1 <sup>st</sup> of the month and Transaction Type is 02 or 10 and Shelter Type Is 01-03, 11, 38-40.
SRC	11009 - SHELTER RESOURCE CODE (1)	I or R required if entry in 1 <sup>ST</sup> MONTH PAID field is more than zero.
<b>WATER</b>		
RES	11038 - WATER RESTRICTED (1)	
AMOUNT	11035 - PA ACTUAL WATER AMOUNT (7)	
<b>PA ADDITIONAL ALLOWANCES</b>		
R	11098 - ADDITIONAL NEEDS (1)	2 occurrences
TY	11086 - PA ADDITIONAL NEEDS TYPE (2)	2 occurrences
AMOUNT	11095 - PA ACTUAL ADDITIONAL NEEDS AMOUNT (7)	2 occurrences
<b>EARNED INCOME</b>		
LN	3045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences; Required for entry of most Earned Income Source Codes
I	07373 - 30+ 1/3 / \$30 INDICATOR (1)	2 occurrences
M	07374 - 30+ 1/3 LAST MONTH INDICATOR (2)	2 occurrences
SRC	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
F	07025 - PA EARNED INCOME FREQUENCY CODE (1)	2 occurrences
D	07322 - WORK DEDUCTIONS INDICATOR CODE (1)	2 occurrences
HRS	07044 - HOURS WORKED PER MONTH (3)	2 occurrences
GROSS	07190 - GROSS WAGES	2 occurrences
EXEMPT	07270 - PA EARNED INCOME EXEMPTION AMOUNT (7)	2 occurrences; For HR \$30 Exemption for MA cases. For exempt income for Boarder Lodger or Roomer for PA cases
<b>CHILD CARE</b>		
MMYY	07006 - CHILD CARE MONTH/YEAR OF DATE OF BIRTH (4)	6 occurrences
T	07024 - CHILD CARE TYPE CODE (1)	6 occurrences
AMOUNT	07400 - PA CHILD CARE DEDUCTION (7)	6 occurrences
R	07403 - CHILD CARE RESTRICTED INDICATOR (1)	
<b>OTHER INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
SRC	07106 - PA UNEARNED INCOME SOURCE (2)	3 occurrences
FRQ	07125 - PA UNEARNED INCOME FREQUENCY CODE (1)	3 occurrences
AMOUNT	07135 - PA UNEARNED INCOME AMOUNT (7)	3 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	3 occurrences
<b>RECOUPMENT</b>		
RECALC	11370 - RECOUPMENT CLAIM RECALCULATION INDICATOR (7)	
TY	11170 - RECOUPMENT/CLAIM TYPES (1)	3 occurrences
BALANCE	11171 - PA RECOUPMENT OPEN BALANCE (7)	3 occurrences
PRCNT	11172 - PA RECOUPMENT PERCENTAGE (4)	3 occurrences
AMOUNT	11176 - PA RECOUPMENT PERCENTAGE (4)	3 occurrences
TY	11004 - FUTURE RECOUPMENT CLAIM TYPE CODE (1)	2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
BALANCE	11005 - FUTURE RECOUPMENT BALANCE AMOUNT (5)	2 occurrences
FS CASE NO.	01056 - FS CASE NUMBER (10)	
DATA SCREEN	NONE	If an 'X' is entered in this field, the WBPADC - PA Data Input screen will be returned when WBP AWB is transmitted.

WBPADC – PA Data Input

```

WBPADC      ** PA DATA INPUT **      VERSION
CASE NAME   REG. NO.   OFC UNIT  WKRK  TRAN  EFFECTIVE DATE  CASE
LESTER, ROBERT  574569          97342  TURNC  02  020107 TO 013108  11

-- CASH RESOURCES --
  0_____

-- MONTHLY EARNED INCOME OF NON-APPLICANT --
LN  AMOUNT      LN  AMOUNT
__  _____  __  _____

-- MONTHLY ADVANCE EITC/MONTHLY UNEARNED INCOME OF NON-APPLICANT --
LN  SRC  AMOUNT      LN  SRC  AMOUNT      LN  SRC  AMOUNT
__  __  _____  __  __  _____  __  __  _____

XMT  __
    
```

Figure 3 – PA Data Input (WBPADC)

Purpose

The WBPADC screen is used to enter Cash Resource and Non-Applicant income information. Data entered on this screen is not used in the ABEL calculation.

Access

- Successful transmission of WBPADB – PA Input under one of the following circumstances:
  - Transaction Type (TRAN) on WBPADB is 02, 06, or 10, **or**
  - Transaction Type (TRAN) is 05 and an 'X' is entered in the Data Screen field on WBPADB

Screen Response

Positive

- Returns to screen WBPADB - PA Input

Negative

- Fields in error returned highlighted with the message EXAMINE BLINKING FIELDS on Line 24.
- One of the following messages on Line 24:

- SF99 KEY NOT SUPPORTED (99 = 1, 3-5, 7-14, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F2	Returns to WBPAAWB - PA Input with fields populated with data previously entered
F6	<i>Renders workstation inactive.</i>
Ctrl+F5	WBPAFS - PA/FS Budget Menu screen with the case number, registry number, and Dist field populated with the data previously entered
Ctrl+F6	WBPAFS - PA/FS Budget Menu with no data entered

Screen Field Description – WBPADC

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	Protected
CASE NAME	01070 - CASE NAME (28)	Protected
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	Protected
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected
UNIT	01030 - UNIT IDENTIFIER (3)	Protected
WRKR	01040 - WORKER IDENTIFIER (5)	Protected
TRAN	02010 - TRANSACTION TYPE (2)	Protected
<b>EFFECTIVE DATE</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATES (12)	Protected
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	Protected
CASE	01060 - CASE TYPE (2)	Protected
CASH RESOURCES	07048 - CASH RESOURCE AMOUNT (7)	
<b>MONTHLY EARNED INCOME OF NON-APPLICANT</b>		
LN	07053 - NON-APPLICANT LINE NUMBER (2)	2 occurrences
AMOUNT	07052 - NON-APPLICANT EARNED INCOME AMOUNT (6)	2 occurrences
<b>MONTHLY ADVANCE EITC/MONTHLY UNEARNED INCOME OF NON-APPLICANT</b>		
LN	07053 - NON-APPLICANT LINE NUMBER (2)	3 occurrences
SRC	07049 - NON-APPLICANT UNEARNED INCOME SOURCE CODE (6)	3 occurrences
AMOUNT	07051 - NON-APPLICANT UNEARNED INCOME AMOUNT (6)	3 occurrences



WBGTPA – PA Budget

WBGTPA ** PA BUDGET **										VERSION		DIST STLA		01/29/2007		
CASE NAME										REG. NO.	OFC	UNIT	WORKER	TRAN	CASE	IVD
LESTER, ROBERT										574569		97786	TURNC	02	11	
HH CA DP-HH DP-CA HC LF PI SI PSP PSF	***** EARNED INCOME *****															
04 04																
TY R		ACTUAL		ALLOW												
	BASIC			30700												
	ENRGY			3870			****	OTHER INCOME	****			0	GROSS			0
03	SPMNT			3000			LN	SRC F	AMOUNT	EXEMPT		0	TAXES			0
	SHELT	0		0							0	0	NYS DIS			0
	WATER	0		0							0	0	WORK EXP			0
1	FUEL			5700							0	0	EXEMPT			0
	OTHER	0		0					TOTAL NET		0	0	CH CARE			0
	OTHER	0		0					\$\$\$\$ PA GRANT	\$\$\$\$			CH CARE			0
	OTHER	0		0					TOTAL NEEDS	43200			CH CARE			0
	TOTAL NEEDS			43200					TOTAL INC	0			DI SREGARD			0
*****	RECOUPMENT	*****		*****					CD / AMT D	43200			TOT DED			0
TY	BALANCE	%	MO	AMT	REM				RECOUPMENT	0			UNAVAIL			0
		0 00.0		0	0				UTIL/RES	0			NET INC			0
		0 00.0		0	0				SHELT/RES	0						
		0 00.0		0	0				RESTRICTED	0	*		EFFECTIVE DATE	*		
RECALC		00.0		0					SEMI CASH	21600			020107 TO 013108			
FS CASE NO.									SEMI N-CASH	0			DATE STORED	/	/	

Figure 4 – PA Budget (WBGTPA)

Purpose

This screen displays either the newly calculated PA budget or the current stored PA budget. All fields on this screen are protected.

If the budget displayed is the current budget, the Version number and the Date Stored will be populated. If the budget is a result of cross district calculation, XCALC followed by the four letter mnemonic of the district used in the calculation will be displayed on the first line of the screen.

When a case fails the Gross Income Test, the TOTAL NEEDS field in the needs column will be replaced with the STATE STANDARD, and the TOTAL NEEDS field under PA GRANT will be replaced with 185% ST STD (State Standard). See the [Temporary Assistance Source Book](#) for more information on the Gross Income Test.

Access

- Transmitting WBPAPB – PA Input Screen with no errors, **or**
- Selecting Function 1 on WBPAPB – WMS PA/FS Budget Calculation Menu and a current PA budget exists, **or**
- Selecting Function 9 on WBPAPB – WMS PA/FS Budget Calculation Menu and a current PA budget exists, **or**

- F8 from WBFSWB or WBGTFB and a current PA budget exists

#### Screen Response

##### Positive

- One or more of the following messages on Line 24:
  - UPDATE MM/DD/YY: BGT99 (99 = Version Number) if F13 is pressed, there is no stored FS Budget and no IRCS record
  - UPDATE MM/DD/YY: BGT99 UPDATE FS BUDGET (99 = Version Number) if F13 is pressed, there is a stored FS budget and no IRCS record.
  - UPDATE MM/DD/YY: BGT99 \* IRCS (99=Version Number) if F13 is pressed, there is no stored FS Budget but there is an IRCS record
  - UPDATE MM/DD/YY: BGT99 UPDATE FS BGT \* IRCS (99=Version Number) if F13 pressed, there is a stored FS Budget and an IRCS record

##### Negative

- One of the following messages displayed on line 24:
  - ADC DEFICIT BDGT CONTAINING SSI INCOME CANNOT BE STORED
  - AUTHORIZATION RPT PRINTER UNAVAILABLE
  - BUDGET NOT ATTACHED TO CASE/SF11 NOT ALLOWED
  - BUDGET STORAGE NOT ALLOWED FOR PAST PERIODS
  - CASE STATUS INVALID/SF14 NOT ALLOWED
  - FS BUDGET UNAVAILABLE FOR CROSS DIST INQUIRY - NOT UPDATED AFTER PA UPDATE
  - FS RECORD NOT UPDATED/SF11 NOT ALLOWED
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - NO FS BUDGET EXISTS FOR CROSS DIST INQUIRY
  - NO PREVIOUS PA-BUDGET EXISTS FOR THIS CASE
  - NO PREVIOUS PA-BUDGET FOUND FOR THIS CASE
  - PA RECORD NOT UPDATED/SF11 NOT ALLOWED
  - PENDING DATA STATUS INVALID/SF-14 NOT ALLOWED
  - SCRATCHPAD, SF99 NOT ALLOWED (99 = 13, 14)
  - SECURITY VIOLATIONS SF99 NOT ALLOWED (99 = 5, 13, 14)
  - SF11 NOT ACTIVE IN THIS DISTRICT
  - SF11 NOT SUPPORTED - 999 (999 = ERROR NUMBER)
  - SF14 NOT ALLOWED FOR DISTRICT
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 10, 12, 17-19)

- SF99 NOT SUPPORTED FOR CROSS DIST (99 = 11)
- STORAGE NOT ALLOWED - EVALUATE CHILD CARE
- XCALC MUST MATCH ON MENU AND PA BUDGET FOR F8
- XMT INVALID MUST HIT SF KEY
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAWB - PA Input with budget data fields empty except for Reg. No. or Case No. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBPAWB - PA Input; if the budget displayed on WBPAWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. No. or Case No.
F3	WBPAWB - PA Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. No. or Case No.
F6	<i>Renders Workstation Inactive</i>
F7	WBHPWB - HEAP Input
F8	WBGTF8 - FS Budget WBFSWB - FS Input - If there is no stored or pending FS budget
F9	WBPFFT - Budget History Screen
F11	WBGTO6 - Direct Reauthorization if all edits are passed (after storing Updated PA and/or FS budget)
Ctrl+F3	Stores PA budget (unless access was via SCRATCHPAD or budget has not been updated)
Ctrl+F4	Prints authorization report for case
Ctrl+F5	WBPAFS - PA/FS Budget Menu screen with the case number, registry number, and Dist field populated with the data previously entered
Ctrl+F6	WBPAFS - PA/FS Budget Menu screen with no data entered

Screen Field Description – WBGTPA

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
DIST	01010 - TRANSACTION DISTRICT	
MM/DD/YYYY	NONE	System Generated, today's date

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 - CASE NAME (28)	
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TRAN	02010 - TRANSACTION TYPE (2)	
CASE	01060 - CASE TYPE (2)	
IVD	07043 - IV-D CHILD SUPPORT NON-COMPLIANCE CODE (1)	
HH	01150 - NUMBER OF PERSONS (2)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
DP-HH	01155 - NUMBER OF DEPENDENT PERSONS IN HOUSEHOLD (2)	
DP-CA	01156 - NUMBER OF DEPENDENT PERSONS IN PA CASE (2)	
HC	01006 - HUD CHILD COUNT (2)	
LF	01015 - LEARNFARE DELINQUENT COUNT (2)	
PI		
SI		
PSP	01016 - SHARE LIVING COUNT (2)	
PSF	01019 - PRORATA SANCTION COUNT - PA AND FS (2)	
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences
30I	07373 - 30+ 1/3 / \$30 INDICATOR (1)	2 occurrences
30M	07374 - 30+ 1/3 LAST MONTH INDICATOR (2)	2 occurrences
SRC	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
FRQ	07025 - PA EARNED INCOME FREQUENCY CODE (1)	2 occurrences
D	07322 - WORK DEDUCTIONS INDICATOR CODE (1)	2 occurrences
CCR	07403 - CHILD CARE RESTRICTED INDICATOR (1)	
BASIC ALLOW	11010 - BASIC ALLOWANCE AMOUNT (7)	
ENRGY ALLOW	11050 - HOME ENERGY ALLOWANCE AMOUNT (7)	
SPMNT ALLOW	11052 - SUPPLEMENTAL HOME ENERGY ALLOWANCE AMOUNT (7)	
SHELT TY	11120 - SHELTER TYPE (2)	
SHELT R	11028 - SHELTER RESTRICTED (1)	
SHELT ACTUAL	11025 - TOTAL ACTUAL SHELTER COST (7)	
SHELT ALLOW	11020 - SHELTER ALLOWANCE (7)	
WATER R	11038 - WATER RESTRICTED (1)	
WATER ACTUAL	11035 - PA ACTUAL WATER AMOUNT (7)	
WATER ALLOW	11030 - PA WATER AMOUNT (7)	
FUEL TY	11130 - FUEL FOR HEATING TYPE (1)	
FUEL R	11048 - FUEL RESTRICTED (1)	
FUEL ALLOW	11040 - FUEL FOR HEATING AMOUNT (7)	
OTHER TY	11086 - PA ADDITIONAL NEEDS TYPE (2)	3 occurrences
OTHER R	11098 - ADDITIONAL NEEDS RESTRICTED INDICATOR (1)	3 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
OTHER ACTUAL	11095 - PA ACTUAL ADDITIONAL NEEDS AMOUNT (7)	3 occurrences
OTHER ALLOW	11090 - PA ADDITIONAL ALLOWANCE AMOUNT (7)	3 occurrences;
TOTAL NEEDS ALLOW or STATE STANDARD ALLOW	11100 - TOTAL NEEDS AMOUNT (7)	Overlay field; If case fails Gross Income Test, 'State Standard' will be displayed.
<b>OTHER INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
SRC	07106 - PA UNEARNED INCOME SOURCE (2)	3 occurrences
F	07125 - PA UNEARNED INCOME FREQUENCY CODE (1)	3 occurrences
AMOUNT	07135 - PA UNEARNED INCOME AMOUNT (7)	3 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	3 occurrences
TOTAL NET	07130 - PA NET UNEARNED INCOME (7)	
GROSS	07027 - MONTHLY GROSS EARNED INCOME AMOUNT (7)	2 occurrences
TAXES	07340 - STATE TAX DEDUCTION (7)	2 occurrences
NYS DIS	07210 - NYS DISABILITY DEDUCTION (7)	2 occurrences
WORK EXP	07320 - WORK EXPENSES DISREGARD AMOUNT (7)	2 occurrences
EXEMP	07270 - PA EARNED INCOME EXEMPTION AMOUNT (7)	2 occurrences
CH CARE	07400 - PA CHILD CARE DEDUCTION (7)	6 occurrences
DISREGARD	07370 - \$30 & 1/3 / \$30 EXEMPTION (7)	2 occurrences
TOT DED	07200 - PA EARNED INCOME DEDUCTION AMOUNT (7)	2 occurrences
UNAVAIL	07290 - OTHER UNAVAILABLE INCOME (7)	2 occurrences
NET INC	07030 - PA NET APPLICABLE EARNED INCOME (7)	2 occurrences
<b>PA GRANT</b>		
TOTAL NEEDS	11100 - TOTAL NEEDS (7)	
TOTAL INC	07150 - PA NET AVAILABLE INTOME (7)	
CD / AMT D	11161 - TOTAL BUDGET SURPLUS OR DEFICIT AMOUNT (7)	
RECOUPMENT	11175 - PA RECOUPMENT TOTAL AMOUNT (7)	
UTIL/RES	11060 - RESTRICTED AMOUNT (7)	
SHELT/RES	11026 - PA SHELTER RESTRICTED AMOUNT (7)	
RESTRICTED	11180 - RESTRICTED GRANT AMOUNT (7)	
SEMI CASH	11111 - PA SEMI-MONTHLY CASH GRANT (7)	
SEMI N-CASH	11112 - PA SEMI-MONTHLY NON-CASH GRANT (7)	
<b>RECOUPMENT</b>		
TY	11170 - RECOUPMENT/CLAIM TYPES (1)	3 occurrences
BALANCE	11171 - PA RECOUPMENT OPEN BALANCE (7)	3 occurrences
%	11172 - PA RECOUPMENT PERCENTAGE (4)	4 occurrences; the fourth occurrence is the total percentage rate for all recoupments
MO	11174 - PA RECOUPMENT NUMBER OF MONTHS (3)	4 occurrences; the fourth occurrence displays the number of months of the shortest recoupment.
AMT	11176 - PA RECOUPMENT PERCENTAGE (4)	4 occurrences; the fourth occurrence is the total amount to be recouped.
REM	11177 - PA RECOUPMENT REMAINDER (7)	3 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
RECALC	11370 - RECALCULATION INDICATOR (1)	A 'Y' displayed in this field means the displayed balance was automatically calculated. 'N' means it was not automatically calculated. This field will not be displayed on stored budgets.
<b>EFFECTIVE DATE</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATES (12)	1 <sup>ST</sup> occurrence is the Effective From Date
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	2 <sup>nd</sup> occurrence is the Effective To Date
FS CASE NO.	01056 - FS CASE NUMBER (10)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

WBFSWB – FS Input

```

WBFSWB      ** FS INPUT **      VERSION
CASE NAME      REG. NO.  OFC UNIT  WRKR  TT SD  EFFECTIVE DATE  CT
              574569
-----SHELTER-----
NO. CASE  SPONSOR  FUEL      SUA  MMY  EXPENSE  HT/AC  UTIL  PHONE  A/D  IT CE
SHELT: TY AMOUNT  TYPE:  DATE:  IND:
   0
-----EARNED INCOME-----
LN SRC FRQ HRS AMOUNT  LN SRC FRQ HRS AMOUNT  LN SRC FRQ HRS AMOUNT
-----UNEARNED INCOME-----
LN SRC FRQ AMOUNT  LN SRC FRQ AMOUNT  LN SRC FRQ AMOUNT  LN SRC FRQ AMOUNT
-----PA INCOME-----
AMOUNT  AMOUNT  DEPENDENT CARE
MMYY FRQ AMOUNT  MMY  FRQ AMOUNT  MMY  FRQ AMOUNT  MMY  FRQ AMOUNT
-----ADDITIONAL DEDUCTIONS/EXCLUSIONS-----
MEDICAL B P  SUPPORT  BRD/LDG  NEG-FRM  PSNL CR
-----CLAIMS-----
RECALC  TY NO.  DI SQ.  BALANCE AMOUNT  TY NO.  DI SQ.  BALANCE AMOUNT
              XMT
    
```

Figure 5 – FS Input (WBFSWB)

Purpose

This screen is used to input or change FS budget data. If there are no stored budgets and one or more individuals on the case has resource data that has not been resolved, the message “UNRESOLVED RFI DATA - RFI FLAG ON” will be displayed on line 23. See **SRM Resource File Integration** for more information.

Access

- F1 from WBGTFB – FS Budget; only the Case Name, Reg. or Case No., OFC, Unit and WRKR fields will be populated, **or**
- F2 from WBGTFB– FS Budget; data fields will be populated with data associated with the budget displayed on WBGTPA regardless of whether or not it is has been stored, **or**
- F3 from WBGTFB – FS Budget; data fields will be populated with data from the current stored budget (if one exists) regardless of whether or not the budget displayed on WBGTPA has been stored. If there is no stored budget, only the Reg. or Case No. field will be populated, **or**
- F8 from WBPABW – PA Input and there is no stored FS Budget, **or**
- F8 from WBGTPA – PA BUDGET and there is no stored FS Budget

### Screen Response

#### Positive

- WBGTF5 – FS Budget

#### Negative

- Field(s) in error return highlighted with the message EXAMINE BLINKING FIELDS on line 24
- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED – REXMT (99 = 4, 5, 10-14, 17-19)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WBFSWB - FS Input with budget data fields empty except for Reg. No. or Case No. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBFSWB - FS Input; if the budget displayed on WBPAPWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. No. or Case No.
F3	WBFSWB - FS Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. No. or Case No.
F6	<i>Renders Workstation Inactive</i>
F7	WBHPWB - HEAP Input
F8	WBPAPWB - PA Input - if there is no calculated PA Budget, WBGTPA - PA Budget - the most recent calculated budget, stored or unstored, will be displayed.
F9	WBPFHT - Budget History Screen
Ctrl+F5	WBPAFS - PA/FS Budget Menu screen with the case number, registry number, and Dist field populated with the data previously entered
Ctrl+F6	WBPAFS - PA/FS Budget Menu screen with no data entered



Screen Field Description - WBFSWB

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
CASE NAME	01070 - CASE NAME (28)	Protected
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	Protected
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected
UNIT	01030 - UNIT IDENTIFIER (3)	Protected
WRKR	01040 - WORKER IDENTIFIER (5)	Protected
TT	02010 - TRANSACTION TYPE (2)	Protected
SD	02070 - SEPARATION DETERMINATION BUDGET INDICATOR (1)	
<b>EFFECTIVE DATE</b>		
NONE	01310 - FS BUDGET EFFECTIVE DATE (12)	
TO	01310 - FS BUDGET EFFECTIVE DATE (12)	
CT	01060 - CASE TYPE (2)	
<b>SHELTER</b>		
NO. CASE	01154 - NUMBER OF PERSONS IN FS CASE (2)	
SPONSOR	01158 - NUMBER OF PERSONS IN A SPONSOR'S HOUSEHOLD (2)	
FUEL TYPE:	11130 - FUEL FOR HEATING TYPE (1)	
SUA DATE: MMY	17001 - FS STANDARD UTILITY ALLOWANCE (SUA) END DATE (6)	
<b>EXPENSE IND:</b>		
HT/AC	11245 - ACTUAL HEATING FUEL COST (7)	
UTIL	17060 - FS UTILITY EXPENSE INDICATOR (1)	
PHONE	17070 - FS TELEPHONE EXPENSE INDICATOR (1)	
A/D	17020 - FS AGED DISABLED INDICATOR (1)	
IT	07110 - SEPARATE HOUSEHOLD INCOME TEST INDICATOR (1)	
CE	11320 - FS CATEGORICAL ELIGIBILITY INDICATOR (1)	
<b>SHELT:</b>		
TY	11121 - SHELTER TYPE (2)	
AMOUNT	11225 - FS ACTUAL SHELTER AMOUNT (7)	
WATER	11235 - FS ACTUAL WATER AMOUNT (7)	
HT/AC	11245 - ACTUAL HEATING FUEL COST (7)	
DISPOSAL	11255 - FS ACTUAL DISPOSAL COST (7)	
UTILITY	11265 - FS ACTUAL UTILITY COST (7)	
PHONE	11275 - FS ACTUAL TELEPHONE COST (7)	
<b>OTHER:</b>		
TY	11087 - FS ADDITIONAL NEEDS TYPE (2)	
AMOUNT	11295 - FS ACTUAL NEEDS AMOUNT (7)	
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
SRC	07017 - FS EARNED INCOME SOURCE (2)	3 occurrences
FRQ	07026 - FS EARNED INCOME FREQUENCY CODE (1)	3 occurrences
HRS	07044 - HOURS WORKED PER MONTH (3)	3 occurrences
AMOUNT	07045 - FS EARNED INCOME AMOUNT (7)	3 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences
SRC	07107 - FS UNEARNED INCOME SOURCE (2)	4 occurrences
FRQ	07126 - FS UNEARNED INCOME FREQUENCY CODE (1)	4 occurrences
AMOUNT	07145 - FS UNEARNED INCOME AMOUNT (7)	4 occurrences
<b>PA INCOME</b>		
AMOUNT	07145 - FS UNEARNED INCOME AMOUNT (7)	2 occurrences
<b>DEPENDENT CARE</b>		
MYY	07006 - CHILD CARE MONTH/YEAR DATE OF BIRTH (4)	3 occurrences
FRQ	07412 - FS DEPENDENT/CHILD CARE FREQUENCY (1)	3 occurrences
AMOUNT	07410 - FS DEPENDENT/CHILD CARE AMOUNT (7)	3 occurrences
<b>ADDITIONAL DEDUCTIONS/EXCLUSIONS</b>		
MEDICAL	07420 - FS MEDICAL DEDUCTION AMOUNT (7)	
B	07023 - FS MEDICARE COUNT (1)	
P	07074 - FS MED PRESCRIPTION DRUG CARE COUNT (1)	
SUPPORT	07041 - FS ACTUAL CHILD SUPPORT AMOUNT (7)	
BRD/LDG	07430 - FS BOARDER LODGER EXCLUSION AMOUNT (7)	
NEG-FRM	07750 - FS NEGATIVE FARM INCOME EXCLUSION (7)	
PSNL CR	07440 - FS GROUP HOME EXCLUSION AMOUNT INPUT (7)	
<b>CLAIMS</b>		
RECALC	11370 - RECOUPMENT CLAIM RECALCULATION INDICATOR (7)	
TY	11170 - RECOUPMENT CLAIM TYPES (1)	2 occurrences
NO. DISQ.	11378 - FS CLAIM NUMBER OF PERSONS DISQUALIFIED (1)	2 occurrences
BALANCE	11371 - FS CLAIM BALANCE AMOUNT (7)	2 occurrences
AMOUNT	11376 - FS CLAIM AMOUNT (7)	2 occurrences

WBGTF5 – FS Budget

WBGTF5		** FS BUDGET **		VERSION				DIST		STLA		01/29/2007	
CASE NAME	REG. NO.	OFC	UNIT	WRKR	TT	SD	CT	CE	#	SH	AD	IT	P
LESTER, ROBERT	574569		98871	TURNC	02		11	Y	01				
I/TY	ACTUAL	ALLOW	UNEARNED INCOME		EARNED INCOME		***** ADDL *****		***** EXCLUSIONS *****				
01 SHEL	0	0	LN	SRC	FRQ	AMOUNT	LN	SRC	FRQ	AMOUNT	**	**	
WATER	0	0				0				0	BRD/LDG	0	
N 0 HT/AC	0	0				0				0	NEG-FRM	0	
DISP	0	0				0				0	PSNL CR	0	
A UTIL	0	22200				0				0	SPONSOR	0	
N PHONE	0	0	PA			0	HRS #	1	2	3	TOTAL	0	
OTHER	0	0	PA			0					TOTAL	0	
TOTAL SHEL	22200		TOTAL			0					***** DEDUCTIONS *****	*****	
\$\$\$ FS ALLOTMENT \$\$\$	***** CLAIMS *****		*****		*****		*****		*****		ACTUAL	ALLOW	
TOTAL INC	0	T	DISQ	BALANCE	AMOUNT	MO	REM	DEP CARE	0		0	0	
ADDL EXCL	0	0	0	0	0	0	0	DEP CARE	0		0	0	
TOTAL DED	35600	0	0	0	0	0	0	MEDICAL	0		0	0	
FS NET INC	0	RECALC				0		SUPPORT	0		0	0	
CLAIM AMT	0							20% EARNED	0		0	0	
\$\$\$\$ BENEFIT \$\$\$\$\$								STANDARD			13400		
MONTHLY	15500		** EFFECTIVE DATE **					EXC SHEL	22200		22200		
			020107 TO 013108					TOTAL DEDUCTIONS			35600		
			DATE STORED / /					TA VERSION NO.					

Figure 6 – FS Budget (WBGTF5)

Purpose

This screen displays the calculated FS budget. All fields on this screen are protected.

If the budget displayed is the current budget, the Version number and the Date Stored will be populated. If the budget is a result of cross district calculation XCALC followed by the four letter mnemonic of the district used in the calculation will be displayed on the first line of the screen.

Access

- Transmitting WBF5WB – FS Input with no errors, **or**
- Selecting Function 1 on WBP5FS – PA/FS Budget Calculation Menu and a current FS budget exists but no current PA budget exists, **or**
- Selecting Function 9 on WBP5FS – WMS PA/FS Budget Calculation Menu no current PA budget exists, **or**
- F8 from WBGTPA – PA Budget screen or WBP5WB – PA Input and there is a calculated FS budget

Screen Response

Positive

- One or more of the following messages On Line 24:

- If Ctrl+F3 pressed and there is no IRCS record, UPDATE MM/DD/YY: BGT99 (99 = Version Number)
- If Ctrl+F3 pressed and there is an IRCS record, UPDATE MM/DD/YY: BGT99\*IRCS (99=Version Number) CLM-TRK UPDATED
- CLM FILE DELETED
- CLM DATA DELETED

#### Negative

- One of the following messages on Line 24:
  - AUTHORIZATION RPT PRINTER UNAVAILABLE
  - AUTHORIZATION REPORT SCHEDULE ERROR
  - BUDGET NOT ATTACHED TO CASE/SF11 NOT ALLOWED
  - CASE STATUS INVALIDS/SF14 NOT ALLOWED
  - \*CLM-TRK ERROR 9999\* (9999=SYSTEM ERROR NUMBER)
  - FS RECORD NOT UPDATED/SF11 NOT ALLOWED
  - INVALID CASE TYPE, SF5 NOT ALLOWED
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - NO PA BUDGET EXISTS FOR CROSS DIST INQUIRY
  - NO PREVIOUS FS-BUDGET EXISTS FOR THIS CASE
  - NO PREVIOUS FS-BUDGET FOUND FOR THIS CASE
  - PA RECORD NOT PDATED/SF11 NOT ALLOWED
  - PENDING DATA STATUS INVALID/SF14 NOT ALLOWED
  - SCRATCHPAD, SF99 NOT ALLOWED (99 = 5, 13, 14)
  - SECURITY VIOLATIONS/SF99 NOT ALLOWED (99 = 13, 14)
  - SF11 NOT ACTIVE IN THIS DISTRICT
  - SF11 NOT SUPPORTED-999 (999=ERROR NUMBER)
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 11, 14)
  - SF13 NOT ALLOWED FOR PAST PERIOD BUDGET
  - SF13 NOT ALLOWED FOR SEPARATE HOUSEHOLD INCOME TEST BUDGET
  - SF14 NOT ALLOWED FOR APPLICATIONS
  - SF14 NOT ALLOWED FOR DISTRICT
  - SF99 NOT SUPPORTED-REXMT (99 = 4, 10, 12, 17-22)
  - XMIT INVALID MUST HIT SF KEY
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBFSWB - FS Input with budget data fields empty except for Reg. No. or Case No. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBFSWB - FS Input; if the budget displayed on WBPAPWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. No. or Case No.
F3	WBFSWB - FS Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. No. or Case No.
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F7	WBHPWB - HEAP Input
F8	WBGTPA - PA Budget, if there is a stored or pending PA budget (if there is both a stored and pending budget, the stored budget is displayed), or WBPAPWB - PA Input, if there is no stored or pending PA budget
F9	WBGT06 - Budget History Screen
F11	WBGT06 - Direct Reauthorization if all edits are passed (after storing updated FS budget)
Ctrl+F3	Stores FS budget (unless access was via SCRATCHPAD)
Ctrl+F4	Prints authorization report for case
Ctrl+F5	WBPAFS - PA/FS Budget Calculation Menu with previously entered Reg. No./Case No./Dist appearing in appropriate fields
Ctrl+F6	WBPAFS - PA/FS Budget Menu screen with no data entered

Screen Field Description – WBGTF5

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
DIST	01010 - TRANSACTION DISTRICT	4 letter mnemonic
MM/DD/YYYY	NONE	System Generated; Today's Date
CASE NAME	01070 - CASE NAME (28)	
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
WRKR	01040 - WORKER IDENTIFIER (5)	
TT	02010 - TRANSACTION TYPE (2)	
SD	02070 - SEPARATION DETERMINATION BUDGET INDICATOR (1)	
CT	01060 - CASE TYPE (2)	
CE	11320 - FS CATEGORICAL ELIGIBILITY INDICATOR (1)	
#	01154 - NUMBER OF PERSONS IN FS CASE (2)	
SH	01158 - NUMBER OF PERSONS IN A SPONSOR'S HOUSEHOLD (2)	
AD	17020 - FS AGED DISABLED INDICATOR (1)	
IT	07110 - SEPARATE HOUSEHOLD INCOME TEST INDICATOR (1)	
P	07074 - FS MED PRESCRIPTION DRUG CARD COUNT (1)	
SHELT TY	11121 - SHELTER TYPE (2)	
SHELT ACTUAL	11225 - FS ACTUAL SHELTER AMOUNT (7)	
SHELT ALLOW	11220 - FOOD STAMPS SHELTER AMOUNT (7)	
WATER ACTUAL	11235 - FS ACTUAL WATER AMOUNT (7)	
WATER ALLOWED	11230 - FS WATER AMOUNT (7)	
HT/AC I	17040 - FS HEAT EXPENSE INDICATOR (1)	
HT/AC TY	11130 - FUEL FOR HEATING TYPE (1)	
HT/AC ACTUAL	11245 - ACTUAL HEATING FUEL COST (7)	
HT/AC ALLOW	11240 - FS HEAT ALLOWANCE	
DISP ACTUAL	11255 - FS ACTUAL DISPOSAL COST (7)	
DISP ALLOW	11250 - FOOD STAMPS DISPOSAL AMOUNT (7)	
UTIL I	17060 - FS UTILITY EXPENSE INDICATOR (1)	
UTIL ACTUAL	11265 - FS ACTUAL UTILITY COST (7)	
UTIL ALLOW	11260 - FS UTILITY ALLOWANCE (7)	
PHONE I	17070 - FS TELEPHONE EXPENSE INDICATOR (1)	
PHONE ACTUAL	11275 - FS ACTUAL PHONE COST (7)	
PHONE ALLOW	11270 - FS TELEPHONE ALLOWANCE (7)	
OTHER TY	11087 - FS ADDITIONAL NEEDS TYPE (1)	
OTHER ACTUAL	11295 - FS ACTUAL NEEDS AMOUNT (7)	
OTHER ALLOW	11290 - FS ADDITIONAL ALLOWANCE (7)	
TOTAL SHELT	11300 - FS TOTAL SHELTER EXPENSE (7)	
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences
SRC	07107 - FS UNEARNED INCOME SOURCE (2)	4 occurrences
FREQ	07126 - FS UNEARNED INCOME FREQUENCY CODE (1)	4 occurrences
AMOUNT	07145 - FS UNEARNED INCOME AMOUNT (7)	4 occurrences
PA AMOUNT	07145 - FS UNEARNED INCOME AMOUNT (7)	2 occurrences
TOTAL	07140 - FS APPLICABLE UNEARNED INCOME (7)	
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
SRC	07017 - FS EARNED INCOME SOURCE (2)	3 occurrences
FREQ	07026 - FS EARNED INCOME FREQUENCY CODE (1)	3 occurrences
AMOUNT	07045 - FS EARNED INCOME AMOUNT (7)	3 occurrences
TOTAL	07040 - FS CASE APPLICABLE EARNED INCOME (7)	
<b>HRS #</b>		
1	07044 - HOURS WORKED PER MONTH (3)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
2	07044 - HOURS WORKED PER MONTH (3)	
3	07044 - HOURS WORKED PER MONTH (3)	
<b>ADDL EXCLUSIONS</b>		
BRD/LDG	07430 - FS BOARDER LODGER EXCLUSION AMOUNT (7)	
NEG-FRM	07750 - FS NEGATIVE FARM INCOME EXCLUSION (7)	
PSNL CR	07440 - FS GROUP HOME EXCLUSION AMOUNT INPUT (7)	
SPONSOR	07450 - SPONSORS INCOME EXCLUSION AMOUNT (7)	
TOTAL	07470 - FS INCOME EXCLUSION AMOUNT (7)	
<b>FS ALLOTMENT</b>		
TOTAL INC	07160 - FS TOTAL INCOME (7)	
ADDL EXCL	07470 - FS INCOME EXCLUSION AMOUNT (7)	
TOTAL DED	07460 - FS TOTAL DEDUCTIONS AMOUNT (7)	
FS NET INC	07060 - FS NET INCOME (7)	
CLAIM AMT	11375 - FS TOTAL CLAIM AMOUNT (7)	
<b>CLAIMS</b>		
T	11170 - RECOUPMENT CLAIM TYPES (1)	2 occurrences
DISQ	11378 - FS CLAIM NUMBER OF PERSONS DISQUALIFIED (1)	2 occurrences
BALANCE	11371 - FS CLAIM BALANCE AMOUNT (7)	2 occurrences
AMOUNT	11376 - FS CLAIM AMOUNT (7)	2 occurrences
MO	11374 - FS CLAIM MONTHS (2)	2 occurrences
REM	11377 - FS CLAIM REMAINDER AMOUNT (7)	2 occurrences
<b>DEDUCTIONS</b>		
DEP CARE ACTUAL	07410 - FS DEPENDENT/CHILD CARE AMOUNT (7)	3 occurrences
DEP CARE ALLOW	07410 - FS DEPENDENT/CHILD CARE AMOUNT (7)	3 occurrences
MEDICAL	07023 - FOOD STAMP MEDICARE COUNT (1)	
MEDICAL ACTUAL	17420 - FS MEDICAL DEDUCTION AMOUNT (7)	
MEDICAL ALLOW	17420 - FS MEDICAL DEDUCTION AMOUNT (7)	
SUPPORT ACTUAL	07041 - FS ACTUAL CHILD SUPPORT AMOUNT (7)	
SUPPORT ALLOW	07042 - FS ALLOWED CHILD SUPPORT AMOUNT (7)	
20% EARNED	07050 - FOOD STAMP PERCENTAGE EXEMPTION (7)	
STANDARD	17010 - FS STANDARD DEDUCTION AMOUNT (7)	
EXC SHELTT ACTUAL	11310 - FS EXCESS SHELTER ADJUSTMENT (7)	
EXC SHELTT ALLOW	11310 - FS EXCESS SHELTER ADJUSTMENT (7)	
TOTAL DEDUCTIONS	07460 - FS TOTAL DEDUCTIONS AMOUNT (7)	
<b>BENEFITS</b>		
MONTHLY	17050 - FOODSTAMP ALLOWMENT VALUE (7)	
1 <sup>ST</sup> MONTH	17052 - FOOD STAMP FIRST MONTH ALLOTMENT AMOUNT (7)	
QUARTERLY	17080 - FOOD STAMP QUARTERLY ALLOTMENT AMOUNT (7)	
<b>EFFECTIVE DATE</b>		
NONE	01310 - FS BUDGET EFFECTIVE DATE (12)	First six digits of the data element are the Effective From Date
TO	01310 - FS BUDGET EFFECTIVE DATE (12)	Second six digits of the data element are the Effective To Date
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	
TA VERSION NO.	24022 - TEMPORARY ASSISTANCE/FOOD STAMP VERSION NUMBER (2)	

WBG TBL – PA-FS Bottom-Line

WBG TBL	PA-FS	BOTTOM-LINE	VERSION	DISTRICT	STLA	03/05/2007
CASE NAME			CASE NO.	OFC	UNIT	WRKR TT CT
HOWARD_LI SA			HOWARD0001			05 12
TY R	--PA--	--FS--	EARNED INC	--PA--	--FS--	---OTHER INCOME---
BASIC			GROSS AMT			FS TOT AMT
ENRGY			TOTAL EXP			PA TOT AMT
SPMNT			DI SREGARD			PA TOT NET
01 SHEL T			NET INCOME			SRCS
WATER			SOURCES			
FUEL			LN HRS LN HRS			---FS ALLOTMENT---
DISP						TOTAL INC
UTIL			-----PA GRANT-----			INC EXCL
PHONE			TOTAL NEEDS			TOTAL DED
OTHER			TOTAL INC			NET INCOME
OTHER			CD / AMT			ALLOTMENT
OTHER			RECOUPMENT			ADJUSTMENT
TOTAL			UTIL/RES			ADJ ALLOT
---FS EXCLUSI ONS/DEDUCTI ONS---			SHEL T/RES			
BRD/LDG		SPONSOR	RESTRI CTED			FS EFFECTIVE DATE
PSNL CR		DEP CARE	ADJUSTMENT			TO
NEG-FRM		MEDI CAL	SEMI CASH			PA EFFECTIVE DATE
			SEMI N-CASH			TO
			DATE STORED	/ /		XMT

Figure 7 – PA-FS Bottom-Line (WBG TBL)

Purpose

This screen is used to input or change budget data when the WMS ABEL budget calculation is to be bypassed. It is also used to display the current bottom-line budget. If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Entering 2 in Function on WBPAFS – PA/FS Budget Calculation Menu

Screen Response

Positive

- One of the following messages on Line 24:
  - INPUT DATA IS ERROR FREE (when WGTBL is transmitted)
  - BUDGET 99 updated MM/DD/YY (when an error free budget is stored by pressing Ctrl+F3)
  - AUTHORIZATION REPORT SCHEDULED (when Ctrl+F4 is pressed and all edits are passed)



Negative

- Field(s) in error return highlighted (missing entries highlighted with the message: EXAMINE BLINKING FIELDS on line 24,
- One of the following messages on Line 24:
  - AUTHORIZATION REPORT PRINTER UNAVAILABLE
  - AUTHORIZATION REPORT SCHEDULED
  - DATA NOT ACCEPTED, NO APPLICATION OR CASE RECORD FOR NO. ENTERED
  - EDITS MUST BE DONE BEFORE SF13, DEPRESS XMT KEY
  - SECURITY VIOLATIONS/SF13 NOT ALLOWED
  - SF-14 NOT ALLOWED FOR APPLICATIONS
  - SF99 NOT SUPPORTED-REXMT (99= 4, 5, 7, 8, 10-12, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBG TBL - PA/FS Bottom-Line; only the Case Name, Reg. or Case No., OFC, Unit and WRKR fields will carry over from the budget displayed
F2	WBG TBL - PA/FS Bottom-Line with fields populated with current stored data
F3	WBG TBL - PA/FS Bottom-Line with fields populated with current stored data
F6	<i>Renders Workstation Inactive</i>
F9	WBFHT - Budget History
Ctrl+F3	Stores budget data
Ctrl+F4	Prints case authorization report
Ctrl+F5	WBPAFS - PA/FS Budget Calculation Menu with previously enter Reg. No./Case No./Dist appearing in appropriate fields
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu with no data entered

Screen Field Description – WBG TBL

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CASE NAME	01070 - CASE NAME (28)	Protected

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	Protected
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected
UNIT	01030 - UNIT IDENTIFIER (3)	Protected
WRKR	01040 - WORKER IDENTIFIER (5)	Protected
TT	02010 - TRANSACTION TYPE (2)	Protected
CT	01060 - CASE TYPE (2)	
HH	01150 - NUMBER OF PERSONS (2)	
PA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
FS	24722 - PA SANCTIONED NUMBER (2)	
CAP	01421 - CAP INDICATOR (2)	
AD	17020 - FS AGED DISABLED INDICATOR (1)	
BASIC PA	11010 - BASIC ALLOWANCE (7)	
ENERGY PA	11050 - HOME ENERGY ALLOWANCE (7)	
SPMNT PA	11052 - SUPPLEMENTAL HOME ENERGY ALLOWANCE (7)	
SHELT TY	11120 - SHELTER TYPE (2)	
SHELT R	11028 - SHELTER RESTRICTED (1)	
SHELT PA	11020 - SHELTER ALLOWANCE (7)	
SHELT FS	11220 - FOOD STAMPS SHELTER AMOUNT (7)	
WATER R	11038 - WATER RESTRICTED INDICATOR (1)	
WATER PA	11030 - PA WATER AMOUNT (7)	
WATER FS	11230 - FS WATER AMOUNT (7)	
FUEL TY	11130 - FUEL FOR HEATING TYPE (1)	
FUEL R	11048 - FUEL RESTRICTED (1)	
FUEL PA	11040 - FUEL FOR HEATING AMOUNT (7)	
FUEL FS	11240 - FS HEAT ALLOWANCE (7)	
DISP FS	11250 - FOOD STAMPS DISPOSAL AMOUNT (7)	
UTIL FS	11260 - FS UTILITY ALLOWANCE (7)	
PHONE FS	11270 - FS TELEPHONE ALLOWANCE (7)	
OTHER TY	11080 - ADDITIONAL NEEDS TYPE (2)	3 occurrences
OTHER R	11098 - ADDITIONAL NEEDS RESTRICTED INDICATOR (1)	3 occurrences
OTHER PA	11090 - PA ADDITIONAL ALLOWANCES (7)	3 occurrences
OTHER FS	11290 - FS ADDITIONAL ALLOWANCE (7)	1 occurrences
TOTAL PA	11100 - TOTAL NEEDS (7)	
TOTAL FS	11300 - FOOD STAMP TOTAL SHELTER EXPENSE (7)	
<b>EARNED INCOME</b>		
GROSS AMOUNT PA	07190 - GROSS WAGES (7)	
GROSS AMOUNT FS	07045 - FS EARNED INCOME AMOUNT (7)	
TOTAL EXP PA	07220 - NON-PERSONAL WORK DEDUCTION (7)	
DISREGARD PA	07370 - 30+1/3/30 EXEMPTION (7)	
NET INCOME PA	07030 - PA NET APPLICABLE EARNED INCOME (7)	
NET INCOME FS	07040 - FS CASE APPLICABLE EARNED INCOME (7)	
SOURCES	07010 - EARNED INCOME SOURCES (2)	4 occurrences
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
HRS	07044 - HOURS WORKED PER MONTH (3)	3 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>OTHER INCOME</b>		
FS TOT AMT	07140 - FS APPLICABLE UNEARNED INCOME (7)	
PA TOT AMT	07135 - PA UNEARNED INCOME AMOUNT (7)	
PA NET AMT	07130 - PA NET UNEARNED INCOME (7)	
SRCS	07010 - EARNED INCOME SOURCES (2)	4 occurrences
<b>FS EXCLUSIONS/DEDUCTIONS</b>		
AMOUNT	07145 - FS UNEARNED INCOME AMOUNT (7)	2 occurrences
BRD/LDG	07430 - FS BOARDER LODGER EXCLUSION AMOUNT (7)	
PSNL CR	07440 - FS GROUP HOME EXCLUSION AMOUNT INPUT (7)	
NEG-FRM	07750 - FS NEGATIVE FARM INCOME EXCLUSION (7)	
SPONSOR	07450 - SPONSORS INCOME EXCLUSION AMOUNT (7)	
DEP CARE	07410 - FS DEPENDENT/CHILD CARE AMOUNT (7)	
MEDICAL	17420 - FS MEDICAL DEDUCTION AMOUNT (7)	
<b>PA GRANT</b>		
TOTAL NEEDS	11100 - TOTAL NEEDS (7)	
TOTAL INC	07150 - PA NET AVAILABLE INTOME (7)	
CD/AMT	11160 - TOTAL BUDGET SURPLUS OR DEFICIT CODE (1) 11161 - TOTAL BUDGET SURPLUS OR DEFICIT AMOUNT (7)	
RECOUPMENT	11175 - PA RECOUPMENT TOTAL AMOUNT (7)	
UTIL/RES	11060 - RESTRICTED AMOUNT (7)	
SHELT/RES	11026 - PA SHELTER RESTRICTED AMOUNT (7)	
RESTRICTED	11180 - RESTRICTED GRANT AMOUNT (7)	
ADJUSTMENT	11190 - PA GRANT ADJUSTMENT (7)	
SEMI CASH	11111 - PA SEMI-MONTHLY CASH GRANT (7)	
SEMI N-CASH	11112 - PA SEMI-MONTHLY NON-CASH GRANT (7)	
<b>FS ALLOTMENT</b>		
TOTAL INC	07160 - FS TOTAL INCOME	
INC EXCL	07470 - FS INCOME EXCLUSION AMOUNT (7)	
TOTAL DED	07460 - FS TOTAL DEDUCTIONS AMOUNT (7)	
NET INCOME	07060 - FS NET INCOME (7)	
ALLOTMENT	17050 - FOOD STAMP ALLOTMENT VALUE (7)	
ADJUSTMENT	17101 - FOOD STAMP ALLOTMENT ADJUSTMENT (7)	
ADJ ALLOT	17100 - FS ADJUSTED ALLOTMENT VALUE (7)	
<b>FS EFFECTIVE DATE</b>		
NONE	01310 - FS BUDGET EFFECTIVE DATE (12)	1 <sup>ST</sup> group of six characters is the Effective From Date
TO	01310 - FS BUDGET EFFECTIVE DATE (12)	2 <sup>nd</sup> group of six characters is the Effective To Date
<b>PA EFFECTIVE DATE</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATES (12)	1 <sup>ST</sup> group of six characters is the Effective From Date
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	2 <sup>nd</sup> group of six characters is the Effective To Date
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

WBPFHT – Budget History Screen

WBPFHT	BUDGET HISTORY SCREEN		REG. NO. 575014		03/06/2007	
CASE NAME	WILSON,	MAGGIE				
	PA	PA	FS	FS	BL	BL
BDGT VERS NO					01	
STORAGE DATE					03/05/07	
ENRGY/RES AMT	0	0			0	0
SHELT/RES AMT	0	0			0	0
OTHER PA ALLOW	0	0			0	0
PA RECOUP TOT	0	0			0	0
S/D CODE					D	
CASH GRANT	0	0			100000	0
SEMI CASH	0	0			50000	0
PA NON CASH	0	0			0	0
SEMI NON CASH	0	0			0	0
PA EFFECTIVE DATES					03/01/07	
FS ALLOTMENT			0	0	02/28/08	0
FS CLAIM TOT			0	0		0
FS ADJ ALLOT					0	0
FS EFFECTIVE DATES						

Figure 8 – Budget History Screen (WBPFHT)

Purpose

This screen is used to display limited data for at most two historical budgets for each budget type, PA, FS, and BL, for a given case or application. The budgets displayed will be the most recent budgets stored prior to storing the current. The current PA, FS, or BL budget is never displayed on this screen. All fields on this screen are protected.

Access

- Selecting Function 3 entry on WBPAFS – WMS PA/FS Budget Calculation Menu and historical PA, FS, or BL budgets exist, **or**
- F9 from any PA, FS and BL input or calculated budget screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED – REXMT (99 = 1- 5,7-11,13,14, 17-22
  - XMT INVALID MUST HIT SF KEY
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
F12	WINQ01/WINQ02 - Application and Case Inquiry/Individual CIN and SSN Inquiry Menu
Ctrl+F5	WBPAFS - PA/FS Budget calculation Menu with previously entered Reg. No/Case No./Dist in appropriate fields.
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu with no data entered

Screen Field Description – WBPFFT

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DATE	None	The current date, system generated.
CASE NAME	01070 - CASE NAME (28)	
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
<b>PA</b>		
BDGT VERS NO	24732 - PA BUDGET VERSION NUMBER (3)	2 occurrences
STORAGE DATE	02020 - TRANSACTION INPUT DATE (6)	2 occurrences
ENERGY/RES AMT	11018 - HISTORICAL ENERGY RESTRICTION AMOUNT (7)	2 occurrences
SHELT/RES AMT	11021 - HISTORY - SHELTER RESTRICTED AMOUNT (7)	2 occurrences
OTHER PA ALLOW	11092 - HISTORY - PA ADDITIONAL AMOUNT (7)	2 occurrences
PA RECOUP TOT	11065 - HISTORY RECOUPMENT AMOUNT (7)	2 occurrences
S/D CODE	11165 - PA HISTORY SURPLUS DEFICIT CODE (1)	2 occurrences
CASH GRANT	11108 - HISTORY MONTHLY GRANT AMOUNT (7)	2 occurrences
SEMI CASH	11109 - HISTORY - SEMI-MONTHLY GRANT AMOUNT (7)	2 occurrences
PA NON CASH	11032 - HISTORICAL PUBLIC ASSISTANCE NON-CASH GRANT AMOUNT (7)	2 occurrences
SEMI NON CASH	11109 - HISTORICAL SEMI-MONTHLY GRANT AMOUNT (7)	2 occurrences
PA EFFECTIVE DATES	01340 - PA HISTORY EFFECTIVE DATES (12)	1 <sup>ST</sup> group of 6 characters is the Effective From Date; 2 <sup>nd</sup> group of 6 characters is the Effective To Date; 2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>FS</b>		
BDGT VERS NO	24736 - FOOD STAMP HISTORY VERSION NUMBER (2)	2 occurrences
STORAGE DATE	02025 - HISTORY TRANSACTION DATE (6)	2 occurrences
FS ALLOTMENT	17053 - FOOD STAMP HISTORY ALLOTMENT AMOUNT (7)	2 occurrences
FS CLAIM TOT	11023 - HISTORICAL CLAIM TOTAL AMOUNT (&)	2 occurrences
FS EFFECTIVE DATES	01360 - FOOD STAMP HISTORY EFFECTIVE DATES (12)	1 <sup>ST</sup> group of 6 characters is the Effective From Date; 2 <sup>nd</sup> group of 6 characters is the Effective To Date; 2 occurrences
<b>BL</b>		
BDGT VERS NO	24737 - BOTTOM LINE HISTORY VERSION NUMBER (2)	2 occurrences
STORAGE DATE	02025 - HISTORY TRANSACTION DATE (6)	2 occurrences
ENERGY/RES AMT	11018 - HISTORICAL ENERGY RESTRICTION AMOUNT (7)	2 occurrences
SHELT/RES AMT	11021 - HISTORY - SHELTER RESTRICTED AMOUNT (7)	2 occurrences
OTHER PA ALLOW	11092 - HISTORY PA ADDITIONAL AMOUNT (7)	2 occurrences
PA RECOUP TOT	11065 - HISTORY RESTRICTED UTILITY AMOUNT (7)	2 occurrences
S/D CODE	11165 - PA HISTORY SURPLUS DEFICIT CODE (1)	2 occurrences
CASH GRANT	11108 - HISTORY MONTHLY GRANT AMOUNT (7)	2 occurrences
SEMI CASH	11109 - HISTORY SEMI-MONTHLY GRANT AMOUNT (7)	2 occurrences
PA NON CASH	11032 - HISTORICAL PUBLIC ASSISTANCE NON-CASH AMOUNT (7)	2 occurrences
SEMI NON CASH	11109 - HISTORY SEMI-MONTHLY GRANT AMOUNT	2 occurrences
PA EFFECTIVE DATES	01340 - PA HISTORY EFFECTIVE DATES (12)	1 <sup>ST</sup> group of 6 characters is the Effective From Date; 2 <sup>nd</sup> group of 6 characters is the Effective To Date; 2 occurrences
FS ALLOTMENT	17059 - FOOD STAMP HISTORY RECORD ALLOWMENT (7)	2 occurrences
FS ADJ ALOT	17031 - ALTERNATE ADJUSTMENT AMOUNT (BOTTOM-LINE) (7)	2 occurrences
FS EFFECTIVE DATES	01360 - FOOD STAMP HISTORY EFFECTIVE DATES (12)	1 <sup>ST</sup> group of 6 characters is the Effective From Date; 2 <sup>nd</sup> group of 6 characters is the Effective To Date

WBPFDL – Budget Record Deletions

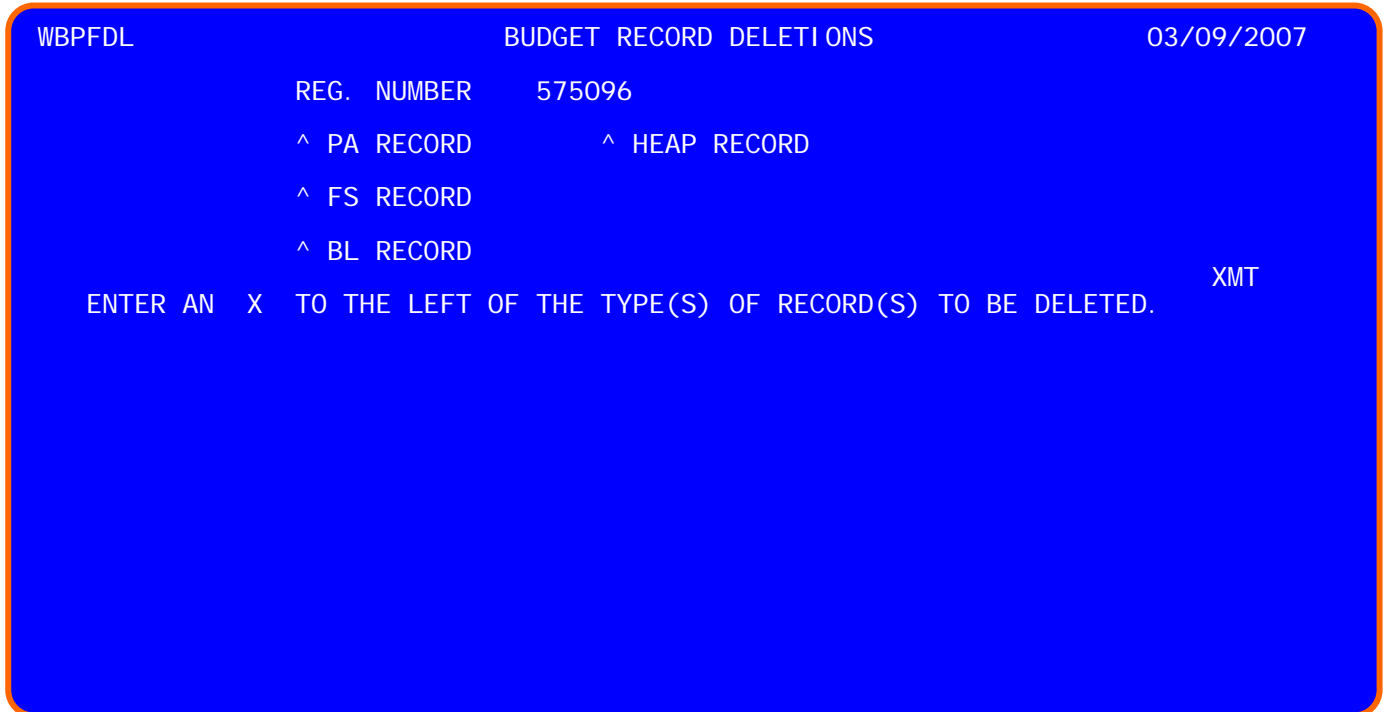


Figure 9 – Budget Record Deletions (WBPFDL)

Purpose

This screen is used to delete stored budgets from WMS. The current budget as well as all historical budgets of the selected budget type will be deleted in WMS. (Note - The entire PA, FS, or HEAP budget history for a case is always available for view using the WMS Budget History application which is discussed under External Systems in this document.)

Access

- Selecting Function 4 on WBPAFS – PA/FS Budget Calculation Menu.

Screen Response

Positive

- One or more of the following messages where XX stands for PA, FS, BL, or HP, or any multiple combinations of these:
  - XX RECORD(S) DELETED
  - XX RECORD(S) EXIST(S)
  - XX RECORD(S) NOT FOUND

Negative

- One of the following messages on Line 24:
  - PLEASE MAKE A SELECTION
  - SF99 NOT SUPPORTED – REXMT (99 =1-5, 7-14, 17-19)
  - SF7 SUPPORTED FOR LDF DISTRICTS ONLY
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WBPAFS - PA/FS Budget calculation Menu with previously entered Reg. No/Case No./Dist in appropriate fields.
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu with no data entered

Screen Field Description – WBPFFT

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER OR REG. NUMBER	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	Protected
PA RECORD	NONE	
HEAP RECORD	NONE	
FS RECORD	NONE	
BL RECORD	NONE	



WMRINQ – Mass Rebudgeting Inquiry Menu

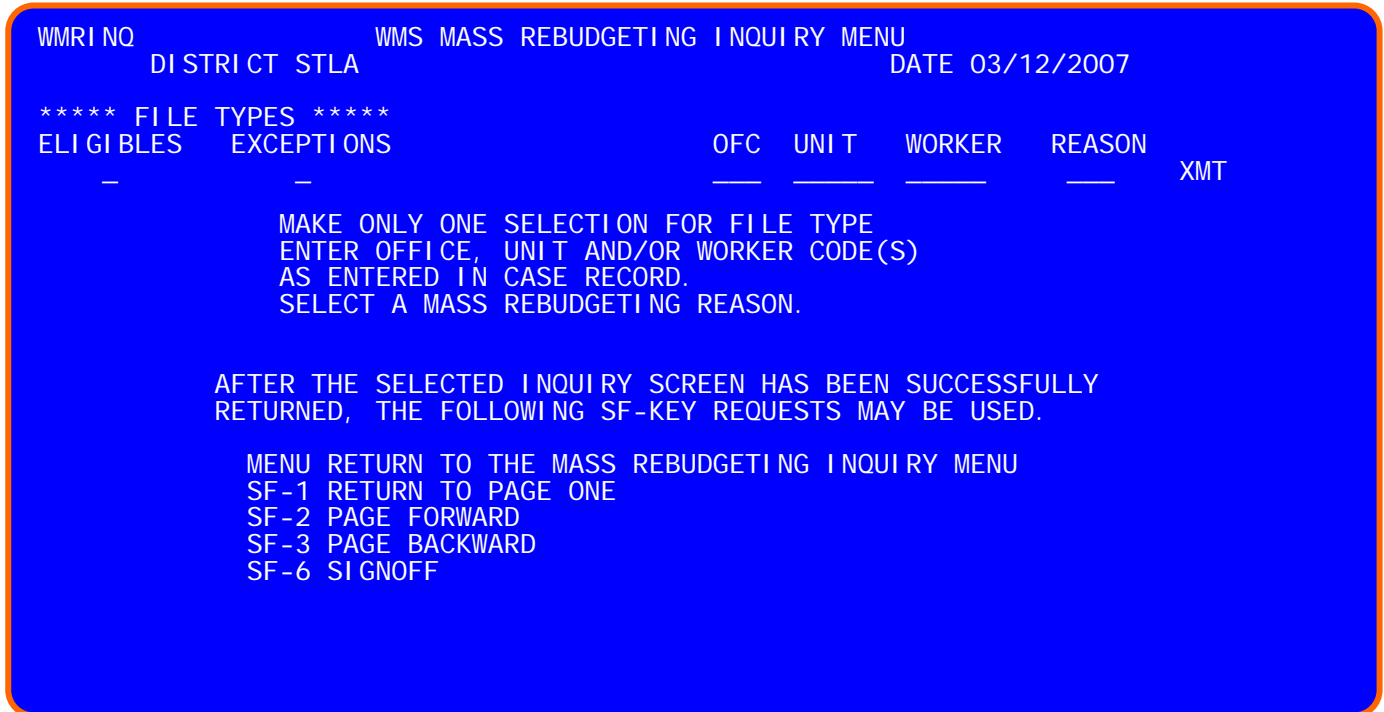


Figure 10 – Mass Rebudgeting Inquiry Menu (WMRINQ)

Purpose

This screen is used to select the desired Mass Rebudgeting Inquiry listing or totals summary screen to display.

Access

- Entering 6 in FUNCTION ON WBPFS – PA/FS Budget Calculation Menu, or
- Ctrl+F6 from Mass Rebudget Results and Inquiry screens.

Screen Response

Positive

- WMRIQ4 – if Exceptions File Type selected,
- WMRIQ5 – if Eligibles File Type selected

Negative

- Missing entries return highlighted with one of the following messages on line 24:
  - MAKE A SELECTION: FILE TYPE, UNIT/WORKER AND REASON
  - MAKE A SELECTION FOR UNIT AND/OR WORKER

- MAKE ONLY ONE FILE TYPE SELECTION
- NO CASES FOR OFFICE-UNIT-WORKER ENTRY
- NO DISTRICT CASES IN SELECTED FILE
- PLEASE MAKE A SELECTION FOR FILE TYPE
- SELECT A VALID REASON CODE
- SF99 NOT SUPPORTED – REXMT (99=1-5, 7-15, 17-19)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WMRINQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
ELIGIBLES	NONE	A selection must be made in one of the fields by entering an 'X'.
EXCEPTIONS	NONE	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
REASON	NONE	

WMRIQ5 – Mass Rebudgeting Results - Eligible List

WMRI Q5 WMS MASS REBUDGETING RESULTS - ELIGIBLE LIST FOR JAN PAGE 1						
DISTRICT ALBA		OFC SSI	UNIT FSSSI	WRKR 22399	CASE NAME	ORDER 03/20/2007
CASE NAME	CASE NUMBER	OLD DEFCT	NEW DEFCT	NET CHNG	SPEC ALERT	
		OLD ETLMT	NEW ETLMT	NET CHNG	REJ/EXCEPT	
BARRETT CHARLES	P117272					U
		014100	013800	-00300	FBI	U
BARON ANNI E	P111053					U
		007700	007400	-00300	FBI	U
BETNER HAROLD	0 P558931					U
		015000	014700	-00300	FBI	U
BEECHUM YOLANDA	P124245					U
		002000	001700	-00300	FBI	U
BLACK JOHN	P867676					U
		014100	013800	-00300	FBI	U
BORDEN MARTHA	P166577					U
		014100	013800	-00300	FBI	U
BRADLEY DEBRA	P456623					U
		007700	007400	-00300	FBI	U
BRANCH ANNI E	P908776					U
		008400	008100	-00300	FBI	007

Figure 11 – Mass Rebudgeting Results - Eligible List (WMRIQ5)

Purpose

This screen lists all cases eligible for Mass Rebudgeting for the Office and/or Unit and/or Worker specified on the Mass Rebudgeting Inquiry Menu screen, WMRIQ5. The list is in alphabetical order by case name. All fields on this screen are protected.

Access

- Transmitting WMRIQ5-Mass Rebudgeting Inquiry Menu after selecting the Eligibles file and entering OFC and/or UNIT and/or WORKER fields and appropriate REASON Code.

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	Renders Workstation Inactive
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ5

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
CASE NAME	01070 - CASE NAME	
CASE NUMBER	01050 - CASE NUMBER	
OLD DEFCT	NONE	See the <a href="#">ABEL Manual</a> for more information on these fields.
NEW DEFCT	NONE	
NET CHNG	NONE	
OLD ETLMT	NONE	
NEW ETLMT	NONE	
NET CHNG	NONE	
SPEC ALERT	NONE	
REJ/EXP	NONE	

WMRIQ4 – Mass Rebudgeting Inquiry – *Exceptions List*

WMRIQ4 DIST ALBA WMS MASS REBUDGETING INQUIRY FOR JAN PAGE 1			
EXCEPTIONS IN OFC ELD UNIT ELDIS WRKR CCCC CASE NAME ORDER 03/20/2007			
CASE NAME	CASE NUMBER	EXCEPTED REASON	
BEECHER IRENE	F120222	INV FS BDGT	123106
COOKE HARVEY	F104630	INV FS BDGT	123106
DAVIS SYLVIA	F213808	FS AUTH DATE	113006
DELMONTE RAYMOND	F215769	INV FS BDGT	123106
ESNER WAYNE	F213832	INV FS BDGT	123106
GALVIN JUSTNE	F191255	FS AUTH DATE	113006
GIOVANNI CHERI	F132129	INV FS BDGT	123106
GOLWAY THOMAS	F134555	INV FS BDGT	123106
GRAY JOHN	F130184	INV FS BDGT	123106
GREEN MI CHAEL J	F214319	INV FS BDGT	123106
JARRETT JAMES	F188246	INV FS BDGT	123106
JOHNSON NORA	F172597	INV FS BDGT	123106
KING KATHERINE	F078434	INV FS BDGT	123106
LARUE NI COLE	F239410	INV FS BDGT	123106
MASON ANNE	F141010	INV FS BDGT	123106
MASTERS MI CHAEL	F134237	FS AUTH DATE	113006

Figure 12 – Mass Rebudgeting Inquiry – *Exceptions List* (WMRIQ4)

Purpose

This screen lists all cases for the Office and/or Unit and/or Worker specified on the Mass Rebudgeting Inquiry Menu screen, WMRIQ4, that are not eligible for Mass Rebudgeting and the reason why the case was not eligible. All fields on this screen are protected.

Access

- Transmitting WMRIQ4-Mass Rebudgeting Inquiry Menu after selecting the Exceptions file and entering OFC and/or UNIT and/or WORKER fields and appropriate REASON Code.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ4

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
CASE NAME	01070 - CASE NAME	
CASE NUMBER	01050 - CASE NUMBER	
EXCEPTED REASON	NONE	Reason why the case was not mass rebudgeted. Some Excepted Reasons will include an associated date. Refer to the specific MRB/A transmittal for details on the Excepted Reason.

WMRIQ5 – Mass Rebudgeting Results - Eligible List (*Summary*)

WMRIQ5 WMS MASS REBUDGETING RESULTS - ELIGIBLE LIST FOR JAN PAGE 1							
DI STRI CT	ALBA	OFC	UNI T	TOTAL	WRKR	CASE NAME ORDER 03/21/2007	
CASE NAME			CASE NUMBER	OLD DEFCT	NEW DEFCT	NET CHNG	SPEC ALERT
				OLD ETLMT	NEW ETLMT	NET CHNG	REJ/EXCEPT
FS AUTH	\$	43833600					
FS CASE AUTH			4301				
FS MRA-REJCTD			583				
FS MRI -ELGBLS			4884				
FS NET CHG	-	2250300					
FS/PAN CH	+	14100					
PA AUTH	\$	1294535					
PA CASE AUTH			96				

Figure 13 – Mass Rebudgeting Results - Eligible List (*Summary*) (WMRIQ5)

Purpose

This screen summarizes the results of mass rebudgeting for a district. The actual totals and labels describing the totals will vary depending on the reason for the mass rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WMRINQ, the Mass Rebudgeting Inquiry Menu after selecting the Eligibles File and entering the letters "TOTAL" in the Unit field and the appropriate code in the Reason Field.

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE

- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ5 - Eligible List (*Summary*)

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for information about the totals displayed on this screen.		



WMRIQ4 – Mass Rebudgeting Inquiry - *Exceptions (Summary)*

WMRI Q4		DIST ALBA		WMS MASS REBUDGETING INQUIRY FOR JAN		PAGE 1	
EXCEPTIONS IN OFC		UNIT TOTAL		WRKR		CASE NAME ORDER 03/21/2007	
CASE NAME		CASE NUMBER		EXCEPTED REASON			
TOTAL FS EXCPTNS =		1060					
TOTAL PA EXCPTNS =		248					

Figure 14 – Mass Rebudgeting Inquiry - *Exceptions (Summary)* (WMRIQ4)

Purpose

This screen displays a district's total number of PA and/or FS exceptions. All fields on this screen are protected.

Access

- Successful transmission of WMRINQ – Mass Rebudgeting Inquiry Menu after selecting the Exceptions File and entering the letters “TOTAL” in the Unit field and the appropriate code in the Reason Field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE
  - SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ4 - *Exceptions (Summary)*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TOTAL FS EXCPTNS	NONE	See the <a href="#">ABEL Manual</a> for more information on these fields.
TOTAL PA EXCPTNS	NONE	

WMRIQ4 – Mass Rebudgeting Inquiry – Total PA/FS Exceptions by Exception Reason

WMRIQ4 DIST ALBA WMS MASS REBUDGETING INQUIRY FOR JAN PAGE 1			
EXCEPTIONS IN OFC FS		UNIT TOTAL	WRKR EXCEP CASE NAME ORDER 03/22/2007
CASE NAME		CASE NUMBER	EXCEPTED REASON
ALREADY REBUDGETED	84		
APPLI CATION STATUS	10		
BL-BUDGET EXI STS	1		
FS AND BL EXI ST	0		
FS AUTH DATE	258		
FS MI X	102		
FUT FS BDGT	0		
INV FS BDGT	345		
MAX EXCEEDED	0		
MULTI SSI INC	0		
NO ALL UPDT	12		
NO BUDGET RECORD	15		
NO FS RECORD	0		
NO SDX SSA BFT	0		
PC SUPV APT	0		
POSS COMB BFTS	1		

Figure 15 – Mass Rebudgeting Inquiry – Total PA/FS Exceptions by Exception Reason (WMRIQ4)

Purpose

This screen displays a district’s total PA and/or FS Exceptions by Exception Reason. The actual totals and labels describing the totals may vary depending on the reason for the mass rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WMRIQ4 – Mass Rebudgeting Inquiry Menu after selecting the Exception file and entering PA or FS in the Office field, “TOTAL” in the Unit field, “EXCEP” in the Worker field and the appropriate code in the Reason field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ4 - *Total PA/FS Exceptions by Exception Reason*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
EXCEPTION REASON	NONE	See the <a href="#">ABEL Manual</a> for more information on these fields
EXCEPTION REASON TOTAL	NONE	

WMRIQ5 – Mass Rebudgeting Results – *Total FS Exceptions by Exception Reason for PA/FS Cases*

WMRIQ5 WMS MASS REBUDGETING RESULTS - ELIGIBLE LIST FOR JAN PAGE 1							
DISTRICT ALBA		OFC FS	UNIT TOTAL	WRKR LINE2	CASE NAME	ORDER	03/22/2007
CASE NAME	CASE NUMBER	OLD DEFCT	NEW DEFCT	NET CHNG	SPEC ALERT		
FS AUTH DATE		OLD ETLMT	NEW ETLMT	NET CHNG	REJ/EXCEPT		
		0					
FS AUTH PEND		1					
FS BDGT DATE		0					
FS-ONLY SSI		0					
FUT FS BDGT		0					
HOMELESS TYP		0					
MAX EXCEEDED		0					
MULT TA INCS		0					

Figure 16 – Mass Rebudgeting Results – *Total FS Exceptions by Exception Reason for PA/FS Cases (WMRIQ5)*

Purpose

This screen displays subtotals for FS Exceptions identified only after a successful PA Rebudget in PA/FS cases. The actual totals and labels describing the totals may vary depending on the reason for the mass rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WMRIQ5 – Mass Rebudgeting Inquiry Menu after selecting the Eligible file and entering FS in the Office field, “TOTAL” in the Unit field, “LINE2” in the Worker field and the appropriate code in the Reason field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ5 - *Total FS Exceptions by Exception Reason for PA/FS Cases*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of the district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for more information on totals displayed on this screen.		

WMRIQ5 – Mass Rebudgeting Results - *MRA Rejection Edit Totals*

WMRIQ5 WMS MASS REBUDGETING RESULTS - ELIGIBLE LIST FOR EID PAGE 1									
DISTRICT	ALBA	OFC	MRA	UNIT	TOTAL	WRKR EDITS	CASE NAME	ORDER	05/02/2007
CASE NAME	CASE NUMBER	OLD DEFCT	NEW DEFCT	NET CHNG	SPEC ALERT				
FAP 133		OLD ETLMT	NEW ETLMT	NET CHNG	REJ/EXCEPT				
		0							
FS BDGT BASE 002		0							
FS BDGT BASE 003		0							
FS BDGT BASE 007		1							
FS BDGT BASE 011		0							
FS BDGT BASE 012		0							
FS MRA ERROR 004		0							
FS MRA ERROR 019		0							

Figure 17 – Mass Rebudgeting Results – *MRA Rejection Edit Totals* (WMRIQ5)

Purpose

This screen subtotals the MRA Rejection Edits of a Mass Rebudgeting by edit code. The actual totals and labels describing the totals may vary depending on the reason for the mass rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WMRIQ5 – Mass Rebudgeting Inquiry Menu after selecting the Eligible file and entering “MRA” in the Office field, “TOTAL” in the Unit field, “EDITS” in the Worker field and the appropriate code in the Reason field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ5 - *MRA Rejection Edit Totals*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic; first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for more information on totals displayed on this screen.		



WMRIQ5 – Mass Rebudgeting Results – *MRA Alert Totals*

WMRIQ5 WMS MASS REBUDGETING RESULTS - ELIGIBLE LIST FOR JAN PAGE 1										
DISTRICT ALBA		OFC	MRA	UNIT	TOTAL	WRKR	ALERT	CASE NAME	ORDER	03/22/2007
CASE NAME	CASE NUMBER	OLD	DEFCT	NEW	DEFCT	NET	CHNG	SPEC	ALERT	REJ/EXCEPT
		OLD	ETLMT	NEW	ETLMT	NET	CHNG			
FS ALERT C			38							
FS ALERT D			0							
FS ALERT E			4							
FS ALERT I			648							
FS ALERT K			0							
FS ALERT M			687							
FS ALERT N			1							
FS ALERT P			0							

Figure 18 – Mass Rebudgeting Results - *MRA Alert Totals* (WMRIQ5)

Purpose

This screen displays subtotals for PA and/or FS eligible cases by “ALERTS”. The actual totals and labels describing the totals may vary depending on the reason for the mass rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WMRINQ – Mass Rebudgeting Inquiry Menu after selecting the eligible file, and after entering “MRA” in the Office field, “TOTAL” in the Unit field, “ALERT” in the Worker field and the appropriate code in the Reason field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE

- PAGE BACKWARD IGNORED – ON LOWEST PAGE
- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRINQ - Mass Rebudgeting Inquiry Menu

Screen Field Description – WMRIQ5 - *MRA Alert Totals*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for more information on totals displayed on this screen.		

WIVINQ – IVD Payment Inquiry Menu

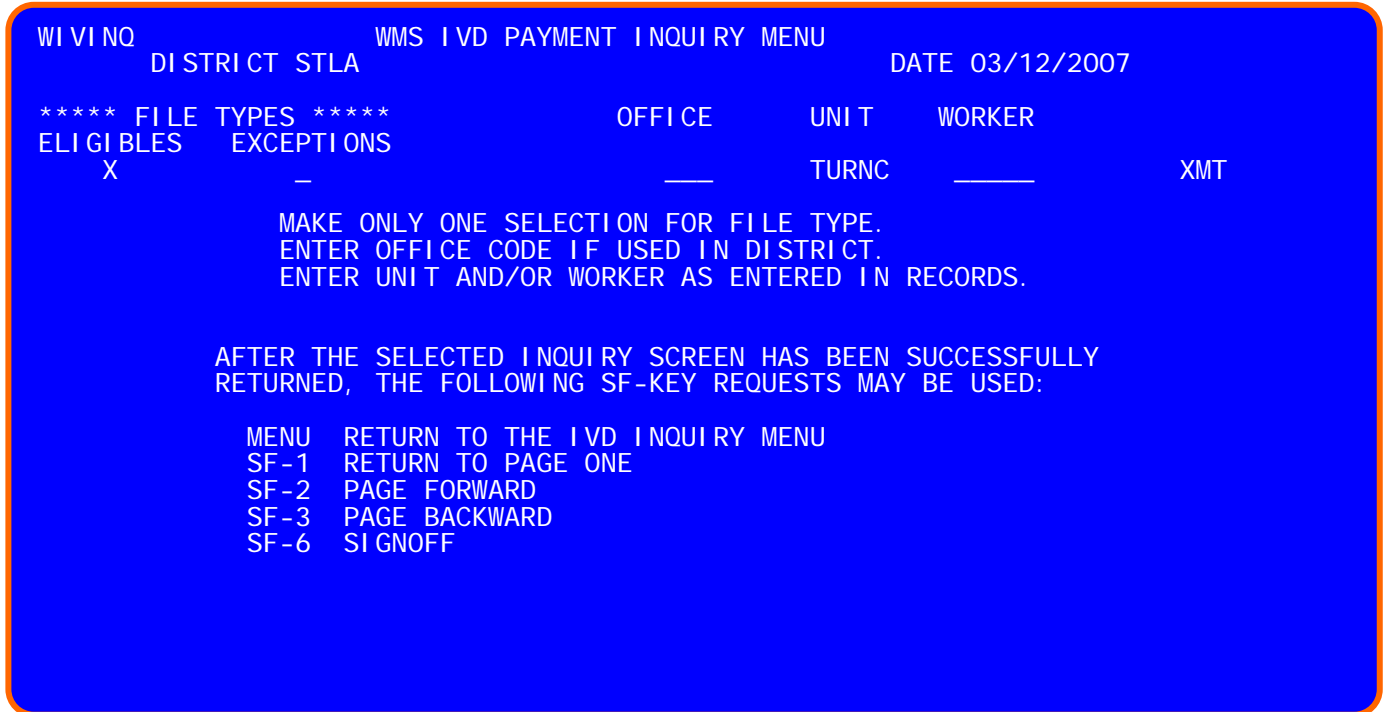


Figure 19 – IVD Payment Inquiry Menu (WIVINQ)

Purpose

This screen is used to select the desired IV-D Payment Inquiry listing.

Access

- Selecting Function 7 on WBPAFS – PA/FS Budget Calculation Menu, **or**
- Ctrl+F6 from IV-D Mass Rebudgeting Inquiry screens.

Screen Response

Positive

- WMRIV2 – if Eligibles File Type selected
- WMRIV1 – if Exceptions File Type selected

Negative

- Missing entries return highlighted with one of the following messages on line 24:
  - MAKE A SELECTION: FILE TYPE, UNIT/WORKER
  - MAKE A SELECTION FOR UNIT AND/OR WORKER

- MAKE ONLY ONE FILE TYPE SELECTION
- NO DISTRICT CASES IN SELECTED FILE
- PLEASE MAKE A SELECTION FOR FILE TYPE
- SF99 NOT SUPPORTED – REXMT (99 =1-5, 7-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WIVINQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
ELIGIBLES	NONE	A selection must be made in one of the fields by entering an 'X'.
EXCEPTIONS	NONE	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	

WMRIV2 – Mass Rebudgeting - IVD Eligible List

WMRIV2 WMS MASS REBUDGETING - IVD ELIGIBLE LIST 03/07 PAGE 01									
DIST ALBA OFC MEN UNIT FAFAM WRKR 22223 CASE NAME ORDER 03/22/2007									
CASE NAME	MESSAGE #1	PREV 2	PREV 1	CUR IVD	NEW FS	SPEC ALERTS			
CASE NUMBER	MESSAGE #2	CUM 2	CUM 1	CUR CUM	OLD FS	ACTION CODE			
BUTTERFIELD DOMINIC		0000	0000	5000		1			
P332226		5000	5000	5000		C			
MASON EILEEN		0000	0000	5000					
P773332		0000	0000	5000		C			
MOSES JARAD	CLOSE 0207	0000	0000	5000					
P288668		5000	5000	5000		C			
MURRAY WILLIAM	PA WARNING	0000	0000	5000					
P182999		0000	0000	5000		C			
NORTON ANTHONY		0000	0000	5000		1			
P255551		5000	5000	5000		C			
PARSONS MARY	CLOSE 0207	0000	0000	4040					
P144494		5000	5000	4040		C			
PATTERSON REBECCA		0000	0000	5000		1			
P333721		5000	5000	5000		C			

Figure 20 – Mass Rebudgeting - IVD Eligible List (WMRIV2)

Purpose

This screen displays the eligible list file for IV-D Mass Rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WIVINQ – WMS IVD Payment Inquiry Menu after selecting Eligibles File and entering data in Office and/or Unit and/or Worker field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE
  - SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIVINQ – WMS IVD Payment Inquiry Menu

Screen Field Description – WMRIV2

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
CASE NAME	01070 - CASE NAME (28)	
CASE NUMBER	01050 - CASE NUMBER (10)	
MESSAGE #1	NONE	See the <a href="#">ABEL Manual</a> for information on these fields
MESSAGE #2	NONE	
PREV 2	NONE	
PREV1	NONE	
CUM 2	NONE	
CUM 1	NONE	
CURR IVD	NONE	
CURR CUM	NONE	
NEW FS	NONE	
OLD FS	NONE	
SPEC ALERTS	NONE	
ACTION CODE	NONE	

WMRIV2 – Mass Rebudgeting - IVD Eligible List - *Totals*

WMRIV2 DIST	WMS MASS ALBA	REBUDGETING - OFC	IVD UNIT	ELIGIBLE LIST TOTAL	03/07 WRKR	CASE NAME	ORDER	PAGE 01 03/22/2007
CASE NAME	CASE NUMBER	MESSAGE #1 MESSAGE #2	PREV 2 CUM 2	PREV 1 CUM 1	CUR IVD CUR CUM	NEW FS OLD FS	SPEC ALERTS ACTION CODE	
CUR MO ADC AMT		+ 726351						
CUR MO HR AMT		+ 221927						
CUR MO IVD AMT		+ 948278						
CUR MO IVD LINES		000216						
CUR MO NO ACTION		000910						
CUR MO ONLY AUTH		000215						
FS ONLY AUTH		000004						

Figure 21 – Mass Rebudgeting - IVD Eligible List - *Totals* (WMRIV2)

Purpose

This screen displays the Eligibles totals file for IVD Mass Rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WIVINQ – WMS IVD Payment Inquiry Menu after selecting the Eligibles file and entering “TOTAL” in the unit field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE
  - SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIVINQ - WMS IVD Payment Inquiry Menu

Screen Field Description – WMRIV2 - *Totals*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for information on the totals displayed on this screen		



WMRIV1 – Mass Rebudgeting - IVD Exception List

WMRIV1 WMS MASS REBUDGETING - IVD EXCEPTION LIST 03/07 PAGE 01									
DIST	ALBA	OFC	MEN	UNIT	FAFAM	WRKR 22223	CASE NAME	ORDER	03/22/2007
CASE NAME	MESSAGE #1		PREV 2	PREV 1	CUR IVD	EXCEPTION REASON			
CASE NUMBER	MESSAGE #2		CUM 2	CUM 1	CUR CUM	ACTION REQUIRED			
RODRI GEZ	FREDO		0000	0000	2500	CASE DENIAL			
	P616170		0865	0000	2500	C			
PI CORA	PIA	PA WARN NG	0000	0000	5000	FS BDGT 033107			
	P454540		0000	0000	5000	C N			
QUI NLN	DARRYL M		0000	0000	5000	DIRECT SUPPORT			
	P170002		5000	5000	5000	C F			

Figure 22 – Mass Rebudgeting - IVD Exception List (WMRIV1)

Purpose

This screen displays the exceptions list file for IV-D Mass Rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WIVINQ – WMS IVD Payment Inquiry Menu after selecting Exceptions File and entering data in Office and/or Unit and/or Worker fields.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE
  - SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIVINQ - WMS IVD Payment Inquiry Menu

Screen Field Description – WMRIV1

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
CASE NAME	01070 - CASE NAME	
CASE NUMBER	01050 - CASE NUMBER	
MESSAGE #1	NONE	See the <a href="#">ABEL Manual</a> for more information on these fields
PREV 2	NONE	
PREV 1	NONE	
CURR IVD	NONE	
EXCEPTION REASON	NONE	
MESSAGE #2	NONE	
CUM 2	NONE	
CUM 1	NONE	
CUR CUM	NONE	
ACTION REQUIRED	NONE	

WMRIV1 – Mass Rebudgeting - IVD Exception List (*Totals*)

WMRIV1 DIST ALBA	WMS MASS OFC	REBUDGETING - UNIT TOTAL	IVD WRKR	EXCEPTION LIST CASE NAME	03/07 ORDER	PAGE 01 03/23/2007
CASE NAME CASE NUMBER	MESSAGE #1 MESSAGE #2	PREV 2 CUM 2	PREV 1 CUM 1	CUR IVD CUR CUM	EXCEPTION ACTION	REASON REQUIRED
CUR MO ADC AMT		+ 590525				
CUR MO HR AMT		+ 230954				
CUR MO IVD AMT REP		+ 821479				
CUR MO ONLY EXCEPS		000205				
CUR MO TOT EXCEPS		000209				
FS ACTION REQUIRED		000052				
PREV MO#1 ADC AMT		+ 0				

Figure 23 – Mass Rebudgeting - IVD Exception Totals (WMRIV1)

Purpose

This screen displays the exceptions total file for IV-D Mass Rebudgeting. All fields on this screen are protected.

Access

- Successful transmission of WIVINQ – WMS IVD Payment Inquiry Menu after selecting the Exceptions File and entering “TOTAL” in the unit field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE
  - SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIVINQ - WMS IVD Payment Inquiry Menu

Screen Field Description – WMRIV1 - *Totals*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for information on the totals displayed on this screen		

WMRIV1 – Mass Rebudgeting - IVD Exception List (*Totals by Exception Reason*)

WMRIV1 DIST ALBA	WMS MASS OFC IVD	REBUDGETING UNIT TOTAL	- IVD WRKR	EXCEPTION LIST EXCEP	03/07 CASE NAME	ORDER	PAGE 01 03/23/2007
CASE NAME	CASE NUMBER	MESSAGE #1 MESSAGE #2	PREV 2 CUM 2	PREV 1 CUM 1	CUR IVD CUR CUM	EXCEPTION REASON ACTION REQUIRED	
ALREADY MRA		000000					
APP STATUS		000000					
BDGT EXTENDS AUTH		000001					
BL BUDGET EXISTS		000000					
CAP AUTH		000000					
CAP FLAG PROBLEM		000000					
CAP STATUS		000000					

Figure 24 – Mass Rebudgeting - IVD Exception List (*Totals by Exception Reason*) (WMRIV1)

Purpose

This screen displays district totals for IV-D mass rebudgeting exceptions by reason and district total. All fields on this screen are protected.

Access

- Successful transmission of WIVINQ – WMS IVD Payment Inquiry Menu after selecting Exceptions file and entering “IVD” in the office field, “TOTAL” in the Unit field and “EXCEP” in the worker field.

Screen Response

Positive

See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE IS PAGE 1
  - PAGE FORWARD IGNORED – ON HIGHEST PAGE
  - PAGE BACKWARD IGNORED – ON LOWEST PAGE

- SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIVINQ - WMS IVD Payment Inquiry Menu

Screen Field Description – WMRIV1 - *Totals by Exception Reason*

Note: For summary screens disregard the captions beginning with Case Name on lines 4 and 5.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
See the <a href="#">ABEL Manual</a> for information on the totals displayed on this screen		

WBGTO6 – Direct Reauthorization

WBGTO6		Case # MRB31A		Type FA		Trans Type CHNG		03/23/2007		
LN	Act	Pay Meth	Pay	P-U	--Effective--	Ind	Cl m	Vend	Manual Issue	
		Typ	Pay	Amount	Iss	Sch	Cd	From	To	
01	2	96	01	015100	1	M	1	040107	043007	
02	2	05	01	012200	1	S	1	040107	043007	
03	5	05	01	012350	1	S	1	060107	093007	
04	5	96	01	015000	1	M	1	060107	093007	
05	2	05	01	012200	1	S	1	050107	093007	
06	2	96	01	015100	1	M	1	050107	093007	
07										
08										
09										
10										
11										
12										
			LN	Amount	LN	Amount	LN	Amount	LN	Amount
			Recoupment							
			Energy Rst							
			HVnd/Acct							
			Replace LN	CHK/FSB			LN	Vnd/Acct	CHK/FSB	
			Reason Code	___	Notice	Ind_				

XMT ^

Figure 25 – Direct Reauthorization (WBGTO6)

Purpose

This screen is used to verify payment lines produced by the Direct Budget Reauthorization process and to enter the appropriate Reason Code to produce a new Authorization.

Access

- SF11 from error-free WBGTPA – Budget or WBGTFB – FS Budget

Screen Response

Positive

- WSYSAK – System Acknowledgement screen with messages: TRANSACTION ACCEPTED and AUTHORIZATION REPORT TO BE PRINTED. See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Negative

- Fields in error returned highlighted with message on line 24 – EXAMINE BLINKING FIELDS,
- One of the following messages on line 24:
  - SF – MENU NOT SUPPORTED – REXMT

- SF99 NOT SUPPORTED – REXMT (99 = 1-10, 12-14, 17-19)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.
- WSYSAK – System Acknowledgement screen with message: TRANSACTION REJECTED – FATAL ERROR DETECTED with any Error Numbers listed. See Payment Line Error Messages in this Section. See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

Positive

- WMS Authorization, depending on District Option.

Negative

None

Function Keys

Key	Description
F11 or Ctrl+F1	WBPAFS – PA/FS Budget Calculation Menu with Case No. field populated
Ctrl+F5	WSYSAK – System Acknowledgement Screen with message: TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WBGTO6

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
<b>PAY METH</b>		
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences
TO	14012 - PAYMENT PERIOD (12)	12 occurrences
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
MANUAL ISSUE CHECK NUMBER	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	6 occurrences
AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
HVND/ACCT	14024 - HEAP VENDER ID (8) 14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
VND/ACCT	14024 - HEAP VENDER ID (8) 14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
<b>REPLACE</b>		
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	2 occurrences
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	2 occurrences
REASON CODE	02050 - REASON CODE (3)	
NOTICE IND	04001 - NOTICE INDICATOR CODE (1)	

WBHPWB – HEAP Input

```

WBHPWB      **  HEAP INPUT  **      VERSION 6
CASE NAME   HOWARDFS_____      CASE NUMBER  OFC   UNIT   WRKR   APP DATE
HOWARDFS_____      HOWARD0001      TURNC   050307
-----
CASE TYPE  11      HH SIZE  03      FUEL TYPE  2      BENEFIT TYPE  B  RECD  _
VULN IND  N      CE IND  Y      ACTUAL ENERGY COST  0250000
-----
** INCOME **
LN  FRQ  AMOUNT      LN  FRQ  AMOUNT      PA AMOUNT
___  _  _____      ___  _  _____      _____
___  _  _____      ___  _  _____
___  _  _____      ___  _  _____
REG BENEFIT:  VEN ID  _____      ACCT  _____
-----
** EMERGENCY BENEFIT **
EMERGENCY TYPE      BILL AMOUNT      FURNACE/PROPANE
1      A      0050000      _____
2      _  _____
1 VEN ID 89076541 ACCT _____      2 VEN ID _____ ACCT _____
XMT
    
```

Figure 26 – HEAP Input (WBHPWB)

Purpose

This screen is used to input or change HEAP Budget data.

Access

- Entering 10 in FUNCTION on WBPAFS – PA/FS Budget Calculation Menu

Screen Response

Positive

- WPGTHP - HEAP Budget

Negative

- One of the following messages on line 24:
  - SF99 NOT SUPPORTED – REXMT (99 = 4, 5, 7-14, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBHPWB - HEAP Input with budget data fields empty except for Reg. No. or Case Number. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBHPWB - HEAP Input; if the budget displayed on WBPAWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. Number or Case Number.
F3	WBHPWB - HEAP Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. Number or Case Number.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WBPAFS - PA/FS Budget Calculation Menu with previously entered Reg. No/Case No./Dist in appropriate fields.
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description - WBHPWB

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24019 - HEAP BUDGET VERSION NUMBER	Protected
CASE NAME	01070 - CASE NAME	Protected
CASE NUMBER OR REGISTRY NUMBER	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	Protected
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected
UNIT	01030 - UNIT IDENTIFIER (3)	Protected
WRKR	01040 - WORKER IDENTIFIER (5)	Protected
APP DATE	01090 - APPLICATION DATE (6)	Protected
CASE TYPE	01060 - CASE TYPE (2)	Protected
HH SIZE	01034 - NUMBER OF PERSONS IN HEAP HOUSEHOLD COUNT (2)	Protected
FUEL TYPE	11130 - FUEL FOR HEATING TYPE (1)	Protected
BENEFIT TYPE	11051 - HP BENEFIT TYPE (1)	Protected
RECD	11072 - RENTERS BENEFIT RECEIVED INDICATOR CODE (1)	Protected
VULN IND	11053 - HP VULNERABILITY INDICATOR (1)	Protected
CE IND	11055 - HP CATEGORICAL ELIGIBILITY INDICATOR (1)	Protected
ACTUAL ENERGY COST	11056 - HP ACTUAL ENERGY COST AMOUNT (7)	Protected
<b>INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	7 occurrences
FRQ	07061 - HP INCOME FREQUENCY (1)	7 occurrences
AMOUNT	07054 - HP MONTHLY INCOME AMOUNT (7)	7 occurrences
PA AMOUNT	07055 - HP PA TOTAL MONTHLY INCOME (7)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>REG BENEFIT:</b>		
VEN ID	14023 - VENDOR IDENTIFICATION (8)	
ACCT	95401 - CUSTOMER ACCOUNT NUMBER (15)	
<b>EMERGENCY BENEFIT</b>		
EMERGENCY TYPE	01036 - HP EMERGENCY TYPE CODE (1)	2 occurrences
BILL AMOUNT	11058 - HP HEAP EMERGENCY BILL SUBMITTED AMOUNT (7)	2 occurrences
FURNACE/PROPANE	11070 - FURNACE PROPANE AMOUNT (7)	
VEN ID	14023 - VENDOR IDENTIFICATION (8)	2 occurrences
ACCOUNT	95401 - CUSTOMER ACCOUNT NUMBER (15)	2 occurrences

WBGTHP – HEAP Budget

WBGTHP ** HEAP BUDGET **				VERSION 06	DIST STLA	05/03/2007	
CASE NAME				CASE NUMBER	OFC	UNIT	
HOWARDS				HOWARD0001		WRKR	
				REGULAR & EMERGENCY BENEFIT ELIGIBLE		TURNC	
CASE TYPE	HH	FUEL	VULN	CE	TIER	INC CD	RECD
11	3	2	N	Y	I	1	
***** MONTHLY INCOME *****						*** AMOUNT ***	
LN	AMOUNT	LN	AMOUNT				
	0		0		ANNUAL INCOME		0
	0		0		ANNUAL ENERGY COST		425600
	0		0		EMERGENCY BILL	*** AMOUNT ***	50000
PA	0		0		EMERGENCY BILL		0
TOTAL MONTHLY INCOME			0		*** BENEFIT AMOUNT ***		
					REGULAR		38500
					EMERGENCY TYPE A		12500
					EMERGENCY		0
					EMERGENCY TYPE		
VEN ID		ACCT					
VEN ID	89076541	ACCT					
VEN ID		ACCT					
			APPLI CATION DATE	05/03/2007	TO	09/30/2007	
			DATE STORED	05/03/2007			

Figure 27 – HEAP Budget (WBGTHP)

Purpose

This screen displays the calculated HEAP Budget. All fields on this screen are protected.

Access

- Successfully transmitting WPHPWB - HEAP Input, or
- Entering Function 10 on W WBPFS – PA/FB Budget Calculation Menu if there is a HEAP stored budget. The current stored budget will be displayed.

Screen Response

Positive

- The following message on line 24:
  - UPDATE OF MM/DD/YY BGT 99 (99 = Version Number) COLD UPDATED (Note: When a HEAP Budget is stored in WMS, an open TI transaction also saves the budget to an ORACLE database. The 'COLD UPDATED' part of this message refers to the successful update of the ORACLE database.)
  - AUTHORIZATION REPORT SCHEDULED

Negative

- One of the following messages on line 24:
  - SF99 NOT SUPPORTED – REXMT (99 = 4, 5, 7-12, 17-22)
  - XMT INVALID: MUST HIT SF-KEY
  - MUST RE-CALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF-13 NOT ALLOWED
  - SECURITY VIOLATION/SF-13 NOT ALLOWED
  - AUTHORIZATION REPORT SCHEDULE ERROR
  - \*\* DATABASE ERROR/SYSTEM ERROR HAS OCCURED \*\*
  - UPDATE OF MM/DD/YY BGT 99 (99 = Version Number) COLD ERROR (Note: The 'COLD ERROR' part of this message means that the ORACLE database was not updated successfully)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBHPWB - HEAP Input with budget data fields empty except for Reg. Number or Case Number. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBHPWB - HEAP Input; if the budget displayed on WBPAPWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. Number or Case Number.
F3	WBHPWB - HEAP Input with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. Number or Case Number.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F3	Stores the calculated HEAP Budget and increases the HEAP Budget by 1
Ctrl+F4	Authorization Report Scheduled
Ctrl+F5	WBPAFS - PA/FS Budget Calculation Menu with previously enter Reg. No./Case No./Dist appearing in appropriate fields
Ctrl+F6	WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WBGTHP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24019 - HEAP BUDGET VERSION NUMBER	
DIST	01010 - TRANSACTION DISTRICT (2)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 - CASE NAME (28)	
CASE NUMBER OR REGISTRY NUMBER	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (3)	
WRKR	01040 - WORKER IDENTIFIER (5)	
CASE TYPE	01060 - CASE TYPE (2)	
HH	01034 - NUMBER OF PERSONS IN HEAP HOUSEHOLD COUNT (2)	
FUEL	11130 - FUEL FOR HEATING TYPE (1)	
VULN	11053 - HP VULNERABILITY INDICATOR (1)	
CE	11055 - HP CATEGORICAL ELIGIBILITY INDICATOR (1)	
TIER	07056 - HP INCOME TIER (2)	
INC CD	01018 - HEAP INCOME LEVEL CODE (1)	
RECD	11072 - RENTER BENEFIT RECEIVED INDICATOR CODE (1)	
<b>MONTHLY INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	7 occurrences
AMOUNT	07054 - HP MONTHLY INCOME AMOUNT (7)	7 occurrences
PA	07055 - HP PA TOTAL MONTHLY INCOME (7)	
TOTAL MONTHLY INCOME	07064 - NET CASE INCOME AMOUNT (7)	
MONTHLY INCOME LIMIT	07062 - HP MONTHLY LIMIT INCOME AMOUNT (7)	
EXCESS INCOME	07063 - HP HOUSEHOLD EXCESS INCOME AMOUNT (7)	
<b>AMOUNT</b>		
ANUAL INCOME	07058 - HOUSEHOLD'S CALCULATED ANNUAL INCOME AMOUNT (7)	
ANUAL ENERGY COST	11057 - HP PROJECT ANNUAL ENERGY COST AMOUNT (7)	
EMERGENCY BILL	11058 - HP HEAP EMERGENCY BILL SUBMITTED AMOUNT (7)	2 occurrences; displayed only if HP budget type is E, emergency, or B, both regular and emergency
<b>BENEFIT AMOUNT</b>		
REGULAR	11059 - HP HEAP REGULAR BILL AMOUNT (7)	
EMERGENCY TYPE	01036 - HP EMERGENCY TYPE CODE (1)	2 occurrences; displayed only if HP budget type is E, emergency, or B, both regular and emergency
EMERGENCY	11064 - HP HEAP EMERGENCY BENEFIT AMOUNT (7)	4 occurrences; displayed only if HP budget type is E, emergency, or B, both regular and emergency
VEN ID	14023 - VENDOR IDENTIFICATION (8)	3 occurrences
ACCOUNT	95401 - CUSTOMER ACCOUNT NUMBER (15)	3 occurrences
<b>APPLICATION DATE</b>		
NONE	01090 - APPLICATION DATE (6)	
TO	01064 - HEAP SEASON END DATE (8)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

## MA Budget Calculation

MA budget functionality is available only for MA case types 20, 21, 22, and 24. A budget type must be designated for MA budgets by entry of one of the following Budget Type codes:

Budget Type Code	Description
01	FP-Non SSI
02	FNP
04	SSI Related
05	SSI Related/ADC Related
06	SSI Related/ FNP
07	Chronic Care
08	Chronic Care/SSI Related
09	Chronic Care/FP
10	Chronic Care/FNP
15	Other (for Bottom-Line Budgets only)

Only one MA Budget for a case may be stored at one time in WMS. The first budget stored is assigned version number 01. The version number is incremented by one for each successive budget stored.

### MA Budget Screens

There are six MA Budget screens (WBGTMMA).

- MA Budget
- MA SSI Budget
- MA CC Budget (Chronic Care)
- MA CC COMM Budget (Chronic Care Community)
- Expanded Eligibility
- Expanded Eligibility/FHP

Depending on one or more of the following factors:

- MA Budget Type
- entry in the EEC (Expanded Eligibility Code) field
- existence of a surplus budget,



up to three of the six MA Budget screens may be required to display the various components of a calculated MA Budget. Pressing the F8 key on any of six budget screens will return to the next screen in the MA Budget sequence. See the section on **MA Budget Screen Sequence** included in this document for further information.

### Expanded Eligibility for MA Budgets

MABEL will calculate expanded eligibility in the following two situations:

- 1) There is a budget surplus and entry in the Expanded Eligibility Code field of one of the following:
  - A - Payment of Health Insurance for Person with Aids
  - B - Determine Expanded Eligibility for all Categories for Pregnant Women and Children (C, D, I, P)
  - C - Determine Expanded Eligibility for Child(ren) 1 to 5 Years
  - D - Determine Expanded Eligibility for Child(ren) 6 or older and born before 9/30/83
  - E - Determine Expanded Eligibility for Disabled Adult/Child
  - H - Payment of Health Insurance under COBRA
  - I - Determine Expanded Eligibility for Infant(s) Birth to 1 Year
  - P - Determine Expanded Eligibility for Pregnant Women
  - T - Transitional Medicaid
  
- 2) Regardless of whether or not there is a surplus budget, there is a Disabled Adult/Child in the case as designated by entry in the Expanded Eligibility Code field of:
  - E - Determine Expanded Eligibility for Disabled Adult/Child

These calculations will be displayed either on the Expanded Eligibility screen or on the Expanded Eligibility/FHP screen. Each screen will display various types of expanded eligibility. The word ELIGIBLE or INELIGIBLE with a poverty level percent and amount will be calculated and displayed for each pertinent expanded eligibility type. The expanded eligibility level for E or H above may display EXCESS INCOME, EXCESS RESOURCES or EXCESS INCOME and RESOURCES.

### MA Budget Screen Sequence

The following table summarizes which MA Budget screens are displayed for each combination of MA Budget Type, EEC, and existence of a surplus budget. Budget screens are returned in the sequence shown by using F8 to display the next budget in the sequence. When the end of the sequence is reached, pressing F8 will display the first screen in the sequence again.

MA Budget Type	EEC Code	First MA Budget Screen	Second MA Budget Screen	Third MA Budget Screen
01, 02	Blank	MA Budget		
01, 02 <i>(Surplus Income Exists)</i>	T	Expanded Eligibility	MA Budget	
01 <i>(Surplus Income Exists)</i>	B, C, D, I, P	Expanded Eligibility/FHP	MA Budget	
04	Blank	SSI Budget		
04 <i>(Surplus Income Exists)</i>	A, H	Expanded Eligibility	SSI Budget	
04	E	Expanded Eligibility	SSI Budget	
05, 06	Blank	SSI Budget	MA Budget	
05, 06	E	Expanded Eligibility	SSI Budget	MA Budget
05 <i>(Surplus Income Exists)</i>	B, C, D, I, P	Expanded Eligibility/FHP	SSI Budget	MA Budget
07	Blank	CC Budget		
08	Blank	CC Budget	CC COMM Budget	
09	Blank	CC Budget	CC COMM Budget	
10	Blank	CC Budget	CC COMM Budget	

## MA Budget Functions

The following functions are available on the MA Budget Calculation Menu screen, WBAMMU, which is selection 02 on the Welfare Management System Menu.

1 - Budget Record - Current

Access to the MA Budget Calculation screens is obtained by entering Function 1 and the Registry Number (for cases which have not completed the Batch Update process) or the Case Number.

If there is no current MA budget for the case or the application record, the WBMAWB - MA Budget Record screen is returned. Data for calculating an MA budget is entered on this screen. If this screen is transmitted error-free, a calculated budget is returned and displayed on the WBGTMMA - MA Budget screen. This budget may be stored by pressing Ctrl+F3. When a budget is stored successfully, the worker will receive an acknowledgement message on this window. The first stored budget for a case will be assigned a version number of 01. The version number is

incremented by one for each subsequently stored budget. The date the budget is stored is also saved. The new version number and Date Stored will be displayed on the WBGTTA screen the next time the worker accesses this function.

If a current MA Budget exists when this function is accessed, the WBGTTA - MA Budget screen is displayed populated with the current calculated MA Budget. The user can navigate from this screen to the WBMABW screen, where the current budget can be modified or new budget data can be entered, by pressing the F1, F2, or F3 keys.

#### 2 - Budget Record - Pending

This function is not available for Upstate. If an Upstate WMS user attempts to access this function, the error message, PENDING BUDGET RECORD NOT ALLOWED, will be displayed.

#### 3 - Income Average

Income Average provides the user with functionality to average fluctuating earned income. The income and deduction information is entered on the WBMABA - MA Income-Average Entry screen. When this screen is transmitted, the average amounts will be calculated and displayed on the bottom of the screen.

Pressing F4 will transfer the averaged amounts to the WBMABW - MA Budget Record input screen. The income and deductions from the Income-Average calculation will be displayed on a line in the Earned Income section of the WBMABW screen. To indicate that the income and deductions that appear on this line are a result of the Income Average calculation the field labeled 'A' will be populated with a 'Y'.

#### 4 - Bottom Line

Like the Bottom-Line Entry function for PA/FS budgets, the Bottom-Line function for MA budgets is a mechanism for storing budgetary information on the data base for those budgets that are not calculated by the MABEL process. The amounts entered on the WBMABL - MA Bottom-Line Entry screen are those which are the results of either a manual or computer calculated budget.

If a bottom-line budget was stored for the case, the bottom-line entry screen returns with the prior budget displayed. The requested screen is completed or changed per budget requirements and transmitted.

A MA Bottom-Line budget can be stored by pressing Ctrl+F3 on the WBMABL screen. When a budget is stored successfully, the user will receive an acknowledgement message on this window. The first stored budget for a case will be assigned a version number of 01. The version number is incremented by one for each subsequently stored budget. The date the budget is stored is also saved. The new version number and Date Stored will be displayed on the WBMABL the next time the user accesses this function.

#### 5 - Deletion - Budget Record

Function 5 is used to delete the current system calculated (not Bottom-Line) MA budget. This is accomplished by entering Function 5 and the Case Number or Registry Number on the WBMAMU screen and transmitting. If the transmission is successful, the message, MA BUDGET RECORD DELETED, acknowledging the deletion is returned.

6 - Deletion - Bottom Line

Function 6 is used to delete the current Bottom-Line MA budget. This is accomplished by entering Function 6 and the Case Number or Registry Number on the WBMAMU screen and transmitting. If the transmission is successful, the message, MA-BL RECORD DELETED, acknowledging the deletion is returned.

WBMAMU – MA Budget Calculation Menu

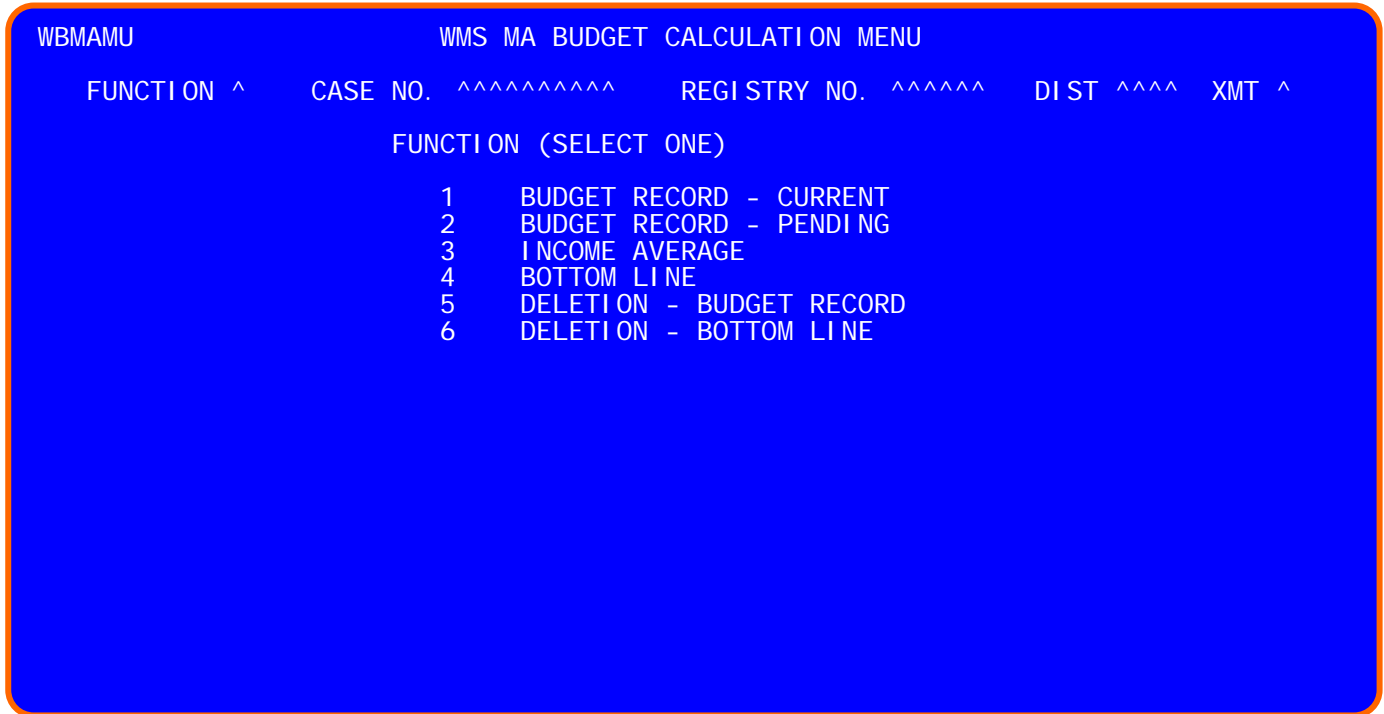


Figure 28 – MA Budget Calculation Menu (WBMAMU)

Purpose

This screen is used to access the desired MA Budget function. Functions to input and delete calculated and bottom-line MA budgets and a function to perform income averaging are available from this menu.

Access

- Entering 2 on WMSMNU – WMS Menu, **or**
- F2 from SIGN-ON COMPLETE

Screen Response

Positive

- Function 1 displays WBGTMMA – MA Budget if MA budget is stored, else WBMAWB – MA Budget Record Current,
- Function 1 and entry in DIST field displays stored MA budgets in selected District,
- Function 3 displays WBMAIA – MA Income Average Entry,
- Function 4 displays WBMABL – MA Bottom-Line,

- Function 4 and entry in DIST field displays stored MA Bottom-Line budgets in district entered,
- Function 5 Displays WBMAMU – MA Budget Calculation Menu with one of the following messages:
  - BUDGET RECORD DOES NOT EXIST
  - MA RECORD DELETED
  - MA RECORD DELETED            MA-BL RECORD EXISTS
  - MA RECORD NOT FOUND        MA-BL RECORD EXISTS
- Function 6 Displays WBMAMU – MA Budget Calculation Menu with one of the following messages listed:
  - BUDGET RECORD DOES NOT EXIST
  - MA-BL RECORD DELETED
  - MA-BL RECORD DELETED            MA RECORD EXISTS
  - MA-BL RECORD NOT FOUND        MA RECORD EXISTS

#### Negative

- One of the following messages on line 24:
  - ENTER EITHER CASE NO. OR REGISTRY NO.
  - CASE TYPE NOT MA
  - PENDING BUDGET RECORD NOT ALLOWED (if Function 2 is selected)
  - SF99 NOT SUPPORTED – REXMT (99 = 13)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F8	WKUM00 - Undercare/Maintenance Menu

Key	Description
F9	WSEMNU - Services Full Data Entry Menu
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WBPAFS - PA/FS Budget Calculation Menu with Case Number in place.
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Services
Ctrl+F10	WMEEMN - EEDSS Host Menu System
Ctrl+F11	W4139R - Auto Closings/Case Conflict Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WBMAMU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Required
CASE NO.	01050 - CASE NUMBER (10)	Entry required for cases which have completed Batch Update.; For Function 1, the word 'SCRATCHPAD' may be entered.
REGISTRY NO.	01046 - REGISTRY NUMBER (6)	Entry required for cases which have not completed Batch Update.
DIST	01010 - TRANSACTION DISTRICT (2)	First four letters of district name must be entered for cross district inquiry. Also required for cross district calculation for functions 1 or 4.

WBMAWB – MA Budget Record

WBMAWB	MA BUDGET RECORD										VERSION		BUDGET TYPE										
CASE NAME	CASE NO.										OFC	UNIT	WRKR	TRAN	EFFECTIVE	PER.	MO						
CA	EEC	EDC1	EDC2	AI	FUEL	TY	SHELTER:	TY	AMOUNT	WATER	AMOUNT	ADD:	TY	AMOUNT	LOC								
-SSI-	DM	LA	NO-DM	NO-ALL	BUY	PASS	-CHRONIC-	DATE	INS	PIA	CON	AMOUNT	LOC										
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	I	RWE								
INC 1																							
CHILD			MOYR					MOYR		AMOUNT		MOYR	AMOUNT										
CARE																							
EARN	A	LN	CTG	N	I	EID	SRC	PER	T	GROSS	INSUR	CT-SUP	WK-REL	I	RWE								
INC 2																							
CHILD			MOYR					MOYR		AMOUNT		MOYR	AMOUNT										
CARE																							
U	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	LN	C	N	I	SR	P	AMOUNT	CD	EXMPT	CD	EXMPT	
I																							
N																							
C																							
RESCS	LN	CTG	N	I	CD	RES-VAL		LN	CTG	N	I	CD	RES-VAL		LN	CTG	N	I	CD	RES-VAL			
																							XMT

Figure 29 – MA Budget Record (WBMAWB)

Purpose

This screen is used to input or change MA budget data. If there is no stored budget and if one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Entering Function 1 on WBMAWB – MA Budget Calculations Menu and there is not stored budget, **or**
- F1 from WBGTMA – MA Budget; only the Case Name, Reg. or Case No., OFC, Unit and WRKR fields will be populated, **or**
- F2 from WBGTMA – MA Budget; data fields will be populated with data associated with the budget displayed on WBGTMA regardless of whether or not it is has been stored, **or**
- F3 from WBGTMA – MA Budget; data fields will be populated with data from the current stored budget (if one exists). If there is no stored budget, only the Reg. or Case No. field will be populated



Screen Response

Positive

- WBGTTA with MA Budget, Expanded Eligibility, Expanded Eligibility/FHP, SSI Budget, or CC Budget displayed depending on the budget sequence

Negative

- Field(s) in error return highlighted. The message EXAMINE BLINKING FIELDS on line 24,
- One of the following messages on line 24:
  - SF99 NOT SUPPORTED – REXMT (99 = 5, 7-15, 17-22)
  - \* \* \* \* WARNING: Field must be filled. (Field will be highlighted)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with budget data fields empty except for Reg. No. or Case No. If the displayed budget data has been stored or calculated, Case Name, Office, Unit, and Worker may also be populated.
F2	WBMAWB - MA Budget Record; if the budget displayed on WBPWWB has been stored or at least calculated, budget fields will be populated with data from the displayed budget. If the displayed budget has not been stored or calculated, all fields will be empty except for Reg. No. or Case No.
F3	WBMAWB - MA Budget Record with budget fields populated with data from the current stored budget. If there is no current stored budget, all fields will be empty except for Reg. No. or Case No.
F4	WBMAIA - Income Average Entry
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBMAWB

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (3)	Protected
BUDGET TYPE	01062 - MA BUDGET TYPE CODE (2)	Required
CASE NAME	01070 - CASE NAME (28)	Required

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	As entered on the WBMAMU - MA Budget Calculation Menu
OFC	01020 - LOCAL OFFICE NUMBER (3)	As entered on WBMAMU - MA Budget Calculation Menu
UNIT	01030 - UNIT IDENTIFIER (3)	Required if Worker ID is not entered
WRKR	01040 - WORKER IDENTIFIER (5)	Required if Unit ID is not entered
TRAN	02010 - TRANSACTION TYPE (2)	Required
<b>EFFECTIVE PER.</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATES (12)	Required 1st occurrence - From Date - MM/DD/YY
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	Required 2nd occurrence - To Date - MM/DD/YY
MO	11420 - MONTHS FOR EXCESS (1)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	Required
EEC	07022 - EXPANDED ELIGIBILITY CODE (1)	Entry allowed only for Budget Types 01, 02, 04, 05, 06
EDC1	03512 - EXPECTED DATE OF CONFINEMENT (6)	1 <sup>st</sup> occurrence
EDC2	03512 - EXPECTED DATE OF CONFINEMENT (6)	2 <sup>nd</sup> occurrence
AI	07603 - BUDGET SCREEN INDICATOR (1)	
FUEL TY	11130 - FUEL FOR HEATING TYPE (1)	Required for BT 01, 02, 05, 06, 09, 10
<b>SHELTER:</b>		
TY	11120 - SHELTER TYPE (2)	Required if Fuel Type is not equal to 0
AMOUNT	11025 - TOTAL ACTUAL SHELTER COST (7)	Required for Budget Types 01, 02, 05, 06, 09
WATER AMOUNT	11035 - PA ACTUAL WATER AMOUNT (7)	
<b>ADD:</b>		
TY	11086 - PA ADDITIONAL NEEDS TYPE (2)	
AMOUNT	11095 - PA ACTUAL ADDITIONAL NEEDS AMOUNT (7)	
<b>SSI</b>		
DM	07090 - DEEMING CODE (1)	Required for Budget Types 04-10
LA	07496 - LIVING ARRANGEMENT CODE (1)	Required for Budget Types 04-10
NO-DM	09115 - NUMBER CHILDREN DEEMED (1)	
NO-ALL	07492 - NUMBER OF CHILDREN ALLOCATED (2)	
BUY	07001 - BUY-IN CODE (1)	
PASS	07072 - SSI PASS AMOUNT (7)	
<b>CHRONIC</b>		
DATE INS	01302 - DATE OF INSTITUTIONALIZATION (6)	Required for Budget Types 07-10, also required for Budget Types 04-06 if LA = 5 or 6
PIA	07602 - PERSONAL INCIDENTAL (1)	Required for Budget Types 07-10
CON	07606 - CHRONIC CARE CONTRIBUTION CODE (1)	Required for Budget Types 08-10
AMOUNT	07655 - CHRONIC CARE COMMUNITY CONTRIBUTION AMOUNT (7)	Required for Budget Types 08-10 if Chronic Care Com Contribution Code = 2, 3 or 4
LOC	01011 - FISCAL DISTRICT (2)	Entry allowed only in District 97 (OMH) or 98 (OMR)
<b>EARN INC1 and EARN INC2</b>		
A	07036 - INCOME AVERAGE INDICATOR (1)	
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Required for certain Earned income codes

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CTG	07037 - EARNED CATEGORICAL INDICATOR (1)	2 occurrences
N	07020 - CHILD EARNED INCOME (1)	2 occurrences
I	07600 - CHRONIC CARE EARNED INCOME INDICATOR (1)	2 occurrences
EID	07373 - 30 & 1/3 / \$30 INDICATOR (1)	2 occurrences
SRC	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
PER	07018 - PA EARNED INCOME PERIOD (1)	2 occurrences
T	07322 - WORK DEDUCTIONS INDICATOR CODES (1)	2 occurrences
GROSS	07190 - GROSS WAGES (7)	2 occurrences
INSUR	07250 - HEALTH INSURANCE DEDUCTION (7)	2 occurrences; For HR \$30 Exemption for MA cases. For exempt income for Boarder Lodger or Roomer for PA cases
CT-SUP	07280 - COURT ORDERED SUPPORT (7)	2 occurrences
WK-REL	07015 - WORK RELATED EXPENSES AMOUNT (7)	2 occurrences
IRWE	07295 - IMPAIRMENT RELATED WORK EXPENSES (7)	2 occurrences
<b>CHILD CARE</b>		
MOYR	07006 - CHILD CARE MONTH/YEAR (4)	6 occurrences
AMOUNT	07400 - PA CHILD CARE DEDUCTION (7)	6 occurrences
<b>UINC</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
C	07137 - UNEARNED CATEGORICAL INDICATION (1)	6 occurrences
N	07125 - PA UNEARNED INCOME FREQUENCY CODE (1)	6 occurrences
I	07601 - CHRONIC CARE UNEARNED INCOME INDICATOR (1)	6 occurrences
SR	07106 - PA UNEARNED INCOME SOURCE (2)	6 occurrences
P	07108 - PA UNEARNED INCOME PERIOD CODE (1)	6 occurrences
AMOUNT	07135 - PA UNEARNED INCOME (7)	6 occurrences
CD	07138 - MA UNEARNED AMOUNT CODE (2)	12 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	12 occurrences
<b>RESCS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
CTG	09105 - CATEGORICAL INDICATOR - RESOURCES (1)	6 occurrences
N	09104 - RESOURCE CHILD NUMBER (2)	6 occurrences
I	09106 - CHRONIC CARE RESOURCE INDICATOR (1)	6 occurrences
CD	09100 - RESOURCE TYPE (2)	6 occurrences
RES-VAL	09110 - RESOURCE VALUE (7)	6 occurrences



- IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY, if SF13 is pressed

Negative

- One of the following messages on Line 24:
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5)
  - XMIT INVALID: MUST HIT SF KEY This message is displayed when SF99 (99 = 7, 9-12, 14-15, 17-22) is pressed.
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTM A
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBGTM A if it has been stored. If the budget displayed on the WBGTM A screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBGTM A

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
		name
CASE NAME	01070 - CASE NAME (28)	
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TRN	02010 - TRANSACTION TYPE (2)	
BT	01062 - MA BUDGET TYPE CODE (2)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
EDC1	03512 - EXPECTED DATE OF CONFINEMENT (6)	1 <sup>st</sup> occurrence
EDC2	03512 - EXPECTED DATE OF CONFINEMENT (6)	2 <sup>nd</sup> occurrence
AI	07603 - BUDGET SCREEN INDICATOR (1)	
<b>NEEDS</b>		
PRE ADD ALLOW	11010 - BASIC ALLOWANCE (7)	
ENERGY ALLOW	11050 - HOME ENERGY ALLOWANCE (7)	
SHELT TY	11120 - SHELTER TYPE (2)	
SHELT ACTUAL	11025 - TOTAL ACTUAL SHELTER COST (7)	
SHELT ALLOW	11020 - SHELTER ALLOWANCE (7)	
WATER ACTUAL	11035 - PA ACTUAL WATER AMOUNT (7)	
WATER ALLOW	11030 - PA WATER AMOUNT (7)	
FUEL TY	11130 - FUEL FOR HEATING TYPE (2)	
FUEL ALLOW	11040 - FUEL FOR HEATING AMOUNT (7)	
ALLOW/PREG	11090 - PA ADDITIONAL ALLOWANCES (7)	
PA STD TY	11401 - APPLICABLE STANDARD CODE (1)	An asterisk in this field indicates the PA standard was used to calculate the MA eligibility.
PA STD ALLOW	11100 - TOTAL NEEDS (7)	
MA LEVEL TY	11401 - APPLICABLE STANDARD CODE (1)	An asterisk in this field indicates the MA standard was used to calculate the MA eligibility.
MA LEVEL ALLOW	11410 - MA LEVEL AMOUNT (7)	
<b>MA SUMMARY</b>		
TOTAL NET INCOME	07150 - PA NET AVAILABLE INCOME (7)	
CD/MONTHLY	11460 - TOTAL MA SURPLUS BUDGET CODE (1) 11461 - TOTAL MA SURPLUS BUDGET AMOUNT (7)	
	11420 - MONTHS FOR EXCESS (1)	
	11430 - AMOUNT OF MA MONTHS EXCESS (7)	
CD/EX RESOURCES CODE	09130 - EXCESS RESOURCE CODE (1) 09140 - EXCESS RESOURCE AMOUNT (7)	
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences
SRC	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
PER	07018 - PA EARNED INCOME PERIOD (1)	2 occurrences
T	07322 - WORK DEDUCTIONS INDICATOR CODES (1)	2 occurrences
EID	07373 - 30 & 1/3 / \$30 INDICATOR (1)	2 occurrences
GROSS INC	07190 - GROSS WAGES (7)	2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
\$90.00	07320 - WORK EXPENSES DISREGARD AMOUNT (7)	2 occurrences
EID	07370 - 30 & 1/3 / \$30 EXEMPTION (7)	2 occurrences
CHILD CR	07400 - PA CHILD CARE DEDUCTION (7)	2 occurrences
INSURANCE	07250 - HEALTH INSURANCE DEDUCTION (7)	2 occurrences
TOTAL DED	07200 - PA EARNED INCOME DEDUCTION AMOUNT (7)	2 occurrences
TOTAL NET EARNED	07030 - PA NET APPLICABLE EARNED INCOME (7)	
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
SR	07106 - PA UNEARNED INCOME SOURCE (2)	6 occurrences
P	07108 - PA UNEARNED INCOME PERIOD CODE (1)	6 occurrences
AMOUNT	07135 - PA UNEARNED INCOME (7)	6 occurrences
CD	07138 - MA UNEARNED AMOUNT CODE (2)	12 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	12 occurrences
TOTAL NET UNEARNED	07130 - PA NET UNEARNED INCOME (7)	
<b>RESOURCES</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	09100 - RESOURCE TYPE (2)	6 occurrences
RES-VAL	09110 - RESOURCE VALUE (7)	6 occurrences
TOT RES	09120 - TOTAL RESOURCE VALUE AMOUNT (7)	
EFF PER	01300 - PA BUDGET EFFECTIVE DATES (12)	
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	





- IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY if SF13 is pressed

Negative

- One of the following messages on line 24:
  - MUST RECALCULATE BUDGET BEFORE STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5)
  - XMIT INVALID: MUST HIT SF KEY This message is displayed when SF99 (99 = 7, 9-12, 14-15, 17-22) is pressed.
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTMA
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBGTMA if it has been stored. If the budget displayed on the WBGTMA screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBGTMA (SS/)

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 - CASE NAME (28)	
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TRN	02010 - TRANSACTION TYPE (2)	
BT	01062 - MA BUDGET TYPE CODE (2)	
DM	07090 - DEEMING CODE (1)	Required for Budget Types 04-10
LA	07496 - LIVING ARRANGEMENT CODE (1)	Required for Budget Types 04-10
NO-DM	09115 - NUMBER CHILDREN DEEMED (1)	
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
C	07137 - UNEARNED CATEGORICAL INDICATION (1)	
N	07120 - CHILD UNEARNED INCOME CODE (1)	
I	07601 - CHRONIC CARE UNEARNED INCOME INDICATOR (1)	
SR	07106 - PA UNEARNED INCOME SOURCE (2)	6 occurrences
P	07108 - PA UNEARNED INCOME PERIOD CODE (1)	6 occurrences
AMOUNT	07135 - PA UNEARNED INCOME (7)	6 occurrences
CD	07138 - MA UNEARNED AMOUNT CODE (2)	12 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	12 occurrences
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences
C	07037 - EARNED CATEGORICAL INDICATOR (1)	
N	07020 - CHILD EARNED INCOME (1)	
I	07600 - CHRONIC CARE EARNED INCOME INDICATOR (1)	
SRC	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
PER	07018 - PA EARNED INCOME PERIOD (1)	2 occurrences
GROSS INC	07190 - GROSS WAGES (7)	2 occurrences
65 EXM AMT	07380 - \$65 DISREGARD AMOUNT (7)	2 occurrences
COURT SUP	07280 - COURT ORDERED SUPPORT (7)	2 occurrences
BLND/WK-RL	07015 - WORK RELATED EXPENSES AMOUNT (7)	2 occurrences
½ REM	07381 - ONE HALF OF THE REMAINDER AMOUNT (7)	2 occurrences
INSURANCE	07250 - HEALTH INSURANCE DEDUCTION (7)	2 occurrences
TOTAL DED	07201 - SSI EARNED INCOME DEDUCTION AMOUNT (7)	2 occurrences
TOTAL NET EARNED	07031 - SSI NET EARNED INCOME AMOUNT (7)	
<b>RESOURCES</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
N	09104 - RESOURCE CHILD NUMBER (2)	6 occurrences
RES-AMT	09110 - RESOURCE VALUE (7)	6 occurrences
DEM-AMT	09117 - SSI RESOURCES DEEMED AMOUNT (7)	
EXCESS	09141 - SSI EXCESS RESOURCE AMOUNT (7)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>MA SUMMARY</b>		
*	11400 - APPLICABLE STANDARD FOR MA BUDGET (1)	An asterisk in this field indicates the PA standard was used to calculate MA eligibility
PA STD	11104 - SSI PA STANDARD (7)	
*	11400 - APPLICABLE STANDARD FOR MA BUDGET (1)	An asterisk in this field indicates the MA standard was used to calculate MA eligibility
MA LEVEL	11412 - SSI MA LEVEL (7)	
TOT NET INC	07151 - SSI TOTAL NET INCOME AMOUNT (7)	
CD/MONTHLY	11463 - MA SSI TOTAL SURPLUS CODE (1) 11462 - TOTAL SSI EXCESS AMOUNT (7)	
	11420 - MONTHS FOR EXCESS (1)	
	11431 - SSI VARIABLE MONTHS EXCESS AMOUNT (7)	
MA LEVEL CHILD	11411 - SSI MA LEVEL CHILD AMOUNT (7)	
AMT DEEMED	07500 - DEEMED AMOUNT (7)	
<b>ALLOCATION</b>		
NO OF CHILD	07492 - NUMBER OF CHILDREN ALLOCATED (2)	
NS CH INC	07191 - NON SSI CHILD INCOME (7)	
N	07121 - SUMMARY AREA SSI CHILD CODE (1)	2 occurrences
TOT NET	07152 - CHILD TOTAL NET INCOME AMOUNT (7)	2 occurrences
CD/ MON AMT	11464 - SSI CHILD TOTAL SURPLUS CODE (1) 11465 - SSI CHILD TOTAL SURPLUS AMOUNT (7)	2 occurrences
AFTER ALLOC	07510 - SSI INCOME AFTER ALLOCATION (7)	
EFFECTIVE PER	01301 - MA SSI EFFECTIVE PERIOD (12)	
TO	01301 - MA SSI EFFECTIVE PERIOD (12)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

WBGTMMA – MA CC Budget

WBGTMMA				MA CC BUDGET		VERSION 03	DISTRICT STLA			04/17/07							
CASE NAME				CASE NO.		OFC	UNIT	WRKR	TR	BT	CA	DATE	INS				
MABUDGET				MACASH1				TURN	02	07	01	102807					
-----UNEARNED INCOME-----						-----EARNED INCOME-----											
LN	C	N	I	SR	P	AMOUNT	CD	EXEMPT	CD	EXEMPT	LN	C	N	I	EID	SR	P
01	1		X	44	6	60000		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
						0		0		0							
*****MA SUMMARY*****																	
						MO OF INST	CHRONI C CARE			CONTRI BUTI ON AMT							
										0							
TOT NET U						58000	60000										
MA LEVEL/PIA						70000	5000										
CD/CONT TO COMM						0	0										
CONTRI B TO COST						0	55000										
TOTAL TO COST						0	55000										
EFF PER: MO OF INST						100107	TO 103107										
CHRONI C CARE						110107	TO 043008			DATE STORED							
-----RESOURCES-----																	
						CD/EX RES	0			TO							
						CD/EX RES	0			TO							

Figure 32 – MA CC Budget (WBGTMMA)

Purpose

This screen displays the completed MA-CC budget component. All fields on this screen are protected.

If there is a stored budget and if one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See SRM Resource File Integration.

Access

- Transmitting WBMAWB – MA Budget Record screen with no errors, **or**
- Entering 1 in Function on WBMAMU – MA Budget Calculation Menu and there is a stored budget with MA - CC Budget as the first screen in the budget sequence, **or**
- F8 from other MA budget screens. See **MA Budget Screen Sequence** in this section for more detail.

Screen Response

Positive

- The following message on Line 24:

- IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY if SF13 is pressed

Negative

- One of the following messages on line 24:
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTM
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBGTM if it has been stored. If the budget displayed on the WBGTM screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBGTM (CC)

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic
CASE NAME	01070 - CASE NAME (28)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TR	02010 - TRANSACTION TYPE (2)	
BT	01062 - MA BUDGET TYPE CODE (2)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
DATE INS	01302 - DATE OF INSTITUTIONALIZATION (6)	
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
C	07137 - UNEARNED CATEGORICAL INDICATOR (1)	
N	07120 - CHILD UNEARNED INCOME CODE (1)	
I	07601 - CHRONIC CARE UNEARNED INCOME INDICATOR (1)	
SR	07106 - PA UNEARNED INCOME SOURCE (2)	6 occurrences
P	07108 - PA UNEARNED INCOME PERIOD CODE (1)	6 occurrences
AMOUNT	07135 - PA UNEARNED INCOME (7)	6 occurrences
CD	07138 - MA UNEARNED AMOUNT CODE (2)	12 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	12 occurrences
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences
C	07037 - EARNED CATEGORICAL INDICATOR (1)	
N	07020 - CHILD EARNED INCOME CODE (1)	
I	07600 - CHRONIC CARE EARNED INCOME INDICATOR (1)	
EID	07373 - 30 & 1/3 / \$30 INDICATOR (1)	
SR	07016 - PA EARNED INCOME SOURCE (2)	
P	07018 - PA EARNED INCOME PERIOD (1)	
GROSS INC	07190 - GROSS WAGES (7)	
\$65 ½	07319 - CHRONIC CARE WORK RELATED EXPENSE (7)	
MO OF INST TOTAL DED	07203 - CHRONIC CARE EARNED INCOME DEDUCTION (7)	
MO OF INST TOTAL NET	07033 - CHRONIC CARE NET INCOME AMOUNT (7)	
CHRONIC CARE TOTAL DED	07203 - CHRONIC CARE EARNED INCOME DEDUCTION (7)	
CHRONIC CARE TOTAL NET	07033 - CHRONIC CARE NET INCOME AMOUNT (7)	
<b>MA SUMMARY</b>		
TOTAL NET	07604 - CHRONIC CARE \$20 DISREGARD CODE (1)	
TOTAL NET MO OF INST	07148 - CHRONIC CARE TOTAL INCOME AMOUNT (7)	1 <sup>ST</sup> occurrence is total net income for first month
TOTAL NET CHRONIC CARE	07148 - CHRONIC CARE TOTAL INCOME AMOUNT (7)	2 <sup>ND</sup> occurrence is total net income for chronic care budgeting
MA LEVEL/PIA MO OF INST	11414 - CHRONIC CARE MA LEVEL (7)	1 <sup>ST</sup> occurrence relates to first month
MA LEVEL/PIA CHRONIC CARE	11414 - CHRONIC CARE MA LEVEL (7)	2 <sup>ND</sup> occurrence relates to chronic care budgeting
CD/CONT TO COM	07606 - CHONIC CARE CONTRIBUTION CODE (1)	
CD/CONT TO COM MO OF INST	07656 - CHRONIC CARE CONTRIBUTION TO THE COMMUNITY (7) 07657 - CHRONIC CARE CONTRIBUTION FROM THE COMMUNITY (7)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CD/CONT TO COM CHRONIC CARE	07656 - CHRONIC CARE CONTRIBUTION TO THE COMMUNITY (7) 07657 - CHRONIC CARE CONTRIBUTION FROM THE COMMUNITY (7)	
CONTRIB TO COST MO OF INST	07654 - CHRONIC CARE CONTRIBUTION TO COST OF CARE (7)	1 <sup>st</sup> occurrence relates to first month
CONTRIB TO COST CHRONIC CARE	07654 - CHRONIC CARE CONTRIBUTION TO COST OF CARE (7)	2 <sup>nd</sup> occurrence relates to chronic care budgeting
TOTAL TO COST MO OF INST	07660 - CHRONIC CARE TOTAL COST (7)	
TOTAL TO COST CHRONIC CARE	07660 - CHRONIC CARE TOTAL COST (7)	
CONTRIBUTION AMOUNT	07650 - TABLE OF SUPPORT AMOUNT (7)	
<b>EFF PER:</b>		
MO OF INST	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	1 <sup>st</sup> six characters of this field are the From Date
TO	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	
CHRONIC CARE	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	1 <sup>st</sup> six characters of this field are the From Date
TO	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	
<b>RESOURCES</b>		
CD/EX RES	09133 - CHRONIC CARE EXCESS RESOURCE CODE (1) 09143 - CHRONIC CARE EXCESS RESOURCE AMOUNT (7)	
NONE	09102 - CHRONIC CARE RESOURCE DATE (12)	1 <sup>st</sup> six characters of this field are the From Date
TO	09102 - CHRONIC CARE RESOURCE DATE (12)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

WBGTMMA – MA CC COM Budget

WBGTMMA	MA CC COMM BUDGET VERSION 04 DISTRICT STLA	04/18/07	
CASE NAME	CASE NO.	OFC UNIT	WRKR TRN BT CA AI DATE INS
MABUDGET	MACASH1		TURNC 02 08 02 102807
-----UNEARNED INCOME-----		-----EARNED INCOME-----	
LN C N I SR P	AMOUNT CD EXEMPT CD EXEMPT	LN CTG	N I EID SRC P T
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
	0 0 0 0		
*****MA SUMMARY*****			
	MO OF INST	COMMUNITY BUDGETING	
TOTAL NET INC	0	0	0 GROSS INCOME 0
CD/CONT TO COMM	0	55000	0 \$65.00 0
TOTAL AVAIL INC	0	55000	0 INSURANCE 0
*MA LEVEL/ PA STD	70000	70000	0 CHILD CARE 0
CD/MONTHLY AMT	0	0	0 CT/IR 0
	0	0	0 1/2 REMAINDER 0
	0	0	0 WORK REL EXP 0
	0	0	0 \$90.00 0
	0	0	0 EID 0
	0	0	TOTAL DED 0
	0	0	TOTAL NET 0
	0	0	CD/EX RES 0 TO
	0	0	CD/EX RES 0 TO
EFF PER: MO OF INST 100107 TO 103107		CONTRIBUTION AMT	0
COMMUNITY BUDGETING 110107 TO 043008		DATE STORED	04/18/07

Figure 33 – MA CC Com Budget (WBGTMMA)

Purpose

This screen displays the MA CC Com Budget component. All fields on this screen are protected.

If there is a stored budget and if one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Transmitting WBMAWB – MA Budget Record screen with no errors and MA - CC COM Budget is the first screen in the calculated budget sequence, or
- Entering 1 in Function on WBMAMU – MA Budget Calculation Menu and there is a stored budget with MA - CC COM Budget as the first screen in the budget sequence, or
- F8 from other MA budget screens. See **MA Budget Screen Sequence** in this section for more detail.

Screen Response

Positive

- The following message on Line 24:



- IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY if SF13 is pressed

Negative

- One of the following messages on line 24:
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBG TMA
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBG TMA if it has been stored. If the budget displayed on the WBG TMA screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBG TMA (CC COM)

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
CASE NAME	01070 - CASE NAME (28)	

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO. or REG. NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TRN	02010 - TRANSACTION TYPE (2)	
BT	01062 - MA BUDGET TYPE CODE (2)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
AI	07603 - BUDGET SCREEN INDICATOR (1)	
DATE INS	01302 - DATE OF INSTITUTIONALIZATION (6)	
<b>UNEARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
C	07137 - UNEARNED CATEGORICAL INDICATOR (1)	
N	07120 - CHILD UNEARNED INCOME CODE (1)	
I	07601 - CHRONIC CARE UNEARNED INCOME INDICATOR (1)	
SR	07106 - PA UNEARNED INCOME SOURCE (2)	6 occurrences
P	07108 - PA UNEARNED INCOME PERIOD CODE (1)	6 occurrences
AMOUNT	07135 - PA UNEARNED INCOME (7)	6 occurrences
CD	07138 - MA UNEARNED AMOUNT CODE (2)	12 occurrences
EXEMPT	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	12 occurrences
<b>EARNED INCOME</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences
CTG	07037 - EARNED CATEGORICAL INDICATOR (1)	
N	07020 - CHILD EARNED INCOME CODE (1)	
I	07600 - CHRONIC CARE EARNED INCOME INDICATOR (1)	
SRC	07373 - 30+ 1/3 / \$30 INDICATOR (1)	2 occurrences
P	07016 - PA EARNED INCOME SOURCE (2)	2 occurrences
T	07018 - PA EARNED INCOME PERIOD (1)	
GROSS INC	07190 - GROSS WAGES (7)	2 occurrences
\$65	07382 - CHRONIC CARE COMMUNITY TAXES-65 DEDUCTION AMOUNT (7)	2 occurrences
INSURANCE	07251 - COMMUNITY HEALTH INSURANCE (7)	2 occurrences
CHILD CARE	07401 - COMMUNITY CHILD CARE (7)	2 occurrences
CT/IR	07280 - COURT ORDERED SUPPORT (7) 07295 - IMPAIRMENT RELATED WORK EXPENSES (7)	2 occurrences
½ REMAINDER	07384 - CHRONIC CARE COMMUNITY ½ REMAINDER (7)	2 occurrences
WORK REL EXP	07015 - WORK RELATED EXPENSES AMOUNT (7)	
\$90.00	07320 - WORK EXPENSES DISREGARD AMOUNT (7)	
EID	07370 - 30 & 1/3 / \$30 EXEMPTION (7)	
TOTAL DED	07202 - CHONIC CARE COMMUNITY EARNED INCOME DEDUCTION (7)	2 occurrences
TOTAL NET	07032 - CHRONIC CARE COMMUNITY NET INCOME AMOUNT (7)	
CD/EX RES	09132 - CHRONIC CARE COMMUNITY EXCESS RESOURCE CODE (1) 09142 - CHRONIC CARE COMMUNITY EXCESS RESOURCE AMOUNT (7)	2 occurrences
NONE	09102 - CHRONIC CARE RESOURCE DATE (12)	2 occurrences; 1 <sup>st</sup> six characters

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
		are the From Date
TO	09102 - CHRONIC CARE RESOURCE DATE (12)	2 occurrences
<b>MA SUMMARY</b>		
TOTAL NET	07605 - COMMUNITY \$20 DISREGARD CODE (1)	
TOTAL NET MO OF INST	07149 - CHRONIC CARE COMMUNITY TOTAL INCOME AMOUNT (7)	1 <sup>ST</sup> occurrence is total net income for first month
TOTAL NET CHRONIC CARE	07149 - CHRONIC CARE COMMUNITY TOTAL INCOME AMOUNT (7)	2 <sup>ND</sup> occurrence is total net income for chronic care budgeting
CD/CONT TO COM	07606 - CHRONIC CARE CONTRIBUTION CODE (1)	
CD/CONT TO COM MO OF INST	07655 - CHRONIC CARE COMMUNITY CONTRIBUTION TO THE COMMUNITY (7) 07657 - CHRONIC CARE COMMUNITY CONTRIBUTION FROM THE COMMUNITY (7)	
CD/CONT TO COM CHRONIC CARE	07656 - CHRONIC CARE COMMUNITY ONTRIBUTION TO THE COMMUNITY (7) OR 07657 - CHRONIC CARE COMMUNITYCONTRIBUTION FROM THE COMMUNITY (7)	
TOTAL AVAIL INC MO OF INST	07009 - TOTAL AVAILABLE INCOME AMOUNT (7)	
TOTAL AVAIL INC COMMUNITY BUDGETING	07009 - TOTAL AVAILABLE INCOME AMOUNT (7)	
None	11402 - COMMUNITY APPLICABLE STANDARD CODE (1)	An asterisk in this field indicates the community standard was used to calculate MA eligibility.
MA LEVEL/ PA STD MO OF INST	11101 - CHRONIC CARE COMMUNITY PA STANDARD (7)	
MA LEVEL/ PA STD COMMUNITY BUDGETING	11101 - CHRONIC CARE COMMUNITY PA STANDARD (7)	1 <sup>ST</sup> occurrence relates to first month
CD/MONTHLY AMOUNT	11467 - CHRONIC CARE COMMUNITY SURPLUS CODE (1)	2 <sup>ND</sup> occurrence relates to chronic care budgeting
CD/MONTHLY AMOUNT MO OF INST	11466 - CHRONIC CARE COMMUNITY TOTAL SURPLUS AMOUNT (7)	
CD/MONTHLY AMOUNT COMMUNITY BUDGETING	11466 - CHRONIC CARE COMMUNITY TOTAL SURPLUS AMOUNT (7)	
CD/EX RES	09132 - CHRONIC CARE COMMUNITY EXCESS RESOURCE CODE (1) / 09142 - CHRONIC CARE COMMUNITY EXCESS RESOURCE AMOUNT (7)	
	09102 - CHRONIC CARE RESOURCE DATE (12)	
TO	09102 - CHRONIC CARE RESOURCE DATE (12)	
<b>EFF PER:</b>		
MO OF INST	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	1 <sup>ST</sup> six characters of this field are the From Date
TO	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	
COMMUNITY BUDGETING	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	1 <sup>ST</sup> six characters of this field are the From Date
TO	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	
CONTRIBUTIO AMT	07650 - TABLE OF SUPPORT AMOUNT (7)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

WBGTMMA – Expanded Eligibility

WBGTMMA	EXPANDED	ELI GI BI LI TY	VERSI ON	DI STRI CT	STLA	04/23/07
CASE NAME		CASE NO.	OFC	WORKER	BT	EFFECTIVE PERI OD
MABUDGET		MACASH1	UNIT	TURNC	02	050107 TO 043008
CA: 02		EEC: T		TOTAL NET I NCOME:		21667
				MBI -WPD NET I NCOME:		
TRANSI TI ONAL MA:		ELI GI BLE		185%		211100
AI DS I NSURANCE:						
COBRA I NSURANCE:						
DI SABLED ADULT CHI LD:						
MBI -WPD:						
MBI -WPD PREMI UM:						

Figure 34– Expanded Eligibility (WBGTMMA)

Purpose

This screen is used to display expanded eligibility for the following situations:

- Budget Type = 01 or 02, EEC = T, and surplus income exists
- Budget Type = 04, EEC = A or H, and surplus income exists
- Budget Type = 04, 05, or 06, and EEC = E

All fields on this screen are protected.

If there is a stored budget and if one or more individuals in the case have resource data that has not been resolved, the message, UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Transmitting WBMABW – MA Budget Record screen with any of the three situations listed above under Purpose, **or**
- Entering 1 in Function on WBMAMU – MA Budget Calculation Menu and the latest stored budget has an Expanded Eligibility budget component, **or**

- F8 from other MA budget screens. See **MA Budget Screen Sequence** in this section for more detail.

### Screen Response

#### Positive

- If Ctrl+F3 is pressed, the following message is displayed on Line 24:
  - IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY.

#### Negative

- One of the following messages on line 24:
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5, 17-22)
  - XMIT INVALID: MUST HIT SF KEY This message is displayed when SF99 (99 = 7, 9-12, 14-15, 17-22) is pressed.
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTM A
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBGTM A if it has been stored. If the budget displayed on the WBGTM A screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description – WBGTTA

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
CASE NAME	01070 - CASE NAME (28)	
CASE NO. OR REG. NO.	01050 - CASE NUMBER (10) OR 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
BT	01062 - MA BUDGET TYPE CODE (2)	
<b>EFFECTIVE PERIOD</b>		
NONE	01300 - PA BUDGET EFFECTIVE DATES (12)	
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	
CA:	01152 - NUMBER OF PERSONS IN PA CASE (2)	
EEC:	07022 - EXPANDED ELIGIBILITY CODE (1)	
TOTAL NET INCOME:	01050 - PA NET AVAILABLE INCOME (7)	
MBI-WPD NET INCOME::	09032 - FHP TOTAL RESOURCE AMOUNT (7)	
TRANSITIONAL MA:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 185% and poverty level amount if T is entered in EEC field on MBMAWB and Budget type is 01 and 02 and surplus income exists.
AIDS INSURANCE:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 185% and poverty level amount if A is entered in EEC Field on MBMAWB and Budget type is 04 and surplus income exists.
COBRA INSURANCE:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE EXCESS INCOME or INELIGIBLE EXCESS RESOURCES or INELIGIBLE EXCESS INCOME AND RESOURCES with 185% and poverty level amount if H is Entered in EEC field on MBMAWB and Budget Type is 04 and surplus income exists.
DISABLED ADULT CHILD:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	<p>Displayed as ELIGIBLE or INELIGIBLE EXCESS INCOME or INELIGIBLE EXCESS RESOURCES Or INELIGIBLE EXCESS INCOME AND RESOURCES with comparison of Income to SSI Levels if the following is entered on WBMAB and Budget Type is 04, 05 or 06.</p> <ul style="list-style-type: none"> <li>▪ E in ECC Field and</li> <li>▪ 47 (Social Security benefit DAC) in Unearned Income Source Code field and</li> <li>▪ 15 (Receipt/Increase in SSICB Resulting in SSI ineligibility) - in Unearned Income Exception Code Field and</li> <li>▪ 2 (SSI Related Spouse/Parent/Individual - Blind) - in Unearned Categorical Indicator field or</li> <li>3 (SSI Related Spouse/Parent/Individual - Disabled) - in Unearned Categorical Indicator field.</li> </ul>

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
MBI-WPD:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as Eligible or Ineligible at 150% to 250% of Federal Poverty Level (FPL) if EEC of V or W is entered and budget type = 4, 5, or 6
MBI-WPD PREMIUM:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Premium is calculated by subtracting Pass Amount (07-072) from SSI Total Income Amount (07-151). If over 150% and under 250% of FPL, take 3% of net earned income plus 7.5% of net unearned income.

WBGTMMA – Expanded Eligibility/FHP

WBGTMMA	EXPANDED	ELI GI BI LI TY/FHP	VERSION 04	DI STRI CT	STLA	04/18/07
CASE NAME	CASE NO.	OFC	UNIT	WORKER	BT	EFFECTIVE PERIOD
MABUDGET	MACASH1			TURNC	01	050107 TO 043008
CA: 03	EEC: B			TOTAL NET I NCOME:		153500
TOTAL FHP RES:	EXC FHP RES:			TOTAL FHP I NCOME:		162500
				TOTAL FP I NCOME:		153500
PREGNANT WOMAN:	ELI GI BLE			100%		172100
I NFANT:	ELI GI BLE			100%		172100
CHI LD 1-5 YEARS:	ELI GI BLE			133%		228900
CHI LD 6+ < 19:	ELI GI BLE			100%		172100
FHP: FAMI LY	ELI GI BLE			150%		258200/1995000
FAMI LY PLANNI NG:	ELI GI BLE			200%		344200

Figure 35 – Expanded Eligibility/FHP (WBGTMMA)

Purpose

This screen is used to display expanded eligibility/ Family Health Plus (FHP) for the following situation:

- Budget Type = 01 or 05, EEC = B, C, D I, or P, and surplus income exists.

All fields on this screen are protected.

If there is a stored budget and if one or more individuals in the case have resource data that has not been resolved, the message, UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Transmitting WBMAWB – MA Budget Record screen with the three situation listed above under Purpose, **or**
- Entering 1 in Function on WBMAMU – MA Budget Calculation Menu and the latest stored budget has an Expanded Eligibility budget component, **or**
- F8 from other MA budget screens. See **MA Budget Screen Sequence** in this section for more detail.



## Screen Response

### Positive

- The following message on Line 24:
  - IRCS RECORD UPDATED, BUDGET RECORD UPDATED TO VERSION XX ON MM/DD/YY if SF13 is pressed

### Negative

- One of the following messages on line 24:
  - MUST RECALCULATE BUDGET PRIOR TO STORING
  - SCRATCHPAD, SF13 NOT ALLOWED
  - SF99 NOT SUPPORTED FOR CROSS DIST (99 = 1-4, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 5, 17-22)
  - XMIT INVALID: MUST HIT SF KEY This message is displayed when SF99 (99 = 7, 9-12, 14-15, 17-22) is pressed.
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

## Printed Response

None

## Function Keys

Key	Description
F1	WBMAWB - MA Budget Record with no data
F2	WBMAWB - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTM A
F3	WBMAWB - Budget Record; data fields will be populated with data from the budget displayed on WBGTM A if it has been stored. If the budget displayed on the WBGTM A screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F4	WBMAIA - Income Average Entry
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
F8	Displays the next screen in the MA Budget Screen Sequence. See <b>MA Budget Screen Sequence</b> in this section for more information.
Ctrl+F3	Stores MA budget (unless access was via SCRATCHPAD)
Ctrl+F6	MBMAMU - MA Budget

Screen Field Description - WBGTM A

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
CASE NAME	01070 - CASE NAME (28)	
CASE NO. OR REG. NO.	01050 - CASE NUMBER (10) OR 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
BT	01062 - MA BUDGET TYPE CODE (2)	
<b>EFFECTIVE PERIOD</b>		
<i>None</i>	01300 - PA BUDGET EFFECTIVE DATES (12)	
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	
CA:	01152 - NUMBER OF PERSONS IN PA CASE (2)	
EEC:	07022 - EXPANDED ELIGIBILITY CODE (1)	
TOTAL NET INCOME:	01050 - PA NET AVAILABLE INCOME (7)	
TOTAL FHP RES:	09032 - FHP TOTAL RESOURCE AMOUNT (7)	
EXC FHP RES:	09033 - FHP EXCESS RESOURCE AMOUNT (7)	
TOTAL FHP INCOME:	07068 - AMOUNT OF TOTAL MONTHLY GROSS INCOME (7)	
TOTAL FP INCOME:	07067 - AMOUNT OF FAMILY PLANNING NET INCOME (7)	
**PREGNANT WOMAN:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 100% to 200% of poverty level amount if B or P is entered in EEC field on MBMAWB, a date is entered in EDC1 and/or EDC2 (Expected Date of Confinement) and Budget type is 01 or 05 and surplus income exists.
**INFANT:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 100% to 200% of poverty level amount if B or I is entered in EEC field on MBMAWB and Budget type is 01 or 05 and surplus income exists.
**CHILD 1-5 YEARS:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 133% of poverty level amount if B or C is entered in EEC field on MBMAWB and Budget type is 01 or 05 and surplus income exists.
**CHILD 6+< 19:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE with 100% of poverty level amount if B or D is entered in EEC Field on MBMAWB and Budget type is 01 or 05 and surplus income exists.
FHP: FAMILY	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE at 150% of Federal Poverty Level if B is entered in EEC and Case Type is 24.
FAMILY PLANNING:	07021 - EXPANDED ELIGIBILITY LEVEL CODE (1)	Displayed as ELIGIBLE or INELIGIBLE at 200% of Federal Poverty Level if J or K entered in EEC.

\*\* If B is entered in EEC field, then data will be displayed in INFANT, CHILD 1-5 YEARS AND CH 6+DOB 09/30/83.  
If B is entered in EEC field and a date entered in EDC1 and/or EDC1 and/or EDC2 fields, then data will be displayed in PREGNANT WOMAN as well as the three fields just mentioned.

WBMAIA – MA Income - Average Entry

WBMAIA	MA INCOME	AVERAGE ENTRY	BUDGET TYPE 01	
CASE NAME	CASE NO.	OFC UNIT	WRKR	TRUNC
MABUDGET	MACASH1	CHILD CARE	CHILD CARE	CHILD CARE
LN	EARNED INCOME 1	CHILD CARE	CHILD CARE	CHILD CARE
PERIOD	GROSS INCOME	INSURANCE	CHILD CARE	CHILD CARE
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
5	_____	_____	_____	_____
6	_____	_____	_____	_____
7	_____	_____	_____	_____
8	_____	_____	_____	_____
AVERAGE	_____	_____	_____	_____

XMIT \_

Figure 36 – MA Income-Average Entry (WBMAIA)

Purpose

This screen is used to average fluctuating earned income for entry of MA budget data on WBMAWB – MA Budget Record. Required fields are: Budget Type, Case Name, Unit and/or Worker, Income Average Period From and To Dates, Income Source, Period and Gross. After transmitting, the monthly average income/deductions will be displayed on line 24.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Entering Function 3 and either a case number or registry number on WBMAJU – MA Budget Calculations Menu and transmitting, **or**
- F4 from WBMAWB or WBGTM

Screen Response

Positive

- The average amounts for each column are calculated and displayed at the bottom of each column.

Negative

- Field(s) in error return highlighted with the message, EXAMINE BLINKING FIELDS on line 24
- One of the following messages on line 24:
  - EXAMINE BLINKING FIELDS
  - SF99 NOT SUPPORTED – REXMT (99 = 3, 5, 7-15, 17-22)
  - WARNING FIELD MUST BE FILLED
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMAIA - Income Average Entry for first occurrence of earned income
F2	WBMAIA - Income Average Entry for second occurrence of earned income
F4	WBMAWB - MA Budget Record with appropriate data carried over from WBMAIA.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	MBMAMU - MA Budget Calculation Menu

Screen Field Description – WBMAIA

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
BUDGET TYPE	01062 - MA BUDGET TYPE CODE (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
CASE NAME	01070 - CASE NAME (28)	
CASE NO. OR REG. NO.	01050 - CASE NUMBER (10) OR 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
<b>INC. AVG PERIOD</b>		
<i>None</i>	01300 - PA BUDGET EFFECTIVE DATES (12)	
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	
SRC	07016 - PA EARNED INCOME SOURCE (2)	
<b>EARNED INCOME 1 or EARNED INCOME 2</b>		
PERIOD	07018 - PA EARNED INCOME PERIOD (2)	8 occurrences
GROSS INCOME	07190 - GROSS WAGES (7)	8 occurrences
INSURANCE	07250 - HEALTH INSURANCE DEDUCTION (7)	8 occurrences
CHILD CARE	07400 - PA CHILD CARE DEDUCTION (7)	24 occurrences (3 per period)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>AVERAGE</b>		
GROSS INCOME	NONE	
INSURANCE	NONE	
CHILD CARE	NONE	3 occurrences

WBMABL – MA Bottom-Line Entry

```

WBMABL MA BOTTOM-LINE ENTRY VERSION 01 DISTRICT STLA 04/19/07
CASE NAME CASE NO. OFC UNIT WORKER TR BT MO REASON CD
MABUDGET MACASH1 TURNC 02 01 002
CA EEC EDC -SSI - DM LA NO-DM NO-ALL -CHRONIC- DATE INS CON CD
03
TY--NEEDS---AMT ---EARNED INCOME--- ---UNEARNED INCOME--- ---RESOURCES---
ALLOW GROSS INC GROSS INC TOT RES
EN/SUP TOTAL DED TOTAL EXM SOURCES
02 SHEL 020000 NET EARN INC NET INC
WATER SOURCES SOURCES CTG
2 FUEL CTG CTG CTG
OTHER CHI LD CHI LD CHI LD CH NO.
TOTAL
MA LEVEL 070000
*****MA SUMMARY*****
TOT NET INC NS CH INC
CD/MONTHLY AMT AFT ALLO CONT COMM
AMT DEEM INST MO TO
CD/RESOURCES CH AMT EX TOT TO COST
CH AMT EX CHRONIC TO
CH AMT EX TOT TO COST
EFF PERIOD 050107 TO 043008 DATE STORED 04/19/07
XMT
    
```

Figure 37 – MA Bottom-Line Entry (WBMABL)

Purpose

This screen is used to input or change MA budget data when MABEL calculation is to be bypassed. It is also used to display the current stored bottom-line MA budget.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA – RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

Access

- Entering 4 in Function on WBMAMU – MA Budget Calculations Menu, or
- Transmitting WBMABL – MA Bottom-line

Screen Response

Positive

- Field(s) in error return highlighted. The message EXAMINE BLINKING FIELDS on line 24
- One of the following message on Line 24:
  - INPUT DATA IS ERROR FREE

- BOTTOM-LINE BUDGET RECORD UPDATED TO VERSION 99 ON MM/DD/YY (if Ctrl+F3 is pressed, 99 = version number)

Negative

- One of the following messages on line 24:
  - EDITS MUST BE DONE BEFORE SF13, DEPRESS XMT KEY
  - SF99 NOT SUPPORTED FOR CROSS DISTRICT (99 = 1-3, 13)
  - SF99 NOT SUPPORTED – REXMT (99 = 4, 5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBMABL - MA Budget Record with no data
F2	WBMABL - MA Budget Record; data fields will be populated with data associated with the budget displayed on WBGTMA
F3	WBMABL - Budget Record; data fields will be populated with data from the budget displayed on WBMABL if it has been stored. If the budget displayed on the WBMABL screen has not been stored, only the Reg. or Case No. field will be populated, and all other data associated with the displayed budget will be lost.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F3	Stores MA Bottom-Line Budget
Ctrl+F6	MBMAMU - MA Budget Calculation Menu

Screen Field Description – WBMABL

Many data element titles include the abbreviation PA but the data element is shared by PA and MA. For MA only cases consider PA to mean MA

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
VERSION	24733 - MA BUDGET VERSION NUMBER (2)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
CASE NAME	01070 - CASE NAME (28)	
CASE NO. OR REG. NO.	01050 - CASE NUMBER (10) OR 01046 - REGISTRY NUMBER (6)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
TR	02010 - TRANSACTION TYPE (2)	
BT	01062 - MA BUDGET TYPE CODE (2)	



WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
MO	11420 - MONTHS FOR EXCESS (1)	
REASON CD	07008 - MA BOTTOM LINE REASON CODE (3)	
CA	01152 - NUMBER OF PERSONS IN PA CASE (2)	
EEC	07022 - EXPANDED ELIGIBILITY CODE (1)	Entry allowed only for Budget Types 01, 02, 04, 05, 06
EDC	03512 - EXPECTED DATE OF CONFINEMENT (6)	
<b>-SSI-</b>		
DM	07090 - DEEMING CODE (1)	Required for Budget Types 04-10
LA	07496 - LIVING ARRANGEMENT CODE (1)	Required for Budget Types 04-10
NO-DM	09115 - NUMBER CHILDREN DEEMED (1)	
NO-ALL	07492 - NUMBER OF CHILDREN ALLOCATED (2)	
<b>-CHRONIC-</b>		
DATE INS	01302 - DATE OF INSTITUTIONALIZATION (6)	Required for Budget Types 07-10, also required for Budget Types 04-06 if LA = 5 or 6
CON CD	07606 - CHRONIC CARE CONTRIBUTION CODE (1)	Required for Budget Types 08-10
<b>- -NEEDS- -</b>		
ALLOW AMT	11010 - BASIC ALLOWANCE AMOUNT (7)	
EN/SUP AMT	11050 - HOME ENERGY ALLOWANCE AMOUNT (7)	
SHELT TY	11120 - SHELTER TYPE (2)	
SHELT AMT	11020 - SHELTER ALLOWANCE (7)	
WATER AMT	11030 - PA WATER AMOUNT (7)	
FUEL TY	11130 - FUEL FOR HEATING TYPE (2)	
FUEL AMT	11040 - FUEL FOR HEATING AMOUNT (7)	
OTHER TY	11080 - ADDITIONAL NEEDS TYPE (2)	
OTHER AMT	11090 - PA ADDITIONAL ALLOWANCE AMOUNT (7)	
TOTAL	11100 - TOTAL NEEDS AMOUNT (7)	
MA LEVEL	11410 - MA LEVEL AMOUNT (7)	
<b>EARNED INCOME</b>		
GROSS INC	07190 - GROSS WAGES (7)	
TOTAL DED	07220 - NON-PERSONAL WORK DEDUCTION (7)	
NET EARN INC	07030 - PA NET APPLICABLE EARNED INCOME (7)	
SOURCES	07010 - EARNED INCOME SOURCES (2)	2 occurrences
CTG	07037 - EARNED CATEGORICAL INDICATOR (1)	2 occurrences
CHILD	07020 - CHILD EARNED INCOME (1)	2 occurrences
<b>UNEARNED INCOME</b>		
GROSS INC	07135 PA UNEARNED INCOME AMOUNT (7)	
TOTAL EXM	07136 - PA UNEARNED INCOME DEDUCTION AMOUNT (7)	
NET INC	07130 - PA NET UNEARNED INCOME (7)	
SOURCES	07100 - UNEARNED INCOME SOURCE (2)	3 occurrences
CTG	07137 - UNEARNED CATEGORICAL INDICATION (1)	3 occurrences
CHILD	07120 - CHILD UNEARNED INCOME CODE (1)	3 occurrences
<b>- -RESOURCES- -</b>		
TOT RES	09120 - TOTAL RESOURCE VALUE AMOUNT (7)	
SOURCES	09100 - RESOURCE TYPE (2)	6 occurrences
CTG	09105 - CATEGORICAL INDICATOR - RESOURCES (1)	6 occurrences
CH NO.	09103 - BOTTOM LINE RESOURCE CHILD NUMBER (1)	3 occurrences

WMS SYSTEM REFERENCE MANUAL  
BUDGET CALCULATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
*****MA SUMMARY*****		
TOT NET INC	07150 - PA NET AVAILABLE INTOME (7)	
NS CH INC	07191 - NON SSI CHILD INCOME (7)	
CD/MONTHLY AMT	11460 - TOTAL MA SURPLUS BUDGET CODE (1) 11461 - TOTAL MA SURPLUS BUDGET AMOUNT (7)	
AFT ALLO	07510 - SSI INCOME AFTER ALLOCATION (7)	
CONT	07656 - CHRONIC CARE CONTRIBUTION TO THE COMMUNITY (7) 07655 - CHRONIC CARE COMMUNITY CONTRIBUTION AMOUNT (7)	Displays 'TO' if data element 07656 is not equal to zero; Displays 'FROM' if data element 07655 is not equal to zero
COMM	07655 - CHRONIC CARE COMMUNITY CONTRIBUTION AMOUNT (7)	
NONE	11430 - AMOUNT OF MA MONTHS EXCESS (7)	
AMT DEEM	07500 - DEEMED AMOUNT (7)	
INST MO	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	
TO	01304 - CHRONIC CARE PHASE TWO EFFECTIVE PERIOD (12)	
CD/RESOURCES	09130 - EXCESS RESOURCE CODE (1) 09140 - EXCESS RESOURCE AMOUNT (7)	
CH	07121 - SUMMARY AREA SSI CHILD CODE (1)	3 occurrences
AMT	07152 - CHILD TOTAL NET INCOME AMOUNT (7)	3 occurrences
EX	11465 - SSI CHILD TOTAL SURPLUS AMOUNT (7)	3 occurrences
TOT TO COST	07660 - CHRONIC CARE TOTAL COST (7)	
CHRONIC	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	
TO	01305 - CHRONIC CASE PHASE THREE EFFECTIVE PERIOD (12)	
TOT TO COST	07660 - CHRONIC CARE TOTAL COST (7)	
EFF PERIOD	01300 - PA BUDGET EFFECTIVE DATES (12)	
TO	01300 - PA BUDGET EFFECTIVE DATES (12)	
DATE STORED	02020 - TRANSACTION INPUT DATE (6)	

## Subsystem Processing

### Error Messages

#### Errors for which Full Messages are Displayed

(listing is alphabetical by error message; these error messages occur as a result of either PA/FS or MA menu processing)

Error Message	Related Data Element	Cause/Remedy
<b>APPLICATION SYSTEM DELETED - 90 DAYS OLD</b>	24020	The PA/FS application record has been deleted by the system due to inactivity.
<b>APPLICATION WITHDRAWN</b>	24020	The PA/FS application record has been worker Withdrawn and is no longer available.
<b>AUTHORIZATION REPORT NOT ALLOWED FOR DISTRICT</b>	N/A	The District did not select PA/FS Authorization Report Function as an option.
<b>AUHTORIZATION RPT PRINTER UNAVAILABLE</b>	N/A	Authorization Report printer is unavailable for PA/FS.
<b>BUDGET MARKED FOR ARCHIVING</b>	24901	Archive flag equals X for PA/FS/MA budgets (flagged for removal).
<b>BUDGET RECORD DOES NOT EXIST</b>	N/A	Entry of 5 (Deletion - Budget Record) or 6 (Deletion - Bottom-Line) in Function and There is no stored MA budget.
<b>CASE NUMBER INVALID</b>	01050	Case number is not found.
<b>CASE NUMBER NOT FOUND</b>	01050	Case Number is not found or available for PA/FS/MA.
<b>CASE REMOVED FROM DATABASE</b>	24901	Archive indicator equals X for PA/FS/MA.
<b>CASE STATUS INVALID FOR AUTH REPORT</b>	02090	Only case status 10 (Active), 14 Closed), 21 (Active-Override) or 22 (Closed-Override) are valid For Authorization Report.
<b>CASE TYPE 60 NOT VALID FOR FUNCTION</b>	01060	Functions 1(Input Entry), 2 (Bottom-Line Entry), 3 (Budget History), and 9 (Cross District Calculation) are not available for Case Type 60 (HEAP)
<b>CASE TYPE NOT PA OR FS</b>	01060	Case type must be 11-14, 16-19, 31 or 32 when Entering a Function and Case # Reg # for MA.
<b>CASE TYPE NOT MA</b>	01060	Case type must be 20, 21, 22 or 24 when entering a Function and Case # Reg # for MA.

<b>Error Message</b>	<b>Related Data Element</b>	<b>Cause/Remedy</b>
<b>CASE TYPE NOT PERMITTED FOR MA BUDGETTING</b>	01060	Case type must be 20, 21, 22 or 24 when entering a Function and Case # Reg # for MA.
<b>CASE UNDERGOING FULL DATA ENTRY USE REGISTRY NO.</b>	24020	Enter Registry Number. Do not use case number.
<b>CROSS DIST INQUIRY NOT ALLOWED</b>	N/A	If district name entry does not equal 4 spaces
<b>CROSS DIST INQUIRY PROHIBITED</b>	N/A	Only PA/FS budget functions 1-3, 6-8 may be selected for cross district inquiry. or MA cross district Inquiry is selected from a PID not allowed to do cross district inquiry.
<b>CROSS DISTRICT INQUIRY PROHIBITED</b>	N/A	If district is not allowed to request Cross Dist. Inquiry and it is selected
<b>EEDSS TRANSMISSION IN PROGRESS. PLEASE TRY IN 5 MINUTES.</b>	N/A	Wait 5 minutes and re-transmit.
<b>ENTER A VALID FUNCTION NUMBER</b>	N/A	For MA, entry in Function number is required and must be 1-6. For PA/FS, entry in Function Number is required and must be 1-8.
<b>ENTER CASE NO. ONLY FOR AUTH REPORT</b>	1050	If entry of 5 in Function and Registry Number is entered. Case Number is required for Authorization Report.
<b>ENTER DISTRICT NAME FOR CROSS DIST CALC</b>	1010	If Function is 9, then the first four letters of a District other than the Transaction District must be entered.
<b>ENTER EITHER CASE NO. OR REGISTRY NO.</b>	01050 or 01046	Occurs if both Case Number and Registry Number are entered or neither one is entered On PA/FS Budget Menu. One entry of Either Case No. or Registry No. is required.
<b>FULL DATA ENTRY COMPLETED - USE CASE NO.</b>	24020 01050	The application record has completed Full Data Entry and Registry Number is entered. Case No. is required.
<b>FUNCTION PROHIBITED FOR CROSS DISTRICT</b>	N/A	Only MA Budget Functions 1 and 4 may be selected for Cross District Inquiry. Other Functions are not allowed.
<b>HP BUDGET UNAVAILABLE FOR CROSS DIST INQUIRY - NOT UPDATED AFTER PA UPDATE</b>	24021	HEAP Budget exists but since it was not updated after PA budget was updated, it is not available for inquiry.
<b>INVALID DISTRICT NAME</b>	01010	Cross District Name is not entered correctly for Cross District Inquiry for PA/FS/MA.

<b>Error Message</b>	<b>Related Data Element</b>	<b>Cause/Remedy</b>
<b>INVALID REGISTRATION NUMBER</b>	01046	Registration Number is not found or is not available for PA/FS/MA.
<b>MA BUDGET CALCULATION NOT ALLOWED FROM THIS PID</b>	N/A	MA Budget Calculation is selected from a PID not allowed to do MA Budget Calculations.
<b>MA BUDGET DELETION NOT ALLOWED FROM THIS PID</b>	N/A	Entry of MA Function 5 or 6 from a PID not allowed to do MA Budget Deletions
<b>MA RECORD NOT FOUND</b>	N/A	Cross District Inquiry and Function 1 (Budget Record) are selected and there is no stored MA Budget.
<b>MA-BL RECORD NOT FOUND</b>	N/A	Cross District Inquiry, and/or Function 4 (Bottom-Line) and/or Function 5 (Deletion Budget Record) are selected and there is no Stored MA-BL budget.
<b>NO BGT HISTORY INFORMATION EXISTS</b>	N/A	No historical budget information exists for the Case or Registry number entered. Current budget information may or may not exist.
<b>NO BUDGET RECORD EXISTS</b>	N/A	Entry of 3 (Budget History) in Function and there are no current or historic PA/FS stored budgets.
<b>NO BUDGET RECORD EXISTS FOR CROSS DIST INQUIRY</b>	N/A	Entry of 1 (Input), 2 (Bottom-Line) or 3 (Budget History) in Function on PA/FS Menu and Selecting Cross District Inquiry and there are no Current or historic budgets.
<b>NO HP BUDGET EXISTS FOR CROSS DIST INQUIRY</b>	24021	No HEAP budget exists for the Case/Registry and District entered.
<b>NO IRCS DATA EXISTS FOR THIS CASE/APPLICATION</b>	N/A	If Function 8 is selected and there is no IRCS record for PA/FS.
<b>PENDING BUDGET RECORD NOT ALLOWED</b>	N/A	MA - Function 2 not allowed for Upstate
<b>PENDING DATA STATUS INVALID FOR AUTH RPT</b>	N/A	Entry of 5 (Authorization Report Request) in Function on PA/FS Menu and pending case Status not allowed for Auth. Report.
<b>SCRATCHPAD NOT ALLOWED FOR AUTH REPORT REQUEST</b>	01050	Entry of SCRATCHPAD in the Case No. field on the PA/FS Budget menu only allowed for Function 1
<b>SCRATCHPAD NOT ALLOWED FOR BOTTOM LINE ENTRY</b>	01050	Entry of SCRATCHPAD in the Case No. field on the PA/FS and MA Budget menus only allowed for Function 1; not allowed for Bottom-Line entry

<b>Error Message</b>	<b>Related Data Element</b>	<b>Cause/Remedy</b>
<b>SCRATCHPAD PROHIBITED FOR CROSS DIST</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for PA/FS Cross District Inquiry
<b>SCRATCHPAD NOT ALLOWED FOR CROSS DIST INQUIRY</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for MA Cross District Inquiry
<b>SCRATCHPAD NOT ALLOWED FOR DELETE FUNCTION</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for MA Functions 5 or 6
<b>SCRATCHPAD NOT ALLOWED FOR DELETION ENTRY</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for PA/FS Function 6
<b>SCRATCHPAD NOT ALLOWED FOR HISTORY ENTRY</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for PA/FS Function 3
<b>SCRATCHPAD NOT ALLOWED FOR IRCS INQUIRY</b>	01050	Entry of SCRATCHPAD in the Case No. field not allowed for PA/FS Function 8
<b>SECURITY VIOLATION/AUTH REPORT NOT ALLOWED</b>	N/A	Authorization Report for PA/FS is not allowed for security reasons.
<b>SECURITY VIOLATION/DELETIONS NOT ALLOWED</b>	N/A	Deletion of PA/FS budgets is not allowed for security reasons.
<b>UNRESOLVED RFI DATA - RFI FLAG ON</b>	09010	There is unresolved resource data and no stored budget.
<b>WARNING FIELD MUST BE FILLED</b>	N/A	The Function field has not been entered on the MA Budget Calculation Menu.

After the new budget is stored and SF11 is pressed, a series of budget edits is performed. If any errors are detected, one or more of the following error numbers will appear at the bottom of the last output screen accompanied by the message: SF11 NOT SUPPORTED.

<b>Error #</b>	<b>Error Message</b>	<b>Related Data Element</b>	<b>Cause/Remedy</b>
001	<b>INVALID CASE STATUS</b>	02090	Case Status must be ACTIVE (10) or ACTOVRD (21) and Must <u>not</u> be in Active/Clockdown Closing Status
002	<b>PENDING DATA EXISTS</b>	24040	Pending Data Status must be NO PEND (00), DBR/SSG (50), AT/DBR (52) or AC/DBR (54)
003	<b>NO MATCH ON CASE TYPE CATEGORY</b>	01060	Case Type Category (ADC - 11, 12 OR hr -, 16, 17 or FS - 31, 32) on Case must equal Case Type on Budget Category (11, 12, 16, 17 or 31, 32)

<b>Error #</b>	<b>Error Message</b>	<b>Related Data Element</b>	<b>Cause/Remedy</b>
004	<b>INVALID TRANSACTION TYPE</b>	01060/1130	Transaction Type on Budget must be CHANGE (05)
005	<b>INVALID PA-FS CODE</b>		PA Food Stamp Code must be 01 (Authorized for PA-FS)
006	<b>EXTENDS AUTHORIZATION</b>	01300/1100	PA Budget TO Date must not be later than PA case Authorization Period TO date
007	<b>EXTENDS AUTHORIZATION</b>	01300/1100	PA Budget TO Date must not be later than PA case Authorization Period TO Date
008	<b>CASE TYPE ADC-FC</b>	01060	Case Type of Budget must not be 13 as a case recurring grant cannot be authorized
009	<b>SURPLUS/NOT A SUSPENSION</b>	11160	Total PA Budget Surplus/Deficit Code must be equal to D (Deficit) unless Monthly Reporting Indicator = S (Suspended)
010	<b>CAP CASE OR BUDGET</b>	01421	Direct Budget Reauthorization is prohibited if case record has a Special Program Code of B or C or The PA Budget Cap Indicator greater than 0 - Cap and FS Payment Lines must be written Manually
011	<b>ZERO ENTITLEMENT/NOT CATEGORICALLY ELIGIBLE</b>	17050 11375 11320	FS Entitlement (Allotment plus Claim Amount) must not be equal to Zero unless Monthly Reporting code is S or the case is categorically Eligible for FS
012	<b>FROM DATE IS PAST</b>	01300	PA Budget FROM Date may <u>not</u> be equal to or Earlier than Today's date
013	<b>FROM DATE IS PAST</b>	01310	PA Budget FROM Date may <u>not</u> be equal to or earlier than Today's date
014	<b>FROM DATE IS PAST</b>	01300	FS Budget FROM Date must be equal to the first or the sixteenth of a month
015	<b>FROM DATE INVALID</b>	01310	FS Budget FROM Date must be equal to the first of a month
016	<b>TO DATE INVALID</b>	01300	PA Budget TO Date must be equal to the fifteenth or last day of the month
017	<b>CHANGE IN RESTRICTED</b>	11026 11060	Total PA Restricted Amount on current budget must be equal to the Total Restricted Amount on The previous stored budget
018	<b>NEW PA GRANT AMOUNT SAME AS THE PREVIOUS PA GRANT AMOUNT</b>	11110	(This error only occurs during Mass Rebudgeting)

Error #	Error Message	Related Data Element	Cause/Remedy
019	<b>NEW FS ALLOTMENT IS THE AS THE PREVIOUS FS ALLOTMENT</b>	17050 17053	(This error only occurs during Mass Rebudgeting)
040	<b>CHANGE IN NUMBER OF PERSONS IN PA CASE</b>	01152	Total number of persons in FS case on current budget is greater than or less than the number of Persons on the prior stored PA budget. Number In case must be the same on both budgets.
041	<b>CHANGE IN NUMBER OF PERSONS IN FS CASE</b>	01154	Total number of persons in FS case on current budget is greater than or less than number of Persons on the prior stored FS budget. Number In case must be the same on both budgets.
042	<b>SEPARATE DETERMINATION INDICATOR</b>	01600	Separate Determination Indicator must <u>not</u> be present on the FS budget. Benefits for a future FS case cannot be authorized through the closed PA case.

After the new budget is stored and SF 11 is pressed, a series of payment line edits is performed. If any errors are detected, the WSYSK screen will be returned with the following message "Transaction Rejected - Fatal Error Detected. Error Number XXX." See **SRM Standards, Conventions, and General Information** for further information on the WSYSK screens.

These Payment Line Errors cannot be corrected in the Direct Budget Reauthorization process. Regular Undercare/Maintenance procedures must be used. See **SRM Undercare and Recertification** for information on these procedures. Below are the possible error numbers which may appear:

Error #	Error Message	Related Data Element	Cause/Remedy
020	<b>NO BLANK PAYMENT LINE</b>	N/A	No space is available to generate any type of payment line.
021	<b>NO PAYMENT LINE</b>	14009 14010 14045	To avoid error, the PA Budget must be updated, the Local Action Code must be 2 (Prepare & Issue) or 4 (Release), the Payment Type must Be 05 (Case Recurring Grant), Payment Issue Code must be 1, 3 or 4.
022	<b>MORE THAN TWO QUALIFIED PA - PAYMENT LINES EXIST</b>	14009 14010 14045 14012	There are more than two PA Payment Lines (the most recent) as described in error #021 with the same budget dates.
024	<b>ONLY ONE BLANK PAYMENT LINE</b>	14040	Two lines are needed to write the payment lines for the Recurring Cash Grant and only one line is available.
025	<b>INCONSISTENT ISSUANCE CODES</b>	14045	If Issuance Code is 3 or 4 the matching line with Issuance Code 3 or 4 must be present.



Error #	Error Message	Related Data Element	Cause/Remedy
026	<b>HOLD LINE PRESENT</b>	14009	There is a payment line with a Payment Type of 05 and a Payment Action Code of 3 - HOLD. A New payment cannot be written until the "Hold" Payment line is resolved via Undercare/Maintenance.
030	<b>NO BLANK PAYMENT LINE FOR FS</b>	N/A	No payment line is available on which to write the new recurring FS benefit.
031	<b>NO FS PAYMENT LINE</b>	14009 14010 14045	No payment has a Payment Action Code of 2 or 4 <u>and</u> a Payment type of 96 <u>and</u> a Payment Issue Code of 1.

## Internal Processing

### WMS Income & Resource Collection System (IRCS)

Certain types of Resources from stored MA Budgets, as well as Wages, Unemployment Insurance Benefits and IRS pension funds from MA, PA, and FS stored budgets, are automatically transferred to the IRCS system. The Resources and Income are associated with the line number entered on the budget input screens. The WIRCIQ - Inquiry/History screen can be accessed by entering Function 8 on the WBPAFS - PA/FS Budget Calculation Menu. For more information see **SRM Income & Resource Collection System**.

### Transfer of FS Budget for FS Separate Determination

If a new FS case is opened by the FS Separate Determination process (see Section J), the FS budget can be transferred by the system from the closed PA case to the new FS case. The transfer will take place if the following conditions are met:

1. The closed PA case must have Case Type of 11, 12, 16, or 17.
2. The FS budget to be transferred must
  - a. have a FROM date equal to the first of the month
  - b. have been updated to reflect all information pertinent only to the new FS case
  - c. have an X entered in the SD (Separate Determination) field
  - d. has been stored using the PA case number.

When the new FS case opening goes through Batch Update, the updated and stored FS budget previously linked to the PA case will now be linked to the new FS case. This FS budget will now have the FS Case number and Case type plus a Transaction Type of 05. The X in the SD (Separate Determination) field will be deleted.

## External Processing

### eHEAP

HEAP and ABEL budgets along with associated payment lines can also be created using the eHEAP Workbook web application. Data entered or modified in the eHEAP Workbook updates the WMS database. The eHEAP Workbook does not retrieve data directly from the WMS database but instead retrieves it from the WRTS database. More information on the eHEAP Workbook can be found in **SRM Application/Registration Denial**.

### WMS Budget Inquiry

The entire PA, FS, and HEAP budget history associated with a case or application registration is available for viewing on the Intranet. When any of these budget types are stored in WMS, the budget data is also stored in an ORACLE database. HEAP budgets are stored in ORACLE via an open TI transaction that occurs when the user presses F13 on the WBGTHP screen. PA and FS budgets are stored in ORACLE via batch jobs that run nightly, Monday through Saturday.

This budget data is available for display via the WMS Budget Inquiry application which is available on the CentraPort website. To view budget data follow the following steps:

1. Log onto CentraPort ([NYSDS Login](#)).
2. In the Links area of the Centraport website select the Applications menu.
3. Select Budget History from the Applications menu.
4. On the WMS Budget Inquiry window enter the district, Case or Registration number, and budget type to retrieve the desired budget(s). Results retrieved can be further refined by entering the budget version number and/or date stored. Only users with the proper security can view budget data.

# CIN Assignment and Verification

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## Overview

The Client Identification Number (CIN) is the primary identifier for individuals in the WMS system. It is unique for each individual, and each individual should have one and only one CIN. The CIN is eight characters in length and follows the construct, XX99999X, where 'X' represents an alpha character and '9' represents a digit. It is system generated, and the last position is a check character. The CIN is stored in the data element 03-010-RECIP-ID in the WMS database.

The integrity of the WMS database is dependent on correct CIN assignment. WMS has processes in place to aid in preventing assignment of multiple CINS to the same person or assignment of the same CIN to different persons. However, it is ultimately the responsibility of the local district worker to make sure CINs are assigned properly.

If it is discovered that a person has multiple CINs, the CIN Consolidation process can be used to correct the situation. See **CIN Consolidation** later in this section for details on this process.

## CIN Entry and Assignment

Entry in the CIN field is not required for completion of Application Registration (WAPREG). However, if the worker determines that an individual entered on the Application Registration matches someone already known to the system, the worker may either:

- enter the existing CIN, if the match is a recipient (has completed Batch Update), or
- if the matching person is still an applicant (has not completed Batch Update), enter the Application Register Number/Line Number (App Reg/LN) of the matched person's existing application

Otherwise, the CIN field should be left blank.

When the WAPREG Application Registration screen is successfully transmitted, WMS searches the database to find matches for individuals entered on the application. As a result of this search a Clearance Report is generated and printed, listing exact and possible matches for each applicant.

In order to complete Full Data Entry or the Application Denial process each individual in the case must have an entry in the CIN field. This entry can be an existing CIN, an App Reg/LN, or, if the individual is new to the system, the word "ASSIGN" must be entered in the CIN field and upon transmission WMS will generate and assign a CIN unless the Assign Verification (AV) Flag has been set in which case an error is generated. (See **Assign Verification Process** later in this section for more details.)

If an individual is added to a case during the Undercare/Maintenance process and the transaction is submitted, the individual goes through the clearance process and a Clearance Report is generated. The Pending Status of the case will be UM/CL, awaiting clearance resolution. The case must be accessed again for Undercare/Maintenance, the CIN field must be entered with an existing CIN, an App Reg/LN, or the word "ASSIGN", and the transaction submitted.

## Clearance Report

The results of the WMS search for matching clients are printed on the Clearance Report. A Clearance Report is automatically generated whenever the following transactions are submitted successfully:

- a person is added to an application
- a person is added to a case
- a person's demographic data is changed on an application

If a person's demographic data is changed on a case, no clearance report is generated.

A Clearance Report can also be generated anytime by using function 5 on the WAR001 - Application Register Menu screen. For each individual on the application the clearance report lists exact matches on CIN, exact matches on SSN, and possible matches.

The possible match search is a weighted search. The client's name is encoded into a 12 digit name group which is used to search on name matches. For example, Cathy, Kathy, Kathie, etc. would be returned as possible name matches. The possible search also takes sex and birth date into consideration. Matches on each data element (first name, last name, sex, and month, day, year of birth date, and district) receive a score. Possible matches with higher scores will appear higher on the list of possible matches on the Clearance Report. However, the actual score is not printed.

Even though there may be a total of more than 25 matches, never more than 25 matches for each applicant will be listed on the Clearance Report. This includes the sum of both exact and possible matches. The number of returned matches is also affected by the setting of the Assign Verification Flag as explained in following section.

An example of a Clearance Report is available on CentraPort Intranet site under the Desk Guides menu.

## Assign Verification Process

In order to reduce the number of occurrences in which a single individual is assigned more than one CIN, WMS has established the *Assign Verification Process*. This process prohibits using the word "ASSIGN" in the CIN field if it appears that the individual is already known to the system.

For clarity in the ensuing discussion, the following terms are defined:

- **applicant** - an individual who is applying or is being added to a case who is the subject of the Clearance Process.
- **Applicant** - an individual who is applying on another application and that application has not yet completed Batch Update after Full Data Entry or Application Denial.
- **Recipient** - an individual who has received a CIN by completion of Full Data Entry, Application Denial or Undercare/Maintenance.

- **Match** - an Applicant or Recipient found as a SSN Match or Possible Match on the Clearance Report.  
(Note: the CIN is not considered in the matching process.)

The Assign Verification Process takes place as part of the Clearance Process. During the SSN Match and Possible Match searches, a comparison is made between the demographic data of the "applicant" and the demographic data of the individuals. If this comparison indicates that the "applicant" and one of the Matches are likely to be the same person, the Assign Verification Flag (AV Flag) is set for the "applicant" and the Match. The AV Flag can be set only once for an "applicant" and one of its Matches.

When the AV Flag is set, it means that the CIN or the Application Register/Line Number of the Match which set the AV Flag must be used when completing the Client ID (CIN) field for the "applicant" during Full Data Entry, Undercare (adding individual) or Application Denial. If "ASSIGN" or Application Register/Line Number of a Match that did *not* set the AV Flag is entered in the CIN field, an error results.

### Conditions Which Set the Assign Verification Flag

The AV Flag is turned on when any one of the sets of criteria shown below are met by *exact matches* between the elements shown. (Exact match includes letter for letter comparison of First and Last Names, e.g. if the "applicant" is Susan and the match is Sue, this is *not* an exact match).

#### Criteria for Setting AV Flag

1. Exact match on: SEX DATE OF BIRTH SSN
2. Exact match on: FIRST NAME LAST NAME SEX SSN  
(Date of Birth is blank for Match)
3. Exact match on: FIRST NAME LAST NAME SEX DATE OF BIRTH  
(SSN is blank for either "applicant" or Match or both)

### Affect on Clearance Report

The setting of an AV flag can affect the number of matches that are printed on a Clearance Report.

#### AV Flag Not Set

If an AV flag is *not* set in the Clearance Process then the Clearance Report prints a maximum of 25 matches of all types even though more than 25 matches may be found. On the Clearance Report, below the line containing the current applicant's Line Number and Name, is a line that reads \*SEARCH TOTALS. This "search" line indicates the number of CIN, SSN and POSSIBLE matches found and the number printed.

For example, if no CIN or SSN matches are found, but 48 POSSIBLE MATCHES are found, then this search line will read:

\*SEARCH TOTALS (FOUND/PRINTED): CIN 0/0 SSN 0000/0000 POSSIBLE MATCHES 0048/0025.

If however, one CIN match was found, two SSN matches were found and 48 possible matches were found, the search line would read:

\*SEARCH TOTALS (FOUND/PRINTED): CIN 1/1 SSN 0002/0002 POSSIBLE MATCHES 0048/0022

and the total of the matches printed is  $1 + 2 + 22 = 25$ .

If more than 100 Possible Matches are found, none will be printed. The search line will read, for example,

\*SEARCH TOTALS (FOUND/PRINTED): CIN 0/0 SSN 0000/0000 POSSIBLE MATCHES 100+/0,

and the message, POSSIBLE MATCHES TOTAL MORE THAN 100 - SUPPLY ADDITIONAL DATA, will be printed on the Clearance Report for this individual.

### AV Flag is Set

If the AV flag is set in the Clearance Process, then the number of matches shown on the Clearance Report is affected as follows:

1. The AV flag can be set during the SSN Match search only by a Match between the "applicant" and a Recipient. If this occurs, all SSN Matches that are found are printed, but there is no Possible Match search done, therefore no Possible Matches are found or printed. The search line might read, for example:

\*SEARCH TOTALS (FOUND/PRINTED): CIN 0/0 SSN 0002/002 POSSIBLE MATCHES 0000/0000.

2. The AV flag can be set during the Possible Match search by (a) a Match between the "applicant" and a Recipient or by (b) a Match between the "applicant" and another Applicant.

- a) If the AV flag is set by a Match between the "applicant" and a Recipient, then the Possible Match search is stopped and no additional Possible Matches between the "applicant" and other Recipients and Applicants are examined. All Possible Matches that were found up to where the AV Flag was set are printed. The search line might read, for example,

\*SEARCH TOTALS (FOUND/PRINTED): CIN 0/0 SSN 0001/0001 POSSIBLE MATCHES 0005/0005.

- b) If the AV flag is set by a Match between the "applicant" and another Applicant, then the Possible Match search continues for other Applicants and Recipients until either:

- All other Possible Matches are found. The search line might read, for example,

\*SEARCH TOTALS (FOUND/PRINTED): CIN 0/0 SSN 0001/0001 POSSIBLE MATCHES 0029/0024,

**or**

- A Match between the "applicant" and a Recipient is found. Since the AV Flag can be set only once for an "applicant" and one of its Matches, this situation causes the AV Flag to be removed from the Applicant Match and put on the Recipient Match. The situation in 2(a) then applies.

### Errors Associated With Assign Verification

When the AV Flag is set for an "applicant" any attempt to use ASSIGN or an Application Register/Line Number in the Client ID field results in:

- a non-fatal error during Full Data Entry



- a non-fatal error during Undercare when adding an individual
- a fatal error during Application Denial

#### Errors in Full Data Entry and Undercare

The following non-fatal errors may occur in Full Data Entry and Undercare:

**297 - POTENTIAL CIN ASSIGN ERROR - REG#/LN#-CANCEL OR OVERRIDE**

This error occurs when ASSIGN is entered in the Client ID field and the AV Flag was set by an Applicant match who is applying in another application.

**298 - POTENTIAL CIN ERROR - CIN IS PROPER ENTRY-CANCEL OR OVERRIDE**

This error occurs when an Application Register/Line Number is entered in the Client ID field and the AV Flag was set by a Recipient match who has a CIN.

**299 - POTENTIAL CIN ASSIGN ERROR - CIN IS PROPER ENTRY-CANCEL OR OVERRIDE.**

This error occurs when ASSIGN was entered in the Client ID field and the AV Flag was set by a Recipient Match who has a CIN.

The above errors may be overridden if it is determined by the local district that the "applicant" and the Match which set the AV Flag are different individuals and should not have the same CIN. See the **SRM Transaction Disposition** for information on overriding errors.

#### Errors in Application Denial

The following fatal errors may occur during Application Denial:

**097 - POTENTIAL CIN ASSIGN ERROR - ENTER REG#/LINE# OR DO FDE DENIAL.**

This error occurs when ASSIGN is entered in the Client ID field and the AV Flag was set by an Applicant match who is applying in another application.

**098 - POTENTIAL CIN ERROR - REG#/LINE# USED - ENTER CIN OR DO FDE DENIAL.**

This error occurs when an Application Register/Line Number is entered in the Client ID field and the AV Flag was set by a Recipient match who has a CIN.

**099 - POTENTIAL CIN ASSIGN ERROR - ENTER CIN OR DO FDE DENIAL.**

This error occurs when ASSIGN is entered in the Client ID field and the AV Flag was set by a Recipient match who has a CIN.

The above errors may *not* be overridden. If the local district determines that the "applicant" and the Match which set the AV Flag are different individuals, then Full Data Entry Denial (Transaction Type 03) should be used. Error Nos. 297, 298 or 299 will occur which can then be overridden.

CIN Assignment Flowcharts

Chart #1 - Completing the Client ID Field with "ASSIGN"

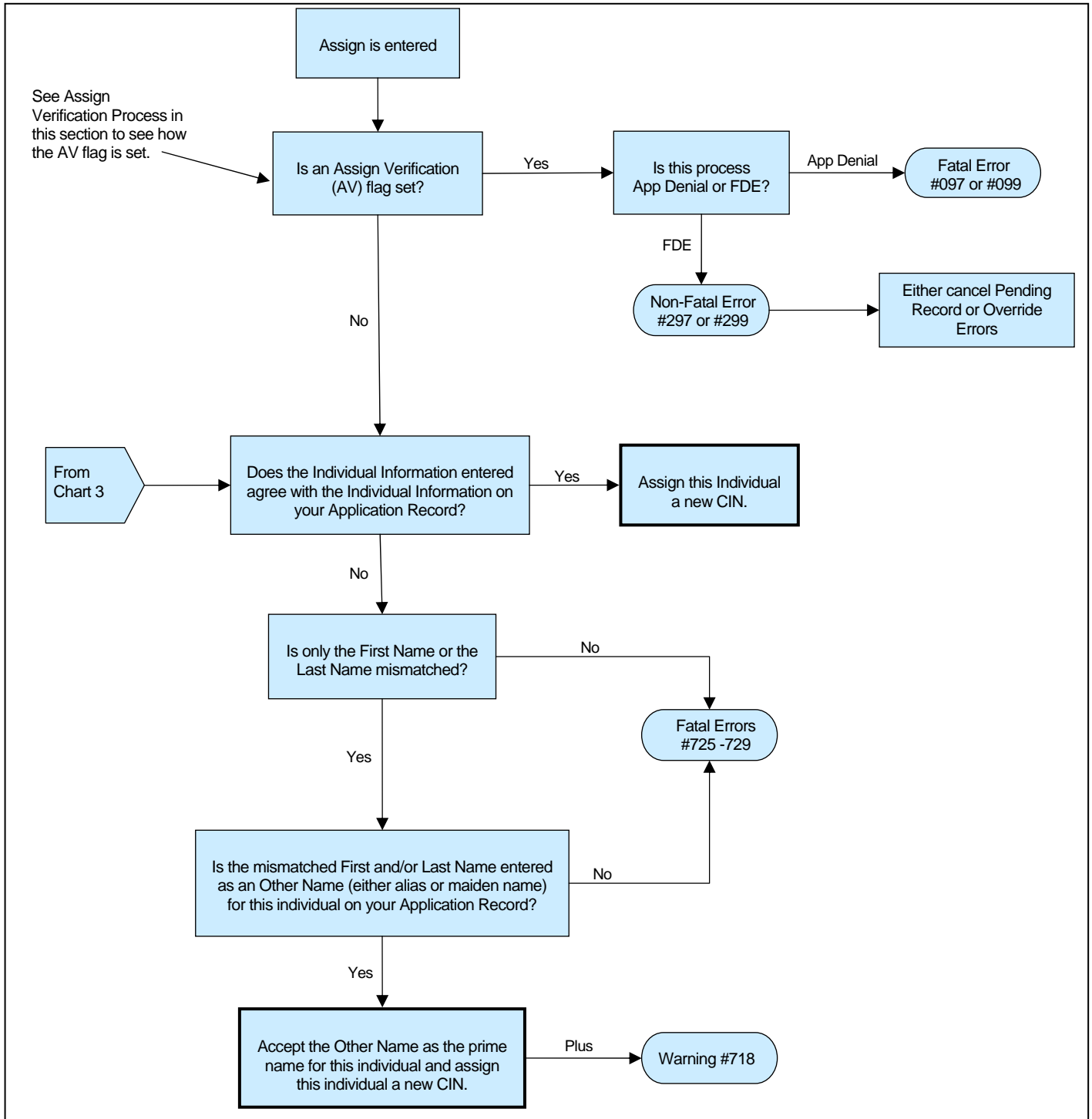


Chart #2 - Completing the Client ID Field with a CIN

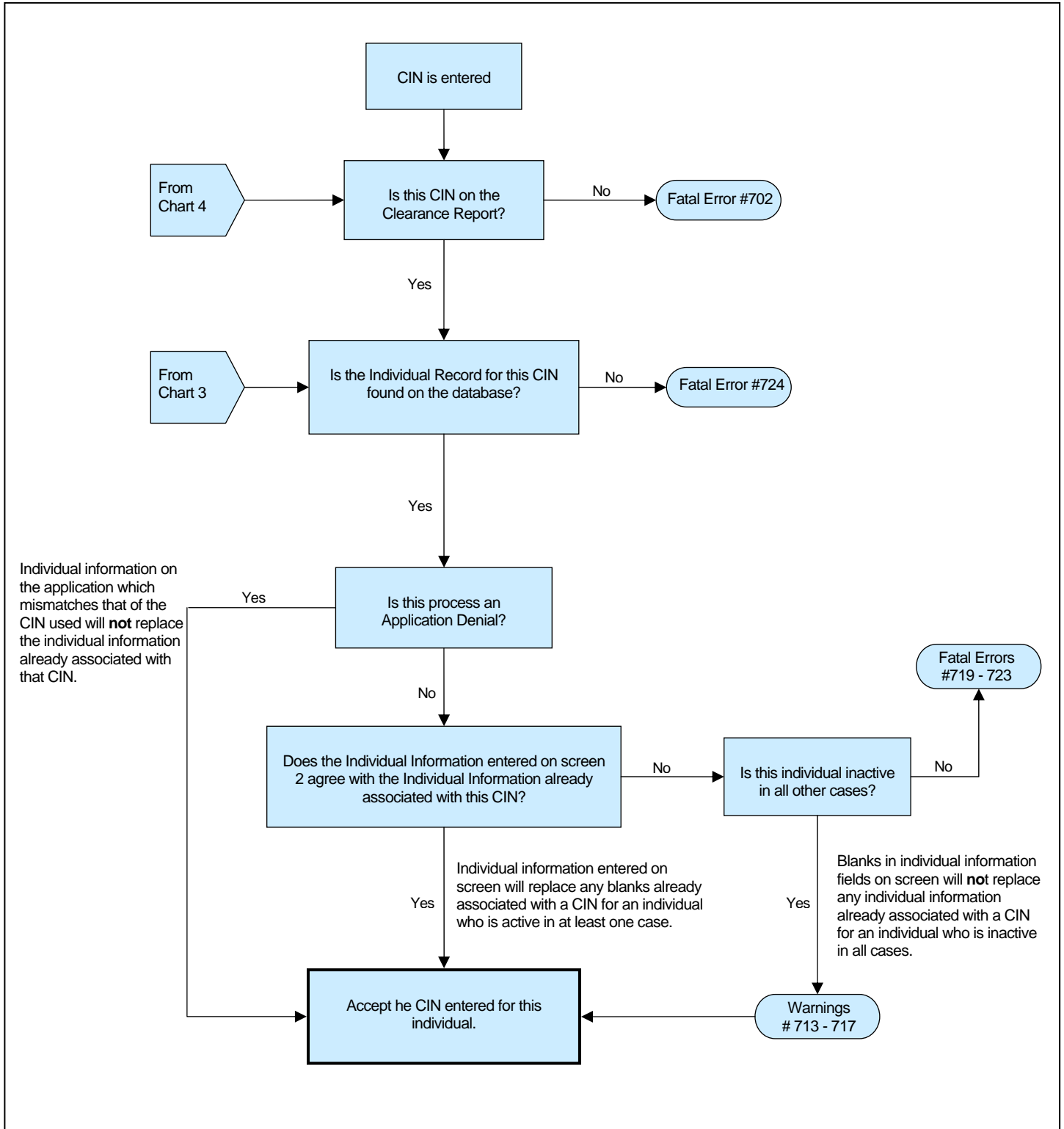


Chart #3 - Completing the Client ID Field with an App Reg #/Line #

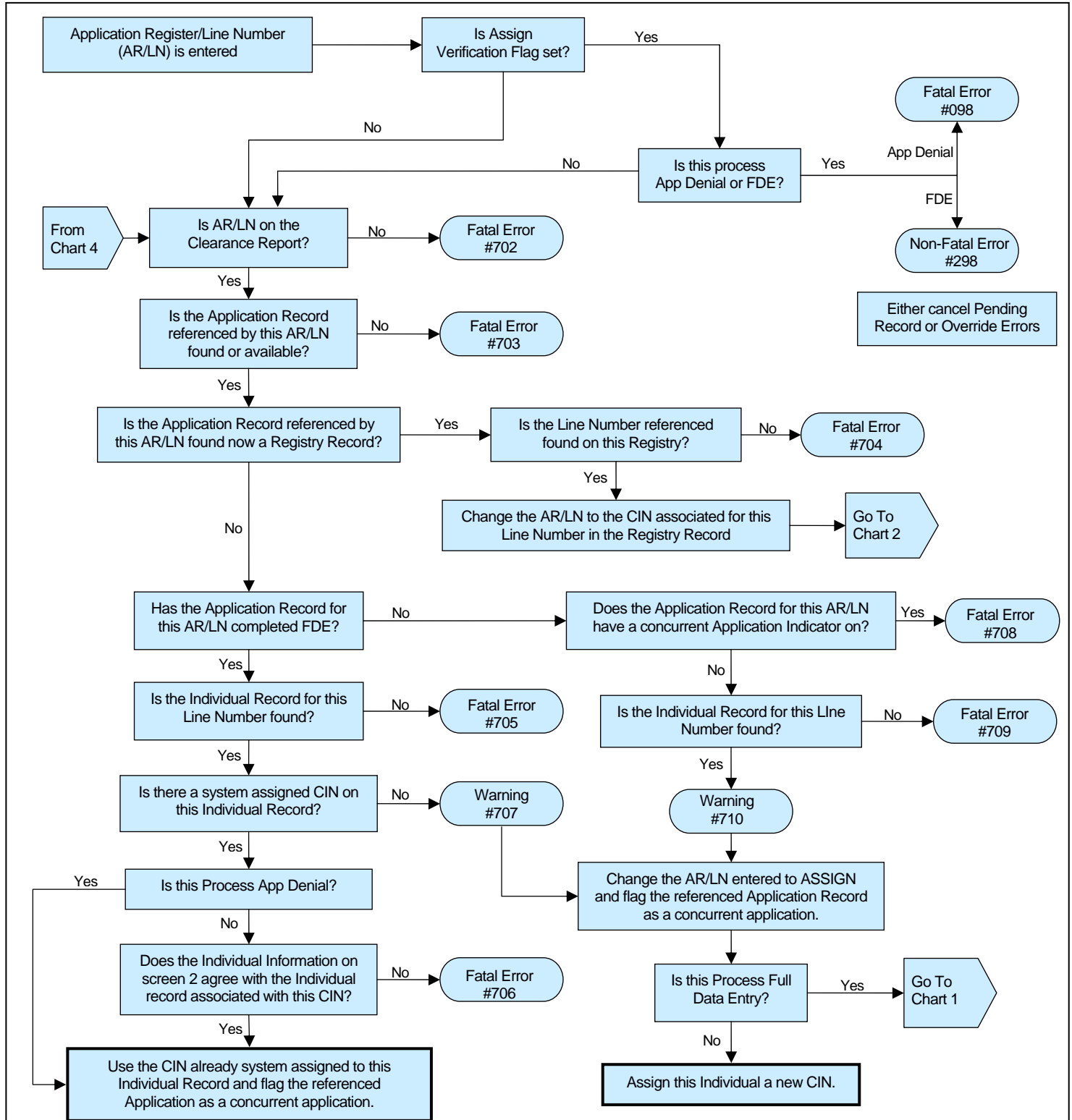
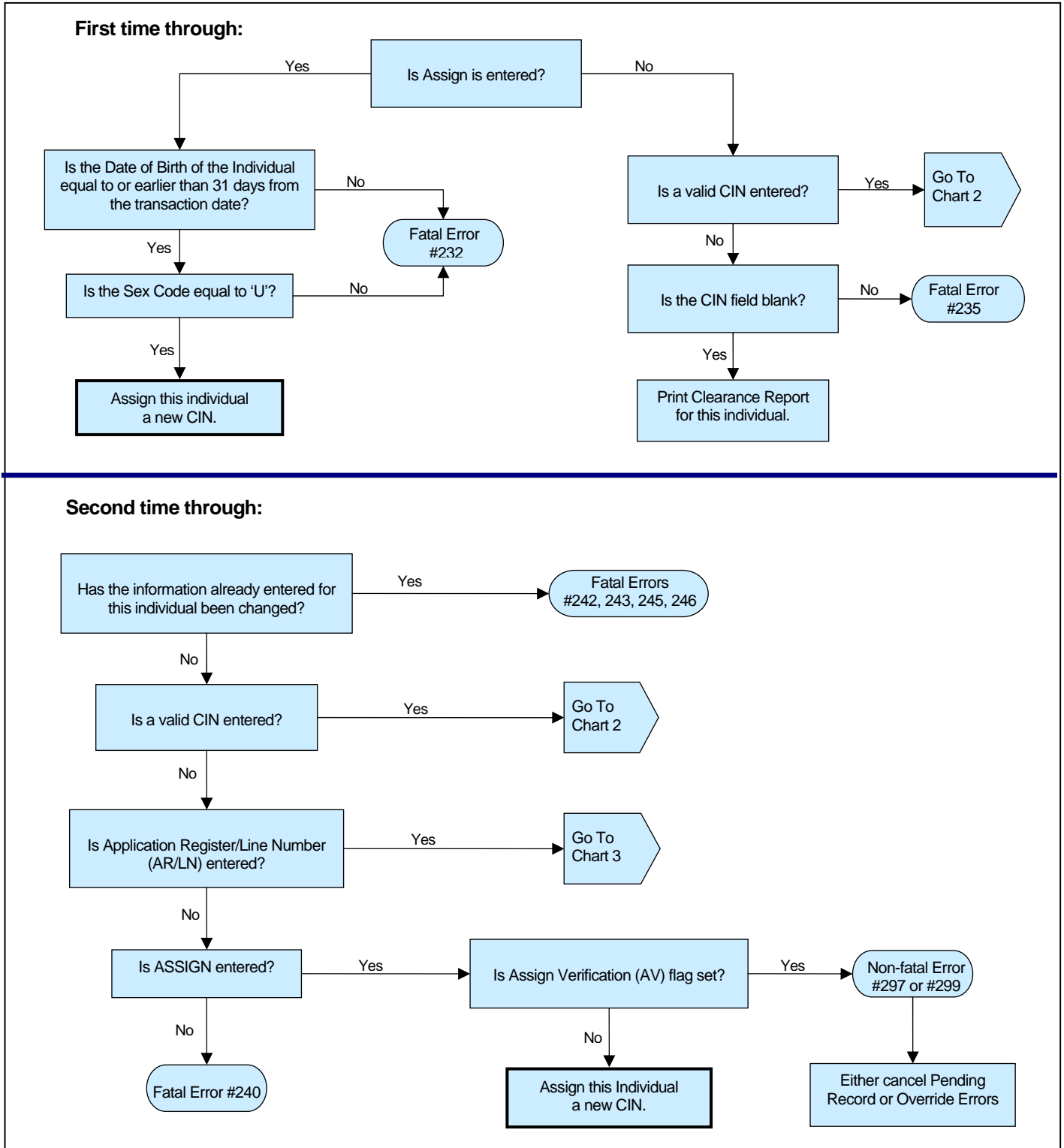


Chart #4 - Completing the Client ID Field when Adding an Individual



## Changing Individual Information in Undercare

The Individual Information Data Elements are:

- 03030 - LAST NAME
- 03030 - FIRST NAME
- 03201 - SOCIAL SECURITY NUMBER
- 03050 - SEX
- 03060 - DATE OF BIRTH

These data elements will appear on screen WKUM02 only for "Active" individuals; i.e., an Individual Status of 07 (Active), 08 (Inactive - Excess Restricted Income), or 10 (Inactive - Sanctioned). They are stored in the Individual Record identified by the individual's CIN. The Individual Record is attached to all of the Case Records in which the individual is or has been involved.

When any of the Individual Information Data Elements are changed or added, the system checks to determine this individual's status in any other case(s) before it accepts (or rejects) the new data. If an individual is active in more than one case, the case type hierarchy as shown below is taken into consideration.

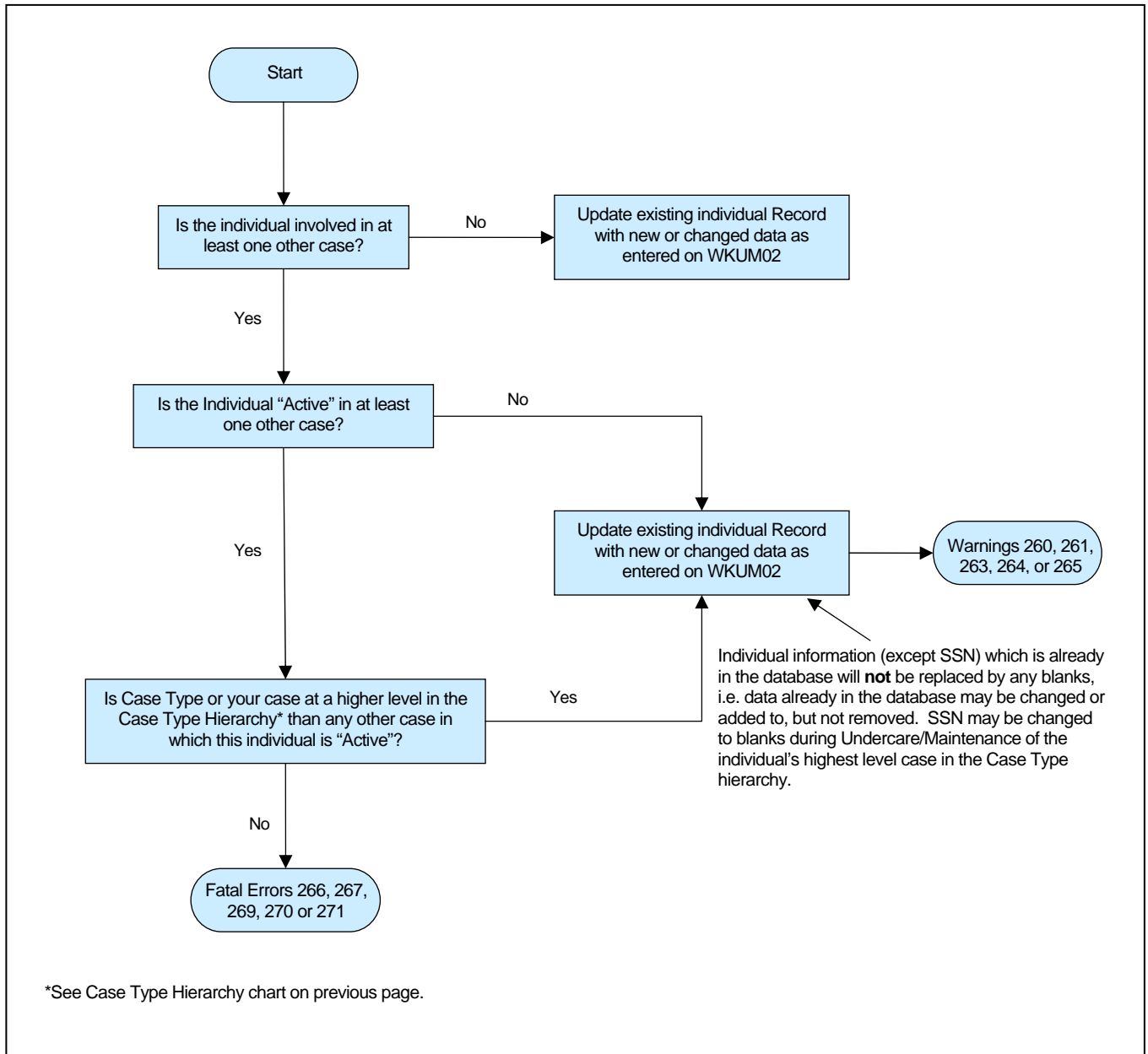
### Case Type Hierarchy

<p><b>Highest</b></p>  <p><b>Lowest</b></p>	<p>Level 1</p> <p>Level 2</p> <p>Level 3</p> <p>Level 4</p> <p>Level 5</p> <p>Level 6</p>	<p><b>Case Type</b></p> <p>11 - 13, 16 - 17</p> <p>20</p> <p>22</p> <p>18, 19</p> <p>31 - 32</p> <p>40, 60</p>
--	---	--

Individual information cannot be changed in a case if an individual is active in another case in which the case type is at a higher level in the hierarchy. The individual information can only be changed in the case at the highest level.

The following flowchart summarizes the conditions that determine if and where the new individual data will be accepted.

Changing Individual Information in Undercare



## CIN Consolidation

The possibility that a single individual in WMS may have two or more different CINs exists on WMS. The three most frequent causes of this situation occur when newborns that were previously known as "Unborns" are entered in the system, when WMS receives updates from external systems that use SSN as the identifying key, and misinterpreting the Clearance Report.

When such a situation is discovered, the CIN Consolidation process is used to retain one CIN with the correct demographic data and delete the other CIN(s). (The terms "CIN Unduplication", "New CIN" and "Old CIN" are being replaced by the terms "CIN Consolidation", "Retained CIN" and "Deleted CIN" respectively).

Beginning in December 2007 authorized Local District staff may perform the CIN Consolidation data entry for duplicate CINs that are in cases within their district.

State staff will continue to data entry CIN Consolidations for CINs that are in cases in multiple districts.

CIN Consolidation consists of the following major activities:

- Local District and State staff identifying individuals whom have multiple (two or more) CINs
- Local District staff selecting the CIN and demographic data to be retained and deleted and providing this information to State staff for CINs in multiple districts
- State staff entering the correct CIN and first name, last name, and Social Security Number for each individual identified
- State staff periodically running the CIN Consolidation program to affect the retention and deletion of CINs (Usually run each weekend).
- State staff producing a report showing both successful and unsuccessful CIN Consolidation. This report, entitled CIN CONSOLIDATION REPORT, consists of Part I - Successful Consolidations and Part II - Processing Errors.

## Consolidation Procedures

Individuals with multiple CINs may be identified in several ways including:

- by Local District review of Clearance Reports
- by Local District use of inquiry screens
- by Local District running local ad hoc reports

When an individual is identified as having multiple CINs, the Local District must make a decision as to which CIN to retain, which CIN to delete, and what combination of demographic data should be associated with the retained CIN. Some factors to consider when determining which CIN to retain:

- Retain the CIN with the most current or extensive MA coverage history on WMS.



- If MA coverage is not a factor, other guidelines should be used. The following scenarios may aid in determination:
  - Both CINs are active, but CIN A has multiple case involvements - Keep CIN A
  - Both CINs are inactive and have similar case involvement, but CIN B has a longer history in its cases - Keep CIN B
  - Both CINs are active, have similar case involvement, but CIN B is in the CIN in a Services case with current purchase of service paylines - Keep CIN B
  - CIN A is active but only recently in a HEAP opening and has no other case involvement. CIN B is inactive, but has multiple case involvements with recent activity - Keep CIN B and complete undercare on the active HEAP case to correct the CIN.

A decision must also be made whether to add the retained CIN to active cases where removal of the deleted CINs may result in loss of benefits.

If the multiple CIN situation involves an individual who is active in cases in other Local Districts, consultation with the other districts will be required to decide which district should initiate the request for CIN Consolidation.

In MA cases it may be necessary to delete the individual(s) or close the case associated with the CIN to be deleted. If the CIN to be deleted is not in MA Managed Care or Family Health Plus (FHP), follow normal closing/deletion procedures.

If the CIN to be deleted is in MA Managed Care or FHP, local district staff should first disenroll the recipient effective the first of the next month or the first of the following month depending upon whether the disenrollment transaction is done before or after the Managed Care pulldown. If the CIN to be disenrolled is within the guarantee period (first 6 months of enrollment), local district staff will need to first shorten the guarantee period to the end of the day before the effective date of the disenrollment. Then either close the case or delete the individual with the CIN to be deleted. The effective date of the closing or deletion should be the day before the disenrollment effective date on the PCP subsystem. Examples:

- Closing/deletion transaction done on 11/03/06, the disenrollment effective date should be 12/01/06, and the case closing/deletion effective date should be 11/30/06.
- For a closing/deletion transaction done on 11/27/06, the disenrollment effective date should be 01/01/07, and the case closing/deletion effective date should be 12/31/06.

### System Requirements for CIN Consolidation

In deciding which CIN to retain, consideration must be given to the System Requirements for CIN Consolidation. These are:

- 1) If an individual has more than two CINs, only two may be consolidated at one time. Note: If the CIN consolidation program encounters two or more requests with the same retained CIN, one request will be processed and the other requests will remain on the request file for the next CIN consolidation run.

- 2) The CIN to be deleted must be associated with an Individual Status of 11 - Denied, 13 - Deceased, 15 - Deleted or 20 - Closed in all cases in which it is used at the time of the running of the WMS CIN Consolidation program. (The CIN to be retained may have any Individual Status).
- 3) The CIN to be retained cannot be associated with an Unborn individual.
- 4) Neither the CIN to be retained nor the CIN to be deleted can be part of a Pending Record at the time of the running of the CIN Consolidation program.
- 5) Social Security Number - The following table summarizes the rules for SSN retention. An entry of N/A in the table means that the system ignores this information when deciding what action to take. (Note: LD stands for Local District in this table.)

Individual Status Associated with RET (Retain) CIN	SSN Situation	Demographics	Entry on CIN Correction Form	Action
<b>Active</b> (Individual Status = 07, 08, 10)	N/A	N/A	N/A	System keeps SSN associated with retained CIN even if blank
<b>Inactive</b> (Individual Status = 11, 13, 15, 20)	RET CIN and DEL CIN have the same SSN	N/A	N/A	System keeps SSN associated with both RET and DEL CIN.
	RET CIN and DEL CIN have different SSNs	N/A	LD must select either the RET SSN or the DEL SSN	System keeps LD selection; if LD does not select either the RET or DEL SSN, an error message will be generated.
	Neither CIN has an SSN	N/A	N/A	System keeps blank SSN
	Only RET CIN has SSN	Match	N/A	System keeps RET SSN
	Only RET CIN has SSN	Mismatch	LD must select the RET SSN	System keeps the RET SSN; if LD does not select the RET SSN, an error message will be generated.
	Only DEL CIN has SSN	Match	N/A	System keeps DEL SSN
	Only DEL CIN has SSN	Mismatch	LD must select the DEL CIN or blank	System keeps LD selection; if LD selection is not DEL CIN or blank, an error message will be generated.
	Neither has SSN	N/A	N/A	System keeps blank

The SSN Code will be changed to a "1" only if the SSN from the Delete CIN is selected to be kept. In all other circumstances the SSN Code associated with the Retain CIN remains the same.

- 6) The Date of Birth and Sex of the CIN to be retained cannot be changed by the CIN Consolidation Process. It must be done via Undercare prior to CIN Consolidation. (See **SRM Undercare Changes and Recertification**)

### WMS CIN Correction by Local District – multiple CINS in one district

Authorized local district staff may perform CIN Consolidation for CINs in their district only. Procedures and screens to be used are listed in this chapter.

### WMS CIN Correction Form – multiple CINS in multiple districts

When CINs to be consolidated are in multiple districts, State staff will continue to consolidate these CINs based on Local District identification and request.

The Local District initially informs the WMS Helpdesk of the CINs to be retained and deleted by using the WMS CIN CORRECTION FORM - WMS-1. When this form is completed, it is either sent via regular mail or e-mailed to the WMS Helpdesk at [otda.sm.wmscin](mailto:otda.sm.wmscin).

When it appears that an individual has two or more CINs that should be consolidated, the WMS CIN CORRECTION form (WMS-1) is used by the LDSS to initiate CIN Consolidation.

Complete the form by:

- 1) Entering the CIN to be retained and the First and Last Name that are currently associated with this CIN.
- 2) Entering the CIN to be deleted and entering the First and Last Names that are currently associated with the CIN.
- 3) Entering the SSN to be retained. See the previous discussion of Social Security Number under **System Requirements for CIN Consolidation**.
- 4) Entering the name, phone number and date of the submitter.

### Data Entry Procedures

Whether preformed by Local District staff or when the various forms containing the requests for CIN Consolidation are received from the LDSS, all requests are entered into the system. They are held in a temporary "working file" until the next run of the CIN Consolidation program which is usually run on weekends (Fridays after close of business).

Two screens are used for the CIN Consolidation process. These are:

- WCINC1 - WMS CIN CONSOLIDATION DATA ENTRY. This screen is used to enter the CIN Consolidation data received from the local districts. It can also be used to delete data previously entered.
- WCINC2 - WMS CIN CONSOLIDATION REQUESTS ON FILE. This screen is used to inquire about CIN Consolidation requests already entered into the working file prior to the next run of the CIN Consolidation program.

#### WCINC1 Screen

The WCINC1 screen is obtained by signing on and entering the transaction code WCINC1 on the SIGN-ON COMPLETE acknowledgement screen and transmitting.

**Data Entry** - For initial data entry of a CIN Consolidation the following fields are entered on the WCINC1 screen.

- DISTRICT - First four letters of the district that is on the input form.
- CLIENT INFORMATION TO RETAIN - The CIN, Last Name, First Name and SSN must be entered.
- CLIENT INFORMATION TO DELETE - CIN must be entered. Last Name and First Name may be left blank if they are exactly the same as the Last Name and First Name entered for the retained CIN.

Other fields on the screen are:

- TODAY'S DATE - System generated
- LAST PROCESSING DATE - System generated. The last date the CIN Consolidation program was run.
- (I)nquire, (D)elete, or (R)efresh

**Inquiry** - Inquiry about requests in the working file can be made by entering inquiry parameters and an "I" in the transmit field and transmitting. The WCINC2 screen will be returned with a listing of requests. See **WCINC2 Screen** below.

**Cancellation (Refresh)** - A transaction can be canceled by entering an "R" in the transmit field and re-transmitting. A blank WCINC1 screen will be returned.

**Deletion** - CIN Consolidation requests that were previously entered in the working file can be deleted prior to the CIN Consolidation run. Obtain a blank WCINC1 screen and enter the data for the district, the retained CIN and the deleted CIN exactly as they currently appear in the working file. Enter a "D" in the transmit position and transmit the screen. If there are no errors, a blank WCINC1 screen is returned with the message REQUEST HAS BEEN REMOVED FROM FILE on line 24, and the data is deleted from the working file.

**Changes** - Changes or corrections to a CIN Consolidation request previously entered in the working file cannot be made. If a change is necessary, the request must be deleted (see above) and then re-entered with the necessary changes or corrections.

When data entry is completed, the screen is transmitted. Any errors or missing required fields are returned blinking. One or more of the CIN Consolidation Error Messages listed under the System Processing section of this document are displayed on the bottom of the screen. Errors may be corrected and the screen transmitted. If the errors cannot be corrected, an "A" (for accepting errors) is entered in the transmit position and the screen re-transmitted. Transmission of WCINC1 with no errors, or with an "A" in the transmit position, returns the message CONSOLIDATION REQUEST ACCEPTED. The accepted error will be indicated on the CIN Consolidation Report.

### WCINC2 Screen

The WCINC2 - WMS CIN CONSOLIDATION REQUESTS ON FILE screen can be used to inquire about requests already in the working file. The WCINC2 screen can be obtained by first obtaining a blank WCINC1 screen. The entries made on the WCINC1 screen will determine the data that is returned, as follows:

**To view all requests in the working file** - in the DIST field, enter ALL. (All requests in the working file may also be viewed by obtaining a blank screen, entering the transaction code WCINC2 and transmitting).

**To view a request for a Specific District** - In the DIST field, enter the first four letters of the desired district.

**To view a request for a Specific CIN** - In the CIN field of CLIENT INFORMATION TO RETAIN, enter the desired CIN.

**To view a request for a Specific Last Name** - In the LAST NAME fields of CLIENT INFORMATION TO RETAIN, enter the desired names.

When the desired fields are entered, enter an "I" in the transmit position and transmit. The WCINC2 - WMS CIN CONSOLIDATION REQUESTS ON FILE screen is returned with the desired request(s) displayed. F1, F2 and F3 are used to page forward and backward.

## CIN Consolidation Program

The CIN Consolidation Program is run every weekend. It re-edits all requests in the working file. When a request was initially entered into the working file, it may have had an error, e.g. a case associated with the retained or deleted CIN may have had a Pending Record. At the time of the CIN Consolidation run, if the case now no longer has a Pending Record, then this re-editing of the request will now find it error-free and the request will be processed.

For each error-free CIN Consolidation situation, a Pending Record is created for every case (regardless of its status) that is associated with the retained CIN and with the deleted CIN. These Pending Records have a system-generated Reason Code of 986 - CIN Unduplication and a Transaction Code of 05 - Change. The Authorization Number does *not* change and these Pending Records are *not* available to the local district for any transactions.

If the case containing a CIN Consolidation situation is active, then the Pending Data Status of the Pending Record for that case is UM/BUP or AT/UM. If the case is inactive, the Pending Data Status is CUI/BUP or AT/CUI. (The AT/XXX statuses only occur when the Local District wishes to have the CIN Consolidation Pending Record included in the LDF extract).

After these pending records go through Batch Update, the WINQ08 - Transaction Disposition History inquiry screen for *each* case shows the CIN Consolidation transaction.

## CIN Consolidation Report

The CIN Consolidation Program also produces the CIN CONSOLIDATION REPORT for each district. This report is sent to the districts via the BICS queue.

**Part I - Successful Consolidation.** A listing of the Retained and Deleted CINs with Last and First Name, Sex, DOB and SSN now associated with these CINs. For each case with which the Retained CIN is now associated, the Case Number, Case Status, and the Individual Status in that case is listed.

**Part II - Processing Errors.** A listing of all CIN Consolidations that were in the working file but could not be processed because of errors. For each error situation, the following information is listed:

- The Retained CIN and associated First and Last Name.
- The SSN to be retained (if it was entered).
- The Deleted CIN and associated First and Last Name.

- One of the CIN Consolidation Error Messages (Listed at the end of this section) indicating the reason the situation could not be resolved.

This Part II is used by the LDSS as a turnaround document, that is, corrections are made in the spaces provided and the document is returned to OTDA staff for data entry and inclusion in the next run of the CIN Consolidation program.

### Effect of CIN Consolidation on WMS Subsystems

The results of CIN Consolidation affect the following WMS subsystems which use the CIN as an entry point.

#### Inquiry

If a deleted (old) CIN is entered on WINQ02 - Individual Inquiry Initiator, the message OLD CIN ENTERED - NEW CIN IS XX99999X is displayed. The retained (new) CIN is the only CIN that can be used on the screen. Inquiry screens directly impacted by CIN Consolidation are:

- WINQ38 - Other Identifiers Inquiry. Other Names associated with deleted CIN will be kept with retained CIN. This screen will also display deleted CIN(s) in the PRIOR CIN field, plus the date of the CIN Consolidation and the District. This CIN information is displayed on the screen with Other Name data for the individual. Any Other Names that were associated with the deleted CIN are now associated with the retained CIN.
- WINQ55 - MA Coverage History. After CIN Consolidation, the individual may appear to have duplicate or overlapping coverage. If a line of MA Coverage data includes an \* in the CU (CIN Unduplication) field, then that data was associated with the deleted CIN.

See **SRM Inquiry** for further information on Inquiry screens.

#### Medical Assistance Subsystem

An individual whose CINs have been consolidated may have Restriction/Exception, Principal Provider and/or Prepaid Capitation records under one or both CINs. After CIN Consolidation only the retained CIN may be used for input to, or inquiry about each of the MA records. If the deleted CIN is entered on WMAMNU - Medical Assistance Menu, the message OLD CIN ENTERED - NEW CIN IS XX99999X is displayed. The audit screen, however, is accessible using the deleted CIN and will contain only those records associated with the deleted CIN. For more details, see **SRM Medical Assistance**.

WDXMNU – Non-Services Data Entry and Case Disposition Menu

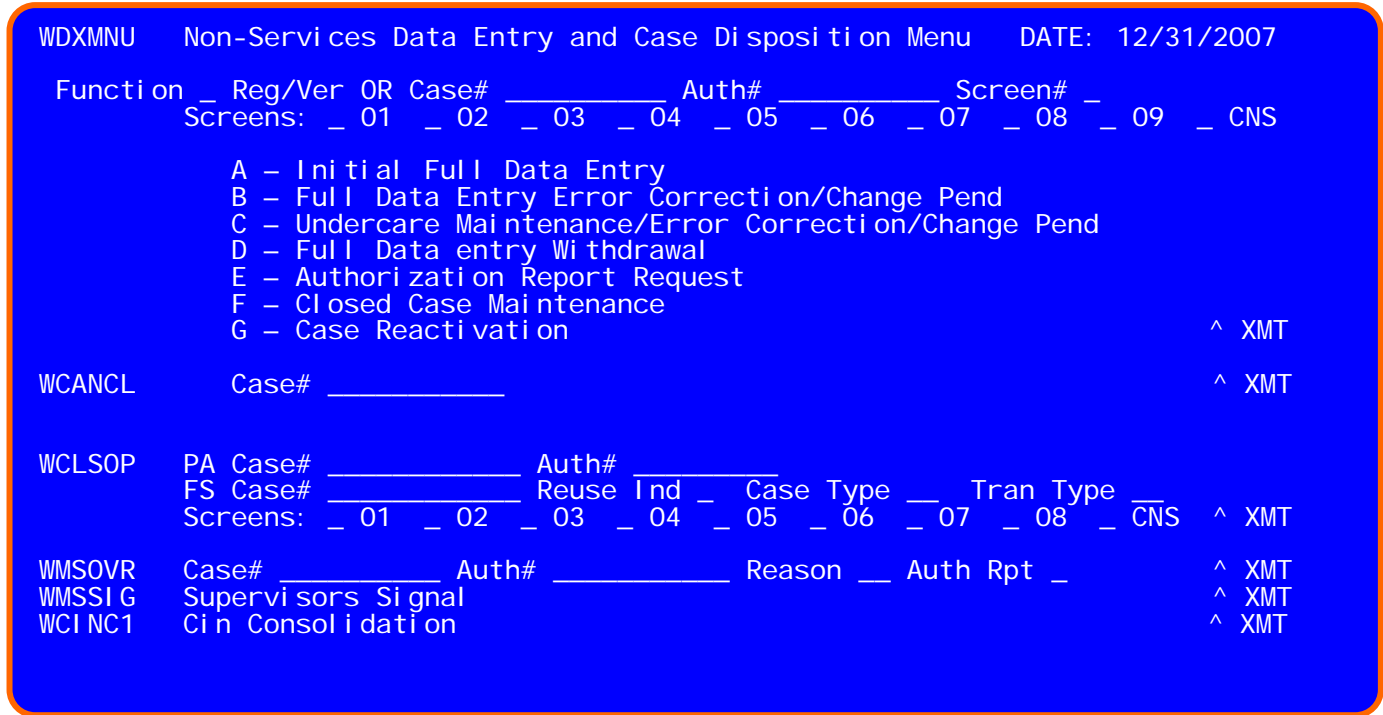


Figure 1 – Non-Services Data Entry and Case Disposition Menu (WDXMNU).

Purpose

This screen is used for accessing the WMS CIN Consolidation Data Entry screen. The menu selection - WCINC1 Cin Consolidation was added effective 12-31-2007.

Access

- Entering 07 (or F7) from) the WMSMNU- WMS Menu or
- F7 from Sign-on acknowledgement screen (SRM Access and Exit Procedures) , most menus and sub-menus and certain other screens.

**This screen is for use by authorized staff only. See your LD TTSS Admin for assistance.**

Screen Response

Positive

None

Negative

None

Printed Response

None

Function Keys

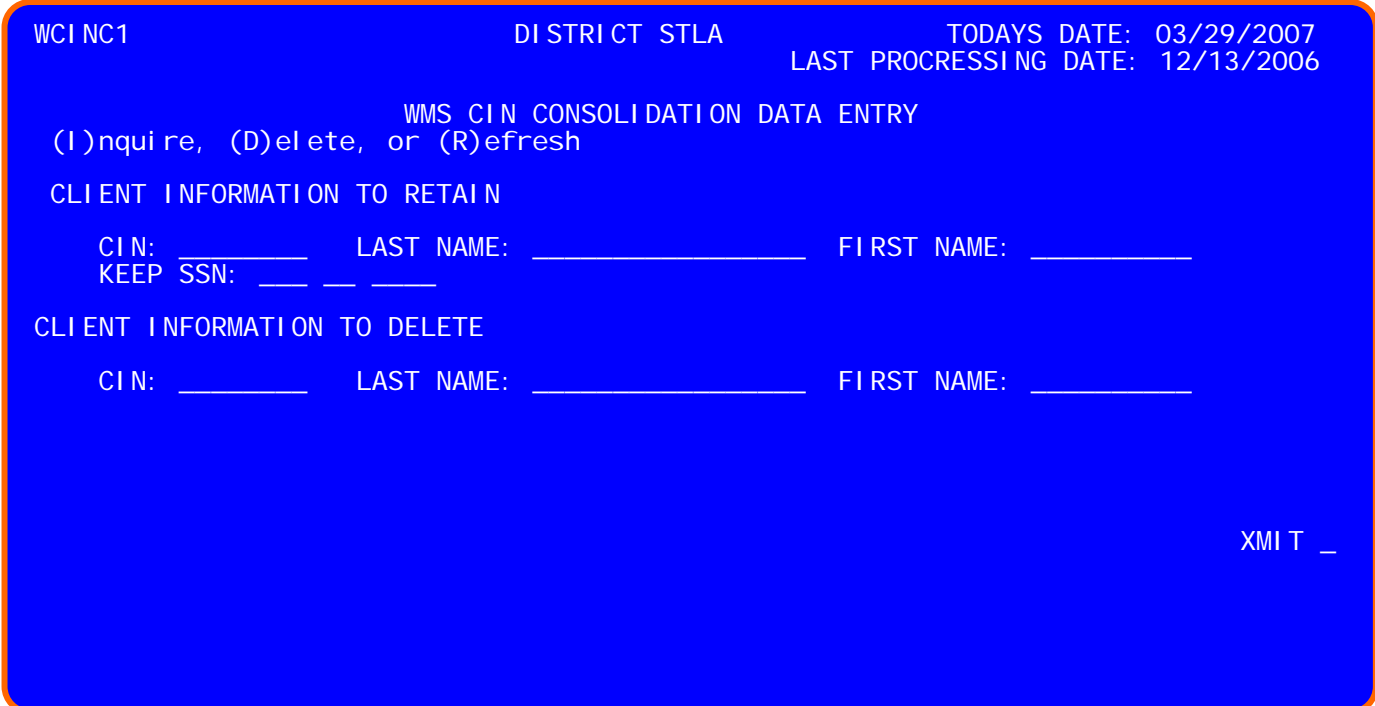
Key	Description
F1	WBPAFS – Budget Calculation Menu
F2	WBMAMU – MA Budget Calculation Menu
F3	WST001 – Statistics Menu
F4	WAR001 – Applications Register
F5	WDENIL – Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU – Non-Services Data Entry Menu
F9	WSEMNU – Services Full Date Entry Menu
F10	WSUMNU – Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 – WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 – Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU – RFI Menu
Ctrl+F5	LDMENU – LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 – Time Limit Tracking Inquiry
Ctrl+F8	WASI01 – Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU – Child Care Review Service
Ctrl+F10	WMEEMN – EEDSS Host System Menu
Ctrl+F11	W4139R – Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description – WDXMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN Consolidation	None	Transaction returns "WCINC1" screen



WCINC1 – WMS CIN Consolidation Data Entry



```
WCINC1           DI STRI CT STLA           TODAYS DATE: 03/29/2007
                LAST PROCESSING DATE: 12/13/2006

                WMS CIN CONSOLIDATION DATA ENTRY
(I)nquire, (D)ellete, or (R)efresh

CLIENT INFORMATION TO RETAIN

CIN: _____ LAST NAME: _____ FIRST NAME: _____
KEEP SSN:  ___ _ _

CLIENT INFORMATION TO DELETE

CIN: _____ LAST NAME: _____ FIRST NAME: _____

XMIT _
```

Figure 1 - WMS CIN Consolidation Data Entry (WCINC1)

Purpose

This screen is used in the CIN Consolidation process for entering and deleting requests for CIN Consolidation. It is also used to initiate inquiry about CIN Consolidation requests. To delete a request all fields must be entered exactly as they were to enter the request and a 'D' must be entered in the XMIT field before transmitting.

If this screen is used to initiate an inquiry, one and only one entry is required in the District, retain CIN, or the retain Last Name field and an 'I' must be entered in the XMIT field before transmitting.

**This screen is for use by authorized staff only and is not available for use by local districts.**

Access

- Entering the transaction code WCINC1 after signing on and receiving the message SIGN ON COMPLETE.

Screen Response

Positive

- One of the following messages on Line 24:
  - CONSOLIDATION REQUESTS ACCEPTED (If screen used for data entry and transmitted or error accepted and A entered in transmit position),

- REQUEST HAS BEEN REMOVED FROM FILE (If deletion “D” is successful)
- REQUEST TO DELETE WAS NOT FOUND ON FILE (If deletion “D” is unsuccessful)
- WCINC1 with all fields blank if used for cancellation and “R” was entered in transmit position
- WCINC2 - WMS CIN Consolidation Requests on File screen if used for Inquiry and “I” was entered in transmit position

#### Negative

- Fields in error and missing entries return highlighted. One or more of the CIN Consolidation error messages and the message, EXAMINE BLINKING FIELDS. ENTER 'A' IN XMIT POSITION TO ACCEPT ERRORS on line 24. See **Error Messages and Edits** in this section for a list of the CIN Consolidation error messages.
- If screen used for Inquiry, then one of the following messages on line 24:
  - ALL FIELDS OTHER THAN SEARCH FIELD MUST BE BLANK
  - AN ENTRY IN 1 OF THE 3 SEARCH FIELDS IS REQUIRED
  - AN ENTRY IN ONLY 1 OF THE 3 SEARCH FIELDS IS ALLOWED
  - NO REQUESTS FOUND ON FILE FOR AAAA BBBBBB (where AAAA is the mnemonic DIST, CIN or NAME and BBBBBB is the actual district name, CIN, or name)
  - TRANSACTION CODE INVALID
  - SF99 NOT SUPPORTED (99 = 8, 13)

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS – Budget Calculation Menu
F2	WBMAMU – MA Budget Calculation Menu
F3	WST001 – Statistics Menu
F4	WAR001 – Applications Register
F5	WDENIL – Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU – Non-Services Data Entry Menu
F9	WSEMNU – Services Full Date Entry Menu
F10	WSUMNU – Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 – WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 – Case/Individual Inquiry Menu

Key	Description
Ctrl+F4	WCTMNU – RFI Menu
Ctrl+F5	LDMENU – LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 – Time Limit Tracking Inquiry
Ctrl+F8	WASI01 – Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU – Child Care Review Service
Ctrl+F10	WMEEMN – EEDSS Host System Menu
Ctrl+F11	W4139R – Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description – WCINC1

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>CLIENT INFORMATION TO RETAIN</b>		
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28.
FIRST NAME	03030 - NAME (FIRST) (10)	Characters 1-10.
KEEP SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
<b>CLIENT INFORMATION TO DELETE</b>		
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28.
FIRST NAME	03030 - NAME (FIRST) (10)	Characters 1-10.

WCINC2 – WMS CIN Consolidation Request on File

WCINC2	WMS CIN CONSOLIDATIONS REQUEST FILE				PAGE 01 OF 01
	CIN	LAST NAME	FIRST NAME	SSN	DIST
RETAIN:	AB23787P	JONAS	MARI LEE	144-58-9532	STLA
DELETE:	AB23804W	JONAS	MARI LYN		
RETAIN:	AB23794R	MEINZER	EDI TH	114-58-2565	STLA
DELETE:	AB23804W	JONAS	MARI LYN		
RETAIN:	AB23789J	MCGARRY	ZENA	778-50-0236	STLA
DELETE:	AB23806S	McGARRY	ZENOBI A		

Figure 2 - WMS CIN Consolidation Request File (WCINC2)

**Purpose**

This multi-page screen is used to display the results of CIN Consolidation Request File inquiry. For each consolidation request the retained CIN with its associated name, SSN, and district is displayed in the row labeled RETAIN, and the deleted CIN with its associated name is displayed in the row labeled DELETE.

If there are more consolidations than can fit onto one screen, function keys can be used to page back and forth through multiple screens. All fields on this screen are protected.

**This screen is for use by authorized staff only and is not available for use by local districts.**

**Access**

- Entering a valid District mnemonic, or a CIN, or a Name on WCINC1 - WMS CIN Consolidation Data Entry screen and an I in the transmit field, **or**
- Entering the transaction code WCINC2 after signing on and receiving the message SIGN ON COMPLETE. (Obtaining this screen by entering the transaction code will return all requests for all districts that are in the working file. If there are no requests on file, the message NO REQUESTS ARE CURRENTLY ON THE FILE is displayed on line 24 of the screen on which the transaction code was entered).

Screen Response

Positive

- See FUNCTION KEYS

Negative

- One or more of the following messages on line 24:
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF02 IGNORED
  - SF99 NOT SUPPORTED - REXMIT (99 = 4, 5, 7-14, 17-19)

Printed Response

None

Function Keys

Key	Description
F1	Page 1
F2	Next page
F3	Previous page
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Message – CONVERSATIONAL LINK CLEARED
Ctrl+F6	WCINC1 – WNS CIN Consolidation Data Entry Screen

Screen Field Description – WCINC2

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>RETAIN:</b>		
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Occurs as often as needed.
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28. Occurs as often as needed.
FIRST NAME	03030 - NAME (FIRST) (10)	Characters 1-10. Occurs as often as needed.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Occurs as often as needed.
DIST	01010 - TRANSACTION DISTRICT (2)	Occurs as often as needed.
<b>DELETE:</b>		
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Occurs as often as needed.
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28. Occurs as often as needed.
FIRST NAME	03030 - NAME (FIRST) (10)	Characters 1-10. Occurs as often as needed.

## Subsystem Processing

### Error Messages and Edits

#### CIN Consolidation Error Messages

(Listing is alphabetical by Message. Error Messages marked with \* can only appear on the CIN Consolidation Report Part II. All other messages can appear on the Report and can also be returned as edit errors on WCINC1)

**\*CASE #999999 PENDING IN XXXX, RESCHED (999999 = Case No; XXXX = District)**

**Cause:** One CIN is associated with a case which has a pending record.

**Action:** CIN will be automatically scheduled for next run of CIN Consolidation.

**CIN TO BE DELETED HAS ACTIVE CASE INVOLVEMENT**

**Cause:** Deleted CIN must have Individual Status of 11 - Denied, 13 - Deceased, 15 - Deleted or 20 - Closed.

**Action:** Delete the CIN from all active cases, or close active cases containing this CIN. Enter retained CIN and deleted CIN in spaces provided.

**CIN TO BE DELETED HAS ALREADY BEEN CONSOLIDATED**

**Cause:** Deleted CIN has already been deleted in a previous run of CIN Consolidation.

**Action:** No action required

**CIN TO BE DELETED HAS CONNECTIONS INVOLVEMENT**

**Cause:** Deleted CIN has involvement in a CONNECTIONS system services case.

**Action:** Contact Services supervisor.

**CIN TO BE DELETED IS INVALID**

**Cause:** Deleted CIN entered is not a valid CIN.

**Action:** Enter correct CIN in space provided.

**CIN TO BE DELETED NOT FOUND ON DATABASE**

**Cause:** Deleted CIN not found on database.

**Action:** Enter correct CIN in space provided.

**CIN TO BE RETAINED CANNOT BE AN UNBORN**

**Cause:** Retained CIN cannot be associated with an unborn individual.

**Action:** If individual is a newborn or has demographic data on the deleted CIN, then change demographics for Unborn on WMS via Undercare and submit new request on the WMS CIN CORRECTION form WMS-1.

**CIN TO BE RETAINED HAS ALREADY BEEN CONSOLIDATED**

**Cause:** Retained CIN has already been consolidated on a previous run.

**Action:** No action required.

**CIN TO BE RETAINED IS INVALID**

**Cause:** Retain CIN entered is not a valid CIN.

**Action:** Enter correct CIN in space provided.

**CIN TO BE RETAINED NOT FOUND ON DATABASE**

**Cause:** Retained CIN not found on database.

**Action:** Enter correct CIN in space provided.

**\*DATABASE ERROR, CALL OPERATIONS HOTLINE**

**Cause:** Problem with record or with system during run of CIN Consolidation.

**Action:** Contact the WMS Helpdesk for resolution.

**\*DELETE CIN IS RET CIN ON ANOTHER REQUEST**

**Cause:** Deleted CIN has been requested as a retained CIN on another request on this run of CIN Consolidation.

**Action:**

1. If other request was successful, it will appear on Part I.
2. If other request was unsuccessful it will appear in another place on this Part II. Select which request should be processed, correct any errors on the request chosen, and write "DO NOT PROCESS" on the *other* request *not* selected.

**\*DUPLICATE REQUEST**

**Cause:** This is an exact duplicate of another request on this run of CIN Consolidation.

**Action:**

1. If other request was successful it will appear on Part I. No further action required.
2. If other request was unsuccessful it will appear on this Part II. Resolve other request and write "DO NOT PROCESS" on this request. If the other request is from a different district, it will not appear on the CIN Consolidation Report for this district. Resolution may require consultation with the other district(s)

**FIRST NAME OF CIN TO BE DELETED DOES NOT MATCH DATABASE**

**Cause:** First Name entered for deleted CIN does not match First Name on database for that CIN.

**Action:** Enter First Name currently associated with deleted CIN in space provided.

**FIRST NAME OF CIN TO BE RETAINED DOES NOT MATCH DATABASE**

**Cause:** First Name entered for retained CIN does not match First Name on database for that CIN.

**Action:** Enter First Name currently associated with retained CIN in space provided.

**LAST NAME OF CIN TO BE DELETED DOES NOT MATCH DATABASE**

**Cause:** Last Name entered for deleted CIN does not match Last Name on database for that CIN.

**Action:** Enter Last Name currently associated with deleted CIN in space provided.

**LAST NAME OF CIN TO BE RETAINED DOES NOT MATCH DATABASE**

**Cause:** Last Name entered for retained CIN does not match Last Name on database for that CIN.

**Action:** Enter Last Name currently associated with the retained CIN in space provided.

**\*MISC ERROR. CALL OPERATIONS HOTLINE**

**Cause:** System processing problem other than a database error during this run of CIN Consolidation.

**Action:** Write "DO NOT PROCESS". Contact Operations Hotline for resolution and further action.

**\*MULTIPLE DELETE CINS FOR SAME CIN**

**Cause:** This request contains the same retained CIN as another request on this run of CIN Consolidation, but the deleted CINs are different.

**Action:**

1. If other request was successful it will appear on Part I. If this second deleted CIN is to be consolidated with retained CIN, enter deleted CIN in space provided on Part II.
2. If other request was unsuccessful, it will appear in another place on this Part II. Select which request should be processed, correct any errors and write "DO NOT PROCESS" on the *other* request *not* selected. If both deleted CINs are to be consolidated, the request on this report which was marked "DO NOT PROCESS" should be re-submitted on the WMS CIN CORRECTION form WMS-1.

**RETAIN AND DELETE CINS CANNOT BE THE SAME**

**Cause:** The retained CIN and the deleted CIN are the same.

**Action:** Enter correct data.



**\*RETAIN CIN IS DEL CIN ON ANOTHER REQUEST**

**Cause:** Retained CIN has been requested as a deleted CIN on another request on this run of CIN Consolidation.

- Action:**
1. If other request was successful it will appear on Part I. Write "DO NOT PROCESS" on Part II.
  2. If other request was unsuccessful it will appear in another place on this Part II. Select which request should be processed and enter retained CIN in space provided. Write "DO NOT PROCESS" on the *other* request *not* selected. If other request is from a different district, it will appear on the CIN Consolidation Report for this district. Resolution may require consultation with the other district(s).

**SSN TO BE RETAINED DOES NOT MATCH SSN FOR EITHER CIN**

**Cause:** The Social Security Number (SSN) entered for the retained CIN does not match the SSN on the database for either the retained CIN or deleted CIN.

**Action:** Enter correct SSN for the retained CIN in space provided. (See discussion of SSN under **System Requirements for CIN Consolidation** earlier in this section).

**TRANSACTION NOT ALLOWED**

**Cause:** Not authorized to process CIN Consolidation requests

**Action:** Contact WMS Security Coordinator

# Establishing a Pending Non-Services Case

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## Establishing a Pending Non-Services Case

### Overview

Establishing a Pending Non-Services Case is the process of entering data from the Application Turnaround Document (DSS-3631), or its equivalent, into the WMS database to establish a Pending Record. This process has three components:

- 1) Full Data Entry which creates the Pending Record;
- 2) Full Data Entry Error Correction and Pending Data Change which allows data on the Pending Record to be added to, changed, deleted and/or corrected;
- 3) Full Data Entry Withdrawal which allows the Pending Record created by Full Data Entry and the Application Registry Record to be withdrawn in a single transaction.

For some Case Type, Transaction Type and Reason Code combinations, data can be entered in the Client Notice System (CNS) at the same time the transaction is entered on WMS. This section includes a description of how to access the Client Notice System from the WMS Non-Services Data Entry Menu. For a detailed description of the Client Notice System see **SRM Client Notice System**.

Additional information on denials is contained in the **SRM Denials and Closings**.

## Full Data Entry

Full Data Entry (FDE) of the enhanced Application Turnaround Document (APP TAD), or its equivalent, is begun by entering Function A, Initial Full Data Entry, the Registry Number, a slash (/), and the most current Version Number of the Application Record on WDXMNU - Non-Services Data Entry Menu. If the Application Record is not available for Full Data Entry, a System Acknowledgment screen is returned with the message TRANSACTION REJECTED. If the Application Record is available, and there is no X by CNS (Client Notice System), the WKBK01 screen is returned.

If a CNS Limited Fill Input Form accompanies the APP TAD, an X is entered in front of CNS to request the Client Notice System Reason Code Entry Screen, WCN011. This screen is displayed before any WMS Data Entry screens. After successful completion of WCN011, other CNS screens may be displayed if the Reason Code or Codes entered on WCN011 require additional information. Data is entered on the CNS screens as it appears on the CNS Limited Fill Input Form.

After successful completion of all appropriate CNS screens, a Pending Notice Record is created, and a Notice Number is generated. WKBK01 is automatically displayed after error-free transmission of the final CNS entry screen. For a case denial, the *first* Case Reason Code entered on WCN011, the Transaction Type and the Notice Number are carried forward from the CNS entry screens to WKBK01. The *first* PA/MA or FS Individual Reason Code that was entered on WCN011 for each line number is carried forward from CNS to WKBK03, and, if entered on CNS, the PA Food Stamp Code is carried forward to WKBK01.

All CNS errors are fatal. No information is saved on CNS if any error occurs and is not corrected. The transaction cannot be canceled while in CNS. The operator must return to a WMS screen to cancel the transaction. Pressing the Ctrl+F6 keys displays WDXMNU.

After WKBK01 is displayed, the transaction can be canceled by pressing Ctrl+F5, or Full Data Entry can continue. To continue data entry, some of the data which would normally be carried forward from CNS must be entered on WKBK01 to avoid a fatal error. These fields are Case Reason Code and Transaction Type. Because a Notice Number is not available from CNS, the pending record will be placed in an error status until CNS entry is completed and a Notice Number is entered.

Data is entered on WKBK01 as it appears on the APP TAD. The screen is transmitted and edited. Any errors or missing fields are returned highlighted. If the errors cannot be corrected, a Y is entered after ACCEPT BLINKING FIELDS.

If the errors are fatal, a System Acknowledgment screen with the message TRANSACTION REJECTED is returned. The transaction is terminated, and no data is retained by the system. If the errors are non-fatal, processing continues and screen WKBK02 is returned. For more information, see **SRM Standards, Conventions, and General Information**.

Data entry continues on screen WKBK02, the data is transmitted, and fatal and/or non-fatal errors may be displayed on the screen. This same pattern of data entry, transmission, and error detection is used on all screens in the series including WKBK03, WKBK04, WKBK06, WKBK07, WKBK08 and WKBK09. Each of these screens is accessed in sequence except in special situations when screens are bypassed due to case type or the optional nature of the data on the screen. The following table provides examples of screens that may be bypassed and the reason it can occur:

SCREEN	BYPASS REASON
WKBK03	Bypassed for Case Type 60
WKBK07	May be bypassed for all case types. Optional data.
WKBK08	May be bypassed for all case types. Optional data.
WKBK09	Not selectable for Case Types 21, 22 or 60

Errors on these screens may be fatal or non-fatal. They can be accepted by entering Y after ACCEPT BLINKING FIELDS. Screen WKBK08 is available to the local districts to enter any local data as desired. This screen is not edited by WMS and may contain data not collected by WMS or BICS.

A second page of screens for WKBK02, WKBK03, WKBK04, WKBK05, and WKBK08 are available if the APP TAD being entered has more than 10 individuals.

When data entry of the APP TAD is completed, transmission of the last screen returns the System Acknowledgment screen with the message TRANSACTION ACCEPTED. If any screens had non-fatal errors or warnings that were "accepted", the error/warning numbers are listed on this screen.

Completion of FDE establishes a Partial Case Record and a Pending Record. If the Pending Record is error free, the Pending Data Status is AT/FDE (awaiting transmission to BICS) or FDE/RFI. The FDE/RFI status occurs if one or more individuals have Resource data (RFI) that has not been resolved. When the resource data is resolved, the Pending Data Status will change to AT/FDE. See **SRM Resource File Integration** for information on resolving resource data.

If the Pending Record has non-fatal errors, the Pending Data Status is FDE/ERR. If these errors are corrected or overridden and there is no unresolved resource date, the Pending Data Status will change to AT/FDE, or AT/FDEOV if errors have been overridden. See **SRM Transaction Disposition** for information on overriding errors.

An Authorization Number is assigned to the Pending Record by the system. If the Pending Record is error-free, an Authorization may be printed depending on the local district option. Most local districts are in "full BICS" mode which means that BICS edits must be applied before the authorization is printed automatically the next day. If a local district is in "full BICS" mode, an Authorization CANNOT be printed immediately because the BICS edits have not yet been applied to the authorization. This workflow was established to prevent authorizations from being printed and then being made invalid by BICS edits. For more information, see **SRM Standards, Conventions, and General Information**.

If a case has more than five individuals, the Authorization will consist of two or more pages. These additional pages will contain the District, Transaction Type, Cycle Number, Case Number, Authorization Number, Case Name and the Office, Unit and Worker in addition to the data about the individuals. If the Pending Record contains non-fatal errors, an Authorization is not available, but a Case Comprehensive Report and/or a Case Comprehensive Error Report may be selected on the System Acknowledgment screen and printed. Fatal and non-fatal errors may be seen on the WKERQY error inquiry screen by pressing F1 or F2 from the System Acknowledgment screen. Data with fatal errors is not retained after leaving the System Acknowledgment screen. The reader is directed to **SRM Standards, Conventions, and General Information** for more information.

WDXMNU - Non-Services Data Entry Menu (Functions A, B, D, E)

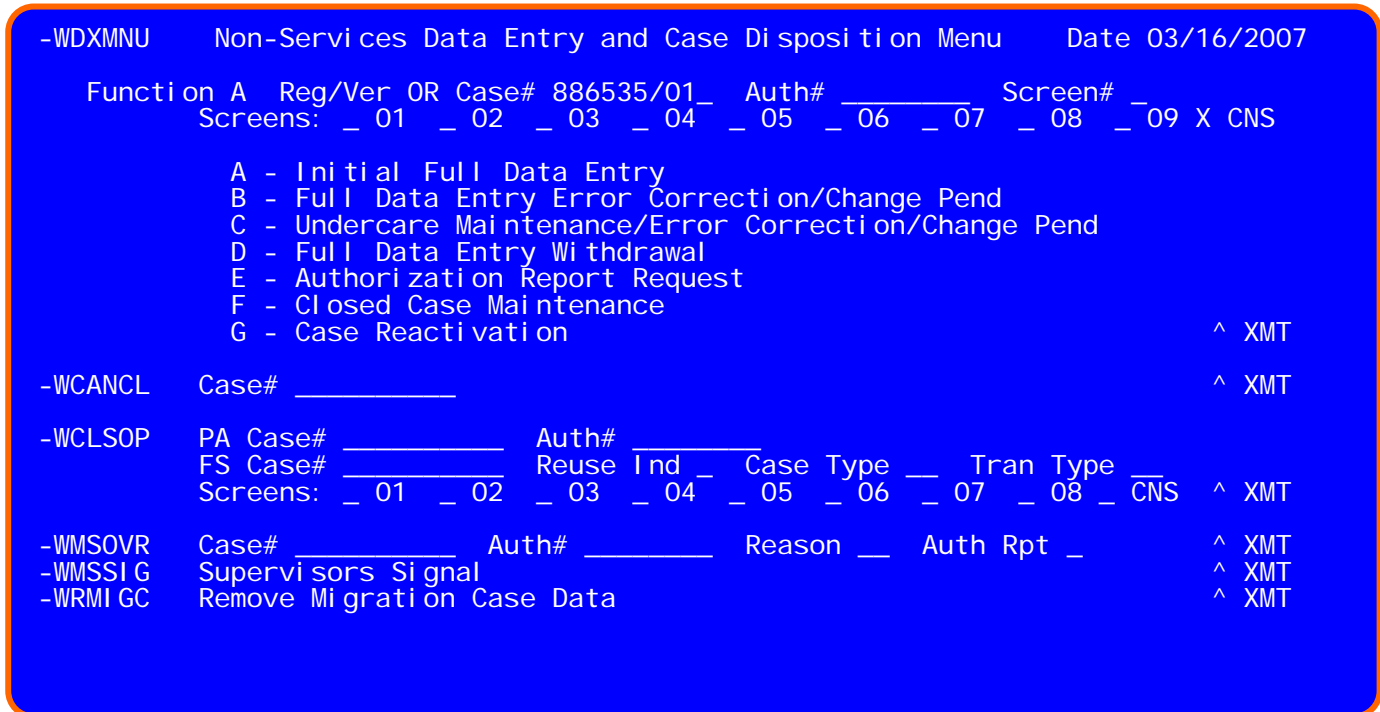


Figure 1 - Non-Services Data Entry and Case Disposition Menu (WDXMNU)

Purpose

This screen provides access to the menu of non-services data entry and case disposition functions:

- Function A is used to initiate Full Data Entry
- Function B is used to obtain the data entry screens need to change, delete and/or correct data in a pending record
- Function D on this screen is used to enter a workbook withdrawal transaction
- Function E on this screen is used to obtain the most current Authorization for the case

Access

- Entering 07 (or F7 from) the WMSMNU - WMS Menu, or
- F7 from Sign-on Acknowledgement screen (**SRM Access and Exit Procedures**), most menus and sub-menus and certain other screens

## Screen Response

### Positive

- Based on function:
  - (Function A) WKBK01 screen and CNS not selected
  - (Function A) WCN011 - Reason Code Screen if CNS is selected (see **SRM Client Notice System** for information on the WCN011 screen)
  - (Function B) First screen selected and/or first screen with an error
  - (Function D) WSYSAK - System Acknowledgment Screen with the messages TRANSACTION ACCEPTED WITHDRAWAL NOTIFICATION TO BE PRINTED
    - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - (Function E) WSYSAK - System Acknowledgement Screen with messages TRANSACTION ACCEPTED AUTHORIZATION TO BE PRINTED and with any Warnings listed.
    - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
- If one or more of the individuals in the case has unresolved RFI data, the message UNRESOLVED RFI DATA - RFI FLAG ON also appears.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks). One of the following messages on Line 24:
  - APPLICATION NOT FOUND
  - AUTH NUMBER MISSING
  - AUTH NUMBER MISSINGO
  - AUTH NUMBER/ACCEPT NO INVALID
  - AUTO SDX CASES CANNOT BE WITHDRAWN
  - A SLASH IS REQUIRED. BETWEEN REG NUMBER AND VERSION
  - CASE NOT FOUND
  - CASE NUMBER INVALID
  - CASE NUMBER MISSING
  - CASE PENDING DATA STATUS INVALID



- CASE STATUS INVALID
- CLOCKDOWN CLSING IN PROGRESS-PENDING REC ACCESS NOT ALLOWED.
- CNS SELECTION NOT ALLOWED. FOR THIS DISTRICT
- CNS SELECTION NOT ALLOWED. FOR THIS FUNCTION
- CNS SELECTION NOT ALLOWED. FOR MA CASE TYPES
- ENTRY NOT A VALID SCREEN NUMBER
- FUNCTION MUST BE ENTERED
- INDIVIDUAL AUX MARKED FOR DATA MIGRATION
- INVALID CALL TO INDIV PULLDOWN
- INVALID CALL TO MED-CASE PULLDOWN
- INVALID CASE TYPE FOR THIS PROCESS
- INVALID FUNCTION CODE ENTERED
- MA EXT/SEP DET CASES CANNOT BE WITHDRAWN
- MA RECERT IN PROGRESS PENDING REC ACCESS NOT ALLOWED
- MUST ACCESS PA CASE THAT CREATED MA CASE
- NO MATCH ON AUTH NUMBER
- NO SCREEN ENTRIES ALLOWED FOR THIS FUNCTION
- ONLY SCREEN 8 ALLOWED FOR MA EXTENSION
- ONLY SCREEN 8 ALLOWED FOR TRANSACTION TYPE
- ONLY SCREENS 1 AND 4 ALLOWED FOR RC Y35
- PLEASE SELECT SCREENS
- REGISTRY NUMBER MISSING/INVALID
- REGISTRY NUMBER/VERSION NUMBER MISSING
- REPLACEMENT FOOD STAMPS TRANS IN PROGRESS NO ACCESS
- REQUEST INVALID-CASE FLAGGED FOR DATA MIGRATION

- SCREEN 8 NOT ALLOWED.
- SCREEN 9 INVALID FOR CASE TYPE
- SCREEN 9 NOT PERMITTED FOR CASE TYPE
- SCREEN SELECTION MUST BE MADE
- SELECT ONLY SCREEN 8
- SEP CASE NOT FOUND
- SERVICES CASE TYPE NOT ALLOWED.
- SSN ENUMERATION IN PROGRESS-PENDING REC ACCESS NOT ALLOWED
- UPDATE NOT ALLOWED-PCP PENDING RECORD EXISTS
- VA CERTIFICATION PENDING REC ACCESS NOT ALLOWED
- VERSION NUMBER INCORRECT
- VERSION NUMBER MISSING/INVALID
- WITHDRAWAL NOT ALLOWED. USE INITIAL LOAD CANCEL
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

- Based on function:
  - Function A and B - None
  - Function D - WITHDRAWAL NOTIFICATION
  - Function E
    - AUTHORIZATION - See **SRM Access and Exit Procedures**, or
    - AUTHORIZATION REPORT ABORT NOTICE

Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBAMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WDXMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Valid values are A through G
REG/VER or CASE #	01046 - REGISTRY NUBER (6) and 01047 - VERSION NUMBER (2) Or 01050 - CASE NUMBER (10)	Required
AUTH #	02040 - AUTHORIZATION NUMBER (8)	Optional
SCREEN #	NONE	User entered to move to a specific data entry screen. Valid values are 1-9.
<b>SCREENS:</b>		
01	NONE	Enter an "X" returns WKBK01.
02	NONE	Enter an "X" returns WKBK02.
03	NONE	Enter an "X" returns WKBK03.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
04	NONE	Enter an "X" returns WKBK04.
05	NONE	Enter an "X" returns WKBK05.
06	NONE	Enter an "X" returns WKBK06.
07	NONE	Enter an "X" returns WKBK07.
08	NONE	Enter an "X" returns WKBK08.
09	NONE	Enter an "X" returns WKBK09.
CNS	NONE	Enter an "X" returns WCN011

WKBK01 - Full Data Entry Screen 1

```

WKBK01      Case#                               03/14/2007
Trans Type 05  Case Reason Y20  PA/FS RC M68  PA/MA RC      SafeNet  APP
Client Notice: Ind  _  Number _____  Language E  HII  _  RVI  _  SRC  _
Auth Period 010107 to 063007 Recert Date _____  FS Intw P  TI
FS Period 010107 to 013107  PA/FS Code 09  TOP          Ofc Unit  Worker
                                         Trans:  ___  ___  ___
                                         Resp:  ___  01  ___  CARRJ
Reuse Case Number Type  Emergency  Fiscal  Trans:
Ind  P61171  ___  12  Emergency  40  Resp:
FS Rep Cd  _  IV-D Ind  Y  Sp-Code  _  HEAP Income  _
Case Name OSTRANDER _____  LFLN  _
Residence Address _____  City  St  Zip  Phone
427_KIAH_STREET _____  OGDENSBURG  NY 13669  5182347645
Care Of Name _____
Mailing Address _____  City  St  Zip
427_KIAH_STREET _____  OGDENSBURG  NY 13669

Co-op Case Nos:  _____
Local Data:  ___  ___  ___
FS Extension: Case No _____  Ofc  ___  Unit  ___  Worker  ___
MA Extension: Case No _____  Ofc  ___  Unit  ___  Worker  ___  Reason  ___

ACCEPT BLINKING FIELDS  _  NEXT SCREEN 02  XMT  _
    
```

Figure 2 - Full Data Entry Screen 1 (WKBK01)

Purpose

This screen is used to input data from the APP TAD.

Access

- Entering Function A and a valid Registry No. and Version No. on the **WDXMNU - Non-Services Data Entry Menu** screen, or
- Directly from the last CNS screen if CNS data is transmitted error-free, or
- Pressing the Ctrl+F6 if errors on CNS.

Screen Response

Positive

- If one or more individuals have Resource data that has not been resolved, the message UNRESOLVED RFI DATA- RFI FLAG ON will appear on line 23.
- WKBK02 screen

Negative

- Field(s) in error returns highlighted (missing entries display highlighted asterisks). The message EXAMINE BLINKING FIELDS on Line 24, or
- One of the following messages on Line 24:
  - F99 NOT SUPPORTED - REXMT (99 = 1-14 or Ctrl+F6)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK01

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	System-returned. Unprotected but changes are not accepted.
REGISTRY VERSION	01046 - REGISTRY NUMBER (6)	System-returned. Unprotected but changes are not accepted.
	01047 - VERSION NUMBER (2)	System-returned. Unprotected but changes are not accepted.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Required
CASE REASON	02050 - REASON CODE (3)	Required
PA/FS RC	02006 - PA/FA REASON CODE (2)	
PA/MA RC	02005 - PA/MA REASON CODE (2)	
SAFENET	01026 - FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (1)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>CLIENT NOTICE</b>		
IND	04001 -TIMELY OR ADEQUATE NOTICE INDICATOR CODE (1)	
NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	
LANGUAGE	04002 - LANGUAGE OF NOTICE FLAG (1)	Required
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
RVI	01043 - RESOURCE VERIFY (1)	
APP SRC	01066 – APPLICATION SOURCE CODE (1)	
<b>AUTHORIZATION PERIOD</b>		
AUTH PERIOD	01100 - AUTHORIZATION PERIOD (12)	Characters 1-6.; Displayed as MMDDYY.; Required
TO	01100 - AUTHORIZATION PERIOD (12)	Characters 7-12; Displayed as MMDDYY; Required
RECERT DATE	01910 - CERTIFICATION DATE (6)	
FS Intw	02022 - FOOD STAMP INTERVIEW (1)	
TI	01067 – TRUST INDICATOR (1)	Must be Y or N. The default value is N.
<b>FOOD STAMP PERIOD</b>		
FS PERIOD	17051 - FS AUTHORIZATION PERIOD (12)	Characters 1-6.; Displayed as MMDDYY
TO	17051 - FS AUTHORIZATION PERIOD (12)	Characters 7-12; Displayed as MMDDYY.
PA/FS CODE	01130 - PA FOOD STAMP CODE (2)	
TOP	01041 - TOP INDICATOR (1)	
<b>TRANS:</b>		
OFC	02014 - TRANSACTION OFFICE NUMBER (3)	
UNIT	02015 - TRANSACTION UNIT NUMBER (5)	
WORKER	02016 - TRANSACTION WORKER NUMBER (5)	
<b>RESP:</b>		
OFC	01020 - LOCAL OFFICE NUMBER (3)	System-returned if on the Application Record
UNIT	01030 - UNIT IDENTIFIER (5)	Required; System-returned if on the Application Record. Either unit or worker Required
WORKER	01040 - WORKER IDENTIFIER (5)	Required. System-returned if on the Application Record. Either unit or worker Required.
REUSE IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	
CASE NUMBER	01050 - CASE NUMBER (10)	Required. System-returned if on the Application Record.
TYPE	01060 - CASE TYPE (2)	Required. System-returned if on the Application Record.
EMERGENCY	01061 - EMERGENCY INDICATOR (1)	
FISCAL	01011 - FISCAL DISTRICT (2)	
FS REP CD	01350 - MONTHLY REPORTING CODE (1)	
IV-D IND	01440 - IV-D INDICATOR (1)	
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	
CASE NAME	01070 - CASE NAME (28)	Required.; System-returned if on the Application Record

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
RESIDENCE ADDRESS	01080 - RESIDENCE STREET (35)	Required.; System-returned if on the Application Record
CITY	01082 - RESIDENCE CITY/TOWN (15)	Required; System-returned if on the Application Record
ST	01083 - RESIDENCE STATE (2)	Required.; System-returned if on the Application Record
ZIP	01084 -RESIDENCE ZIP (5)	Required; System-returned if on the Application Record
PHONE	01085 - TELEPHONE NUMBER (10)	System-returned if on the Application Record
CARE OF NAME	05110 - IN CARE OF NAME (FIRST) (10)	
	05110 - IN CARE OF NAME (MI) (1)	
	05110 - IN CARE OF NAME (LAST) (17)	
MAILING ADDRESS	05120 - MAILING STREET (35)	System-returned if on the Application Record
CITY	05130 - MAILING CITY/TOWN (15)	System-returned if on the Application Record
ST	05140 - MAILING STATE (2)	System-returned if on the Application Record
ZIP	05150 - MAILING ZIP (5)	System-returned if on the Application Record
CO-OP CASE NOS	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
LOCAL DATA	24760 - CASE LOCAL DATA (57)	4 occurrences
<b>FS EXTENSION</b>		
CASE NO	01050 - CASE NUMBER (10)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>MA EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	Not Allowed
OFC	01002 - MA EXTENSION LOCAL OFFICE NUMBER (3)	Not Allowed
UNIT	01003 - MA EXTENSION UNIT ID NUMBER (5)	Not Allowed
WORKER	01004 - MA EXTENSION WORKER ID NUMBER (5)	Not Allowed
REASON	01605 - SEPARATE DETERMN. REASON CODE (3)	Not Allowed



WKBK02 - Full Data Entry Screen 2

WKBK02		Case # P61175		Type SN-FP		Trans Type OPEN		03/20/2007	
	C Individual	Name	C SS/RR	M Id	Client	Ap	S	Date	
	d First	M Last	d Number	S	Number	LN	x	of SSI	
01	WENDI	L SMILEY	1 059669933	-	ASSIGN	01	F	12131975	
02	JORDAN	R SMILEY	1 107827890	-	ASSIGN	02	M	04121994	
03	-	-	-	-	-	-	-	-	
04	-	-	-	-	-	-	-	-	
05	-	-	-	-	-	-	-	-	
06	-	-	-	-	-	-	-	-	
07	-	-	-	-	-	-	-	-	
08	-	-	-	-	-	-	-	-	
09	-	-	-	-	-	-	-	-	
10	-	-	-	-	-	-	-	-	
	C Other Name		C Other Name						
LN	d First	M Last	LN	d First	M Last				
-	-	-	-	-	-				
-	-	-	-	-	-				
-	-	-	-	-	-				
ACCEPT BLINKING FIELDS _			NEXT SCREEN 03			XMT ^			

Figure 3 - Full Data Entry Screen 2 (WKBK02)

Purpose

This screen is used to input data from the APP TAD.

Access

- Transmitting **WKBK01 - Full Data Entry Screen 1** with no errors or with accepted non-fatal errors, **or**
- Entering 02 in NEXT SCREEN on first page of **WKBK02 - Full Date Entry Screen 2** (Second page will have Line Numbers 11-20).

Screen Response

Positive

- WKBK02 (Page 2) if 02 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKBK02 will have Line Numbers 11-20)
- WKBK03 if 03 is entered after NEXT SCREEN
- WKBK05 if 05 is entered after NEXT SCREEN when Case Type is 60.

### Negative

- Field(s) in error returned highlighted (missing entries display highlighted asterisks). The message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - NO APPLICANT ENTERED (if no individual data was entered on WKBK02)
  - ADDITIONAL PAGE NOT ALLOWED. (if on Page 2 and Page 2 is requested again)
  - INVALID NEXT SCREEN ENTRY
  - NEXT SCREEN SELECTION INVALID FOR THIS CASE TYPE (05 may be entered only if Case Type is 60)
  - DUPLICATE CINS EXIST LINE NOS: 99,99 (99 = 01-20)
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

### Printed Response

None

### Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK02

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>INDIVIDUAL NAME</b>		
CD	03514 – PREGNANCY/PARENTING INDICATOR (1)	10 occurrences
FIRST	03030 - NAME (FIRST) (10)	10 occurrences; Characters 1-10
M	03030 - NAME (MI) (1)	10 occurrences; Character 11
LAST	03030 - NAME (LAST) (17)	10 occurrences; Characters 12-28
CD	03200 -SOCIAL SECURITY CODE (1)	10 occurrences
SS/RR NUMBER	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences
MS	03070 - CURRENT MARITAL STATUS (1)	10 occurrences
CLIENT ID NUMBER	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
AP RG LN	01045 - APPLICATION REGISTER LINE NO. (2)	10 occurrences
SEX	03050 - SEX (1)	10 occurrences
DATE OF BIRTH	03060 - DATE OF BIRTH (8)	10 occurrences
SSI STAT	03145 - SSI STATUS (1)	10 occurrences
<b>OTHER NAME</b>		
LN	03045 - LINE NO. OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	03040 - OTHER NAME CODE (1) 00183 - PRISON CODE (1)	6 occurrences For Prisoner case processing
FIRST	03041 -OTHER NAME (FIRST) (10) 00184 - DEPARTMENT IDENTIFICATION NUMBER (10)	6 occurrences; Characters 1-10 For Prisoner case processing
M	03041 - OTHER NAME (MI) (1)	6 occurrences; Character 11
LAST	03041 - OTHER NAME (LAST) (17)	6 occurrences; Character 12-28

WKBK03 - Full Data Entry Screen 3

Ln	Rel Cd	De gr	Cat Cd	Fap Cd	Emp Cd	PA/MA Indv	FS Indv	MA Indv	St/Fd Chgs	T Lm	Mom Ln	Vet Stat	Race H IABPW	Ed Stat	Cit	MS Pl
01	01	0	13	-		F45	---					9	N NNNNY	10	C	
02	04	0	06	-		---	---			01		9	N NNNNY	06	C	
03																
04																
05																
06																
07																
08																
09																
10																

DV Wai vers  
Ln IVD Ti mLmt Drug/Al c Other

ACCEPT BLINKING FIELDS \_      NEXT SCREEN 04      XMT ^

Figure 4 - Full Data Entry Screen 3 (WKBK03)

Purpose

This screen is used to input data from the APP TAD.

Access

- Entering 03 in NEXT SCREEN on **WKBK02 - Full Data Entry Screen 2, or**
- **WKBK03 - Full Data Entry Screen 3** when case has more than 10 members. (Page 2 of WKBK03 will have Line Numbers 11-20.)

Screen Response

Positive

- WKBK04 screen
- WKBK03 (Page 2) if case has more than 10 members. Page 2 of WKBK03 will have Line Numbers 11-20.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - see **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK03

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
REL CD	03090 - RELATIONSHIP CODE (2)	10 occurrences
DEGR	03029 - HIGHEST EDUCATION DEGREE ATTAINED CODE (1)	10 occurrences
CAT CD	03110 - INDIVIDUAL CATEGORICAL CODE (2)	10 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FAP CD	03028 - FOOD ASSISTANCE PROGRAM CODE (1)	10 occurrences; This field is not currently used.
EMP CD	03190 - EMPLOYABILITY CODE (2)	10 occurrences
PA/MA INDV	03121 - PA/MA INDIVIDUAL REASON CODE (3)	10 occurrences
FS INDV	03014 - FS INDIVIDUAL REASON CODE (3)	10 occurrences
MA INDV	03015 - MA INDIVIDUAL REASON CODE (3)	10 occurrences
ST/FD CHGS	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	10 occurrences
T LM	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. OR 60 MO. TANF LIMIT (1)	10 occurrences
MOM LN	03044 - MOTHERS LINE NUMBER (2)	10 occurrences
VET STAT	09302 - VETERAN STATUS (1)	10 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	10 occurrences
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	10 occurrences; Represented by I of IABPW
A	03055 - ASIAN (1)	10 occurrences; Represented by A of IABPW
B	03056 - BLACK OR AFRICAN AMERICAN (1)	10 occurrences; Represented by B of IABPW
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences; Represented by P of IABPW
W	03058 - WHITE OR CAUCASIAN (1)	10 occurrences; Represented by W of IABPW
ED STAT	09304 - EDUCATION LEVEL (2)	10 occurrences
CIT	03180 - CITIZENSHIP INDICATOR (1)	10 occurrences
MS PI	15021 - RECIPIENT BUY-IN ELIGIBILITY STATUS CODE (1)	10 occurrences
<b>DV WAIVERS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences; Protected
IVD	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; The user places a "Y" in this field if the individual has a domestic violence waiver. 3 occurrences Protected.
TIMLMT	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; The user inputs a "Y" in this field if the individual has a domestic violence waiver. 3 occurrences; Protected
DRUG/ALC	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; The user inputs a "Y" in this field if the individual has a domestic violence waiver. 3 occurrences; Protected.
OTHER	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; The user inputs a "Y" in this field if the individual has a domestic violence waiver. 3 occurrences; Protected

WKBK04 - Full Data Entry Screen 4

```

WKBK04   Case # P61175   Type SN-FP   Trans Type OPEN   03/20/2007
Future Action Information:
LN      AFA Cd   Date           LN      AFA Cd   Date
  _      _      _           _      _      _
  _      _      _           _      _      _
  _      _      _           _      _      _

Resident Alien Program Information:
Ln      Individual
No      First      M Last      Alien No   DEC   DOS   EPI   SP
01      WENDI      L SMILEY
02      JORDAN      R SMILEY
03
04
05
06
07
08
09
10

ACCEPT BLINKING FIELDS _   NEXT SCREEN 05   XMT ^
    
```

Figure 5 - Full Data Entry Screen 4 (WKBK04)

Purpose

This screen is used to input data from the APP TAD.

Access

- Entering 04 in NEXT SCREEN on **WKBK03 - Full Data Entry Screen 3**, or
- **WKBK04 - Full Data Entry Screen 4** when case has more than 10 members. (Page 2 of WKBK04 will have Line Numbers 11-20.)

Screen Response

Positive

- WKBK05 screen
- WKBK04 (Page 2) if case has more than 10 members. Page 2 of WKBK04 will have Line Numbers 11-20.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK04

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>FUTURE ACTION INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
AFA CD	01140 - ANTICIPATED FUTURE ACTION CODE (3)	6 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	6 occurrences
<b>RESIDENT ALIEN PROGRAM INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
INDIVIDUAL FIRST	24120 - GIVEN NAME (10)	10 occurrences



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
ALIEN NO	03171 - ALIEN NUMBER (9)	10 occurrences
DEC	03072 - DATE OF ENTRY INTO THIS COUNTRY (8)	10 occurrences
DOS	03172 - DATE OF STATUS (6)	10 occurrences
EPI	03073 - EPI INDICATOR (1)	10 occurrences
SP	03076 - CHAFEE INDICATOR (1)	10 occurrences

WKBK05 - Full Data Entry Screen 5

WKBK05	Case #	P61175	Type	SN-FP	Trans	Type	OPEN	03/20/2007
Ln	Individual		Ind	PA/MA	FS		MA Coverage	PP C E A
No	First	M Last	Stat	Eff	Eff	Cv	From	rr a B F
				Date	Date	Cd	To	io r C I
								nv d d S
01	WENDI	L SMI LEY	07					P X _
02	JORDAN	R SMI LEY	07					N _ _
03								
04								
05								
06								
07								
08								
09								
10								

ACCEPT BLINKING FIELDS \_      NEXT SCREEN 06      XMT ^

Figure 6 - Full Data Entry Screen 5 (WKBK05)

Purpose

This screen is used to input data from the APP TAD.

Access

- Successful transmission of **WKBK04 - Full Data Entry Screen 4** (if 05 was entered after NEXT SCREEN on WKBK04), or
- **WKBK05 - Full Data Entry Screen 5** when case has more than 10 members. (Page 2 of WKBK05 will have Line Numbers 11-20.)

Screen Response

Positive

- WKBK06 screen
- WKBK05 (page 2) if case has more than 10 members. (Page 02 of WKBK05 will have Line Numbers 11-20.)

Negative

- Field(s) in error returns highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK05

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24140 - SURNAME (17)	10 occurrences
IND STAT	03120 - INDIVIDUAL STATUS (2)	10 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PA/MA EFF DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	10 occurrences
FS EFF DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (6)	10 occurrences
CV CD	21090 - RECIPIENT MEDICAID COVERAGE (2)	10 occurrences
<b>MA COVERAGE</b>		
FROM	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 1-6
TO	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 7-12
PRIN PROV	21550 - PRINCIPAL PROVIDER CODE (2)	10 occurrences
CARD	21620 - CARD CODE (2)	10 occurrences
EBCD	01001 - FOOD STAMPS CARD HOLDER FLAG (1)	10 occurrences
AFIS	03047 - AFIS EXEMPTION INDICATOR (1)	10 occurrences

WKBK06 - Full Data Entry Screen 6

WKBK06		Case # P61175		Type SN-FP		Trans Type OPEN		03/20/2007	
LN	Act	Pay Meth	Pay P-U	--Effective--	Ind	Clm	Vend	Manual	Issue
		Typ	Pay	Amount	Iss	Sch	Cd	From	To
01									
02	-								
03									
04									
05	2	10	09	020000	1	M	4	032007	083107
06									10700
07									
08									
09									
10									
11									
12									

LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount
Recoupment											
Energy Rst											
HVnd/Acct											
Repl ace LN		CHK/FSB		LN		Vnd/Acct		CHK/FSB			

ACCEPT BLINKING FIELDS \_ NEXT SCREEN 99 XMT ^

Figure 7 - Full Data Entry Screen 6 (WKBK06)

Purpose

This screen is used to input payment information from the APP TAD document.

Access

- Successful transmission of **WKBK05 - Full Data Entry Screen 5**.

Screen Response

Positive

- WKBK07 if 07 or nothing is entered after NEXT SCREEN
- WKBK08 if 08 is entered after NEXT SCREEN. (If 08 is entered and any Method of Payment is 05 or 06, screen 07 is returned.)
- WSYSAK - System Acknowledgement Screen TRANSACTION ACCEPTED with any System Acknowledgement Message and/or Error Numbers listed if 99 is entered after NEXT SCREEN and Method of Payment Code is not 05 or 06.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK06

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>LINE INFORMATION</b>		
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6
TO	14012 - PAYMENT PERIOD (12)	12 occurrences Characters 7-12.
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Protected; 12 occurrences; This field is not currently used.
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	6 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
VND/ACCT	14024 - HEAP VENDOR (8)	Can be used for non-HEAP vendor.
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	Can be used for non-HEAP account number.
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	
REASON CODE	02050 - REASON CODE (3)	
NOTICE IND	04001 - NOTICE INDICATOR CODE (1)	

WKBK07 - Full Data Entry Screen 7

```

WKBK07      Case # P61175      Type EAF      Trans Type OPEN      03/20/2007
Associated Names And Addresses
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____
The following 2 addresses may be used ONLY for additional Notice copies
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____ CPC _____
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____ CPC _____
ACCEPT BLINKING FIELDS _      NEXT SCREEN 99      XMT ^
    
```

Figure 8 - Full Data Entry Screen 7 (WKBK07)

Purpose

This screen is used to input data from the reverse side of the APP TAD.

Access

- Successful transmission of **WKBK06 - Full Data Entry Screen 6**. This screen is “forced” if the Method of Payment is input as 05 or 06 on **WKBK06 - Full Data Entry Screen 6**.

Screen Response

Positive

- WSYSAK System Acknowledgement Screen TRANSACTION ACCEPTED with any Screen Acknowledgement Messages and/or Error Numbers listed if 99 is entered after NEXT SCREEN.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
- WKBK08 if nothing is entered after NEXT SCREEN.



Negative

- Field(s) in error return highlighted (missing fields display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK07

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected.
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>ASSOCIATED NAMES AND ADDRESSES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	2 occurrences
	05011 - ASSOCIATED NAME (LAST) (17)	2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
<b>THE FOLLOWING 2 ADDRESSES MAY BE USED ONLY FOR ADDITIONAL NOTICE COPIES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	2 occurrences
	05011 - ASSOCIATED NAME (LAST) (17)	2 occurrences
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
CPC	05004 - CANADIAN POSTAL CODE (6)	2 occurrences

WKBK08 - Full Data Entry Screen 8

WKBK08	Case # P61175	Type EAF	Trans Type OPEN	03/20/2007
Case Information				
—	—	—	—	—
—	—	—	—	—
Individual Data				
01	—	—	—	—
02	—	—	—	—
03	—	—	—	—
04	—	—	—	—
05	—	—	—	—
06	—	—	—	—
07	—	—	—	—
08	—	—	—	—
09	—	—	—	—
10	—	—	—	—
ACCEPT BLINKING FIELDS _		NEXT SCREEN 99		XMT ^

Figure 9 - Full Data Entry Screen 8 (WKBK08)

Purpose

This screen is used to input local district data from the reverse side of the APP TAD, if present.

Access

- Successful transmission of **WKBK07 - Full Data Entry Screen 7**, or
- Entering 08 after NEXT SCREEN on a previous screen.

Screen Response

Positive

- WSYSAK System Acknowledgement Screen TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

- WKBK08 (page 2) - If 08 is entered after NEXT SCREEN
- WKBK09 if nothing is entered after NEXT SCREEN (and Case Type is 21, 22, 24, or 60)

Negative

- One of the following messages on Line 24:
  - ADDITIONAL PAGE NOT ALLOWED. (If on Page 2 and Page 2 is requested again)
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - ADDITIONAL PAGE NOT ALLOWED.
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK08

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>CASE INFORMATION</b>		
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 1-2; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 3-4; 2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 5-7; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 8-13; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 14-17; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 18-21; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 22; 2 occurrences
<b>INDIVIDUAL DATA</b>		
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 1-2; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 3-4; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 5-6; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 7-8; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 9-10; 2 occurrences

WKBK09 - Full Data Entry Screen 9

WKBK09		Case # P61175			Type SN-FP		Trans Type OPEN		03/20/2007		
LN	Act	Pay Meth	Pay	P-U	--Effective--	Ind	Cl m	Vend	Manual	Issue	
		Typ	Amount	Sch	From	Ln	Cd	Id	Check	No	
01	-										
02	-										
03	-										
04	-										
05	2	R1	09	020000	1	M	4	032007	083107		10700
06	-										
07	-										
08	-										
09	-										
10	-										
11	-										
12	-										
		LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount
Recoupmen		Energy Rst		Vnd/Acct		LN		CHK/FSB			
HVnd/Acct		Repl ace LN		CHK/FSB		LN		CHK/FSB			
ACCEPT BLINKING FIELDS _								NEXT SCREEN 99		XMT ^	

Figure 10 - Full Data Entry Screen 9 (WKBK09)

Purpose

This screen is used to input payment information.

Access

- Successful transmission of **WKBK08 - Full Data Entry Screen 8**.

Screen Response

Positive

- WSYSAK - System Acknowledgement Screen TRANSACTION ACCEPTED with any System Acknowledgement Message and/or Error Numbers listed if 99 is entered after NEXT SCREEN and Method of Payment Code is not 05 or 06.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKBK09

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected.
<b>LINE INFORMATION</b>		
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>EFFECTIVE</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6.
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12.
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Required; 12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	Protected; 6 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	Protected; 6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	Protected; 3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	Protected; 3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	Protected
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	Protected
VND/ACCT	14024 - HEAP VENDOR (8)	Protected
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	Protected
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	Protected
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	Protected
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	Protected
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	Protected



## Full Data Entry Error Correction and Pending Data Change

After FDE, and prior to any other transaction, the Pending Record can be accessed for FDE Error Correction and Pending Data Change. This allows any errors to be corrected and/or data to be changed subject to the limits of the appropriate edits. See the **SRM Full Data Entry and Undercare Error Messages**. The Pending Data Status must be one of the following: FDE/ERR, FDE/ALEC, FDE/RFI, AT/FDE or FDE/BUP.

Function B, Full Data Entry Error Correction/Pending Data Change, and the Case Number are entered on WDXMNU - Non-Services Data Entry Menu. An Authorization Number is required if the district has selected Auth Printing Option 1. See the **SRM Standards, Conventions, and General Information**. An X is entered in front of the screens on which changes are to be made. Screens with system errors are returned automatically and need not be selected. Depending on what data is changed, certain other screens are automatically scheduled.

The WCN011-Client Notice System Reason Code Entry screen can be accessed by entering an X in front of CNS. This screen is displayed before any WMS data entry screens. If a Pending Notice Record was previously created, that record cannot be accessed for modification from WDXMNU, however a new notice record can be created.

After successful completion of WCN011, other CNS screens may be displayed if the Reason Code or Codes entered on WCN011 require additional information. Data is entered on the CNS screens as it appears on the CNS Limited Fill Input Form.

After successful completion of all appropriate CNS screens, a Pending Notice Record is created, and a Notice Number is generated. The *first* Individual PA/MA or FS Reason Code that was entered for each line number on WCN011 is carried forward from CNS to WKBK03, and the PA Food Stamp Code is carried forward to WKER01.

If an error cannot be corrected during CNS entry, the screen with the error message is printed and any highlighted fields are circled by the user. All CNS errors are fatal. No information is saved if any error occurs and is not corrected. The transaction cannot be canceled in CNS. The operator must return to a WMS screen to cancel the transaction. Pressing the Ctrl+F6 keys displays WDXMNU.

After WKER01 is displayed, the transaction can be cancelled by pressing Ctrl+F5, or Full Data Entry Error Correction/Pending Data Change can continue. To continue, some of the data which would normally be carried forward from CNS must be entered on WKER01, to avoid a fatal error. These fields are Case Reason Code and Transaction Type. Because a Notice Number is not available, the pending record will be placed in an error status until CNS entry is completed.

The corrected and/or changed data is entered on the appropriate screen and the screen transmitted. All the data on each transmitted screen is edited. Any errors or missing elements are returned highlighted. If these errors cannot be corrected, a Y is entered after ACCEPT BLINKING FIELDS. Errors can be fatal or non-fatal as in Full Data Entry. Fatal errors will result in a System Acknowledgment screen with the message TRANSACTION REJECTED and the transaction is terminated. The Pending Record must be accessed again via Function B, Full Data Entry Error Correction/Pending Data Change.

When data entry of all appropriate screens is completed, a System Acknowledgment screen with the message TRANSACTION ACCEPTED is returned. A new Authorization Number is assigned to the Pending Record if its last Pending Data Status was not FDE/ERR. See the **SRM Standards, Conventions, and General Information**.

An Authorization, a Case Comprehensive Report, a Case Comprehensive Error Report, or the WKERQY error inquiry screen may be obtained under the same conditions as explained previously in Full Data Entry.

The new Pending Data Status of the corrected or changed Pending Record that is error-free is one of the appropriate statuses as shown in Full Data Entry. See the **SRM Standards, Conventions, and General Information**.

WKER01 - FDE Error Correction and Pending Data Change Screen 1

```

WKER01      Case#                               03/14/2007
Trans Type 05 Case Reason Y20 PA/FS RC M68 PA/MA RC SafeNet APP
Client Notice: Ind _ Number _____ Language E HI I _ RVI _ SRC _
Auth Period 010107 to 063007 Recert Date _____ FS Intw _ TI
FS Period 010107 to 013107 PA/FS Code 09 TOP Ofc Unit Worker
Trans: _____
Resp: _____ 01 CARRJ
Reuse Case Number Type Emergency Fiscal
Ind P61171 12 40
FS Rep Cd IV-D Ind Y Sp-Code HEAP Income
Case Name OSTRANDER LFLN
Residence Address City St Zip Phone
427_KIAH_STREET OGDENSBURG NY 13669 5182347645
Care Of Name
Mailing Address City St Zip
427_KIAH_STREET OGDENSBURG NY 13669

Co-op Case Nos: _____
Local Data: _____
FS Extension: Case No _____ Ofc _____ Unit _____ Worker _____
MA Extension: Case No _____ Ofc _____ Unit _____ Worker _____ Reason _____

ACCEPT BLINKING FIELDS _ NEXT SCREEN 02 XMT _
    
```

Figure 11 - FDE Error Correction and Pending Data Change Screen 1 (WKER01)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record. All data elements that are on the Pending Record are system-returned. If one or more individuals have Resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will appear on line 23.

Access

- Entering Function B and a valid Case No. and Authorization No. on the **WDXMNU - Non-Services Data Entry Menu** screen. **WKER01 - FDE Error Correction and Pending Data Change Screen 1** is returned automatically (even if screen 1 does not contain errors). Other screens may be automatically scheduled by the system depending upon conditions, **or**
- Directly from the last CNS screen if CNS data is transmitted error-free, **or**
- Entering 01 after NEXT SCREEN on a previous screen, **or**
- Pressing the Ctrl+F6 if errors on CNS.

Screen Response

Positive

- WKER02, WKER03, WKER04, WKER05, WKER06, WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks). The message EXAMINE BLINKING FIELDS on Line 24, or
- One of the following messages on Line 24:
  - F99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER01

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	System-returned; Unprotected but changes are not accepted.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
REGISTRY VERSION	01046 - REGISTRY NUMBER (6)	System-returned.; Unprotected but changes are not accepted.
	01047 - VERSION NUMBER (2)	System-returned.; Unprotected but changes are not accepted.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Required
CASE REASON	02050 - REASON CODE (3)	Required
PA/FS RC	02006 - PA/FA REASON CODE (2)	
PA/MA RC	02005 - PA/MA REASON CODE (2)	
SAFENET	01026 - FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (1)	
<b>CLIENT NOTICE</b>		
IND	04001 - TIMELY OR ADEQUATE NOTICE INDICATOR CODE (1)	
NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	
LANGUAGE	04002 - LANGUAGE OF NOTICE FLAG (1)	Required
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
RVI	01043 - RESOURCE VERIFY (1)	
APP SRC	01066 - APPLICATION SOURCE CODE (1)	
<b>AUTHORIZATION PERIOD</b>		
AUTH PERIOD	01100 - AUTHORIZATION PERIOD (12)	Characters 1-6; Displayed as MMDDYY; Required; System-returned if entered on the WKUM01
TO	01100 - AUTHORIZATION PERIOD (12)	Characters 7-12; Displayed as MMDDYY; Required. System-returned if entered on the WKUM01
RECERT DATE	01910 - CERTIFICATION DATE (6)	System-returned if entered on the WKUM01.
FS Intw	02022 - FOOD STAMP INTERVIEW (1)	
TI	01067 - TRUST INDICATOR (1)	Must be Y or N. The default value is N.
<b>FOOD STAMP PERIOD</b>		
FS PERIOD	17051 - FS AUTHORIZATION PERIOD (12)	Characters 1-6; Displayed as MMDDYY
TO	17051 - FS AUTHORIZATION PERIOD (12)	Characters 7-12; Displayed as MMDDYY
PA/FS CODE	01130 - PA FOOD STAMP CODE (2)	
TOP	01041 - TOP INDICATOR (1)	
<b>TRANS:</b>		
OFC	02014 - TRANSACTION OFFICE NUMBER (3)	
UNIT	02015 - TRANSACTION UNIT NUMBER (5)	
WORKER	02016 - TRANSACTION WORKER NUMBER (5)	
<b>RESP:</b>		
OFC	01020 - LOCAL OFFICE NUMBER (3)	System-returned if on the Application Record
UNIT	01030 - UNIT IDENTIFIER (5)	Required; System-returned if on the Application Record; Either unit or worker Required
WORKER	01040 - WORKER IDENTIFIER (5)	Required; System-returned if on the Application Record; Either unit or worker Required
REUSE IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 - CASE NUMBER (10)	Required; System-returned if on the Application Record
TYPE	01060 - CASE TYPE (2)	Required; System-returned if on the Application Record
EMERGENCY	01061 - EMERGENCY INDICATOR (1)	
FISCAL	01011 - FISCAL DISTRICT (2)	
FS REP CD	01350 - MONTHLY REPORTING CODE (1)	
IV-D IND	01440 - IV-D INDICATOR (1)	
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	
CASE NAME	01070 - CASE NAME (28)	Required; System-returned if on the Application Record
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
RESIDENCE ADDRESS	01080 - RESIDENCE STREET (35)	Required. System-returned if on the Application Record.
CITY	01082 - RESIDENCE CITY/TOWN (15)	Required. System-returned if on the Application Record.
ST	01083 - RESIDENCE STATE (2)	Required; System-returned if on the Application Record
ZIP	01084 -RESIDENCE ZIP (5)	Required; System-returned if on the Application Record
PHONE	01085 - TELEPHONE NUMBER (10)	System-returned if on the Application Record
CARE OF NAME	05110 - IN CARE OF NAME (FIRST) (10)	
	05110 - IN CARE OF NAME (MI) (1)	
	05110 - IN CARE OF NAME (LAST) (17)	
MAILING ADDRESS	05120 - MAILING STREET (35)	System-returned if on the Application Record
CITY	05130 - MAILING CITY/TOWN (15)	System-returned if on the Application Record
ST	05140 - MAILING STATE (2)	System-returned if on the Application Record
ZIP	05150 - MAILING ZIP (5)	System-returned if on the Application Record
CO-OP CASE NOS	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
LOCAL DATA	24760 - CASE LOCAL DATA (57)	4 occurrences
<b>FS EXTENSION</b>		
CASE NO	01050 - CASE NUMBER (10)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>MA EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	Not Allowed
OFC	01002 - MA EXTENSION LOCAL OFFICE NUMBER (3)	Not Allowed
UNIT	01003 - MA EXTENSION UNIT ID NUMBER (5)	Not Allowed
WORKER	01004 - MA EXTENSION WORKER ID NUMBER (5)	Not Allowed
REASON	01605 - SEPARATE DETERMN. REASON CODE	Not Allowed

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	(3)	

WKER02 - FDE Error Correction and Pending Data Change Screen 2

```

WKER02      Case # P61175      Type SN-FP      Trans Type OPEN      03/20/2007
  C Individual Name      C SS/RR      M Client      Ap S      Date
  d First      M Last      d Number      S Number      LN x      of      SSI
01  _ WENDI      L SMILEY      1 059669933  _ AX83097Q  01 F 12131975  _
02  _ JORDAN      R SMILEY      1 107827890  _ AX83098Q  02 M 04121994  _
03  _ _____      - _____      - _____      - _____      - _____      -
04  _ _____      - _____      - _____      - _____      - _____      -
05  _ _____      - _____      - _____      - _____      - _____      -
06  _ _____      - _____      - _____      - _____      - _____      -
07  _ _____      - _____      - _____      - _____      - _____      -
08  _ _____      - _____      - _____      - _____      - _____      -
09  _ _____      - _____      - _____      - _____      - _____      -
10  _ _____      - _____      - _____      - _____      - _____      -

  C Other Name      C Other Name
  LN d First      M Last      LN d First      M Last
  _ _ _____      - _____      _ _ _____      - _____
  _ _ _____      - _____      _ _ _____      - _____
  _ _ _____      - _____      _ _ _____      - _____

ACCEPT BLINKING FIELDS _      NEXT SCREEN 03      XMT ^
ERR 0205 0205
    
```

Figure 12 - FDE Error Correction and Pending Data Change Screen 2 (WKER02)

Purpose

This screen is used to correct, change, add, and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 02 after NEXT SCREEN on a previous screen, or
- **WKER02 - FDE Error Correction and Pending Data Change Screen 2** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER02 (Page 2) if case has more than 10 members

- WKER03, WKER04, WKER05, WKER06, WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

#### Negative

- Field(s) in error returned highlighted (missing entries display highlighted asterisks). The message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - ADDITIONAL PAGE NOT ALLOWED. (if on Page 2 and Page 2 is requested again)
  - DUPLICATE CINS EXIST LINE NOS: 99,99 (99 = 01-20)
  - INVALID NEXT SCREEN ENTRY
  - NEXT SCREEN SELECTION INVALID FOR THIS CASE TYPE (05 may be entered only if Case Type is 60)
  - NO APPLICANT ENTERED (if no individual data was entered on WKBK02)
  - NO INDIVIDUALS ON PAGE 2 OF WKER02
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

None



Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER02

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>INDIVIDUAL NAME</b>		
CD	03514 - PREGNANCY/PARENTING INDICATOR (1)	10 occurrences
FIRST	03030 - NAME (FIRST) (10)	10 occurrences; Characters 1-10
M	03030 - NAME (MI) (1)	10 occurrences; Character 11
LAST	03030 - NAME (LAST) (17)	10 occurrences; Characters 12-28
CD	03200 - SOCIAL SECURITY CODE (1)	10 occurrences
SS/RR NUMBER	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences
MS	03070 - CURRENT MARITAL STATUS (1)	10 occurrences
CLIENT ID NUMBER	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
AP RG LN	01045 - APPLICATION REGISTER LINE NO. (2)	10 occurrences
SEX	03050 - SEX (1)	10 occurrences
DATE OF BIRTH	03060 - DATE OF BIRTH (8)	10 occurrences
SSI STAT	03145 - SSI STATUS (1)	10 occurrences
<b>OTHER NAME</b>		
LN	03045 - LINE NO. OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	03040 - OTHER NAME CODE (1) 00183 - PRISON CODE (10)	6 occurrences For Prisoner case processing
FIRST	03041 - OTHER NAME (FIRST) (10) 00184 - DEPARTMENT IDENTIFICATION NUMBER (10)	6 occurrences; Characters 1-10 For Prisoner case processing
M	03041 - OTHER NAME (MI) (1)	6 occurrences; Character 11
LAST	03041 - OTHER NAME (LAST) (17)	6 occurrences; Character 12-28

WKER03 - FDE Error Correction and Pending Data Change Screen 3

WKER03	Case #	P61175										Type	SN-FP	Trans	Type	OPEN	03/20/2007
Ln No	Rel Cd	De gr	Cat Cd	Fap Cd	Emp Cd	PA/MA Indv	FS Indv	MA Indv	St/Fd Chgs	T Lm	Mom Ln	Vet Stat	Race H IABPW	Ed Stat	Cit	MS Pl	
01	01	0	13	—		F45	—		—		01	9	N NNNNY	10	C		
02	04	0	06	—		—	—		—		01	9	N NNNNY	06	C		
03																	
04																	
05																	
06																	
07																	
08																	
09																	
10																	
DV Wai vers Ln IVD Ti mLmt Drug/Al c Other																	
ACCEPT BLINKING FIELDS _      NEXT SCREEN 04      XMT ^																	

Figure 13 - FDE Error Correction and Pending Data Change Screen 3 (WKER03)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 03 after NEXT SCREEN on a previous screen, or
- **WKER03 - FDE Error Correction and Pending Data Change Screen 3** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER03 (Page 2) if case has more than 10 members
- WKER04, WKER05, WKER06, WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system

- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER03

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
REL CD	03090 - RELATIONSHIP CODE (2)	10 occurrences
DEGR	03029 - HIGHEST EDUCATION DEGREE ATTAINED CODE (1)	10 occurrences
CAT CD	03110 - INDIVIDUAL CATEGORICAL CODE (2)	10 occurrences
FAP CD	03208 - FOOD ASSISTANCE PROGRAM CODE (1)	10 occurrences; Not currently used
EMP CD	03190 - EMPLOYABILITY CODE (2)	10 occurrences
PA/MA INDV	03121 - PA/MA INDIVIDUAL REASON CODE (3)	10 occurrences
FS INDV	03014 - FS INDIVIDUAL REASON CODE (3)	10 occurrences
MA INDV	NONE	10 occurrences
ST/FD CHGS	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	10 occurrences
T LM	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. OR 60 MO. TANF LIMIT (1)	10 occurrences
MOM LN	03044 - MOTHERS LINE NUMBER (2)	10 occurrences
VET STAT	09302 - VETERAN STATUS (1)	10 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	10 occurrences
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	10 occurrences; Represented by I of IABPW
A	03055 - ASIAN (1)	10 occurrences; Represented by A of IABPW
B	03056 - BLACK OR AFRICAN AMERICAN (1)	10 occurrences; Represented by B of IABPW
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences; Represented by P of IABPW
W	03058 - WHITE OR CAUCASIAN (1)	10 occurrences; Represented by W of IABPW
ED STAT	09304 - EDUCATION LEVEL (2)	10 occurrences
CIT	03180 - CITIZENSHIP INDICATOR (1)	10 occurrences
MS PI	15021 - RECIPIENT BUY-IN ELIGIBILITY STATUS CODE (1)	10 occurrences
<b>DV WAIVERS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
IVD	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; Protected; The user inputs a "Y" in this field if the individual has a domestic violence waiver; 3 occurrences
TIMLMT	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; Protected; The user inputs a "Y" in this field if the individual has a domestic violence waiver; 3 occurrences
DRUG/ALC	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; Protected; The user inputs a "Y" in this field if the individual has a domestic violence waiver; 3 occurrences
OTHER	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; Protected; The user inputs a "Y" in this field if the individual has a domestic violence waiver; 3 occurrences

WKER04 - FDE Error Correction and Pending Data Change Screen 4

WKER04	Case #	P61175	Type	SN-FP	Trans	Type	OPEN	03/20/2007
Future Action Information:								
	LN	AFA	Cd	Date	LN	AFA	Cd	Date
	—	—	—	—	—	—	—	—
	—	—	—	—	—	—	—	—
	—	—	—	—	—	—	—	—
Resident Alien Program Information:								
Ln	Individual			Alien No	DEC	DOS	EPI	SP
No	First	M Last						
01	WENDI	L SMI LEY		—	—	—	—	—
02	JORDAN	R SMI LEY		—	—	—	—	—
03								
04								
05								
06								
07								
08								
09								
10								
ACCEPT BLINKING FIELDS _				NEXT SCREEN 05			XMT ^	

Figure 14 - FDE Error Correction and Pending Data Change Screen 4 (WKER04)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 04 after NEXT SCREEN on a previous screen, or
- **WKER04 - FDE Error Correction and Pending Data Change Screen 4** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER04 (Page 2) if case has more than 10 members
- WKER05, WKER06, WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system

- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER04

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>FUTURE ACTION INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
AFA CD	01140 - ANTICIPATED FUTURE ACTION CODE (3)	6 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	6 occurrences
<b>RESIDENT ALIEN PROGRAM INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
INDIVIDUAL FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
ALIEN NO	03171 - ALIEN NUMBER (9)	10 occurrences
DEC	03072 - DATE OF ENTRY INTO THIS COUNTRY (8)	10 occurrences
DOS	03172 - DATE OF STATUS (6)	10 occurrences
EPI	03073 - EPI INDICATOR (1)	10 occurrences
SP	03076 - CHAFEE INDICATOR (1)	10 occurrences

WKER05 - FDE Error Correction and Pending Data Change Screen 5

Ln	Individual		Type	SN-FP	Trans	Type	OPEN	03/20/2007
No	First	M Last	Ind Stat	PA/MA Eff Date	FS Eff Date	Cv Cd	MA Coverage From To	PP C E A rr a B F i o r C I nv d d S
01	WENDI	L SMI LEY		07				P X _
02	JORDAN	R SMI LEY		07				N _ _
03								
04								
05								
06								
07								
08								
09								
10								

ACCEPT BLINKING FIELDS \_      NEXT SCREEN 06      XMT ^

Figure 15 - FDE Error Correction and Pending Data Change Screen 5 (WKER05)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 05 after NEXT SCREEN on a previous screen, or
- **WKER05 - FDE Error Correction and Pending Data Change Screen 5** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER05 (Page 2) if case has more than 10 members
- WKER06, WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system



- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER05

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected.
<b>INDIVIDUAL INFORMATION</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24140 - SURNAME (17)	10 occurrences
IND STAT	03120 - INDIVIDUAL STATUS (2)	10 occurrences
PA/MA EFF DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	10 occurrences
FS EFF DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (6)	10 occurrences
CV CD	21090 - RECIPIENT MEDICAID COVERAGE (2)	10 occurrences
<b>MA COVERAGE</b>		
FROM	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 1-6
TO	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 7-12
PRIN PROV	21550 - PRINCIPAL PROVIDER CODE (2)	10 occurrences
CARD	21620 - CARD CODE (2)	10 occurrences
EBCD	01001 - FOOD STAMPS CARD HOLDER FLAG (1)	10 occurrences
AFIS	03047 - AFIS EXEMPTION INDICATOR (1)	10 occurrences

WKER06 - FDE Error Correction and Pending Data Change Screen 6

WKER06		Case # P61175			Type SN-FP		Trans Type OPEN		03/20/2007		
LN	Act	Pay Meth	Pay	P-U	--Effective--	Ind	Cl m	Vend	Manual	Issue	
		Pay	Amount	Iss	Sch Cd	From	To	Id	Check	No	
01	-	-	-	-	-	-	-	-	-	-	
02	-	-	-	-	-	-	-	-	-	-	
03	-	-	-	-	-	-	-	-	-	-	
04	-	-	-	-	-	-	-	-	-	-	
05	2	10	09	020000	1	M	4	032007	083107	10700	
06	-	-	-	-	-	-	-	-	-	-	
07	-	-	-	-	-	-	-	-	-	-	
08	-	-	-	-	-	-	-	-	-	-	
09	-	-	-	-	-	-	-	-	-	-	
10	-	-	-	-	-	-	-	-	-	-	
11	-	-	-	-	-	-	-	-	-	-	
12	-	-	-	-	-	-	-	-	-	-	
		LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount
Recoupment		-	-	-	-	-	-	-	-	-	-
Energy Rst		-	-	-	-	-	-	-	-	-	-
HVnd/Acct		-	-	-	-	-	-	-	-	-	-
Repl ace LN		-	-	-	-	-	-	-	-	-	-
		CHK/FSB	-	LN	CHK/FSB	-	-	-	-	-	-
		ACCEPT BLINKING FIELDS	-	NEXT SCREEN	99	-	-	-	-	XMT ^	-
ERR 0632		0762	0762	-	-	-	-	-	-	-	-

Figure 16 - FDE Error Correction and Pending Data Change Screen 6 (WKER06)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 06 after NEXT SCREEN on a previous screen, or
- **WKER06 - FDE Error Correction and Pending Data Change Screen 6** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER07, WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.

- See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

None

#### Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

#### Screen Field Description - WKER06

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6.
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12.
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Protected; 12 occurrences; Not currently used
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	6 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
VND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	

WKER07 - FDE Error Correction and Pending Data Change Screen 7

```

WKER07      Case # P61175      Type EAF      Trans Type OPEN      03/20/2007
Associated Names And Addresses
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____
The following 2 addresses may be used ONLY for additional Notice copies
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____ CPC _____
LN  __ Code  __ Noti ce Cpy  _  Name _____
                               Addr _____
                               Ci ty _____ St  __ Zi p  _____ CPC _____
ACCEPT BLINKING FIELDS _      NEXT SCREEN 99      XMT ^
    
```

Figure 17 - FDE Error Correction and Pending Data Change Screen 7 (WKER07)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, **or**
- Entering 07 after NEXT SCREEN on a previous screen, **or**
- **WKER07 - FDE Error Correction and Pending Data Change Screen 7** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- WKER08 or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system

- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKER07

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>ASSOCIATED NAMES AND ADDRESSES</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LN	05015 - ASSOCIATED NAME NUMBER (2)	Protected; 2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	2 occurrences
	05011 - ASSOCIATED NAME (LAST) (17)	2 occurrences
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
<b>THE FOLLOWING 2 ADDRESSES MAY BE USED ONLY FOR ADDITIONAL NOTICE COPIES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	2 occurrences
	05011 - ASSOCIATED NAME (LAST) (17)	2 occurrences
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
CPC	05004 - CANDIAN POSTAL CODE (6)	2 occurrences



WKER08 - FDE Error Correction and Pending Data Change Screen 8

WKER08	Case #	P61175	Type	EAF	Trans	Type	OPEN	03/20/2007
Case Information								
—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—
Individual Data								
01	—	—	—	—	—	—	—	—
02	—	—	—	—	—	—	—	—
03	—	—	—	—	—	—	—	—
04	—	—	—	—	—	—	—	—
05	—	—	—	—	—	—	—	—
06	—	—	—	—	—	—	—	—
07	—	—	—	—	—	—	—	—
08	—	—	—	—	—	—	—	—
09	—	—	—	—	—	—	—	—
10	—	—	—	—	—	—	—	—
ACCEPT BLINKING FIELDS _				NEXT SCREEN 99			XMT ^	

Figure 18 - FDE Error Correction and Pending Data Change Screen 8 (WKER08)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Entering 08 after NEXT SCREEN on a previous screen, or
- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- **WKER08 - FDE Error Correction and Pending Data Change Screen 8** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- System Acknowledgement Screen WSYSK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.

- See **SRM Standards, Conventions, and General Information** for further information on the WSYSK screens.
- WKER08 (page 2) or WKER09 as selected on WDXMNU, as entered following NEXT SCREEN, or as required by the system

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSK screens.

Printed Response

None

Function Keys

Key	Description
Ctrl+F5	Presents WSYSK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSK screens.

Screen Field Description - WKER08

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Mnemonic; Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; Protected
<b>CASE INFORMATION</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 1-2; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 3-4; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 5-7; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 8-13; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 14-17; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 18-21; 2 occurrences
(NONE)	24760 - CASE LOCAL DATA (57)	Character position 22; 2 occurrences
<b>INDIVIDUAL DATA</b>		
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 1-2; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 3-4; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 5-6; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 7-8; 2 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	Character position 9-10; 2 occurrences

WKER09 - FDE Error Correction and Pending Data Change Screen 9

WKER09		Case # P61175			Type SN-FP		Trans Type OPEN		03/20/2007			
LN	Act	Pay Meth	Pay	P-U	--Effective--	Ind	Cl m	Vend	Manual	Issue		
		Typ	Pay	Amount	Iss	Sch Cd	From	To	Ln	Id		
										Check No		
01	-	-	-	-	-	-	-	-	-	-		
02	-	-	-	-	-	-	-	-	-	-		
03	-	-	-	-	-	-	-	-	-	-		
04	-	-	-	-	-	-	-	-	-	-		
05	2	10	09	020000	1	M	4	032007	083107	02		
06	-	-	-	-	-	-	-	-	-	10700		
07	-	-	-	-	-	-	-	-	-	-		
08	-	-	-	-	-	-	-	-	-	-		
09	-	-	-	-	-	-	-	-	-	-		
10	-	-	-	-	-	-	-	-	-	-		
11	-	-	-	-	-	-	-	-	-	-		
12	-	-	-	-	-	-	-	-	-	-		
		LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount	
Recoupmnt		_____										
Energy Rst		_____										
HVnd/Acct		_____										
Repl ace LN		CHK/FSB	_____				LN	CHK/FSB	_____			
ACCEPT BLINKING FIELDS		_				NEXT SCREEN 99				XMT ^		
ERR 0632 0762 0762												

Figure 19 - FDE Error Correction and Pending Data Change Screen 9 (WKER09)

Purpose

This screen is used to correct, change, add and/or delete data in a pending record.

Access

- Successful transmission of selection made in **WDXMNU - Non-Services Data Entry Menu** screen, or
- Entering 09 after NEXT SCREEN on a previous screen, or
- **WKER09 - FDE Error Correction and Pending Data Change Screen 9** is returned automatically if the screen contains errors. Other screens may be automatically scheduled by the system depending upon conditions.

Screen Response

Positive

- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - INVALID NEXT SCREEN ENTRY
  - SF99 NOT SUPPORTED - REXMT (99 = 1-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

### Printed Response

None

### Function Keys

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

### Screen Field Description - WKER09

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Required; 12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	7 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	7 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
VND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	
REASON CODE	02050 - REASON CODE (3)	
NOTICE IND	04001 - NOTICE INDICATOR CODE (1)	

## Full Data Entry Withdrawal

If a decision is made to withdraw an application and the APP TAD has completed Full Data Entry (i.e. a Pending Record has been established), it is then necessary to withdraw the FDE transaction. The Pending Data Status must be one of the statuses necessary for Error Correction and Pending Data Change. See the sections entitled **Full Data Entry Error Correction and Pending Data Change** and the **SRM Section Standards, Conventions, and General Information (Pending Data Status Chart)**.

### Menu Selection - D

Withdrawal of the FDE transaction is accomplished by entering Function D, Full Data Entry Withdrawal, and the Case Number (and the Authorization Number if Auth Printing Option is 1) on the entry line on the WDXMNU Menu screen. No information is entered on CNS for a withdrawal.

Successful completion of this transaction results in the return of the System Acknowledgment screen with the messages TRANSACTION ACCEPTED, WITHDRAWAL NOTIFICATION TO BE PRINTED. A Withdrawal Notification is also printed. See CentraPort for examples of WMS documents and forms.

An accepted transaction removes the Full Data Entry transaction (similar to the Cancel Pending Transaction) and also sets the Application Record Internal Status of the application (Data Element #24020) to "4 - Application Withdrawn".

All case related and individual records associated with the withdrawn Application and APP TAD is effectively deleted.

The internal status is checked by a monthly batch process (APP KILLER) which walks through the database and deletes withdrawn or uncompleted applications. See **SRM Application Registration and Denial (Application Deletion by the System)** for more information.

Also see the screen **WDXMNU - Non-Services Data Entry Menu** for more information.

### Pending Records with a Pending Data Status – FDE/ERR

For Full Data Entry transactions that have a Pending Data Status of "FDE/ERR" and the pending record has not had a transaction within the last 90 days for PA case type and 180 for MA case types, WMS will automatically remove the Full Data Entry Error pending record (similar to the Cancel Pending Transaction process) and change the Application Record Internal Status (DE # 24020) to "4 - Application Withdrawn".

### Reports – WINR 4111

This activity will be reported on the WMS Report – WINR4111 – APPLICATION REGISTER – LIST OF OVERDUE APPLICATIONS, APPLICATIONS DUE FOR PROCESSING, APPLICATIONS TO BE DELETED, APPLICATIONS SYSTEMATICALLY DELETED.

No information is entered on CNS for a withdrawal.

## Authorization Report Request

Additional copies of the current Authorization can be obtained by entering Function E, Authorization Report Request, the Case Number and the Authorization Number on the entry line on the WDXMNU Menu screen. See the **SRM Standards, Conventions, and General information** for a full explanation of conditions that may restrict the use of this WK3209 transaction.

Most local districts are set up so that authorizations are automatically printed if there are no WMS errors and the transaction can pass all of the BICS edits. This setup is called "Full BICS" and is designed to preclude the printing of Authorizations before BICS edits have been applied. The goal is to not have potential Authorizations printed by WMS only to be invalidated by BICS edits. If the transaction passes BICS edits, the Authorizations are automatically printed.

WMS tracks the number of requests for Authorization printing using the Cycle Number field (D.E. #24750). This field is incremented by one whenever a request for Authorization printing is processed by WMS.

Entering Function E, and the letters ALIGN in the Case # field on the entry line will cause a dummy Authorization to be printed with all fields filled with a 9 or an X. This can be used to align the Authorization form paper in the printer. This function is rarely used because most local districts do NOT print their Authorizations but instead have the system print them automatically after passing BICS edits.

See the screen **WDXMNU - Non-Services Data Entry Menu** for more information.

The printing of the WMS Authorization (3209) is suppressed in certain instances. If a change is made to only one or more of the fields listed in the table below and the case reason code (de # 02-050) is "Y35" the printing of the LDSS 3209 (Authorization) will be suppressed.



Changes to other fields in addition to the ones listed below will not suppress the printing of the 3209.

SCREEN CAPTION	D.E. NUMBER - NAME	3209 CAPTION
LFLN	01063 - LIFE LINE PARTICIPATION	LFLN
OFC	01020 - LOCAL OFFICE NUMBER	OFFICE CODE
UNIT	01030 - UNIT IDENTIFIER	UNIT ID
WORKER	01040 - WORKER IDENTIFIER	WORKER ID
CO-OP CASE NOS	01110 - COOPERATIVE CASE NUMBER	CO-OP CASE NUMBERS
PHONE	01085 - TELEPHONE NUMBER	PHONE
RESIDENCE ADDRESS	01080 - RESIDENCE STREET	RESIDENCE ADDRESS
CITY	01082 - RESIDENCE CITY/TOWN	CITY/TOWN
ST	01083 - RESIDENCE STATE	ST
ZIP	01084 - RESIDENCE ZIP	ZIP CD
CARE OF NAME	05110 - CARE OF NAME	CARE OF
MAILING ADDRESS	05120 - MAILING ADDRESS	MAILING ADDRESS
CITY	05130 - MAILING CITY	CITY/TOWN
ST	05140 - MAILING STATE	ST
ZIP	05150 - MAILING ZIP	AP CD
AFA CD	01140 - AFA CODE	ANTIC FUT. ACT. CODE
AFA DATE	01141 - AFA DATE	MO DAY YR

## Child Support Enforcement Referral

The Child Support Enforcement Referral is accessed from the menu within WMS that establishes a Non-Service Case to allow users to quickly and easily make child support enforcement referrals during their normal case processing.

The screen is divided into three parts that capture and maintain:

- ADC Case Information
- Absent Parent/Putative Father Lead Information
- Support Obligation/Paternity Information

WSVIVD - Child Support Enforcement Referral

```

-WSVIVD CHILD SUPPORT ENFORCEMENT REFERRAL
****SECTION I - ADC CASE INFORMATION (MUST BE COMPLETELY REPORTED BY IV-A)****
ORG/UPD _ CASE NUMBER _____ OTG _ DEPRIV FAC VER _____ GOOD CAUSE _
LINE#: _____ MOTHER FN _____ MI _ LN _____
****SECTION II - ABSENT PARENT/PUTATIVE FATHER LEAD INFORMATION****
FN _____ MI _ LN _____ SEX _ SSN _____
ADDR _____ DOB _____
CITY _____ ST _ ZIP _____ DATE OF ADDRESS _____ HT _ WT _
ALIAS _____ ETH _ TEL# _____
***MAILING ADDRESS*** LAST CONTACT _____ DESERTION _____
ADDR _____ DATE OF ADDRESS _____
CITY _____ ST _ ZIP _____ DATE OF MARRIAGE _____
***EMPLOYER ADDRESS*** CITY OF MARRIAGE _____
NAME _____ OCCUPATION _____ ST _
ADDR _____ DATE OF ADDRESS _____
CITY _____ ST _ ZIP _____ TEL# _____ MED INS _
POL _____ GP _____ CO _____
UIB _ PA _ CASE# _____ DIST _ CIN _____ MIL BRANCH _ ARREST REC _
****SECTION III - SUPPORT OBLIGATION /PATERNITY INFORMATION****
SUPPORT : CURRENTLY RECD _ COURT ORDERED _ AMOUNT _____ FREQUENCY _
COURT _____
PATERNITY: ACKNOWLEDGED _ EST THROUGH COURT _ COURT _____
XMIT _
    
```

Figure 20 - Child Support Enforcement Referral (WSVIVD)

Purpose

This screen is used for entry of absent parent information.

Access

- Entering 29 on WMSMNU - WMS Main Menu, or
- Ctrl+5 from WSYSAK - System Acknowledgement Screen. See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

Screen Response

Positive

- WSVIVD - Child Support Enforcement referral screen with the message TRANSACTION ACCEPTED\*\*CASE 999999999\*\* (999999999 = Case Number)

Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks). One of the following messages on Line 24:
  - RESPONDENT NOT FOUND, REQUIRES ORIG.

- SF99 NOT SUPPORTED (99 = 1-4, 8-15, 17-22)
- TIP FILE 297 IS FULL
- TIP FILE FULL
- \*TIP FILE ERROR\* - FUNCTION/ERR-NUM - 99/9999 (99 = CFCSS Function, 9999 = CFCSS Error Number)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F5	WSVIVD - Child Support Enforcement Referral
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
Ctrl+F6	WDXMNU - Non-Services Data Entry Menu

Screen Field Description - WSVIVD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>SECTION I - ADC CASE</b>		
ORG/UPD	20967 - UPDATE INDICATOR (1)	
CASE NUMBER	01050 - CASE NUMBER (10)	
OTG	20957 - OTHER THAN GRANTEE INDICATOR (1)	
DEPRIV FAC VER	20992 - DEPRIVATION FACTOR DATE (6)	
GOOD CAUSE	20959 - GOOD CAUSE INDICATOR (1)	
LINE #	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	5 occurrences
MOTHER FN	20958 - CHILDREN'S NATURAL MOTHER (FIRST) (10)	Characters 1-10; Name of Natural Mother.
MI	20958 - CHILDREN'S NATURAL MOTHER (MI) (1)	Character 11
LN	20958 - CHILDREN'S NATURAL MOTHER (LAST) (17)	Character 12-28
<b>SECTION II - ABSENT PARENT LEAD INFORMATION</b>		
FN	20971 - RESPONDENT NAME (FIRST) (10)	Characters 1-10
MI	20971 - RESPONDENT NAME (MI) (1)	Character 11
LN	20971 - RESPONDENT NAME (LAST) (17)	Character 12-28
SEX	03050 - SEX (1)	
SSN	20972 - RESPONDENT SSN (9)	
ADDR	20472 - RESPONDENT AND STREET ADDRESS (35)	
DOB	20980 - RESPONDENT DATE OF BIRTH (6)	
CITY	20473 - RESPONDENT ADDRESS CITY (15)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
STATE	20474 - RESPONDENT ADDRESS STATE (2)	
ZIP	20475 - RESPONDENT ADDRESS ZIP CODE (9)	
DATE OF ADDRESS	20479 - RESPONDENT ADDRESS SOURCE DATE (6)	
HT	20446 - RESPONDENT HEIGHT (3)	
WT	20448 - RESPONDENT WEIGHT (3)	
ALIAS	20436 - RESPONDENT MOTHER MAIDEN NAME (FIRST) (10)	
	20436 - RESPONDENT MOTHER MAIDEN NAME (MI) (1)	
	20436 - RESPONDENT MOTHER MAIDEN NAME (LAST) (17)	
ETH	20384 - RESPONDENT ETHNIC CODE (1)	
TEL #	20382 - RESPONDENT PHONE NUMBER (10)	
<b>MAILING ADDRESS</b>		
ADDR	20975 - M178 STREET (35)	
CITY	20976 - M178 CITY (15)	
STATE	20977 - M178 STATE (2)	
ZIP	20978 - M178 ZIP (9)	
LAST CONTACT	20991 - DATE LAST CONTACT (6)	
DESERTION	20896 - DATE RESPONDENT DEPARTED (6)	
DATE OF ADDRESS	20479 - RESPONDENT ADDRESS SOURCE DATE (6)	
DATE OF MARRIAGE	20007 - DATE OF CLIENT/ABSENT PARENT MARRIAGE (6)	
CITY OF MARRIAGE	20009 - CITY OF CLIENT/ABSENT PARENT MARRIAGE (15)	
<b>EMPLOYER ADDRESS</b>		
NAME	20459 - RESPONDENT EMPLOYER NAME (28)	
ADDR	20460 - RESPONDENT EMPLOYER ADDRESS STREET (35)	
CITY	20461 - RESPONDENT EMPLOYER ADDRESS CITY (15)	
STATE	20462 - RESPONDENT EMPLOYER ADDRESS STATE (2)	
ZIP	20463 - RESPONDENT EMPLOYER ADDRESS ZIP CODE (9)	
OCCUPATION	20444 - RESPONDENT OCCUPATION (15)	
ST	20462 - RESPONDENT EMPLOYER STATE (2)	
DATE OF ADDRESS	20996 - DATE OF LAST KNOWN EMPLOYED (6)	
TEL#	20468 - RESPONDENT EMPLOYER PHONE (10)	
MED INS	20993 - MEDICAL INSURANCE INDICATOR (2)	
POL	20995 - MEDICAL INSURANCE NUMBER (15)	
GP	20261 - MEDICAL INSURANCE GROUP (9)	
CO	20994 - MEDICAL INSURANCE COMPANY (35)	
UIB	20962 - RESPONDENT UNEMPLOYMENT INSURANCE BENEFIT INDICATOR (1)	
PA	20963 - RESPONDENT PUBLIC ASSISTANCE INDICATOR (1)	
CASE#	20985 - RESPONDENT'S CASE IDENTIFICATION NUMBER (13)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
MIL BRANCH	20445 - CLIENT BRANCH OF SERVICE CODE (1)	
ARREST REC	20447 - RESPONDENT ARREST RECORD IND (1)	
<b>SECTION III - SUPPORT OBLIGATION</b>		
SUPPORT: CURENTLY REC	20989 - SUPPORT INDICATOR (1)	
COURT ORDERED	20988 - SUPPORT COURT ORDERDD CODE (1)	
AMOUNT	20990 - SUPPORT AMOUNT (7)	
FREQUENCY	20792 - OBLIGATION FREQUENCY (3)	
COURT	20960 - SUPPORT COURT (28)	
PATERNITY: ACKNOWLEDGED	20850 - RESPONDENT PATERNITY INDICATOR (1)	
EST THROUGH COURT	20961 - PATERNITY COURT (28)	
COURT	20449 - RESPONDENT COURT INDICATOR (1)	

## Subsystem Processing

### Internal Processing

#### Batch Update

Each evening all Pending FDE Records with a status of AT/FDE and AT/FDEOV are selected and sent to the BICS system for additional editing. If a record does not pass the BICS edits, its status is changed to FDE/ALEC (awaiting local error correction). Records that pass BICS edits get a status of FDE/BUP (awaiting Batch Update).

For each Pending FDE Record with a status of FDE/BUP, the Batch Update process will delete the Pending Record, create a Case Record with a status of "No Pend", and change the Application Registration to a Registry Record.

Batch Update processes other types of Pending Records and is discussed in further detail in **SRM Batch Processing**.

### External Processing

#### Benefit Issuance and Control System (BICS)

There is a nightly batch processing activity (known as BICS Local Data Feedback/File Maintenance) that is the means by which data entered into WMS is made available to the BICS database. This activity is described in the [BICS Services Payment Processing Manual](#).

#### Local Data Feedback (LDF)

This is a batch processing activity that is performed nightly and is the means by which data entered into WMS is made available to local districts that have their own data processing systems which require WMS data. This activity is described in **SRM Batch Processing**.

#### Electronic Eligibility Decision Support System (EEDSS)

EEDSS provides an interactive computer assisted interview and decision process enabling a local district eligibility worker to conduct a Medicaid (MA) eligibility Interview and eligibility Decision. EEDSS ensures a standardized and programmatically correct interview. Appropriate codes are offered, program and policy help text is presented, and financial data is captured and moved to the budget.

The Certification Interview routes down logic branches specific to the current application presented to the worker for an eligibility determination. The Interview is divided into major topics, and then is further divided into several subtopics. Help screens are available throughout the interview to clarify programmatic eligibility requirements and reference the documentation that supports those requirements. Drop-down lists of viable responses to questions allow the worker to choose a response that will pass a code (Required. to establish a case) directly to WMS, eliminating the need for a separate data entry function.

EEDSS captures responses given by the applicant to questions asked by the worker and populates the Welfare Management System (WMS) and its subsystems such as the Medicaid Automated Budgeting Eligibility Logic (MBL) and the Client Notices System (CNS) with the proper codes to efficiently, accurately and consistently make the MA eligibility determination.

Referral forms and Worker and Client checklists are created dynamically and automatically generated from responses captured during the interview. Checklists are populated with various documentation and other requirements as a reminder to return or respond in a timely manner. Referrals are pre-filled with data collected during the interview and can be e-mailed when appropriate.

The Decision session presents to the worker information extracted from the Certification Interview. Help screens are also available in Decision. All eligibility data is available to be verified prior to Supervisory Signoff which is the final approval point for the determination. Once the eligibility determination has been made, automated client notices may be generated, and insurance data is passed to eMedNY when appropriate.

EEDSS has been used for many years in NYC and in 2005 the technology was updated from a Green Screen to a web based application. The web version of EEDSS was modified to accommodate Upstate eligibility processing. Interview and decision processes accurately reflect programmatic requirements and questions are regularly updated as program requirements change.

The EEDSS User Interface (UI) Framework is built using HTML. Siebel eAdvisor engine along with custom components are used in navigating the user through interview and decision sessions. The enhanced eAdvisor engine with custom components is built in JavaScript. The Application Tier components are built in C# and the responses are stored in an Oracle database. The response data is received and sent back to WMS through DTI (Distributed Transaction Integrator). WMS data elements are referenced as part of the question development to effect a smooth transition of data between EEDSS and WMS.

The EEDSS subsystem is owned by the NYS Department of Health. Further documentation can be found on the [EEDSS County Website](#).

## Reporting

NUMBER	TITLE	FREQ	DESCRIPTION/PROCESSING
W3209P	Authorization Report	On Request	An on-request report that details the information associated with the authorization of a case.
WKCCPR	Case Comprehensive Report	On Request	A comprehensive listing of the data that has been captured on the case up to the point in time the report is generated. Used to create a paper copy of case information and to assist in error detection correction.
WKERPR	Case Comprehensive Error Report	On Request	An on-request report that details all error numbers and messages associated with the case. The report enumerates the detected errors for the current transaction that has been entered into WMS.

# Full Data Entry and Undercare Error Messages

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## Subsystem Overview

### Introduction

This section describes and provides links to error numbers and messages produced during Establishing a Pending Non-Services Case (See **SRM Establishing a Non-Services Case**), and Undercare Maintenance (See **SRM Undercare Changes and Recertification**).

The description of the actual error messages and a cause/remedy for each is maintained by the Center for Employment and Economic Supports (CEES) and is accessible on the OTDA Intranet web site via the link shown in this section.

Error messages associated with other WMS processes are contained within those sections (i.e. Application processing errors are in the Application Registration/Denial; see **SRM Application Registration/Denial**).

### Error Numbers

The Error Number is shown on the WSYSAK System Acknowledgment and the WKERQY Error Inquiry screens. It is printed out on these screens and in reports in the format of the following examples:

0102/00    0308/02    0506/12

The first four digits (0102, 0308, and 0506) are the Error Number. The second digit (1, 3, or 5) usually indicates the screen on which the edit occurred, however, due to the number of additional edits that have been added, not all errors use the appropriate screen number.

The two digits which follow the slash (/) refer to the location on the screen of the data element which caused the error.

In the example 0102/00 above, 00 means the data element appears only once on the screen or the Error Number applies to all possible locations so there is no need to number the location.

In the example 0308/02, 02 means this error occurred in the second location where it is possible to enter this data element on screen 03.

In the third example 0506/12, 12 means the error occurred in the twelfth location where it is possible to enter this data element on screen 05, that is, on page two of screen 05.

## Error Messages

The error number and its occurrence are followed by the actual error message. The error message is displayed on the WSYSAK System Acknowledgement and the WKERQY Error Inquiry screens and printed on Case Comprehensive – Error Report (WKERPR).

All fatal and non-fatal errors must be corrected at some point in the process if the data is to be retained on the pending record.

### Fatal

The word FATAL at the end of an error message during Full Data Entry (FDE) indicates that no data is retained and no pending record is established. If a fatal error occurs during Error Correction (EC) or Undercare/Maintenance (U/M), the data entered during the transaction which caused the fatal error is not retained on the pending record.

### Warning

The word WARNING at the beginning of an error message means the "error" is a Warning that alerts the worker and data entry operator to a special situation that may require certain action. However, the data entered has been accepted by the system or has been changed by the system to be acceptable.

WMS processing allows up to 20 WARNINGS for the data entered to be accepted. The 21<sup>st</sup> WARNING message for the same transaction will result in a FATAL error condition ("MAXIMUM NUMBER OF WARNINGS DETECTED") to be reported by WMS processing. The 20 WARNINGS will be displayed along with the FATAL error condition ("MAXIMUM NUMBER OF WARNINGS DETECTED").

### Non-Fatal

If the error message does not contain either FATAL or WARNING as part of the message, the error is a NON-FATAL error. The data entered has been accepted by the system or has been changed by the system to be acceptable.

WMS does not set a limit on the number of NON-FATAL errors that can be displayed. Therefore, NON-FATAL errors will never place the transaction in a FATAL error condition.

## Error Reference Tables

These tables are referred to in the listing of WMS errors that is maintained by the Center for Employment and Economic Supports (CEES) and is available through the OTDA Intranet web site. The Error Reference Tables are listed by Error Reference Table Number and are on the same page as the errors messages.

The link below will return the current WMS Error Reference Tables for pending and active non-services cases:

[WMS ERROR LIST INDEX](#)

## System Acknowledgement Messages

### Transaction Accepted

One or more of the messages listed in the error listing may also appear on a WSYSAK screen in conjunction with the message TRANSACTION ACCEPTED. The message is exactly as it appears, and the situation(s) that caused the message is also explained. See **SRM Standards, Conventions and General Information** for more information on WSYSAK.

### Transaction Rejected

One or more of the messages listed in the error listing may also appear on a WSYSAK screen in conjunction with the message TRANSACTION REJECTED FATAL ERROR DETECTED. The message is exactly as it appears, and the situation(s) that caused the message is also explained. See **SRM Standards, Conventions and General Information** for more information on WSYSAK.Error Listing

A listing of WMS errors is maintained by the Center for Employment and Economic Supports (CEES) and is available through the OTDA Intranet web site. The messages are listed by Error Number followed by the Error Message in capital letters and the error description.

The link below will return the current WMS error listing for pending and active non-services cases:

### [WMS ERROR LIST INDEX](#)

This error list site is revised periodically. The most current revision date is posted on the first page of the error listing.

In addition to the current error messages, the site also displays various reference tables and system acknowledgment messages for accepted and rejected transactions.

# Common Benefit Identification Card

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## Common Benefit Identification

### Introduction to Common Benefit Identification

A Common Benefit Identification Card (CBIC), in some form, is issued to:

Individuals in receipt of Medicaid (except those in Nursing Homes and other facilities)

Individuals designated as the payment recipient on a Temporary Assistance or Food Stamp case.

The card is a magnetic stripe access card used to confirm eligibility in the Medicaid system (eMedNY) and to grant benefits in the Cash and Food Stamp issuance system (EBT). Some cards support a client photo and signature, many do not.

The CBIC is produced and issued by the Card Contractor based on data received from WMS and from the local districts' on-line WMS workstation.

The CBIC is used for medical benefits upon generation of MA eligibility data such as MA Coverage Code and MA Card Code. Each person eligible for Medicaid gets their own CBIC card for Medical Assistance access.

To make the CBIC usable for Food Stamp and Public Assistance Benefits, one individual in the case must be designated as the EBT (Electronic Benefit Transfer System) Cardholder. This Cardholder must select a four character Personal Identification Number (PIN) or opt for a system-assigned PIN. CBIC information is transmitted in real time to the EBT Vendor who processes this information to enable the Cardholders to use their CBIC to obtain Food Stamp and Public Assistance Benefits.

### Types of Common Benefit Identification Cards

#### Permanent Plastic CBIC - All Benefits

The Permanent Plastic card is issued by the Card Contractor and is produced and mailed to the client after certain transactions have been data entered or if certain data is changed. Any WMS transaction that meets the following criteria will generate a mailed card request record to the CBIC contractor:

A person is added to the WMS database with a card code of P or N.

A person with a card code of P or N is on the database and a WMS transaction has changed their last name or sex or Date of Birth.

A person on the WMS database and during a WMS transaction CBIC logic recognizes that no active card exists and the card code is either P or N.

A worker requests a card using the CBIC on-line card request transactions supported in WMS.

See the topic entitled **Criteria for Permanent Plastic CBIC Production** for more information.

The Permanent Plastic card contains an access number based on the client's CIN and a sequence number. The card displays the client's name, sex, date of birth, CIN. It may also display a photo if one is on file (derived from AFIS)

and a signature if one is on file, (also derived from AFIS). The photo will only be placed on the card if the client's card code is P. There is a magnetic stripe on the back which is essential for access to Medicaid, Cash and Food Stamp benefits. There is no expiration date on the card.

### Vault Plastic CBIC - Cash and Food Stamp Benefits

Vault Plastic CBIC cards are sent in bulk to all Upstate local district by the Card Contractor. At the local districts, they are inventoried and issued as a client's first card while waiting a CBIC in the mail, for emergencies and as temporary replacement cards for lost/stolen Permanent Plastic cards. These cards cannot be used for Medicaid access. They can only be used for Food Stamp or Public Assistance Benefits access.

Vault cards are used routinely in Upstate Local Districts. In NYC, over-the-counter CBIC issuance sites are operated. Clients can pick up their actual CBICS on the same day as they are authorized at these sites. Vault cards are issued in NYC at the over the counter sites only when the sites are experiencing technical problems preventing the issuance of CBICs.

Vault cards are only valid for 90 days from issuance. After 90 days they become unusable.

### 2831A – Temporary Medicaid Card

The 2831A CBIC is used for MA benefits for a person **who is not currently on the WMS system** (yet). Counties can also hand write the 2831A and make the recipient temporarily authorized for services for the month or if it is close to the end of the month, for the following month.

The 2831A card is typed by the local district and allows for temporary MA authorization of one month for immediate medical need. It contains the client's name and demographics, Authorization Effective FROM and TO Dates, CIN or Application Registry Line Number, Category, Case Number (if known), MA Coverage Type and restrictions, if any. This card cannot be used for Food Stamps or Public Assistance Benefits. Counties can use the Intelligent Auto Fill (IAF) which supports many types of forms including the 2831A and information can be pulled from the recipient's Application Registration.

### Designating the EBT Cardholder - Payee

In a PA/FS or NPA-FS case, only one individual must be designated as EBT Payee (Cardholder) in order to access the Food Stamp and/or Public Assistance Benefits for the case. This is done by either one of the following:

Entering an "X" in the EBT code field (DE #01001) for the individual(s) on screen 5 of a Full Data Entry or Undercare transaction. The individual must have a Card Code of P or N. The Case must go through Batch Update processing before the individual is designated as a cardholder, or

Accessing the WIDUPD – INDIVIDUAL CARE REQUEST AND CASE # ENTRY screen from the WIDMNU – WMS ID CARD MENU screen by entering either CIN (or Application Registry Line Number) as well as the case number on WIDMNU. On the WIDUPD – screen use the "A" ADD function in the option that appears as follows:

"ADD (A) or DELETE (D) Individual as PA?FS Payee for Case#"

This function can also be used to DELETE a payee for a case using the "D" option.

An EBT cardholder designation is not necessary for Medical Benefits as each individual obtains his/her own benefits.

## Accessing BICS Pre-Registration Benefits

An applicant or recipient may use a **Permanent Plastic CBIC, or Vault CBIC** to obtain Food Stamp or Public Assistance Benefits authorized via the BICS Pre-Registration screens.

If an applicant or recipient is issued a BICS pre-registration benefit they must have a card to access the benefits. If the person is an applicant then while registering the vault card it is essential that the person also be made a case payee. This is done by entering the Application Registration and Line Number, Case Number and Card Number in the CBIC system. If the person is already the case payee then only the card number and CIN need be entered into CBIC.

If a benefit is registered in BICS pre-registration prior to EBT 4 P.M., the benefit(s) will be available after 6 P.M. the same day. If entered after 4 P.M. benefits may not be available until after midnight.

## PIN Requests

PINs are only used for cash and Food Stamps benefits. PINs are not needed to obtain MA benefits. PIN requests can be made using one of two processes; via MAGTEK or WMS.

### MAGTEK

All local districts have MAGTEK devices that provide for the changing/creation of PINs. Recipients swipe their card through the device and select their PIN real-time. The requested PIN is immediately available for use.

### WMS PIN Mailers

The EBT PIN mailer is a document mailed to an EBT payee by the EBT contractor. PINs are randomly generated for new recipients. The mailers are generated automatically to all new EBT payees entered into the WMS system. Mailers are generated within several days of the WMS transaction which made the person an EBT payee.

PIN mailers can also be requested on-line through WMS as a selection on the EBIC menu. This request from WODPML always mails the PIN number that has already been assigned. It does not change an existing PIN. PIN mailer requests can be made for recipient PIN or for the recipients Authorized Representative. The Auth Rep PIN can only be requested for a client who has an Auth Rep card on file.



## Overview

CBIC Processing refers to the maintenance of information associated with the issuance and use of Common Benefit Identification Cards. Additionally, users may initiate on-line inquiries regarding CBIC and EBT demographic information.

### Input Documents

One input documents are used for the CBIC system.

ID Card Update Form (DSS-4217) or a local equivalent. This form is used request cards, disable cards, assign an individual as a payee for a case or delete an individual as a payee for a case.

See CentraPort for examples of WMS documents and forms.

### Main Menu

CBIC data entry and inquiry activities begin by entering 27 on the WMSMNU - WMS Menu and transmitting. The WIDMNU - WMS ID Card Menu is returned. There are thirteen functions available on this menu:

Function 1 - For data entry of CBIC information for Cases

Function 3 - For data entry of CBIC information for Authorized Representatives

Function 4 - For requesting a Permanent ID Card only

Function 5 - For ID Card History Inquiry

Function 6 - For Authorized Representative Inquiry

Function 7 - For Individual PA/FS Payee Inquiry

Function 8 - For ID Card Audit Inquiry

Function 9 - For Case # PA/FS Payee Inquiry

Function 10 - For Case # ID Card Inquiry

Function 11 - For PIN Mailer Request

Function 12 - For WMS Individual Inquiry

Function 13 - For WMS Application Inquiry

Function 14 - For WMS Case Inquiry

Function 99 - For Printer Alignment Acknowledgement using WIDMNU

Different combinations of data are required for several of the functions. The data combinations are illustrated in the chart entitled **ALLOWABLE ENTRIES FOR FUNCTIONS ON WIDMNU - WMS ID CARD MENU**. This chart is found with the screen description for WIDMNU - WMS ID Card Menu information on WIDMNU.

## Functions

1 - TEMP & PERM CARD, CASE UPDATE

Entering Function 1 on the WIDMNU - WMS ID Card Menu screen and transmitting returns WIDUPD - Card Case #/Card # Entry screen.

When the WIDUPD program is first accessed, the screen is presented in two distinct portions. The upper portion displays fields containing individual data and application or case data.

Fields on the lower portion of the screen are blank and are used for the following transactions:

Requesting an Individual Card - This choice is used to request a new CBIC card for an individual. The request is made by entering a valid reason code and indicating whether the card should have a photo on it.

Requesting an EBT PIN Mailer - This choice is used to request an EBT PIN Mailer to be sent to the recipient or their authorized representative. The user is requested to place an 'X' next to the Client or the Authorized Representative choices.

Add/Delete Individual as EBT Payee for Case # - This is used to ADD (A) or DELETE (D) the Payee in the application or case by entering the Case Number.

Vault/Delete Card or Delete ID Card for Use - This choice is to register a VAULT (V) card for an applicant or to DELETE (D) a card from service. Only the last thirteen digits of the card number must be entered.

After selection, input and error-free transmission of Add/Delete Individual as EBICS Cardholder transaction some or all of the following data is displayed/removed in the upper portion of the screen:

For ADD (A), one or more of the following will be displayed:

- PA/FS Purge Date
- PA/FS Payee

For DELETE (D), some or all of the following is removed:

- PA/FS Purge Date
- PA/FS Payee

The lower portion (transaction area) of the screen is returned to the user with blanks for more data entry and an X is either placed or removed from the EBICS Code field on screen 05 in the case record (depending on A (ADD) or D (DELETE) entry) immediately upon transmission of the WIDUPD screen. This can be seen on WINQ23 - Case Comprehensive - Screen 5 Inquiry screen.

Certain additional input requests are sent to a user if the card is requested for an applicant and a case has been identified. In those situations, the user will be asked if the individual should be added or deleted as a PA/FS Payee on the case. The message is:

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:

An input line accompanies the message and can take one of two forms depending on whether the data input was a Case # or and Application Registry Number/CIN#. The messages are:

TT \_\_ Case # <<Case #>>

Or

TT \_\_ Case # <<Case #>> for Application #: <<Application Registry Number>> Dist <<Local District>>

3 - Authorized Representative Card Request and Case # Entry

Entering Function 3 and the required data on WIDMNU - WMS ID Card Menu returns the screen WIDARP - Authorized Representative Card Request and Case # Entry.

When the WIDARP screen is first accessed, the upper half displays fields containing individual data and application or case data.

Fields on the lower half of the screen are blank and are used for the following transactions:

Requesting an Authorized Representative Card - This selection is used to request a new CBIC card for an individuals authorized representative. The request is made by entering a valid reason code and indicating whether the card should have a photo on it.

Add/Delete Individual as PA/FS Payee for Case # - This selection is used to ADD (A) or DELETE (D) the Payee in the application or case by entering the Case Number.

Vault/Delete Card or Delete ID Card for Use - This selection is used to request a VAULT (V) card for an applicant or to DELETE (D) a card.

After error free transmission in either one of the transactions above (depending on what is data entered) some or all of the following data is displayed/removed in the top portion of the screen:

For ADD (A), one or more of the following will be displayed:

- PA/FS Purge Date
- PA/FS Payee

For DELETE (D), some or all of the following is removed:

- PA/FS Purge Date
- PA/FS Payee

Certain additional input requests are sent to a user if the card is requested for an authorized representative and a case has been identified. In those situations, the user will be asked if the individual should be added or deleted as a PA/FS Payee on the case. The message is:

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:

An input line accompanies the message and is reads:

TT \_\_ Case # <<Case #>>

4 - Perm Card Only

Entering Function 4 and the required data on the WIDMNU - WMS ID Card Menu screen and transmitting returns WIDLIM – Individual Card Request and Case # Entry screen.

Entering a valid reason code and indicating whether the card should have a photo on it caused a new permanent card to be issued to the client.

5 - ID Card History Inquiry

Entering Function 5 and the required data on WIDMNU - WMS ID Card Menu returns the screen WIDCTH - WMS ID Card Transaction History. This screen displays up to three currently active cards and a chronological history of all actions taken on any individual's CBIC. The data displayed includes individual data, card numbers, type of transaction that updated the system, the type of card produced and the following dates: Void Date of the card (if any), date the CBIC is issued, date posted that WMS is updated with new card data and the date the EBICS contractor confirms that data was received and processed. Also shown is the date/time that the PIN mailer was requested for the client.

6 - Authorized Representative Inquiry

Entering Function 6 and the required data on WIDMNU - WMS ID Card Menu returns the screen WIDARQ - Authorized Representative Inquiry. This screen displays information on the Authorized Representative(s) for a case. The data displayed includes the CIN, photo availability, signature sample, date of birth, gender, and SSN for the individual. For each Authorized Representative, the data displayed includes the card number, reason, card disabled flag, card type, name of the authorized representative, district, card number, in care of name, address, date, issue date, and WMS posting date. Among the statuses displayed are the card status, eMedNY status and EBT PA/FS status.

7 - Individual PA/FS Payee Inquiry

Entering Function 7 and the required data on WIDMNU - WMS ID CARD MENU returns the screen WIDICH - WMS ID Card Individual Inquiry with an individual Payee's demographics and card information displayed. This screen also displays the cases and/or applications for which the individual is a Payee cardholder as well as the Benefit End dates. (The Benefit End Date sets a purge date for a client's link to a case on EBT.)

8 - ID Card Audit Inquiry

Entering Function 8 and the required data on WIDMNU - WMS ID Card Menu returns the screen WIDAUD - ID Card Audit Inquiry. This function is used to audit the CBIC card system usage.

Card specific information is void date, issue date, card status, eMedNY status, EBT PA/FS status, first use date and time, request date and time, userid of the user who initiated the request and the physical identifier of the device on which the request was made.

Also displayed is current information regarding card type and status as well as information about the individual assigned to the card. The data at the top of the screen includes the card number, reason code, card disable flag, card type, and referral number. Information concerning the In Care Of Name and Address is displayed as well.

9 - Case # PA/FS Payee Inquiry

Entering Function 9 and the Case Number on WIDMNU returns the screen WIDCCH - WMS Card Case Inquiry. Displayed are the individual data for the EBT Payee for the case.

The data includes CIN or Application Registry Line Number/Registry Number, District, Individual Status, Name, DOB, Sex, SSN and any PIN or Active card information as well as an EBICS Benefit End Date. Benefit End Date is explained in the section entitled **Establishing the Benefit End Date**.

10 - Case # / APP # ID Card Inquiry

Entering Function 10 and the Case Number, Application Registry Number/Line Number or the Card Number on WIDMNU - WMS ID Card Menu returns WIDCRD - Case # ID Card Inquiry screen.

The purpose of this screen is to display current cards for all case members.

All of the individuals in a case are represented in the same manner with each individual's information displayed in a top section followed by their card history in an accompanying bottom section.

Depending on the data that was input, the top portion of the screen may vary. The following chart highlights those differences:

SCREEN INPUT	DIFFERENCES
CASE #	CASE # INSTEAD OF APPLICATION REGISTRY NUMBER CIN # INSTEAD OF APPLICATION REGISTRY LINE NUMBER
APP REG/ LN #	APPLICATION REGISTRY LINE # INSTEAD OF CIN.

Other data elements that are displayed in the top section include the Individual Status, EBT Pin Mailer Date and Time, First Name, Middle Initial, Last Name, Photo Required, Signature Required, CC, Date of Birth, Sex, and Social Security Account Number.

The bottom section represents all of the card activity that has occurred for the individual shown in the top section. The bottom section contains:

Current Card Description

Disposition

Card Type

Void Date

Card Status

eMedNY Status

EBT PA/FS Status

11 - EBT PIN Mailer Request

Entering Function 11 on WIDMNU - WMS ID Card Menu returns WIDPML - PIN Mailer Request. The Pin Mailer Request generates a mailer with the clients PIN for use in EBT. The mailer explains the purpose of the PIN.

The user can also change the mailing address using this function by keying the following data and by entering an 'X' in the Revise Mailing Address? response field:

In Care of Name

Mailing Address (Street, City, State, Zip)

The mailer can be generated for either the client or the Authorized Representative. The user must indicate who the mailer will be generated for by placing an 'X' next to the Client or Auth Rep fields.

12 - 14 - WMS Individual Inquiry, WMS Application Inquiry, and WMS Case Inquiry

For Functions 12 through 14, entering the required data on WIDMNU - WMS ID Card Menu will return a WMS Inquiry screen:

12 - WMS Individual Inquiry (WINQ12)

13 - WMS Application Inquiry (WINQ70)

14 - WMS Case Inquiry (WINQ07)

These screens are described in the **SRM Inquiry** section.

99 - Card Printer Alignment

Entering Function 99 data on WIDMNU - WMS ID Card Menu returns WIDMNU - WMS ID Card Menu with a message on line 24 describing whether a card printer alignment request was successfully processed. A successful request will cause the card printer to print a dummy CBIC card with "X's in all of the required data areas. Workers should check the printed dummy card to ensure that all data prints in the correct positions.

Print requests may be issued multiple times until the printer and card stock is successfully aligned.

An unsuccessful request would display an appropriate diagnostic message to the user informing them of the problem. Users are instructed to contact the Help Desk with any issues surrounding CBIC card printing.

WIDMNU - WMS ID Card Menu

```

WIDMNU  Dist STLA          WMS ID CARD MENU          Date 02/20/2007
                                           10:30:25
Function  __  CIN  _____
Application Registry Num  _____ Line  __ Dist  ____
Card Number  600486 _____
Case  _____ Suffix  __ Dist  ____

----- Selections -----
1 - TEMP & PERM CARD, CASE UPDATE
2 - *****
3 - AUTH REP CARD REQUEST, CASE UPDATE
4 - PERM CARD ONLY
5 - ID CARD HISTORY INQUIRY
6 - AUTHORIZED REPRESENTATIVE INQUIRY
7 - INDIVIDUAL PA/FS PAYEE INQUIRY
8 - ID CARD AUDIT INQUIRY
9 - CASE # PA/FS PAYEE INQUIRY
10 - CASE # / APP # ID CARD INQUIRY
11 - EBT PIN MAILER REQUEST
12 - WMS INDIVIDUAL INQUIRY
13 - WMS APPLICATION INQUIRY
14 - WMS CASE INQUIRY
99 - CARD PRINTER ALIGNMENT

----- Required Entries -----
AR LN, CIN, OR CARD # (CASE # OPT)
*****
CIN, OR CARD # (CASE # OPT)
CIN, OR CARD # (CASE # OPT)
AR LN, CIN, OR CARD #
CIN, OR CARD #
AR LN, CIN, OR CARD #
CARD #, OR AR LN, CIN
CASE # (DIST OPT)
CASE #, APP NUM, OR CARD #, (DIST OPT)
AR LN, CIN, OR CARD # (CASE # OPT)
CIN OR CARD #
APP NUM (DIST OPT) OR CARD #
CASE # (DIST OPT)

                                           xmt  __
    
```

Figure 1 - WMS ID Card Menu (WIDMNU)

Purpose

This screen is used to initiate: card requests, card inquires, payee inquires, card audit inquires, EBT PIN mailers, WMS inquires and Card printer alignment transactions.

Access

Entering 27 on WMSMNU - WMS Menu, **or**

Ctrl+F5 from any ID Card screen, **or**

Ctrl+F6 from any ID Card screen, **or**

Function 99 displays WIDMNU - WMS ID Card Menu (with message in line 24).

Screen Response

Positive

- Function 1 displays WIDUPD - WMS ID Card Case # and Card # Entry
- Function 3 displays WIDARP - Authorized Representative Card Request and Case # Entry
- Function 4 displays WIDLIM – Individual Card Request & Case # Entry

- Function 5 displays WIDCTH - ID Card History Inquiry
- Function 6 displays WIDARQ - Authorized Representative Inquiry
- Function 7 displays WIDICH - Individual PA/FS Payee Inquiry
- Function 8 displays WIDAUD - ID Card Audit Inquiry
- Function 9 displays WIDCCH - Case # PA/FS Payee Inquiry
- Function 10 displays WIDCRD - Case # ID Card Inquiry
- Function 11 displays WIDPML - PIN Mailer Request
- Function 12 displays WINQ12 - WMS Individual Inquiry
- Function 13 displays WINQ70 - WMS Application Inquiry
- Function 14 displays WINQ07 - WMS Case Inquiry
- Function 99 displays WIDMNU - WMS ID Card Menu (with message PRINTER ALIGNMENT FUNCTION COMPLETED in line 24)

#### Negative

- One of the messages on line 24 as shown on the **Common Benefit Identification Error Messages** pages
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**
  - TRANSECTION NOT ALLOWED (F8 and Ctrl+F3 function keys)

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBAMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu



F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WIDMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Functions 1, 3, 5 -14, 99. See Allowable Entries on WIDMNU matrix.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Functions 1, 3, 5, 6, 7, 8, 11, 12
APPLICATION REGISTRY NUM	01046 - REGISTRY NUMBER (6)	Functions 1, 5, 7, 8, 11
LINE	01045 - APPLICATION REGISTER LINE NUMBER (2)	Functions 1, 5, 7, 8, 11
DIST	01010 - TRANSACTION DISTRICT (2)	Optional with Functions 10, 13. Enters the first four characters of district name.
CARD NUMBER 600486	03005 - ID CARD NUMBER (19)	Functions 1, 3, 5, 6, 7, 8, 10, 11, 12, 13
CASE	01050 - CASE NUMBER (10)	Functions 9, 10, 14 Optional with Functions 1, 3, 11
SUFFIX	NONE	Only valid for NYC cases.
DIST	01010 - TRANSACTION DISTRICT (2)	Optional with Functions 9, 10, 13, 14

Allowable Entries on WIDMNU

ALLOWABLE ENTRIES FOR FUNCTIONS ON WIDMNU - WMS ID CARD MENU								
To obtain this screen:	Enter this function	and also enter one of the following data combinations:						Notes
		AR/LN	Reg. No.	CIN	Case No.	District	Card No.	
WIDUPD screen for Applicants	1	X	X					
			X	X				
							X	Only the Card Number needs to be entered if the Card Number is registered to an Application.
			X				X	The Registry Number needs to be entered if the Card Number is registered to a Case.
		X	X		X			
			X	X	X			
					X		X	Only the Case Number and the Card Number need to be entered if the Case Number and Card Number are for an Application
			X		X		X	The Registry Number also needs to be entered if the Case Number entered is for an Application, even if the Card Number is associated with a Case.
WIDUPD screen for Recipients	1			X				
							X	
				X	X			
					X		X	
WIDARP screen for	3			X				

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ALLOWABLE ENTRIES FOR FUNCTIONS ON WIDMNU - WMS ID CARD MENU								
To obtain this screen:	Enter this function	and also enter one of the following data combinations:						Notes
		AR/LN	Reg. No.	CIN	Case No.	District	Card No.	
<b>Applicants</b>								
<b>WIDARP screen for Recipients</b>	<b>3</b>			X				
							X	
<b>WIDCTH screen for Applicants</b>	<b>5</b>	X	X					
				X				
							X	
					X		X	
<b>WIDCTH screen for Recipients</b>	<b>5</b>			X				
							X	
<b>WIDARQ</b>	<b>6</b>						X	
				X				
<b>WIDICH screen for Applicants</b>	<b>7</b>	X	X			X		District is optional.
							X	
<b>WIDICH screen for Recipients</b>	<b>7</b>			X				
							X	
<b>WIDAUD</b>	<b>8</b>			X				
		X	X					
							X	
<b>WIDCCH</b>	<b>9</b>				X			

ALLOWABLE ENTRIES FOR FUNCTIONS ON WIDMNU - WMS ID CARD MENU								
To obtain this screen:	Enter this function	and also enter one of the following data combinations:						Notes
		AR/LN	Reg. No.	CIN	Case No.	District	Card No.	
					X	X		District is optional.
WIDCRD	10	X						
							X	
					X			
WIDPML	11						X	
			X	X				
		X	X					
				X				
WINQ12	12			X				
							X	
WINQ70	13		X			X		District is optional.
							X	
WINQ07	14				X	X		District is optional
WIDMNU	99							No entry is required

WIDUPD - Card Case #/Card # Entry

```

-WI DUPD   Di st STLA   I N D I V I D U A L   C A R D   R E Q U E S T   A N D   C A S E   #   E N T R Y           02/22/2007
                                                14:37:27
CIN AX830970                               Case # HOWARD0001 App # 560510 Dist STLA
Name LISA A HOWARD                         Case Type SN-FP Case Status ACTIVE
DOB 12/12/1955 Sex F SSN 547874541        Individ Status ACT
EBT PIN Mailer 03/25/2005 18:33:39        Case Name LISA A HOWARD
Photo NO Sig NO CC P                       C/O Name _____
                                                Street 1_AVE_A_____
Current Card(s) D Type Void Date
CLIENT SEQUENCE 01 N N/NS                  City PORT_____ State NY Zip 12203
                                                Revise Mailing Address? (Enter X) _
                                                Phone # 518-402-3729
                                                Ofc 010 Unit WRTS Wrkr JJK
                                                PA/FS Purge Date
                                                PA/FS Payee

Request for Individual Card: Reason Code (Enter Value) __ Photo (Y/N) Y

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:
TT _ Case # HOWARD0001
ADD Vault (V) Card or DELETE (D) ID Card for Use:
TT _ Card # 600486 _____ Xmt _
    
```

Figure 2 - Card # / Case # Entry (WIDUPD)

Purpose

This screen is used to request cards, inactivate cards, register vault cards, designate an individual as a Payee for case, and remove an individual as a payee for a case.

Access

Function 1 and the following entered on the WIDMNU - WMS ID Card Menu:

- Registry Number and Application Register Line Number, or
- Registry Number and CIN, or
- Registry Number and Card Number, or
- Registry Number and Application Line Number and Case Number, or
- Registry Number and CIN and Case Number, or
- Registry Number and Case Number and Card Number, or
- Case Number and Card Number, or
- Card Number, or
- CIN and Case Number

Screen Response

Positive

- WIDUPD is returned with the added or changed data displayed in top section of the screen.
- If entered data is for an applicant, the user can optionally add/delete individuals as PA/FS Payees for a Case.

Negative

- One of the messages on Line 24 as shown on the Error Messages and Edits pages
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WIDUPD is returned after data entry with the word NO after EBICS TRANSMISSION PENDING.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDUPD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN #	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected.
CASE #	01050 - CASE NUMBER (10)	Protected.
APP #	01046 - REGISTRY NUMBER (6)	Protected.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. First four characters of district name.
NAME	03030 - NAME (28)	Protected. Characters 1-10.
	03030 - NAME (28)	Protected. Character 11.
	03030 - NAME (28)	Protected. Characters 12-28.
CASE TYPE	01060 - CASE TYPE (2)	Protected.
CASE STATUS	02090 - CASE STATUS (2)	Protected.
DOB	03060 - DATE OF BIRTH (8)	Protected.
SEX	03050 - SEX (1)	Protected.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Formatted as 999-99-9999.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Protected.
REL CD	03090 - RELATIONSHIP CODE (2)	Protected.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER	Protected. Formatted as MM/DD/CCYY

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SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	(PIN) UPDATE DATE (6)	
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Protected. Formatted as HH:MI:SS
CASE NAME	01070 - CASE NAME (28)	Protected.
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Protected.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Protected.
CC	21620 - CARD CODE (1)	Protected.
C/O NAME	05110 - IN CARE OF NAME (28)	
<b>CURRENT CARD INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	Protected. 4 occurrences.
D	12008 - ID CARD VENDOR FLAG (1)	Protected. 4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Protected. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	Protected. 4 occurrences.
STREET	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
REVISE MAILING ADDRESS? (ENTER X)	NONE	Enter "X" if he/she wants to update mailing address information.
PHONE #	01085 - TELEPHONE NUMBER (10)	Protected.
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected.
UNIT	01030 - UNIT IDENTIFIER (5)	Protected.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected.
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	Protected.
PA/FS PAYEE	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected.
<b>REQUEST FOR INDIVIDUAL CARD:</b>		
REASON CODE (ENTER VALUE)	02009 - CBIC CARD CREATION REASON CODE (2)	
PHOTO (Y/N)	03017 - CARD PHOTO INDICATOR CODE (1)	
<b>ADD (A) OR DELETE (D) INDIVIDUAL AS PA/FS PAYEE FOR CASE #</b>		
TT	NONE	Transaction is A for Add and D for Delete
CASE #	01050 - CASE NUMBER (10)	System generated.
APPLICATION #	01046 - REGISTRY NUMBER (6)	System generated. Displayed if Registry Number and CIN are entered
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. System generated. First four characters of district name. Displayed if Registry Number and CIN are entered
<b>ADD VAULT (V) OR DELETE (D) ID CARD FOR USE:</b>		
TT	NONE	Transaction is V for Vault and D for Delete
CARD # 600486	03005 - ID CARD NUMBER (19)	

WIDARP - Authorized Representative Card Request and Case # Entry

```

-WIDARP  Dist STLA  AUTH REP CARD REQUEST AND CASE # ENTRY  02/22/2007
                                         14:39:25
CIN AX830970  Case # HOWARD0001 App # 560510 Dist STLA
Name LISA      A HOWARD  Case Type SN-FP Case Status ACTIVE
DOB 12/12/1955 Sex F  SSN 547874541  Indiv Status ACT
EBT PIN Mailer 03/25/2005 18:33:39  Case Name LISA A HOWARD
Photo NO  Sig NO  CC P  C/O Name _____
                               Street 1_AVE_A_____
Current Card(s)  D Type Void Date  City PORT_____ State NY Zip 12203
CLIENT SEQUENCE 01 N N/NS  Revise Mailing Address? (Enter X) _
                               Phone # 518-402-3729
                               Ofc 010 Unit WRTS Wrkr JJK
                               PA/FS Purge Date
                               PA/FS Payee

Request for Auth Rep Card:  Reason Code (Enter Value) __ Photo (Y/N) Y
Auth Rep Name _____

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:
TT _ Case # HOWARD0001
ADD Vault (V) Card or DELETE (D) ID Card for Use:
TT _ Card # 600486 _____ xmt _
    
```

Figure 3 - Authorized Representative Card Request and Case # Entry (WIDARP)

Purpose

This screen is used to:

Request a CBIC card for an authorized representative of a Case

Add or delete an individual as a PA/FS Payee for a Case

Add or delete a vault card for an individual.

Access

Function 3 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- CIN, or
- Card Number
- Case Number (optional).

Screen Response

Positive

- WIDARP is returned with the added or changed data displayed in top section of the screen.



Negative

- One of the messages on Line 24 as shown in Error Messages and Edits
- WIDARP is returned after data entry with the word NO after EBICS TRANSMISSION PENDING.
- SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDARP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. First four characters of district name.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. System returned if entered on WIDMNU.
CASE #	01050 - CASE NUMBER (10)	Protected.
APP #	01046 - REGISTRY NUMBER (6)	Protected.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. First four characters of district name.
NAME	03030 - NAME (28)	Protected.
CASE TYPE	01060 - CASE TYPE (2)	Protected.
CASE STATUS	02090 - CASE STATUS (2)	Protected.
DOB	03060 - DATE OF BIRTH (8)	Protected.
SEX	03050 - SEX (1)	Protected.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Formatted as 999-99-9999.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Protected.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Protected. Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Protected. Formatted as HH:MI:SS
CASE NAME	01070 - CASE NAME (28)	Protected.

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SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Protected.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Protected.
CC	21620 - CARD CODE (1)	Protected.
C/O NAME	05110 - IN CARE OF NAME (28)	
STREET	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
<b>CURRENT CARD(S) INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	Protected. 4 occurrences.
D	12008 - ID CARD VENDOR FLAG (1)	Protected. 4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Protected. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	Protected. 4 occurrences.
REVISE MAILING ADDRESS	01085 - TELEPHONE NUMBER (10)	System returned if Case # is entered on WIDMNU.
PHONE	01085 - TELEPHONE NUMBER (10)	Protected.
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected.
UNIT	01030 - UNIT IDENTIFIER (5)	Protected.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected.
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	Protected.
PA/FS PAYEE	03010 - CLIENT IDENTIFICATION NUMBER(8)	Protected.
<b>REQUEST FOR INDIVIDUAL CARD:</b>		
REASON CODE (ENTER VALUE)	02009 - CBIC CARD CREATION REASON CODE (2)	
PHOTO (Y/N)	03017 - CARD PHOTO INDICATOR CODE (1)	
<b>ADD (A) OR DELETE (D) INDIVIDUAL AS PA/FS PAYEE FOR CASE # - Optional is the user input was for an applicant</b>		
TT	NONE	Transaction is A for Add and D for Delete
CASE #	01050 - CASE NUMBER (10)	System generated.
APPLICATION #	01046 - REGISTRY NUMBER (6)	System generated. Displayed if Registry Number and CIN are entered
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. System generated. First four characters of district name. Displayed if Registry Number and CIN are entered
<b>ADD VAULT (V) OR DELETE (D) ID CARD FOR USE:</b>		
TT	NONE	Transaction is V for Vault and D for Delete
CARD # 600486	03005 - ID CARD NUMBER (19)	

WIDLIM – Perm Card Only

```

-WIDLIM  Dist STLA  INDIVIDUAL CARD REQUEST AND CASE # ENTRY  06/12/2008
                                     10:37:22
CIN AX830970                               Case # HOWARD0001 App # 560510 Dist STLA
Name LISA      A HOWARD                    Case Type SN-FP   Case Status ACTIVE
DOB 12/12/1955 Sex F  SSN 547874541      Individ Status ACT
EBT PIN Mailer 03/25/2005 18:33:39       Case Name LISA A HOWARD
Photo NO  Sig NO  CC P                    C/O Name _____
                                           Street 1_AVE_A_____

Current Card(s)      D Type Void Date
CLIENT SEQUENCE 01 N N/NS                City PORT_____ State NY Zip 12203
                                           Revise Mailing Address? (Enter X) _
                                           Phone # 518-402-3729
                                           Ofc 010 Unit WRTS Wrkr JJK
                                           PA/FS Purge Date
                                           PA/FS Payee

Request for Individual Card: Reason Code (Enter Value) __ Photo (Y/N) Y

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:
TT _ Case # HOWARD0001
ADD Vault (V) Card or DELETE (D) ID Card for Use:
TT _ Card # 600486 _____ Xmt _
    
```

Figure 4 - Card # / Case # Entry (WIDLIM)

Purpose

This screen is used to request a permanent card, inactivate cards, register vault cards, designate an individual as a Payee for case, and remove an individual as a payee for a case.

Access

Function 4 and the following entered on the WIDMNU - WMS ID Card Menu:

- CIN, or
- Case Number and Card Number, or
- Card Number, or
- CIN and Case Number

Screen Response

Positive

- WIDLIM is returned with the added or changed data displayed in top section of the screen.
- If entered data is for an applicant, the user can optionally add/delete individuals as PA/FS Payees for a Case.

Negative

- One of the messages on Line 24 as shown on the Error Messages and Edits pages
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WIDLIM is returned after data entry with the word NO after EBICS TRANSMISSION PENDING.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDLIM

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN #	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected.
CASE #	01050 - CASE NUMBER (10)	Protected.
APP #	01046 - REGISTRY NUMBER (6)	Protected.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. First four characters of district name.
NAME	03030 - NAME (28)	Protected. Characters 1-10.
	03030 - NAME (28)	Protected. Character 11.
	03030 - NAME (28)	Protected. Characters 12-28.
CASE TYPE	01060 - CASE TYPE (2)	Protected.
CASE STATUS	02090 - CASE STATUS (2)	Protected.
DOB	03060 - DATE OF BIRTH (8)	Protected.
SEX	03050 - SEX (1)	Protected.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Formatted as 999-99-9999.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Protected.
REL CD	03090 - RELATIONSHIP CODE (2)	Protected.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Protected. Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Protected. Formatted as HH:MI:SS
CASE NAME	01070 - CASE NAME (28)	Protected.
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Protected.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Protected.
CC	21620 - CARD CODE (1)	Protected.

WMS SYSTEM REFERENCE MANUAL  
COMMON BENEFIT IDENTIFICATION CARD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
C/O NAME	05110 - IN CARE OF NAME (28)	
<b>CURRENT CARD INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	Protected. 4 occurrences.
D	12008 - ID CARD VENDOR FLAG (1)	Protected. 4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Protected. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	Protected. 4 occurrences.
STREET	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
REVISE MAILING ADDRESS? (ENTER X)	NONE	Enter "X" if he/she wants to update mailing address information.
PHONE #	01085 - TELEPHONE NUMBER (10)	Protected.
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected.
UNIT	01030 - UNIT IDENTIFIER (5)	Protected.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected.
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	Protected.
PA/FS PAYEE	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected.
<b>REQUEST FOR INDIVIDUAL CARD:</b>		
REASON CODE (ENTER VALUE)	02009 - CBIC CARD CREATION REASON CODE (2)	
PHOTO (Y/N)	03017 - CARD PHOTO INDICATOR CODE (1)	
<b>ADD (A) OR DELETE (D) INDIVIDUAL AS PA/FS PAYEE FOR CASE #</b>		
TT	NONE	Transaction is A for Add and D for Delete
CASE #	01050 - CASE NUMBER (10)	System generated.
APPLICATION #	01046 - REGISTRY NUMBER (6)	System generated. Displayed if Registry Number and CIN are entered
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. System generated. First four characters of district name. Displayed if Registry Number and CIN are entered
<b>ADD VAULT (V) OR DELETE (D) ID CARD FOR USE:</b>		
TT	NONE	Transaction is V for Vault and D for Delete
CARD # 600486	03005 - ID CARD NUMBER (19)	

WIDCTH - WMS ID Card History

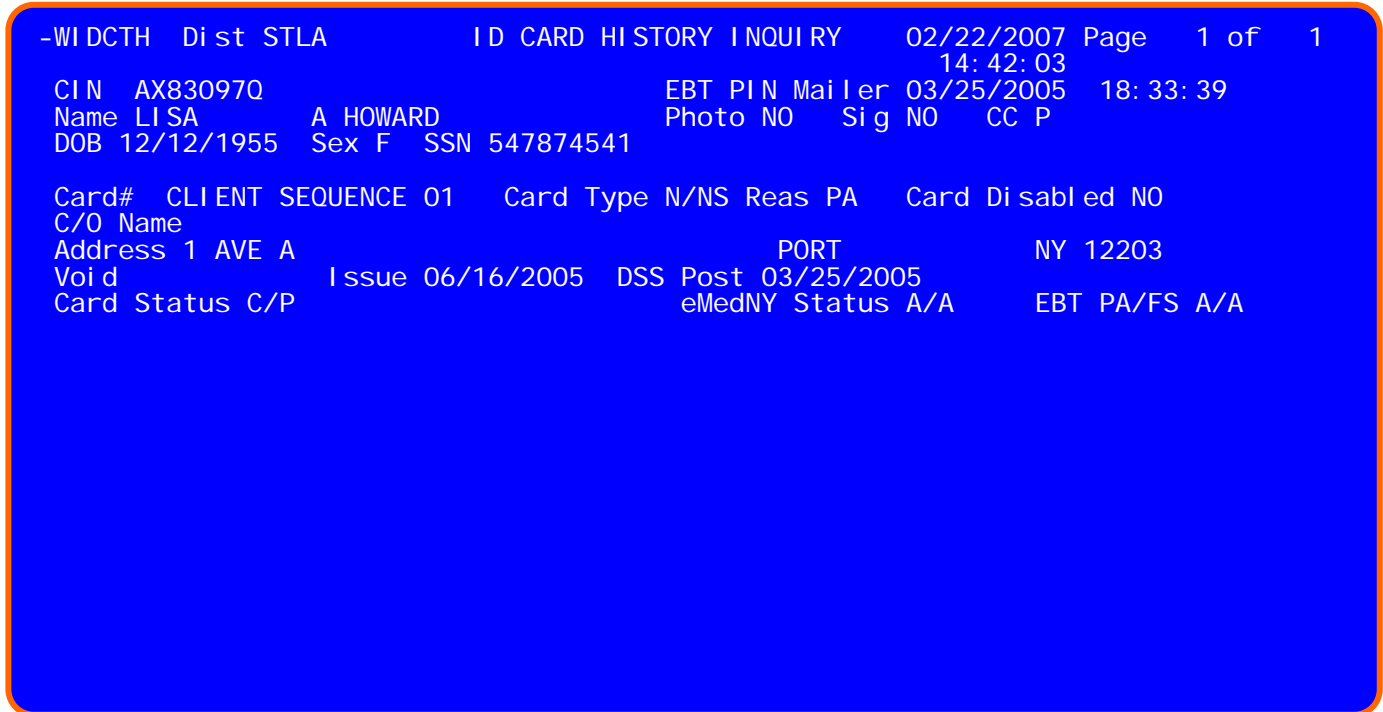


Figure 5 - WMS ID Card Transaction History (WIDCTH)

Purpose

This screen is used to display the history of cards issued to a recipient.

Access

Function 5 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- CIN, or
- Card Number, or
- Registry Number and Application Line Number.

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST SCREEN - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDCTH

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Mnemonic.
CC	21620 - CARD CODE (1)	
CDC	03016 - CARD DELIVERY CODE (1)	
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999.
<b>CARD INFORMATION</b>		
CARD #	03005 - ID CARD NUMBER (19)	Occurrences as often as needed.
CARD TYPE	03006 - ID CARD TYPE CODE (1)	Mnemonic. Occurrences as often as needed.
REAS	02009 - CBIC CARD CREATION REASON CODE (2)	Mnemonic. Occurrences as often as needed.
CARD DISABLED	12008 - ID CARD VENDOR FLAG (1)	Mnemonic. Occurrences as often as needed.
ADDRESS	05120 - MAILING STREET (35)	Occurrences as often as needed.
	05130 - MAILING CITY/TOWN (15)	Occurrences as often as needed.

WMS SYSTEM REFERENCE MANUAL  
COMMON BENEFIT IDENTIFICATION CARD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	05140 - MAILING STATE (2)	Occurrences as often as needed.
	05150 - MAILING ZIP (5)	Occurrences as often as needed.
VOID	03007 - ID CARD VOID DATE (6)	From entry on WIDUPD or system generated from MET Replacement CBIC. Occurrences as often as needed.
ISSUE	12015 - ID CARD TRANSACTION DATE (6)	Date the card contractor prints the CBIC. Occurrences as often as needed.
DSS POST	12016 - ID CARD NYSDSS DATE POSTED (6)	Date WMS is updated with the new card data. Occurrences as often as needed.
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Occurrences as often as needed.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Occurrences as often as needed.
EBT PA/FS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Occurrences as often as needed.



WIDARQ - Authorized Representative Inquiry

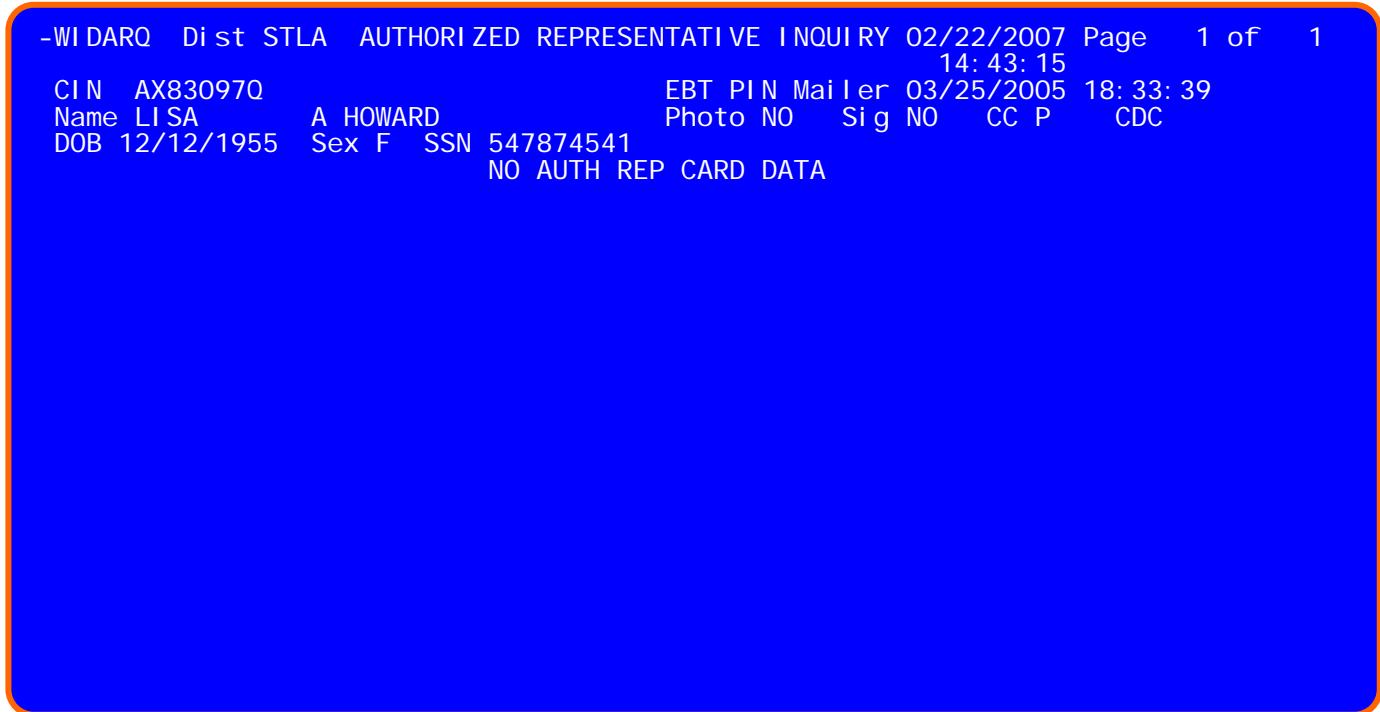


Figure 6 - Authorized Representative Inquiry (WIDARQ)

Purpose

This screen is used to display the history of Authorized Representative cards issued to an individual. Auth Rep cards are issued to clients with both their name and the Authorized Representatives name on it. The card is issued to the Auth Rep on behalf of the CIN (client). The card is displayed in the system as owned by the CIN (Client) but issued to the Auth Rep.

Access

Function 6 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- CIN
- Card Number

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST SCREEN - SF2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF3 IGNORED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDARQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Mnemonic.
CC	21620 - CARD CODE (1)	
CDC	03016 - CARD DELIVERY CODE (1)	
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999.
(NONE)	NONE	System generated. "Client flagged - No card use for MA"
<b>CARD INFORMATION</b>		
CARD #	03005 - ID CARD NUMBER (19)	Multiple occurrences.
REASON #	02009 - CBIC CARD CREATION REASON CODE (2)	Multiple occurrences.

WMS SYSTEM REFERENCE MANUAL  
COMMON BENEFIT IDENTIFICATION CARD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CARD DISABLED	12008 - ID CARD VENDOR FLAG (1)	Mnemonic. Multiple occurrences.
CARD TYPE	03006 - ID CARD TYPE CODE (1)	Multiple occurrences.
A/R NAME	03018 - AUTHORIZED REPRESENTATIVE FIRST NAME (10)	Multiple occurrences.
	03024 - AUTHORIZED REPRESENTATIVE MIDDLE NAME INITIAL (1)	Multiple occurrences.
	03019 - AUTHORIZED REPRESENTATIVE LAST NAME (17)	Multiple occurrences.
CASE #	01050 - CASE NUMBER (10)	Multiple occurrences.
C/O NAME	05110 - IN CARE OF NAME (28)	Multiple occurrences.
CDC	03016 - CARD DELIVERY CODE (1)	Multiple occurrences.
REFERRAL #	12106 - REFERRAL NUMBER (5)	Multiple occurrences.
ADDRESS	05120 - MAILING STREET (35)	Multiple occurrences.
	05130 - MAILING CITY/TOWN (15)	Multiple occurrences.
	98236 - MAILING APARTMENT NUMBER (5)	Multiple occurrences.
	05140 - MAILING STATE (2)	Multiple occurrences.
	05150 - MAILING ZIP (5)	Multiple occurrences.
VOID	03007 - ID CARD VOID DATE (6)	Multiple occurrences.
ISSUE	12015 - ID CARD TRANSACTION DATE	Multiple occurrences.
DSS POST	12016 - ID CARD NYSDSS DATE POSTED (6)	Multiple occurrences.
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Multiple occurrences.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Multiple occurrences.
EBT PA/FS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. Multiple occurrences.

WIDICH - WMS ID Card Individual Inquiry

-WIDICH Dist STLA INDIVIDUAL PA/FS PAYEE INQUIRY 02/23/2007 Page 1 of 3									
09:23:54									
CIN AX830970					EBT PIN Mailer 03/25/2005 18:33:39				
Name LISA		A HOWARD			Photo NO		Sig NO		CC P
DOB 12/12/1955		Sex F	SSN 547874541						
Current Card(s)		Dis	Type	Void Date		Card Status	eMedNY Status	EBT PA/FS Status	
CLIENT	SEQUENCE 01	N	N/NS			C/P	A/A	A/A	
TEMP	SEQUENCE 02	N	TEMP	10/11/2007		N/A	A/A	N/A	
VAULT	SEQUENCE 50	N	VLT	10/11/2007		N/A	N/A	A/A	
CASE NUMBER		DIST	FOR APP #	CASE TYPE	CASE STATUS	INDIV STATUS	PA/FS PURGE DATE		
P2242636		ALBA		FA	ACTIVE	ACT	12/31/2007		
F2242363		ALBA		FS-MIX	ACTIVE	ACT	11/30/2007		

Figure 7 - WMS ID Card Individual Inquiry (WIDICH)

Purpose

This screen is used to display individual and card data for an EBT Cardholder including all the cases and/or applications for which the individual is a cardholder.

Access

Function 7 and one of the following entered on the **WIDMNU - WMS ID Card Menu**, or

- Registry Number and Application Line Number, or
- CIN, or
- Card Number, or
- Registry Number, Application Line Number, and district (DIST)

F3 from WIDICH - WMS ID Card Individual Inquiry (Screen 2), or

F1 from WIDICH - WMS ID Card Individual Inquiry (Screen 2).

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1, 4, 5, 7-14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F2	Next Page
F3	Previous Page
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDICH

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Mnemonic.
CC	21620 - CARD CODE (1)	
CDC	03016 - CARD DELIVERY CODE (1)	
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999.
<b>CURRENT CARD(S) INFORMATION</b>		
CURRENT CARDS	03005 - ID CARD NUMBER (19)	4 occurrences.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIS	12008 - ID CARD VENDOR FLAG (1)	4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Mnemonic. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	4 occurrences. Formatted as MM/DD/CCYY.
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EBT PA/FS STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
<b>CASE INFORMATION</b>		
CASE TYPE	01060 - CASE TYPE (2)	Mnemonic. 9 occurrences.
CASE STATUS	02090 - CASE STATUS (2)	Mnemonic. 9 occurrences.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Mnemonic. 9 occurrences.
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	9 occurrences. Formatted as MM/DD/CCYY.

WIDICH - WMS ID Card Individual Inquiry (Screen 2)

```
-WIDICH Dist STLA INDIVIDUAL PA/FS PAYEE INQUIRY 02/23/2007 Page 2 of 3
EBT Demographics 11:27:33
CIN AX830970
Last EBT Update Date 03/25/2005
Time 18:33:39

Name LISA A HOWARD
DOB 12/12/1955 Sex F SSN 547874541

Auth Rep Name

Case # HOWARD0001 Dist STLA
Card Mailing Address:
C/O Name
Street 1 AVE A
City PORT State NY Zip 12203
Address Changed Ind
Phone 518-402-3729
Office 010 Unit WR Worker

Store Date 03/25/2005 Transaction Date 05/16/2006 Last Transmit Date 03/25/2005
Time 18:33:38 Time 12:04:44 Time 18:34:35
```

Figure 8 - WMS ID Card Individual Inquiry (WIDICH - Screen 2)

Purpose

This screen is used to display the case number and demographic data transmitted to the EBT contractor for the Payee (CIN) of a case. The demographic data is associated with electronic benefits transfer functions.

Access

F2 from the WIDICH - WMS ID Card Individual Inquiry, or

F3 from the WIDPAH - CBIC Payee History Inquiry.

Screen Response

Positive

- See Function Keys.

Negative

- One of the messages on line 24 as shown on the **Common Benefit Identification Error Messages** pages
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

- SF99 - NOT SUPPORTED - REXMT (99 = 1-5, 7-15, 17-22)

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMSMNU - WMS Menu

Screen Field Description - WIDICH (Screen 2)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
LAST EBT UPDATE DATE	96569 - LAST EBT UPDATE DATE (8)	Formatted as MM/DD/CCYY
TIME	96574 - LAST EBT UPDATE TIME (8)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999.
AUTH REP NAME	03018 - AUTHORIZED REPRESENTATIVE FIRST NAME (10)	
	03024 - AUTHORIZED REPRESENTATIVE MIDDLE NAME INITIAL (1)	
	03019 - AUTHORIZED REPRESENTATIVE LAST NAME (17)	
CASE	01050 - CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
<b>CARD MAILING ADDRESS INFORMATION</b>		
C/O NAME	05110 - IN CARE OF NAME (28)	
STREET	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
ADDRESS CHANGED IND	12105 - ADDRESS CHANGED INDICATOR FLAG (1)	
PHONE	01085 - TELEPHONE NUMBER (10)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
STORE DATE	00107 - STORE DATE (6)	Formatted as MM/DD/CCYY
TIME	00113 - STORE TIME (6)	Formatted as HH:MI:SS
TRANSACTION DATE	12013 - ID CARD TRANSACTION DATE (8)	
TIME	12015 - ID CARD TRANSACTION TIME (8)	
LAST TRANSMIT DATE/	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TIME	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS

WIDAUD - ID Card Audit History Inquiry

```
-WIDAUD Dist STLA          ID CARD AUDIT INQUIRY          02/23/2007 Page 2 of 2
                               11:25:28
Card # 6004868219204626801
Reason 310 Card Disabled NO Card Type N/NS CDC M Referral # 23097

C/O Name JULIE          A SMITH
Address 12 VINE STREET          ALBANY          NY 12207
Void Issue 01/26/2003
Card Status C/P          eMedNY Status A/S          EBT PA/FS A/A
First Use Date 01/27/2003 Time 18:33:32
Request Date 01/25/2003 Time 13:33:15
User ID ax7799 PID 14072

Card Individual Data
-----
Name JULIE          A SMITH
DOB 03/15/1984          Sex F

Current Individual Data
-----
Name JULIE          A SMITH
DOB 03/15/1984          Sex F
```

Figure 9 - ID Card Audit Inquiry (WIDAUD)

Purpose

This screen is used to audit CBIC card issuance and usage. It displays the User ID and PID associated with the issuance of a card. It also displays the Card Individual Data printed on each card as well as the address to which the card was mailed.

Access

Function 8 and one of the following entered on the **WIDMNU - WMS ID Card Menu**:

- Application Registry Number and Application Registry Line Number, or
- CIN, or
- Card Number.

Screen Response

Positive

- See Function Keys.

Negative

- One of the messages on line 24 as shown on the **Common Benefit Identification Error Messages** pages or:
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
  - SF99 - NOT SUPPORTED - REXMT (99 = 2, 4, 5, 7-14, 17-22)

Printed Response

None

Function Keys

Key	Description
F1	Page 01 (WIDICH - WMS ID Card Individual Inquiry)
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

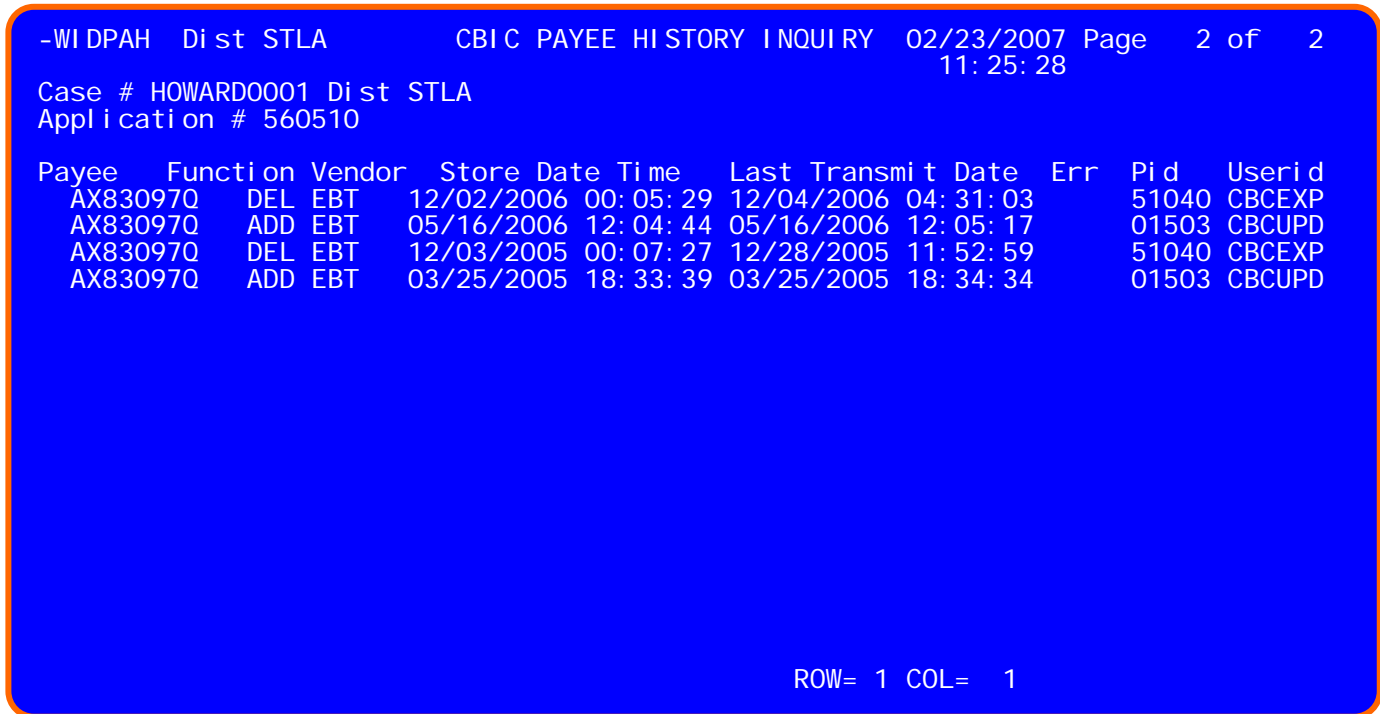
Screen Field Description - WIDAUD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CARD #	03005 - ID CARD NUMBER (19)	
REASON	02009 - CBIC CARD CREATION REASON CODE (2)	Mnemonic.
CARD DISABLED	12008 - ID CARD VENDOR FLAG (1)	Mnemonic.
CARD TYPE	03006 - ID CARD TYPE CODE (1)	Mnemonic.
CDC	03016 - CARD DELIVERY CODE (1)	
REFERRAL	12106 - REFERRAL NUMBER (5)	
C/O NAME	05110 - IN CARE OF NAME (28)	
ADDRESS	05120 - MAILING STREET (35)	
	05130 - MAILING CITY/TOWN (15)	
	05140 - MAILING STATE (2)	
	05150 - MAILING ZIP (5)	
	98236 - MAILING APT NO (5)	
VOID	03007 - ID CARD VOID DATE (6)	
ISSUE	03009 - ID CARD ISSUE DATE (6)	
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic.
EBT PA/FS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic.
FIRST USE DATE	12016 - ID CARD FIRST USE DATE (8)	Formatted as MM/DD/CCYY
TIME	12144 - ID CARD FIRST USE TIME (8)	Formatted as HH:MI:SS
REQUEST DATE	00107 - STORE DATE (6)	Formatted as MM/DD/CCYY

WMS SYSTEM REFERENCE MANUAL  
COMMON BENEFIT IDENTIFICATION CARD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TIME	00113 - STORE TIME (6)	Formatted as HH:MI:SS
USER ID	25001 - USERID (6)	
PID	25015 - PHYSICAL IDENTIFIER (10)	
<b>CARD INDIVIDUAL DATA</b>		
NAME	01070 - CASE NAME (FIRST) (10)	Characters 1-10.
	01070 - CASE NAME (MI) (1)	Character 11.
	01070 - CASE NAME (LAST) (17)	Character 12-28.
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY
SEX	03050 - SEX (1)	
<b>CURRENT INDIVIDUAL DATA</b>		
NAME	03030 - NAME (FIRST) (10)	Characters 1-10.
	03030 - NAME (MI) (1)	Character 11.
	03030 - NAME (LAST) (17)	Character 12-28.
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY
SEX	03050 - SEX (1)	

WIDPAH - CBIC Payee History Inquiry



The screenshot shows a terminal window with a blue background and white text. The title bar reads '-WIDPAH Dist STLA CBIC PAYEE HISTORY INQUIRY 02/23/2007 Page 2 of 2 11:25:28'. Below the title bar, the case information is displayed: 'Case # HOWARD0001 Dist STLA' and 'Application # 560510'. A table of payee history follows, with columns for Payee, Function, Vendor, Store Date, Time, Last Transmit Date, Err, Pid, and Userid. The table contains four rows of data. At the bottom right of the screen, it displays 'ROW= 1 COL= 1'.

Payee	Function	Vendor	Store Date	Time	Last Transmit Date	Err	Pid	Userid
AX830970	DEL	EBT	12/02/2006	00:05:29	12/04/2006 04:31:03		51040	CBCEXP
AX830970	ADD	EBT	05/16/2006	12:04:44	05/16/2006 12:05:17		01503	CBCUPD
AX830970	DEL	EBT	12/03/2005	00:07:27	12/28/2005 11:52:59		51040	CBCEXP
AX830970	ADD	EBT	03/25/2005	18:33:39	03/25/2005 18:34:34		01503	CBCUPD

Figure 10 - CBIC Payee History Inquiry (WIDPAH)

Purpose

This screen shows the history of CINs (EBT Payee) associated with a case. The screen is accessed from other menu functions.

Access

F2 from WIDICH - WMS ID Card Individual Inquiry (Screen 2), or

F2 from Function 9 entered on **WIDMNU - WMS ID Card Menu**.

Screen Response

Positive

- See Function Keys.

Negative

- One of the messages on line 24 as shown on the **Common Benefit Identification Error Messages** pages

- Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- SF99 - NOT SUPPORTED - REXMT (99 = 2, 4, 5, 7-14, 17-22)

Printed Response

None

Function Keys

Key	Description
F1	Page 1 (WIDICH - WMS ID Card Individual Inquiry or WIDCCH - WMS ID Card Case Inquiry)
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDPAH

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
APPLICATION #	01046 - REGISTRY NUMBER (6)	
PAYEE	03010 - CLIENT IDENTIFICATION NUMBER(8)	Multiple occurrences
FUNCTION	00118 - FUNCTION CODE (1)	Mnemonic. Multiple occurrences
VENDOR	12149 - ID CARD VENDOR CODE (2)	Mnemonic. Multiple occurrences
STORE DATE	00107 - STORE DATE (6)	Multiple occurrences.
TIME	00113 - STORE TIME (6)	Multiple occurrences.
LAST TRANSMIT DATE	96566 - LAST TRANSMISSION DATE (8)	Multiple occurrences.
	96567 - LAST TRANSMISSION TIME (8)	Multiple occurrences.
ERR	01210 - EDIT ERROR NUMBER (5)	Multiple occurrences.
PID	25015 - PHYSICAL IDENTIFIER (10)	Multiple occurrences.
USERID	25001 - USERID (6)	Multiple occurrences.

WIDCCH - WMS ID Card Case Inquiry

```

-WIDCCH Dist STLA          CASE # PA/FS PAYEE INQUIRY 02/22/2007 Page 1 of 2
                               14:50:16
Case # HOWARD0001 Dist STLA          Case Type SN-FP Case Status ACTIVE
Application # 560510                Phone # 518-402-3729
Case Name LISA A HOWARD            Office 010 Unit WRTS Worker JJK
C/O Name                            PA/FS Purge Date 12/31/2007
Street 1 AVE A
City PORT                          State NY Zip 12203

Case # being used to obtain PA/FS for Application #
PA/FS Payee
CIN EF71538V                        EBT PIN Mailer
Indiv Status ACT                    Photo COL Sig YES CC P
Name CINDY SMYTH
DOB 05/01/1987 Sex F SSN 095425104

Current Card(s)  Dis Type Void Date Card Status eMedNY EBT PA/FS
                SEQUENCE 02 N TEMP 10/11/2007 N/A      Status      Status
CLIENT SEQUENCE 02 N N/NS          C/P        A/A        A/A
VAULT SEQUENCE 50 N VLT 10/11/2007 N/A        N/A        A/A
    
```

Figure 11 - WMS ID Card Case Inquiry (WIDCCH)

Purpose

This screen is used to display data for the EBT cardholder(s) for a specific case number.

Access

Function 9 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- Case Number
- District (optional).

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 3-5, 7-14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED

- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	WIDPAH - CBIC Payee History Inquiry
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WIDMNU - WMS ID Card Menu
Ctrl+F6	WIDMNU - WMS ID Card Menu

Screen Field Description - WIDCCH

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
CASE #	01050 - CASE NUMBER (10)	
CASE TYPE	01060 - CASE TYPE (2)	Mnemonic.
CASE STATUS	02090 - CASE STATUS (2)	Mnemonic.
APPLICATION #	01046 - REGISTRY NUMBER (6)	
PHONE #	01085 - TELEPHONE NUMBER (10)	
CASE NAME	01070 - NAME (28)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
C/O NAME	05110 - IN CARE OF NAME (28)	
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	Formatted as MM/DD/CCYY
STREET	01080 - RESIDENCE STREET (35)	
CITY	01082 - RESIDENCE CITY/TOWN (15)	
STATE	01083 - RESIDENCE STATE (2)	
ZIP	01084 - RESIDENCE ZIP (5)	
CASE # BEING USED TO OBTAIN PA/FS FOR APPLICATION #	NONE	The system places the verbiage "Application #" on the screen.
	01046 - REGISTRY NUMBER (6)	
PA/FS PAYEE	03010 - CLIENT IDENTIFICATION NUMBER(8)	Also can show <b>**NONE**</b> if CIN is not available.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Mnemonic.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Mnemonic.
CC	21620 - CARD CODE (1)	
CDC	03016 - CARD DELIVERY CODE (1)	
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999.
<b>CURRENT CARD(S) INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	4 occurrences.
DIS	12008 - ID CARD VENDOR FLAG (1)	4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Mnemonic. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	4 occurrences.
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EBT PAFS STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.

WIDCRD - Case # ID Card Inquiry

```

-WIDCRD  Dist STLA          CASE # ID CARD INQUIRY    02/22/2007 Page 1 of 2
                               14:53:23
Case #  HOWARD0001  Dist STLA          Case Type SN-FP    Case Status ACTIVE
CIN AX83097Q  Ind St ACT          EBT PIN Mailer 03/25/2005 18:33:39
Name LISA      A HOWARD          Photo NO    Sig NO    CC P
DOB 12/12/1955 Sex F    SSN 547874541
Current Card(s)      Dis Type Void Date    Card Status      eMedNY Status      EBT PA/FS Status
CLIENT SEQUENCE 01  N  N/NS          C/P              A/A              A/A

CIN AX83098N  Ind St ACT          EBT PIN Mailer
Name MARY      K HOWARD          Photo NO    Sig NO    CC P
DOB 01/15/1985 Sex F    SSN 521320011
Current Card(s)      Dis Type Void Date    Card Status      eMedNY Status      EBT PA/FS Status
CLIENT SEQUENCE 01  N  N/NS          C/P              A/A              N/A
    
```

Figure 12 - WMS ID Card Individual Inquiry (WIDCRD)

Purpose

This screen is used to display card data for all individuals on a case.

Access

Function 10 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- Registry Number and Application Line Number, or
- Card Number, or
- Case Number, or
- District (optional).

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-15)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMSMNU - WMS Menu

Screen Field Description - WIDCRD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. First four characters of district name.
CASE #	01050 - CASE NUMBER (10)	
CASE TYPE	01060 - CASE TYPE (2)	Mnemonic.
CASE STATUS	02090 - CASE STATUS (2)	Mnemonic.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
IND ST	03120 - INDIVIDUAL STATUS (2)	Mnemonic.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Formatted as HH:MI:SS
NAME	03030 - NAME (28)	
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Mnemonic.
CC	21620 - CARD CODE (1)	
<b>CURRENT CARD(S) INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	4 occurrences.
DIS	12008 - ID CARD VENDOR FLAG (1)	4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Mnemonic. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	4 occurrences. Formatted as MM/DD/CCYY.
CARD STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EMEDNY STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.
EBT PA/FS STATUS	12103 - VENDOR POST STATUS CODE (1)	Mnemonic. 4 occurrences.

WIDPML - PIN Mailer Request

```

-WIDPML  Dist STLA                PIN MAILER REQUEST                02/22/2007
                                      14:54:50
CIN AX830970                        Case # HOWARD0001 App # 560510 Dist STLA
Name LISA A HOWARD                  Case Type SN-FP Case Status ACTIVE
DOB 12/12/1955 Sex F SSN 547874541 Indiv Status ACT
EBT PIN Mailer 03/25/2005 18:33:39 Case Name LISA A HOWARD
Photo NO Sig NO CC P                C/O Name _____
                                      Street 1_AVE_A_____
Current Card(s)      D Type Void Date
CLIENT SEQUENCE 01 N N/NS           City PORT_____ State NY Zip 12203
                                      Revise Mailing Address? (Enter X) _
                                      Phone # 518-402-3729
                                      Ofc 010 Unit WRTS Wrkr JJK
                                      PA/FS Purge Date
                                      PA/FS Payee

Request for PIN Mailer for (Enter X) Client _ Auth Rep _

                                      xmt _
    
```

Figure 13 - WMS PIN Mailer Request (WIDPML)

Purpose

This screen is used to request a PIN mailer for a Payee. The screen allows for the PIN Mailer to be generated for the client or the authorized representative. When a user requests a PIN Mailer, the mailing address in WMS will be displayed on the screen. If the user believes that the address is incorrect, the user can change the address in real-time. This new address will only be used to when producing the PIN Mailer. It will not become the mailing address for the case.

Access

Function 12 and the following entered on the **WIDMNU - WMS ID Card Menu**:

- Registry Number and Application Line Number, or
- CIN, or
- Card Number
- District (optional).

Screen Response

Positive

- See Function Keys.

Negative

- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-15, 17-22)
  - XMIT KEY NOT SUPPORT - A SPECIAL FUNCTION KEY MUST BE USED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMSMNU - WMS Menu

Screen Field Description - WIDPML

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected.
CASE #	01050 - CASE NUMBER (10)	Protected.
APP #	01046 - REGISTRY NUMBER (6)	Protected.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. First four characters of district name.
NAME	03030 - NAME (28)	Protected.
CASE TYPE	01060 - CASE TYPE (2)	Protected. Mnemonic
CASE STATUS	02090 - CASE STATUS (2)	Protected. Mnemonic.
DOB	03060 - DATE OF BIRTH (8)	Protected. Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	Protected.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Formatted as 999-99-9999.
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	Protected. Mnemonic.
EBT PIN MAILER	12001 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE (6)	Protected. Formatted as MM/DD/CCYY
	12003 - PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME (6)	Protected. Formatted as HH:MI:SS
CASE NAME	01070 - CASE NAME (28)	Protected.
PHOTO	03017 - CARD PHOTO INDICATOR CODE (1)	Protected. Mnemonic.
SIG	12171 - CARD SIGNATURE INDICATOR FLAG (1)	Protected. Mnemonic.
CC	21620 - CARD CODE (1)	Protected.
C/O NAME	05110 - IN CARE OF NAME (28)	

WMS SYSTEM REFERENCE MANUAL  
COMMON BENEFIT IDENTIFICATION CARD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
STREET	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
<b>CURRENT CARD(S) INFORMATION</b>		
CURRENT CARD(S)	03005 - ID CARD NUMBER (19)	Protected. 4 occurrences.
D	01010 - TRANSACTION DISTRICT (2)	Protected. 4 occurrences.
TYPE	03006 - ID CARD TYPE CODE (1)	Protected. Mnemonic. 4 occurrences.
VOID DATE	03007 - ID CARD VOID DATE (6)	Protected. 4 occurrences. Formatted as MM/DD/CCYY.
REVISE MAILING ADDRESS? (ENTER X)	NONE	User enters X if he/she wants to update mailing address information.
PHONE #	01085 - TELEPHONE NUMBER (10)	Protected.
OFC	01020 - LOCAL OFFICE NUMBER (3)	Protected.
UNIT	01030 - UNIT IDENTIFIER (5)	Protected.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected.
PA/FS PURGE DATE	03008 - ID CARD BENEFIT END DATE (8)	Formatted as MM/DD/CCYY.
PA/FS PAYEE	03010 - CLIENT IDENTIFICATION NUMBER (10)	Protected.
REQUEST FOR PIN MAILER FOR (ENTER X) CLIENT OR AUTH REP	NONE	Enter "X" to request a PIN Mailer for mailing to the Client/Auth Rep.

## Subsystem Processing

### Error Messages and Edits

#### Common Benefit Identification Error Messages

(Listing is alphabetical by error message; these error messages occur as a result of menu processing)

#### **ADD/CHANGE OF DSS PERMANENT CARD NOT ALLOWED**

TT (Transaction Types) A (Add) or C (Change) are not allowed for A/C CARD FOR INDIV entry if Card Number is that of a Permanent CBIC.

#### **ANOTHER APP CAN OBTAIN EBICS FOR THIS CASE #**

If WIDUPD is accessed by selecting Function 1 and entering a Registry # and the Case Number entered in A/D INDIV AS CARDHOLDER entry is linked to a different application with the same Case Number.

#### **APPLICANT CANNOT RECEIVE AUTH REP CARDS**

An applicant cannot receive CBIC cards as an authorized representative.

#### **APPLICANT NOT FOUND**

If Function 1 (Card Case # / Card # Entry), 5 (WMS ID Card Transaction History) or 7 (WMS ID Card Individual Inquiry) is selected and App Reg Ln # entered with a valid Registry # and there are no applicants.

#### **APPLICATION CAN OBTAIN EBICS BENEFIT FOR THIS CASE #**

If WIDUPD is accessed by selecting Function 1 and entering a CIN on WIDMNU and the Case Number entered in A/D INDIV AS CARDHOLDER entry is linked to a different application with the same Case Number.

#### **APPLICATION FOR ID CARD IS NOW CASE #/DIST # XXXXXXXXXXXX/XX**

If a Temporary CBIC Number that was registered to an application is entered and the application has gone through Full Data Entry.

#### **APPLICATION IS NOW CASE #/DIST # XXXXXXXXXXXX/XX**

If a Registry # is entered and the application has gone through Full Data Entry.

#### **APPLICATION NOT FOUND**

If Function 1 (Card Case # / Card # Entry), 5 (WMS ID Card Transaction History) or 7 (WMS ID Card Individual Inquiry) is selected and REGISTRY NUMBER is entered and App Reg Ln # entered with an invalid Registry #.

#### **APPLICATION NUMBER AND CARD NUMBER CANNOT BE ENTERED AT THE SAME TIME**

For the user requested function, the APPLICATION REGISTRY NUMBER and CARD NUMBER cannot both be used as part of the selection criteria.

**APPLICATION NUMBER OR CARD NUMBER OF APPLICANT MUST BE ENTERED**

For the user requested function, the APPLICATION REGISTRY NUMBER or the CARD NUMBER must be entered as part of the selection criteria.

**APPLICATION TEMPORARILY UNAVAILABLE**

If Function 1 (Card Case # / Card # Entry), 5 (WMS ID Card Transaction History) or 7 (WMS ID Card Individual Inquiry) is selected and Registry # is entered and Application is undergoing Full Data Entry or Maintenance or Clearance.

**APPLICATION WITHDRAWN**

If CBIC Number or Registry # is entered and the application has been withdrawn.

**APP/REG LN, CIN AND CARD NO CANNOT BE ENTERED AT THE SAME TIME**

If Function 1 (Card Case # / Card # Entry), 3 (WMS ID Card Transaction History), 5 (Individual Card Holder Inquiry) or 6 (PIN Entry) is selected then App Reg Ln #, CIN and CBIC Number can not be entered at the same time.

**APP DIST ONLY ALLOWED WITH APPLICATION # ENTRY**

A user may only enter a District if the Application Registry Number has been entered as well on the same input line.

**APP DIST ONLY ALLOWED WITH APP REG NO ENTRY**

A user may only enter a District if the Application Registry Number has been entered as well on the same input line.

**APP REG LINE NUMBER INVALID**

If App Reg Ln # is entered, it must be 01-20.

**BOTH REG LN AND REGISTRY NUMBER MUST BE ENTERED**

If Function 1 (Card Case # / Card # Entry), 5 (WMS ID Card Transaction History) or 7 (WMS ID Card Individual Inquiry Individual Card Holder Inquiry) is selected and App Reg Ln # is entered, then Registry # must be entered.

**CANNOT CHANGE DSS REPLACEMENT CARD INFORMATION**

If match is found for a MET Replacement CBIC Number than TT (Transaction Type) must *not* be C (Change) for A/C CARD FOR INDIV entry.

**CANNOT ENTER BOTH CIN AND CARD NUMBER**

For the user selected function, both the CIN NUMBER and CARD NUMBER cannot be used together as selection criteria.

**CANNOT ENTER DISTRICT WITHOUT APP REG # ENTRY**

For the user selected function, the DIST field cannot be entered without the APPLICATION REGISTRY NUMBER being entered as part of the selection criteria.



**CARD # ALREADY ACTIVE FOR EBICS**

TT (Transaction Type) A (Add) must *not* be entered for A/D CARD FOR EBICS entry if that CBIC Number has not been deleted.

**CARD # ALREADY ADDED FOR INDIVIDUAL**

TT (Transaction Type) must *not* be A (Add) for A/C CARD FOR INDIV entry if that Temporary CBIC Number has already been added and is displayed in the Active Cards on WIDUPD.

**CARD # ALREADY ISSUED FOR THIS INDIVIDUAL**

TT (Transaction Type) must *not* be A (Add) for A/C CARD FOR INDIV entry if that Temporary Card Number has already been assigned to the individual and is displayed on the Card History screen.

**CARD # IS NOT ACTIVE FOR EBICS**

TT (Transaction Type) must *not* be D (Delete) for A/D CARD FOR EBICS if the card is not authorized for EBICS Benefits.

**CARD NUMBER ASSIGNED TO APPLICANT IN A DIFFERENT APPLICATION**

The user entered a CARD NUMBER and APPLICATION REGISTRY NUMBER that were associated with different applications.

**CARD NUMBER ASSIGNED TO APPLICANT IN ANOTHER DISTRICT**

The user entered a DIST and CARD NUMBER where the DIST was different from the district assigned to the cardholder.

**CARD NUMBER ENTERED MUST BE ACTIVE TO CHANGE**

TT (Transaction Type) must *not* be C (Change) for A/C CARD FOR INDIV Entry if the Temporary CBIC Number is not active.

**CARD NUMBER NOT ASSIGNED TO APP/REG LN**

The CARD NUMBER entered is not assigned to an APPLICATION REGISTRY NUMBER/APPLICATION REGISTRY LINE NUMBER.

**CARD NUMBER NOT ASSIGNED TO CIN**

The CARD NUMBER entered is not assigned to a CIN NUMBER.

**CARD NUMBER NOT ASSIGNED TO THIS DISTRICT**

Any temporary CBIC Number must be registered to the transaction district in order to access card data.

**CARD NUMBER NOT FOUND**

The Permanent or Met Replacement CBIC Number is not on the WMS Database.

**CASE # ENTRY REQUIRED FOR A NYC CIN**

The user requested function requires the entry of a CASE NUMBER because the CIN NUMBER is for a NYC recipient.

**CASE # ENTRY REQUIRED FOR A NYC TERMINAL OR A NYC CIN**

The user requested function requires the entry of a CASE NUMBER because the CIN NUMBER is for a NYC recipient or the user is designated as a NYC user.

**CASE # MUST BE ENTERED**

For the user requested function, a CASE NUMBER must be entered as part of the selection criteria.

**CASE # NOT CURRENTLY ASSIGNED TO INDIVIDUAL**

TT (Transaction Type) must *not* be D (Delete) for A/D INDIV AS CARDHOLDER entry if the cardholder entered is *not* a Cardholder for the Case Number entered.

**CASE CAN OBTAIN EBICS BENEFITS FOR THIS CASE**

If access to WIDUPD was via Function 1 (Card Case # / Card # Entry) on WIDMNU - ID Card Menu and Case Number entered on A/D INDIV AS CARDHOLDER entry is the same as the Case Number on a case, then TT (Transaction Type) must *not* be A (Add).

**CASE CURRENTLY ACTIVE**

If access to WIDUPD was via Function 1 (Card Case # / Card # Entry) with a Registry #, and the Case Number entered on A/D INDIV AS CARDHOLDER entry has a Case Status of 10 (Active) or 21 (Active/Override) and Archive Indicator is not R (Re-use of Archive Case Number), then access to WIDUPD should be done by selecting Function 1 (Card Case # / Card # Entry).

**CASE DATA PRIOR TO MM/DD/YY - (ARCHIVE DATE) REMOVED FROM DATABASE ON MM/DD/YY - (RUN DATE)**

TT (Transaction Type) A (Add) or D (Delete) for A/D INDIV AS CARDHOLDER entry cannot be entered if the case has been data migrated.

**CASE DIST ONLY ALLOWED WITH CASE NUMBER ENTRY**

A DIST can only be entered if the CASE NUMBER (on the same input line) has also been entered.

**CASE DISTRICT ENTRY NOT ALLOWED FOR NYC CIN**

A user has entered a CASE NUMBER as a selection criteria for client in NYC.

**CASE NUMBER ALREADY IN USE**

If access to WIDUPD was via Function 1 (Card Case # / Card # Entry) with a Registry # and the Case # entered on A/D INDIV AS CARDHOLDER entry is associated with a different case.

**CASE NUMBER BEING REACTIVATED**

If access to WIDUPD was via Function 1 (Card Case # / Card # Entry) with a Registry # and the Case # entered on A/D INDIV AS CARDHOLDER entry has a Pending Record with a Transaction Type of 11 (Reactivation).

**CASE NUMBER MUST BE ENTERED**

If Function 11 (WMS ID Card Case Inquiry) or Function 14 (WMS Case Inquiry) is selected, then Case # must be entered, or

If a Case District has been entered and no Case Number was entered

**CASE NUMBER MUST BE ENTERED FOR A NYC CIN**

If Function 11 is selected and the CIN has been entered and the CIN is for an individual in NYC, then the case number must be entered as well

**CASE NUMBER NOT FOUND**

A valid Case # must be entered, or

If TT (Transaction Type) is A (Add) or D (Delete) for A/D INDIV AS CARDHOLDER entry and the Case # is Unknown.

**CASE SUFFIX ONLY ALLOWED WITH ENTRY OF CASE #**

A Case Suffix value can only be used for input to a function if it is accompanied by a Case Number.

**CBIC CARD NUMBER ENTERED MUST BE ALL NUMERIC**

The CBIC CARD NUMBER must be all numerics.

**CIN, APP REG LN OR CARD NUMBER MUST BE ENTERED**

If Function 1 (Card Case # / Card # Entry) is selected and Registry # entered, then CIN or App Reg Ln # must be entered.

**CIN AND CARD NUMBER CANNOT BE ENTERED AT THE SAME TIME**

If Function 1 (Card Case # / Card # Entry), 2 (Case Card Entry), 5 (WMS ID Card Transaction History), 5 (WMS ID Card Individual Inquiry) or 12 (WMS Individual Inquiry) are selected, then both CIN and CBIC Number may not be entered at the same time.

**CIN CANNOT BE DETERMINED FOR THIS CARD NUMBER**

A CIN Number could not be derived using the input CARD NUMBER.

**CIN OR CARD NUMBER MUST BE ENTERED**

If Function 1 (Card Case # / Card # Entry) or Function 6 (Authorized Representative Inquiry) 12 (WMS Individual Inquiry) is selected, then either a CIN or CBIC Number must be entered.

**CIN NOT FOUND**

There is no CIN record on the database for individual or CBIC data entered.

**CIN NOT PRESENT ON FILE FOR CARD NUMBER**

If a CBIC Number is entered and if Function 1 (Card Case # / Card # Entry) or 10 (WMS Individual Inquiry) is selected, then there must be a CIN in the ID Card Record.

**CIN PRESENT ON FILE FOR CARD NUMBER**

If a CBIC Number is entered and if Function 13 (Application Inquiry) is selected, then there must be a Registry # in the ID Card Record.

**CROSS DISTRICT APPLICATION INQUIRY PROHIBITED FOR SERVICES**

The user has requested an application inquiry for a services case.

**CROSS DISTRICT INQUIRY NOT ALLOWED**

The user requested function does not support cross district inquiries utilizing the submitted selection criteria.

**CROSS DISTRICT INQUIRY NOT ALLOWED FOR USER**

The workstation or user does not have security clearance to perform Cross District Inquiry.

**CROSS DISTRICT INQUIRY NOT ALLOWED ON SVC CASE**

The user has requested an inquiry that crosses districts on a service case.

**DATA MUST BE ENTERED FOR SELECTED FUNCTION**

If any Function is selected, then CIN/APP REG LN # or REGISTRY NUM or CASE NUMBER or CARD NUMBER field must be entered.

**DISTRICT CHANGE NOT ALLOWED FOR THIS FUNCTION**

Entry in DIST field only allowed for Function 9 (Case # PA/FS Payee Inquiry), 10 (Case # / App # ID Card Card Inquiry), 13 (WMS Application Inquiry), or 14 (WMS Case Inquiry).

**DISTRICT ENTRY ONLY ALLOWED WITH ENTRY OF REGISTRY #**

If DIST is entered and if Function 5 (Card Transaction History), 5 (Individual Card Holder Inquiry) or 13 (Application Inquiry) is selected, then Registry # must be entered.

**DISTRICT ENTRY ONLY ALLOWED WITH ENTRY OF REGISTRY # OR CASE #**

If DIST is entered and if Function 9 (Case # PA/FS Payee Inquiry) or 14 (WMS Case Inquiry) is selected, then a Case # must be entered.

**ENTERED CARD NUMBER NOT ISSUED BY THIS DISTRICT**

A Temporary CBIC can be updated (including PIN update) in the district that issued the card.

**ENTERED REG NUMBER DOES NOT MATCH REG NUMBER ON FILE FOR THIS CARD**

If a Temporary CBIC number is entered and Function 1 (Card Case # / Card # Entry) is selected, and Registry # entered, then the Registry # must match the Registry # in the ID Card Record.

**ENTRY OF APP/REG LN, REGISTRY NO, CIN AND CARD NUMBER NOT ALLOWED**

If Function 9 (Card Case Inquiry) or 14 (WMS Case Inquiry) is selected, then only Case # entry allowed.

**ENTRY OF CASE DIST NOT ALLOWED FOR THIS FUNCTION**

For the user input function, a CASE DIST cannot be used for selecting data.

**ENTRY OF CASE NUMBER NOT ALLOWED**

If Function 5 (WMS ID Card Transaction History), 7 (Individual Card Holder Inquiry), or 13 (Application Inquiry) or 12 (WMS Individual Inquiry) is selected, then Case # must *not* be entered.

**ENTRY OF CASE SUFFIX NOT ALLOWED FOR THIS FUNCTION**

For the user input function, a CASE SUFFIX cannot be used for selecting data.

**ENTRY OF CASE # NOT ALLOWED FOR THIS FUNCTION**

For the user input function, a CASE NUMBER cannot be used for selecting data.

**ENTRY OF CIN OR APP/REG LN NOT ALLOWED**

If Function 13 (Application Inquiry) is selected, then only Registry # or CBIC Number should be entered.

**ENTRY OF FUNCTION REQUIRED**

A Function must be entered.

**ENTRY OF REGISTRY NUMBER AND APP/REG LN NOT ALLOWED**

If Function 1 (Card Case # / Card # Entry) or 12 (WMS Individual Inquiry) is selected, then CIN or CBIC Number must be entered.

**ENTRY OF REGISTRY # ONLY ALLOWED WITH APP/REG LINE NUMBER**

If Function 5 (WMS ID Card Transaction History), 5 (Individual Card Holder Inquiry), or 13 (Application Inquiry) is selected and App Reg Ln # is entered, then Registry # must be entered.

**FREE CARD LIMIT FOR PAYEE HAS BEEN REACHED**

The free card limit for the requested payee has been reached (2).

**FUNCTION NOT AVAILABLE FOR NYC CASES**

If the user has requested Function 14 (WMS Case Inquiry) and the DIST is 'NYC', then the function is not allowed.

**FUNCTION NOT AVAILABLE FOR SERVICE CASES**

If the user has requested Function 14 (WMS Case Inquiry) and the first character of the CASE NUMBER is 'S', then the function is not allowed.

**FUNCTION NOT AVAILABLE FOR UPSTATE TERMINAL**

The requested function is not available because the workstation requesting access has been identified with an Upstate office or entity.

**FUNCTION ONLY AVAILABLE FOR UPSTATE CLIENTS**

The request function is only available to users associated with Upstate processing.

**ID-CARD-OWNER HAS ALREADY BEEN UPDATED**

The update was not accepted because another update was made simultaneously and was accepted first. This created a new version. Any further updating must be made on the new version.

**ID CARD IS NOT ACTIVE FOR EBICS**

TT (Transaction Type) D (Delete) for A/D CARD FOR EBICS entry must *not* be entered when the CBIC Number has already been inactivated for EBICS Benefits.

**INDIVIDUAL CANNOT OBTAIN EBICS BENEFITS FOR CASE**

If Case Status is 15 (Denied) or 23 (Denied/Override) and although Individual Status is *not* Denied or Closed, then that individual must *not* be added on A/D INDIV AS CARDHOLDER entry.

**INDIVIDUAL NOT CURRENTLY IN CASE**

If Case Status is 14 (Closed) or 20 (Closed/Override) and although Individual Status is *not* Closed, then the individual must *not* be added on A/D INDIV AS CARDHOLDER entry.

**INDIVIDUAL NOT ACTIVE IN CASE**

If Individual Status is 13 (Deleted) or 15 (Decreased), then individual must *not* be added on A/D INDIV AS CARDHOLDER entry.

**INDIVIDUAL NOT IN THIS CASE**

TT (Transaction Type) cannot be A (Add) for A/D INDIV AS CARDHOLDER if the individual is not in the Case entered.

**INDIVS ENTERED AS LN AND REG. NO MAY ONLY HAVE A DSS TEMP CARD**

If the CBIC Number being added on A/C CARD FOR INDIV entry is for a MET Replacement CBIC, then access from WIDMNU Function 1 (Card Case # / Card # Entry) to WIDUPD requires a CIN *not* App Reg Line Number.

**INVALID APPLICATION DISTRICT ENTRY**

The DIST, entered along with the APPLICATION REGISTRY NUMBER, is invalid.

**INVALID APPLICATION NUMBER**

The APPLICATION REGISTRY NUMBER must be all numerics.

**INVALID CARD CREATE REASON CODE ENTRY**

The permanent card reason code entered must be a valid code.

**INVALID CARD NUMBER ENTERED**

The CBIC Number entered must match the numeric version of the Recipient's CIN used to derive the CBIC number.

**INVALID CARD TYPE**

If a CBIC Number is entered it must be valid for the card type.

**INVALID CARD TYPE FOR CHANGE**

If TT (Transaction Type) is C (Change) for A/C CARD FOR INDIV entry, then CBIC type must be a temporary card.

**INVALID CASE DISTRICT ENTRY**

The DIST, entered along with the CASE NUMBER, is invalid.

**INVALID CASE NUMBER FOR NYC**

The user entered CASE NUMBER is not assigned to NYC.

**INVALID CIN**

If CIN is entered, it must be in valid format (AA99999A). A = Alpha, 9 = Numeric.

**INVALID DISTRICT ENTRY**

Entry in DIST field must be the first four letters of the District Name.

**INVALID FUNCTION ENTRY**

If a Function is selected, then it must be 1, 3, 5-14, or 99.

**INVALID ID CARD NUMBER (CHECK DIGIT)**

A CBIC Number is entered and the Check Digit is in error.

**INVALID ID CARD NUMBER (DECODE ERROR)**

A CBIC Number is entered and the CIN cannot be found.

**INVALID ID CARD NUMBER**

A CBIC NUMBER is entered and it has an incorrect format.

**INVALID ID CARD NUMBER (UNKNOWN)**

A CBIC NUMBER is entered and some other ID Card Number error is present.

**INVALID TEMPORARY ID CARD NUMBER**

If a Temporary CBIC Number is entered, then it must be assigned and associated with an application or case in the transaction district so it is found on the WMS Database.

**INVALID TRANSACTION TYPE ENTRY**

Incorrect code entered in TT (Transaction Type) on any entry for WIDUPD. Valid entries are A or C for CARD FOR INDIV entry or A or D for INDIV AS CARDHOLDER entry or A or D for CARD FOR EBICS entry.

**INVALID VOID DATE**

Void Date must be entered for Temporary CBIC and be today's date or later and in MM/DD/YY format on A/C CARD FOR INDIV entry.

**LINE NUMBER CHOSEN HAS NO ACTIVE CASES IN SUPPLIED DIST**

The user requested line (SELECTION) has no active cases in the user-supplied DIST.

**LINE NUMBER CHOSEN HAS NO CASE INVOLVEMENT**

The user requested line (SELECTION) has no involvement in other cases.

**LINE NUMBER HAS NO INACTIVE CASES**

The user requested line (SELECTION) has no inactive cases.

**LINE # ONLY ALLOWED WITH APPLICATION # ENTRY**

An Application Registry Line Number can only be entered if its associated Application Registry Number has been entered.

**LINE # REQUIRED WITH APPLICATION # ENTRY**

For the requested function, the APPLICATION REGISTRY LINE NUMBER must be entered along with the APPLICATION REGISTRY NUMBER.

**MORE THAN 2 INDIVS ASSIGNED TO PICK UP EBICS FOR CASE**

TT (Transaction Type) cannot be A (Add) on A/D INDIV AS CARDHOLDER entry if there are more than two Cardholders due to a system problem.

**MUST ENTER APP NUM, CARD NUM, OR CASE NUM**

For the user requested function, the APPLICATION REGISTRY NUMBER, CARD NUMBER or CASE NUMBER must be entered as part of the selection criteria.

**MUST ENTER NYC IN CASE DISTRICT FOR A NYC CIN**

For the user requested function, the DIST field was not filled in with 'NYC' for a NYC recipient.

**NO ACTIVE CASE FOUND FOR SUPPLIED DISTRICT**

There are no active cases for the individual in the user-specified district.

**NO ACTIVE CASES FOUND**

There are no active cases for the individual.

**NO APPLICANTS EXIST FOR THIS REG NUMBER**

If a Temporary CBIC Number or Registry # is entered and there are no Applicant Records found.

**NO CASE INVOLVEMENT FOUND**

There are no cases (active or inactive) for the individual.

**NO CASES FOUND FOR SUPPLIED DISTRICT**

The user-supplied DISTRICT did not yield any CASES when queried.

**NO INACTIVE CASE FOUND IN SUPPLIED DISTRICT**

There are no inactive cases found for the individual in the user-specified DISTRICT.

**NO INACTIVE CASES FOUND**

There are no inactive cases for the individual.

**NO PAYEE HISTORY ON SERVER**

No payee history exists within the database for the requested payee.



**NON-SERVICES CASE NUMBER REQUIRED**

Case Type cannot be 40 (Services) for any CBIC activity.

**NYC CIN CANNOT BE ENTERED WITH UPSTATE APPLICATION**

A user has entered a NYC CIN NUMBER and an upstate APPLICATION REGISTRY NUMBER which creates a data inconsistency that is rejected.

**NYC CLIENTS DO NOT NEED AN EBICS PIN**

A user has requested an EBICS PIN Mailer for a NYC Client. This is not allowed.

**OLD CIN ENTERED - NEW CIN IS XX99999X**

This error occurs if a CIN is entered with a CIN Unduplicated Flag on.

**ONLY 2 INDIVIDUALS CAN BE ASSIGNED FOR A CASE**

If TT (Transaction Type) is A (Add) in A/D INDIV AS CARDHOLDER entry, then there cannot be two FS cardholders already assigned.

**ONLY A CASE NUMBER MAY BE ENTERED FOR THIS FUNCTION**

The user requested function number requires the entry of a CASE NUMBER.

**ONLY APP#, CARD#, OR CASE# MAY BE ENTERED**

For the user requested function, only an APPLICATION REGISTRY NUMBER, CARD NUMBER, or CASE NUMBER may be entered as selection criteria.

**ONLY APP #, DIST, OR CARD NUMBER MAY BE ENTERED**

For the user requested function, only an APPLICATION REGISTRY NUMBER, DIST, or CARD NUMBER may be entered as selection criteria.

**ONLY CARD NUMBER MAY BE ENTERED FOR THIS FUNCTION**

The user requested function number requires the entry of a CARD NUMBER.

**ONLY CASE NUM, CASE SUFF, OR CASE DIST ALLOWED**

For the user requested function, only CASE NUMBER, CASE SUFFIX, or CASE DIST can be entered as the selection criteria.

**ONLY CIN OR CARD NUMBER MAY BE ENTERED**

If Function 11 (WMS ID Card Case Inquiry) is requested, then the CIN # or Card # must be input.

**ONLY ONE ENTRY ALLOWED: APP#, CARD#, OR CASE#**

The user may enter only an APPLICATION REGISTRY NUMBER, CARD NUMBER, or a CASE NUMBER. No combinations are allowed in the selection criteria.

**ORIGINAL APPLICATION FOR ID CARD IS NO LONGER AVAILABLE**

If a Temporary CBIC Number is entered and the application has expired or been purged.

**ORIGINAL APPLICATION FOR ID CARD IS TEMPORARILY UNAVAILABLE**

If Function 1 (Card Case #/Card # Entry), 5 (WMS ID Card Transaction History) or 7 (WMS ID Card Individual Inquiry) is selected and Temporary CBIC Number is entered and Application is undergoing Full Data Entry or Maintenance or Clearance.

**PLEASE ENTER A CASE NUMBER**

If TT (Transaction Type) A (Add) or D (Delete) is entered in A/D INDIV AS CARDHOLDER entry, then a Case Number must be entered.

**PLEASE ENTER A TRANSACTION TYPE**

CBIC Number is entered but no TT (Transaction Type) has been entered for A/C CARD FOR INDIV entry or A/D CARD FOR EBICS entry, or

Case Number is entered and no TT (Transaction Type) has been entered for A/D INDIV AS CARDHOLDER entry.

**PLEASE ENTER A TRANSACTION TYPE AND CARD #**

If Void Date is entered on A/C CARD FOR INDIV entry, then a TT (Transaction Type) and CBIC Number must be entered.

**PLEASE ENTER AN ID CARD NUMBER**

If there is an entry in TT (Transaction Type) for A/C CARD FOR INDIV Entry or A/D CARD FOR EBICS entry, then a CBIC Card Number must be entered.

**PLEASE MAKE A SELECTION**

At least one TT (Transaction Type) must be entered on WIDUPD for update.

**PLEASE MAKE ONE SELECTION**

An entry in TT (Transaction Type) for A/C CARD FOR INDIV entry and A/D CARD FOR EBICS entry not allowed at the same time.

**RECIPIENT ID DOES NOT MATCH THIS CARD NUMBER**

The Recipient's CIN is not the same as the CIN in the CBIC ID Number record.

**REGISTRY NUMBER OR CARD NUMBER OF APPLICANT MUST BE ENTERED**

If Function 1 (Card Case # / Card # Entry), or if Function 8 (WMS App Inquiry) is selected, then a CBIC Number or Registry # must be entered.

**REGISTRY NUMBER MUST BE ENTERED**

If Function 1 (Card Case # / Card # Entry) is selected and if App Reg Ln # is entered, then Registry # must be entered, or

If Function 1 (Card Case # / Card # Entry) is selected and CBIC Number is *not* entered, then Registry # must be entered, or

If Function 1 (Card Case # / Card # Entry) is selected, Temporary CBIC Number and Registry # entered, then the ID Card Temp Number record must contain the Registry #.

**REGISTRY NUMBER NOT FOUND IN DISTRICT**

If Function 13 (WMS Application Inquiry) is selected, then the REGISTRY NUMBER must be in the requested district.

**SERVICES APP TYPE INVALID FOR ID CARD ENTRY**

The Case Type on the application must be Non-Services.

**SERVICES CASE TYPE INVALID FOR ID CARD ENTRY**

If Case Number is entered, it must not start with "S".

**SERVICES CASE TYPES INVALID ID-CARD ENTRY**

TT (Transaction Type) can *not* be A (Add) for A/D INDIV AS CARDHOLDER entry if the Case Number begins with S.

**SUFFIX NOT VALID FOR UPSTATE CASES**

If the CASE DIST is U, then a SUFFIX cannot be entered a part of the selection criteria.

**SUFFIX ONLY ALLOWED FOR NYC CINS**

The user has entered a SUFFIX value even though the CIN NUMBER is for an upstate recipient.

**SUFFIX ONLY VALID FOR NYC CASES**

If the CASE DIST is NYC, then a SUFFIX can be entered as part of the selection criteria.

**TEMPORARY ID CARD ALREADY ASSIGNED**

The Temporary CBIC Number being added on A/D CARD FOR INDIV entry has already been assigned to another individual.

**TEMPORARY ID CARD DELETED BY DISTRICT**

TT (Transaction Type) cannot be A (Add) or C (Change) on A/C CARD FOR INDIV entry if it has been voided by entry on WIDTMP (Temporary Card Inventory Control) screen.

**TEMPORARY ID CARD NUMBER HAS NOT BEEN ASSIGNED**

An entered Temporary CBIC number has not yet been assigned to an individual so there is no Registry # or CIN in the ID Card Record.

**TEMPORARY ID CARD NUMBER HAS BEEN DELETED**

An entered temporary CBIC Number has been voided by entry on WIDTMP (Temporary Card Inventory Control) screen.

**TERMINAL SECURITY VIOLATION - USE OF UPDATE FUNCTION NOT ALLOWED**

If Function 1 (Card Case # / Card # Entry) or if Function 1 (Card Case # / Card # Entry) is selected, then ID Card Update Function must be assigned to the workstation and/or individual.

**TERMINAL SECURITY VIOLATION/ACCESS NOT ALLOWED**

Both the workstation and the worker's signon must have Update Functions 1 (App Card Entry) and 2 (Case Card Entry) assigned.

**TRANSACTION NOT ALLOWED FOR APP OR INDIV STATUS**

If an application has been withdrawn or Individual Status is inactive on the application, then card data entry is not allowed.

**UPSTATE APPLICANT CANNOT BE UPDATED FROM NYC**

A NYC user has requested a function that would update an upstate applicant's information.

**UPSTATE APPLICATION CAN ONLY BE LINKED TO UPSTATE CASE**

User entered selection criteria is not consistent. An upstate APPLICATION REGISTRY NUMBER has been entered with a NYC CASE or CIN NUMBER.

**USER ID AND/OR TERMINAL NOT ALLOWED TO ACCESS THIS FUNCTION**

The user and/or this workstation cannot execute the requested function due to security limitations.

**VALID REG NUMBER REQUIRED**

The user-specified function requires that a valid Application Registry Number be entered as input

**VOID DATE ONLY VALID FOR DSS TEMPORARY CARDS**

A Void Date must *not* be entered for MET Replacement CBIC for A/C CARD FOR INDIV entry.

**VOID DATE REQUIRED FOR DSS TEMPORARY CARDS**

Void Date must be entered for a Temporary CBIC for A/C CARD FOR INDIV entry.

[Internal Processing](#)

[The Card Code on the Clearance Report](#)

A Card Code of P (Photo) or N (Non-Photo) is necessary for the production of a CBIC. This Card Code is shown on the Clearance Report for any individual who is listed as a match and therefore already has a Card Code. In the following situations the CARD CODE on the database will not be changed by the pending transactions:

If N is entered for a pending FS case but the individual is active in a PA or MA case with a Card Code of P.

If X is entered for a pending FS case but the individual is already in a PA or MA case with a Card Code of P, N or R.

If X or R is entered for a pending FS case but the individual currently has a Card Code of P or N.

[Establishing the Benefit End Date](#)

A Benefit End Date is calculated for both applications and cases. The Benefit End Date is used to purge criteria for unlinking a Payee from a case. One year after a case closing Payees are unlinked from their EBT accounts. They can still access and redeem existing benefits but no new benefits can be posted to the individual's EBT account. Payee status is reset automatically as the result of any WMS case process that reopens or reactivates the case.

Batch Update recalculates Benefit End Date using the Case Authorization TO Date. The CBIC on-line calculates the Benefit End Date for any Payee Add transaction.

The following calculation will be made for the Benefit End Date:

For Applications - End of the second month after the transaction month in which the card data was input.

For PA and/or FS Cases - End of fifth month after the Case Authorization TO Date. If there are different "TO Dates" for PA and FS, the benefit end date will be the later of the two.

#### Criteria For Permanent Plastic Card Production

Certain types of transactions done at Full Data Entry and Undercare Maintenance for all Case Types except HEAP will result in the transmission of certain data elements to the Card Contractor if the Card Code is P or N.

The following lists the types of transactions and Case Types that will produce the records that are transmitted to the Card Contractor.

Case Type	Transaction
PA, FS, MA	(02) Opening
PA, FS, MA	(05) Change
PA, FS, MA	(06) Recertification/Reauthorization
PA, FS, MA	(07) Closing
PA, FS, MA	(08) Recert-Closing
MA	(09) Open/Close
PA, FS, MA	(10) Reopening
PA, FS, MA	(11) Reactivation
PA, FS, MA	(12) Forced Closing of a Case
PA, FS, MA	(13) Forced Deletion of Individuals

The Care of Name is added to the child's CBIC Card if a card is produced for a child (18 and under). If there is no Care of Name, then the Case Name will be used.

No records are sent for transaction types 01 (Application Denial) or 03 (Full Data Entry Denial) for all Case Types. No records are sent for 09 (Open/Close) for PA or FS cases.

The following chart is a list of the data elements that are transmitted to the Card Contractor.

Data Elements Sent to Card Contractor

D.E. NUMBER - NAME (SIZE)
01010 - TRANSACTION DISTRICT (2)
01011 - FISCAL DISTRICT (2)
01020 - LOCAL OFFICE NUMBER (3)
01050 - CASE NUMBER (10)
03005 - ID CARD NUMBER (19)
03010 - CLIENT IDENTIFICATION NUMBER (8)
03030 - NAME (28)
03050 - SEX (1)
03060 - DATE OF BIRTH (8)
05011 - ASSOCIATED NAME (28)
05110 - IN CARE OF NAME (28)
05130 - MAILING CITY/TOWN (15)
05140 - MAILING STATE (2)
05150 - MAILING ZIP (5)
21620 - CARD CODE (1)

# Transaction Disposition

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## Overview

Transaction Disposition is the process which allows a Pending Record to be "disposed of" by one of two activities:

- **Cancel Pending Transaction** - In certain situations, a Pending Record may be canceled. This activity removes the Pending Record from the database.
- **Override** - A Pending Record that has certain non-fatal errors may have those errors accepted and the Pending Record approved ("signed-off") and made available for Batch Update.

These two processes can be initiated from the WDXMNU - Non-Services Data Entry and Transaction Disposition Menu screen.

### Cancel Pending Transaction

A Pending Record may be canceled by the Cancel transaction, WCANCL. This transaction is initiated on the WDXMNU screen by entering the Case Number of the Pending record to be cancelled and transmitting.

If the cancellation is successful, the message CANCELLATION ON CASE # XXXXXX ACCEPTED will be displayed on line 24 where X's indicate the Case Number. After a Pending Record is canceled by this process, it is no longer available for any further processing. Errors are indicated by the Case Number field highlighted and an error message on line 24.

If a Pending Record for a closing of a PA case has created a Pending Record for opening an MA case via the MA Extension process or for opening an FS case via the Separate Determination or the Transitional Benefit Allowance (TBA) process (see **SRM Denials and Closings**), then canceling the PA Pending Record will also cancel the MA or FS Pending Record and display the message CANCELLATION ON CASE #s XXXXXX, XXXXXX ACCEPTED where the first Case Number is the PA case and the second Case Number is the MA or FS case. This is the only way that an MA Extension Pending Record can be canceled.

See the Pending Data Status charts in **SRM Standards, Conventions and General Information** for the Pending Data Statuses which are allowed to be canceled.

### Override

A Pending Record with certain non-fatal errors may be approved (signed-off) by the Override process. In order for the Override process to be accepted the Override process checks that any non-fatal errors can be overridden by the authorized User ID's.

If the error to be overridden is on a case that has unresolved RFI data, or contains any MA Extension data, the override process is not allowed.

In the fields next to the WMSOVR transaction on the WDXMNU screen the Case #, the Auth #, and one of the following Override Reason Codes (D.E. # 02060) must be entered:

01 - Pending Fair Hearing - Aid to Continue

02 - Fair Hearing Decision



- 03 - Court Decision
- 04 - Department Policy Change
- 05 - Administrative Reason
- 06 - Non-Reimbursable Case - Payment for Services

After transmitting, a successful override is indicated by the line 24 message TRANSACTION ACCEPTED - ERRORS OVERRIDDEN. A list of the errors that were overridden starts on line 10. If there are entry errors on the WMSOVR screen, they are indicated by the fields in error blinking and an error message on line 24.

Since the Override process can take place only for a Pending Record that is in error status, no Authorization has been produced or made available for that Pending Record. Therefore, successful completion of the Override process allows an Authorization to be printed depending on the option selected by the local district for Authorization Generation. See **SRM Standards, Conventions, and General Information**. The Pending Record is now available for the Batch Update process.

The following table shows the Pending Data Statuses for which Override is allowed and the Pending Data Status after the Override is accepted.

Status Allowed For Override	Status After Override
FDE/ERR	AT/FDEOV
UM/ERR	AT/UMOV
REAC/ERR	AT/REAOV

ERROR	MESSAGE
0295	(NOT CURRENTLY BEING USED)
0297	POTENTIAL CIN ASSIGN ERROR - REG#/LINE# - CANCEL OR OVERRIDE
0298	POTENTIAL CIN ERROR - CIN IS PROPER ENTRY-CANCEL OR OVERRIDE
0299	POTENTIAL CIN ASSIGN ERROR - CIN IS PROPER ENTRY-CANCEL OR OVERRIDE
1205	SSN REQ FOR THIS TRANSACTION
1206	CHECK SSN VALIDATION FAILURE
1220	EMPLOYER HEALTH INSURANCE
1329	CAT CODE INCOMPATIBLE WITH MBL
1410	DOS CHANGES PROHIBITED FOR QUALIFIED ALIENS
1525	(NOT CURRENTLY BEING USED)
1540	FROM DATE MUST BE IN THE FUTURE FOR COVERAGE 34

WDXMNU - Non-Services Data Entry and Transaction Disposition Menu

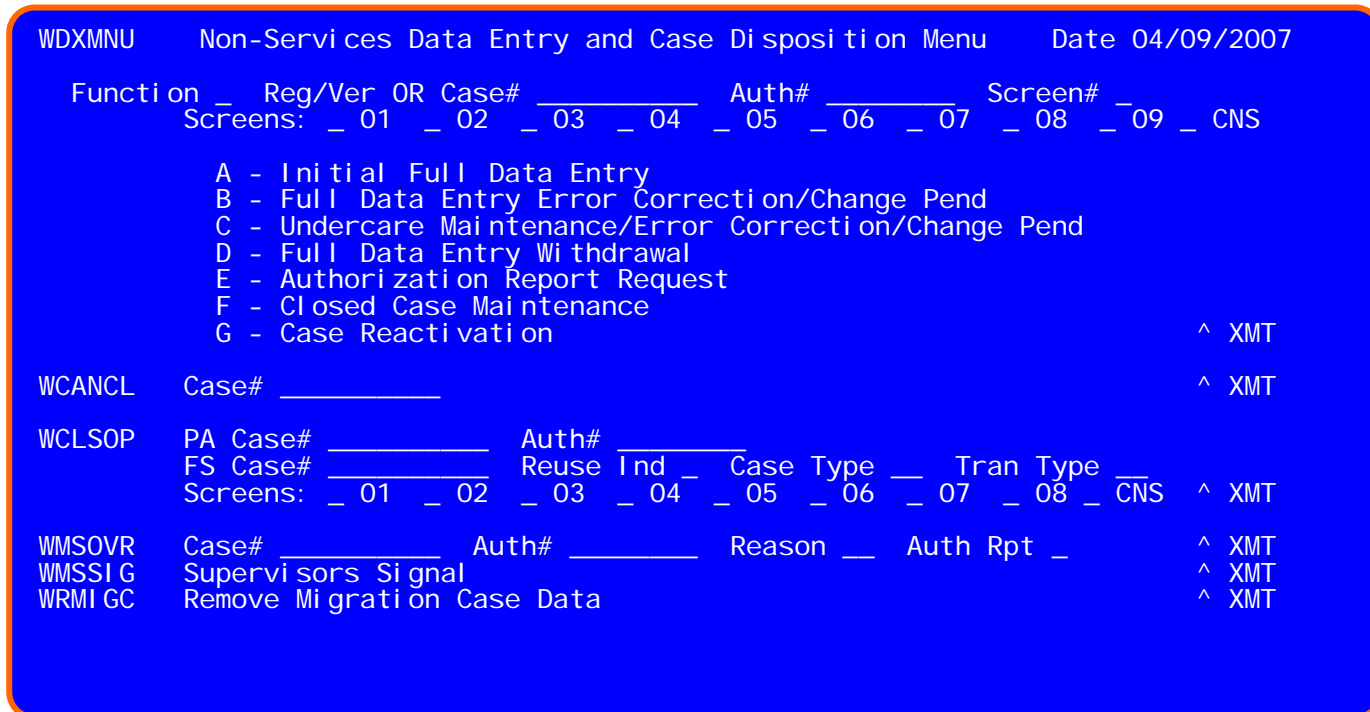


Figure 1 – Non-Services Data Entry and Transaction Disposition Menu (WDXMNU)

Purpose

In addition to providing access to Full Data Entry (FDE) and Undercare Maintenance screens, this screen is also used to initiate WCANCL and WMSOVR transactions. WMSSIG, the Supervisors Signal screen, is no longer used by Upstate districts, and the Remove Migration Case Data screen, WRMIGC, is no longer available.

See **SRM Establishing a Non-Services Case** and **SRM Undercare Changes and Recertification** for information on FDE and Undercare Maintenance, respectively. See **SRM Denials and Closings** for information on WCLSOP.

Access

- Entering 7 on WMS Menu - WMSMNU

Screen Response

Positive

- For WCANCL
  - **\*\*CANCELLATION ON CASE # XXXXXX ACCEPTED\*\***
  - **CASE # XXXXXX CANCELLED - DELETE INFO ON PCP SUBSYSTEM FOR ABOVE (Reason Code is 720)**
  - **\*\*SERVICES CASE #XXXXXX SCHEDULED FOR CANCEL\*\***

- For WMSOVR the Error Numbers that were overridden listed on line 10 plus the message TRANSACTION ACCEPTED on line 24 accompanied by one or more of the following additional messages:
  - ERRORS OVERRIDDEN
  - AUTHORIZATION REPORT SCHEDULED
  - RFI DATA AVAILABLE FOR REVIEW
  - NO MA EXTENSION GENERATED

#### Negative

- One of the following messages on line 24:
  - One of the Disposition Error Messages for WCANCL listed later in this section.
  - One of the Disposition Error Messages for WMSOVR listed later in this section.
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- If Auth Rpt selected and WMSOVR is transmitted, the AUTHORIZATION, depending on local district option. See **SRM Standards, Conventions and General Information** for further explanation of Authorization generation by District options.

#### Function Keys

Key	Screen
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu

Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WCANCL and WMSOVR

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>WCANCL</b>		
CASE #	01050 - CASE NUMBER (10)	
<b>WMSOVR</b>		
CASE #	01050 - CASE NUMBER (10)	
ACCEPT/AUTH #	02040 - AUTHORIZATION NUMBER (8)	
REASON	02060 - OVERRIDE REASON CODE (2)	
AUTH RPT	NONE	Enter an 'X' to request an authorization report after the cancellation transaction

## Subsystem Processing

### Error Messages

#### Disposition Error Messages for WCANCL

(Listing is Alphabetical by Message)

**CANCEL NOT ALLOWED ON CIN UNDUPLICATION PENDING DATA CASE #XXXXXX**

Pending Record with Reason Code of 979, 986, 987, 988 or 990 not allowed to be canceled.

**CANNOT CANCEL CASE # XXXXXX, FS SEP DET CASE ESTABLISHED.**

The pending record for the FS case created by the Separate Determination process has completed Batch Update.

**CASE # XXXXXX NOT FOUND**

Case Number entered does not identify a case known to the system. Enter correct Case Number.

**CLOCKDOWN CLOSING IN PROGRESS - PENDING REC ACCESS NOT ALLOWED**

Pending records for cases in the lockdown closing process cannot be canceled.

**CPS CASE # XXXXXX ALREADY SCHEDULED FOR CANCEL**

If Case Type is 40 and Pending Data Status is PEND/CAN, then the Pending Record cannot be canceled again.

**REASON CODE FOR THIS CASE DOES NOT ALLOW CANCEL CASE # XXXXXX**

If Reason Code is 979, 986 or 987, then the pending record may not be canceled.

**SERVICES CASE # XXXXXX ALREADY SCHEDULED FOR CANCEL**

If Case Type is 40 and Pending Status is PEND/CAN, then the pending record cannot be canceled again.

**TRANSACTION DENIED - MA EXTENSION DATA EXISTS ON PA CASE**

If the Separate Determination Reason Code is 088, 089, 090, 093 or 700, then no errors may be overridden.

**TRANSACTION DENIED - PENDING DATA STATUS CONFLICT CASE # XXXXXX**

- If the Pending Data Status is DBR-SSG, DBR-BUP, AT-DBR, AU-DBR or AC-DBR, then the pending record may be canceled only by an individual whose User ID is authorized to store budgets, or
- the WCANCL function is not allowed for current Sign-on and/or Terminal.

**TRANSACTION DENIED - PENDING DATA STATUS INVALID CASE # XXXXXX**

See **SRM General Information** for list of Pending Data Statuses which may be canceled.

**TRANSACTION DENIED - PENDING DATA STATUS INVALID MAE CASE # XXXXXX**

A PA Case Pending Record with an MA Extension pending record can only be canceled if the MA Extension Pending Data Status is AT/FDE or FDE/BUP.

**TRANSACTION DENIED - PENDING DATA STATUS INVALID TBA CASE # XXXXXX**

A PA Case Pending Record with a FS TBA pending record can only be canceled if the FS TBA Pending Data Status is AT/FDE or FDE/BUP.

**TRANSACTION DENIED - PENDING REASON CODE INVALID CASE # XXXXXX**

If Reason Code on Pending Record is 979, 986, 987, 988 or 990, then pending record may not be canceled.

**TRANSACTION DENIED - MAE AND/OR SD FOR CASE XXXXXX, XXXXXX**

The pending record for a MA and/or FS case created by the MA Extension/Separate Determination process has completed Batch Update.

**TRANSACTION DENIED - USE PA CASE NUMBER XXXXXX TO CANCEL FS EXT CASE XXXXXX**

A pending record for a FS Case created by the FS Separate Determination process cannot be canceled by itself. The PA Case pending record must be canceled

**TRANSACTION DENIED - USE PA CASE NUMBER XXXXXX TO CANCEL MA EXT CASE XXXXXX**

A pending record for a MA Case created by the MA Extension process cannot be canceled by itself. The PA Case pending record must be canceled.

**TRANSACTION DENIED - USE PA CASE NUMBER XXXXXX TO CANCEL TBA CASE XXXXXX**

A pending record for an FS Case created by the TBA process cannot be canceled by itself. The PA Case pending record must be canceled.

[Disposition Error Messages for WMSOVR](#)

**(Listing is Alphabetical by Message)**

**ADDITIONAL INFO REQUIRED**

Case Number and Authorization Number must be entered.

**AUTH/ACCEPT NUMBER ERROR**

Authorization Number entered must identify the latest pending transaction for this case.

**AUTHORIZATION REPORT SELECTION INVALID**

See **Authorization Availability** in **SRM Conventions, Standards, and General Information**.

**CASE ALREADY SIGNED OFF**

Pending data record identified by Case Number, Authorization Number has already been signed off.

**CASE NOT FOUND**

Case Number entered does not identify a case known to the system. Enter correct Case Number.

**ERROR NUMBER(S) ABOVE CANNOT BE OVERRIDDEN**

Error Number(s) to be overridden must be in the table of allowable errors.

**INPUT ACCEPT/AUTH # AND CASE #**

Authorization Number and Case Number must be entered.

**INVALID AUTHORIZATION NUMBER**

Authorization Number entered for override must be the one associated with the pending record for this case.

**INVALID CASE NUMBER**

Case Number entered for override must be the one associated with the pending record's Authorization Number.

**INVALID CASE TYPE**

Override only allowed for Case Type 11-13, 16-19, 20, 22, 31, 32, 40 and 60.

**INVALID OVERRIDE REASON CODE**

Override Reason Code must be a value of 01 through 06.

**INVALID PENDING DATA STATUS**

Case Number entered must have Pending Data Status of FDE/ERR, UM/ERR or REAC/ERR to be overridden.

**PENDING DATA CONTAINS NO EDIT ERRORS**

No Errors exist on pending record.

**SIGN OFF FOR NON-SERVICES IS AUTOMATIC**

Manual sign off of non-services case in automatic sign off district is not allowed.

**UNRESOLVED RFI DATA - RFI FLAG ON**

Errors in a pending record for a non-services Case with a Trans. Type of 02, 05, 06, 09, 10 or 11 were attempted to be overridden and unresolved RFI data exists for one or more individuals. The RFI data must be resolved before doing the override transaction.

# Batch Processing

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## Introduction

In WMS, data processing can be considered to be done either “on-line” or by “batch processing”.

“On-line” data processing means that a transaction by the user results in an immediate update of the database. Examples of on-line data processing are Application Registration, Budget Calculation and Storage, and Full Data Entry. Each on-line transaction results in the updating of the database for a single application or case.

“Batch processing” refers to the practice of running one or more programs against the complete WMS database to make one transaction against all appropriate records. A batch processing activity searches the WMS database for all records that have to be processed for that activity and then makes the appropriate changes. Batch processing is usually done after close of business, either overnight or over a weekend.

Not all batch processes are covered in this section. Instead, they are addressed in the SRM section in which the batch program is an integral part of that process. The following table lists WMS batch processes and where information on them can be found.

ACTIVITY	WHEN SCHEDULED	ADDITIONAL INFORMATION FOUND IN
Common Benefit Identification Card	Daily (Multiple Times)	<b>SRM Common Benefit Identification Card</b>
Local Data Feedback	Nightly	<b>SRM Batch Processing</b>
BICS LDF/File Maintenance	Nightly	<b>SRM Batch Processing</b>
Batch Update	Nightly	<b>SRM Batch Processing</b>
Automatic Closings/Case Conflicts	Nightly	<b>SRM Batch Processing</b>
CIN Consolidation	Weekly	<b>SRM CIN Assign and Verification</b>
SSN Validation	Quarterly	<b>SRM Batch Processing</b>
Data Migration	Annually	<b>SRM Batch Processing</b>
Fleeting Felon/Prisoner Auto-Close	Monthly	<b>SRM Denials and Closings</b>

## Local Data Feedback

The Local Data Feedback (LDF) batch processing activity refers to the processing of Pending Records prior to Batch Update. WMS performs two types of LDF batch processing. These are called:

- Local Data Feedback for the Office of Mental Health (OMH) and the Office of Mental Retardation and Developmental Disabilities (OMRDD), and
- BICS Local Data Feedback/File Maintenance

This batch processing activity is performed nightly and is the means by which data entered into WMS is made available to BICS which then sends the data via the BICS Sydney files to OMH, OMRDD and local districts that have their own data processing systems.

This batch processing activity is performed nightly and is the means by which data entered into WMS is made available to the BICS database. This activity is described in **SRM Volume II - Section BB - BICS LDF**.

## Batch Update

### Overview

The Batch Update processing activity refers to the updating of the WMS database with the data from Non-Services and Services Pending Records and their associated records. It takes place each night after close of business and after the BICS LDF/File Maintenance processing is completed.

### System Processing

Batch Update affects all Pending Records which have one of the following Pending Data Statuses (DE #24040):

FDE/BUP	REAC/BUP
FDE/OVER	REAC/OVR
DEN/BUP	FCFD/BUP
UM/BUP	DBR/BUP
UM/OVER	CUI/BUP

These Pending Records are sorted by the time and the date when processing was completed error-free. Pending Records which have single-issue Food Stamp Benefit payment lines that meet the **FS Single Issue Criteria** below are processed first by Batch Update. After these are completed, all remaining Pending Records are processed starting with those that have the earliest time and date.

Batch Update processing moves the data from these Pending Records and their associated records to specified areas of the database. The Pending Record is then deleted and the Pending Data Status of the case becomes NO PEND. If the Pending Data Status was FDE/BUP, FDE/OVER, or DEN/BUP, the Application Record is deleted and is replaced by a Registry Record.

#### **FS Single Issue Criteria**

Local Action Code	=	2 or 8
Payment Type	=	91, 93, 94, 95, 96 or 97
Method of Payment	=	01
Amount	=	Greater than \$1.00
Issuance Code	=	2

## SSN Validation

### Overview

The batch processing activity known as SSN Validation refers to the process whereby WMS sends Social Security Numbers (SSN) with associated demographic data to the Social Security Administration (SSA) for comparison. If the SSN and demographic data that is associated with an individual on WMS matches the information on file with the SSA, then that individual's SSN Code (DE #03200) is changed to '8' (SSA validated) in WMS. If the SSN is not validated by SSA, the SSN Code is changed to a value to indicate the reason the SSN was not validated.

### System Processing

Each weekend WMS prepares an extract of data to be sent to SSA for validation. Records for all active individuals on WMS (both Upstate and NYC) who have an SSN with an SSN Code equal to '1' are selected to be included in the SSN Validation file. Also, once a month all active Upstate SSNs are resent for a recheck.

The COBOL Program WSNVAL creates and formats an extract file containing the following demographic data:

- Last Name
- First Name
- Middle Initial
- Sex
- Date of Birth
- SSN
- CIN (Used by WMS in the responses from SSA to locate the individual)

The extract is only done for individuals that meet the following criteria:

<b>Case Status:</b>	10 - Active or 21 - Active - Override
<b>Case Type:</b>	Not 60 (HEAP)
<b>Individual Status:</b>	07 - Active, 08 - Inactive - Excess Restricted Income, or 10 - Inactive - Sanctioned
<b>SSN Code:</b>	1 - SSN Present or 9 - SSN Failed SSA Validation

Because the SSA will accept only one file per state, the SSN Validation file is submitted is combined with other files from OTDA. The OTDA file is then sent to the NYS Department Taxation and Finance (NYSDTF) where it is combined with files from other state agencies. The resulting New York State file is then sent to the SSA.

The SSA compares the extract data in the SSN Validation File to their database and prepares a response. This response contains the WMS demographic data as sent to SSA and an indicator of the results of the SSA comparison - either a match or a mismatch. Similar names and close matches on all or part of the Date of Birth are taken into consideration when determining matches.

On a weekly basis the SSA sends their response file to the NYSDTF where it is divided into files are sent to the appropriate state agencies. The SSN Validation response file is separated out from the overall OTDA file and run against the WMS database using the WSNUPD COBOL program. The CIN is utilized as the individual locator, and WMS takes the following actions:

**Matches**

If the SSA response tape shows a match with the WMS data, then the SSN Code is changed to 8 - SSN SSA Validation. (*Exception:* if the matching is associated only with a Case Type = 60 - HEAP, then no action is taken by WMS).

**Mismatches**

If the SSA response tape shows a mismatch with the WMS data, then the SSN Code (DE #03200) is changed to one of the codes found in the following chart that indicate the reason the SSN was not validated:

SSN CODE VALUE	DESCRIPTION
1	SSN present but not validated
2	SSN applied for but not available
3	SSN applied for and denied
4	SSN not applied for
5	SSN indicator not on ODP database (NYC only)
6	SSN unobtainable (Services only)
7	SSN input from SSA by Auto SDX
8	SSA validated SSN
9	SSN failed SSA validation
A	SSN not on SSA file
B	No match on name
C	No longer used by WMS
D	No match on DOB
E	SSA returned different SSN (see RFI)
N	Eligible Alien
X	SSA validated deceased

If the CIN, SSN Code or SSN have changed since the extract file was made, WMS makes no changes regardless of whether the SSA tape shows a match or a mismatch.

Changes to WMS data as a result of the SSN Validation batch processing activity do not produce Pending Records.

The SSN Validation process also creates interface files and sends them to the WRTS system. The WRTS files contain the CIN, demographics, validation code, and date of death if the validation code is 'X'. In the near future an interface file to SOS will be added. See **SRM Resource File Integration** for more information on this process.

#### Auto SDX

As part of creating MA/SSI and FS/NYSNIP cases Auto SDX updates the SSN validation code to a '7' for upstate cases and a '1' for NYC cases. See **SRM Automated SDX/WMS Interface** for more information on this process.

#### Change a SSN after Validation

Currently, if the SSN Code is 8, then neither the SSN Code nor the SSN may be changed unless demographic data (Name, Sex, or Date of Birth) is changed in which case the SSN Code must be changed to 1, forcing a resubmission to the SSA for validation. If the SSN Code is 9 or A-E and the Individual's demographic data is changed, the SSN Code *must* be changed to 1 - SSN Present, or 2 - SSN Applied For/Not Available, and the SSN left blank.

#### Reports Produced

A WMS Report WINR9311 - SOCIAL SECURITY NUMBER VALIDATION is produced as a result of the WMS processing of the response tape. See **SRM Operational Information and Management Reports** for a sample of this report. This report is produced using an extracted reporting file that is produced by the COBOL program WSNUPD.

## Automatic Closings – Case Conflicts

The Automatic Closings - Case Conflicts process serves to alleviate problems which may occur when a case is opened, reopened, reactivated, or an existing case is changed in order to add an individual, and some or all of the individuals in these cases are also members of another active case. This process does not apply to Services (Case Type = 40) cases.

### System Processing

The case being opened, reopened, reactivated or changed is referred to as the NEW case. The case already active is referred to as the TARGET case.

The Automatic Closings - Case Conflicts program examines each individual in the NEW case and searches the data base to determine if this individual is active in another case, i.e., the TARGET case.

If so, then the following activities may take place:

1. If any individual has an Individual Status of 13 in the NEW case, and that same individual (same CIN) has an Individual Status of 07, 08 or 10 in the TARGET case(s) regardless of Case Type, then the case involvement will be reported. No action will be taken by the system.
2. If *all* of the following conditions are met by the NEW case and the TARGET case, the Automatic Closing - Case Conflicts process takes the action indicated on the Automatic Closing/Case Conflict table.
  - a. An individual is in a NEW case and a TARGET case (same CIN) and has an Individual Status of 07, 08 or 10 in either case.
  - b. The NEW case and the TARGET case are in the same district. If the TARGET case is in another district, the conflict will be reported but no closing or deleting will take place.
  - c. The Authorization Period of the NEW case and the TARGET case must overlap. If the NEW case is a PA case with FS Code equal 01 and TARGET case is a FS case, then comparison is made between the FS Authorization Period on the PA Case and the Authorization Period on FS Case.
  - d. The Transaction Type of the NEW Case must be one of the following:
    - Opening (02)
    - Reopening (10)
    - Reactivation (11)
    - Undercare Change (05) or
    - Recertification (06) - Only if one of the following
      - 1) An individual is added, or
      - 2) PA Food Stamp Code is changed to 01, or

- 3) Emergency case changed to non-emergency, i.e., Case Type 11, 12, 16, 17 or 19 with Emergency Indicator equal to X is changed to Case Type 11, 12, 16 or 17 with Emergency Indicator blank, or
  - 4) The last Clockdown status was C and the Authorization Period is extended.
- e. The TARGET case has no Pending Record in any status. If the TARGET case has a Pending Record, the conflict will be reported but no closing or deleting will take place.
  - f. The TARGET case does not have a Clockdown Status of C. If the TARGET case has a Clockdown Status of C, the conflict will be reported as a Clockdown Closing, and no closing or deleting will take place.

The results of all of activities 1 and 2 above are available on the W4139R Inquiry screens only in the district in which the TARGET case is located. These screens are described later in this section.

In the event a TARGET case is closed, or has individuals deleted, the Automatic Closings - Case Conflicts program creates a signed-off Pending Record with a new Authorization Number for the TARGET case. This will be processed by the next day's Batch Update (just as would an undercare transaction is done manually). The Pending Status of this system-created Pending Record will be AT/FCFD - Awaiting Transmission After Forced Closing/Deletion. For Forced Deletions, the Transaction Type on the Pending Record is 13 and the system generated case Reason Code is 740 - CSH ASST. For Forced Closings, the Transaction Type is 12 and the system-generated case Reason Code is 968 (Forced Closing).

### Special Edits

1. Setting of Authorization Period for MA Case being closed:

The MA case Authorization Period TO Date is set equal to the last day of the Transaction Date Month of the PA case. (If the Authorization Period FROM Date in the MA case is later than the PA case Authorization Period FROM Date, then the MA case Authorization Period TO Date is set equal to the MA case Authorization Period FROM Date).

2. For individual(s) being deleted in an MA Case, or in an MA Case being closed:

The MA Coverage TO Date in the MA case is set equal to the last day of the Transaction Date Month of the PA case. (If the MA Coverage FROM Date in the MA case is later than the PA case Authorization Period FROM Date, then the MA Coverage TO Date in the MA case is set equal to the MA Coverage FROM Date in the MA Case in the future, defined as one day greater than transaction date) then the MA Coverage TO Date will be set to equal the MA Coverage FROM Date in the MA case. ).

3. For FS Case being closed

The FS case Authorization Period TO Date is set one day earlier than the FS Authorization Period FROM Date in the new PA Case. (If the Authorization Period FROM Date in the FS case is later than the FS Authorization Period FROM Date in the new PA case, then the FS Authorization Period TO Date in the FS case is set equal to the FS Authorization Period FROM Date in the FS case).

4. Setting of payment line Payment Period Dates for a case being closed (applies to each payment line on the case being closed which has a Payment Action Code of 2):



- (a) If the Payment Period FROM Date on the case being closed is later than the system-generated Authorization Period TO Date, then the Payment Action Code is changed to 5.
- (b) If the Payment Period TO Date on the case being closed is later than the system-generated Authorization Period TO Date, then the Payment Period TO Date is set equal to the Authorization Period TO Date. (If case being closed is FS, then the Payment Period TO Date is set equal to the last day in the month of the Authorization Period TO Date).

Automatic Closings / Case Conflicts Table

Case Type of Case Presently Active on Database	Case Type of Case Being Input (New Case) (this chart is found in COBOL file WB0020)													
	11	12	13	16	17	18	19	20	21	22	24	31	32	60
FA - 11	E	E	E	E	E	E	E	E, 1	E,1	E,1	E,1	E,3	E,3	E
SN-FP - 12	E	E	E	E	E	E	E	E,1	E,1	E,1	E,1	E,3	E,3	E
ADC-FC - 13	E	E	E	E	E	E	E	E,1	E,1	E,1	E,1	E,3	E,3	E
SN-CSH - 16	E	E	E	E	E	OK	E	E,1	E,1	E	E,1	E,3	E,3	E
SN-FNP - 17	E	E	E	E	E	OK	E	E,1	E,1	E	E,1	E,3	E,3	E
EAA - 18	E	E	E	E	E	E	OK	OK	OK	OK	OK	E,3	E,3	OK
EAF - 19	E	E	E	E	E	OK	E	OK	OK	OK	OK	E,3	E,3	OK
MA - 20	X	X,1	X,1	X,1	X,1	OK	OK	E	E	E	E	OK	OK	OK
Medicaid Presumptive Eligibility - 21	X	X,1	X,1	X,1	X,1	OK	OK	E	E	E	E	OK	OK	OK
MA-SSI - 22	E,1	E,1	E,1	X,2	X,2	OK	OK	E	E	E	E	OK	OK	OK
FHP - 24	X	X,1	X,1	X,1	X,1	OK	OK	E	E	E	E	OK	OK	OK
NPA-FS - 31	XE,3	XE,3	XE,3	XE,3	XE,3	E,3	E,3	OK,3	OK	OK	OK	E	E	OK
FS-MIX- 32	XE,3	XE,3	XE,3	XE,3	XE,3	E,3	E,3	OK,3	OK	OK	OK	E	E	OK
HEAP - 60	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	E

Codes are explained on next page.

Explanation of Codes

Each cell in the preceding table can be composed of one or two codes. In each cell, there is always a Conflict Action Code. The Conflict Action Code describes the action that will be “normally” take to resolve the conflict. The Conflict Qualifier Code is used in specials situations and defines when the Conflict Action Code would not apply. For example, if a cell contains X, 1 this would interpret to:

X = Individual(s) in new case will be deleted from target case. If target case has all individuals deleted, it will be closed. Report closing/deletion on AUTO CLOSINGS/CONFLICTS Screen (W4139R).

1 = If Emergency Indicator (DE# 01061) is on for PA case, no action taken.

So if the target case was a PA case with the Emergency Indicator on, then no action would be taken.

CONFLICT ACTION CODE	EXPLANATION
OK	No action
X	Individual(s) in new case will be deleted from target case. If target case has all individuals deleted, it will be closed. Report closing/deletion on AUTO CLOSINGS/CONFLICTS Screen (W4139R).
E	Potential error. Report multiple involvements for individuals who are in both cases on AUTO CLOSINGS/CONFLICTS Screen (W4139R) in target case district.
XE	If all individuals in target case are in new case, close target case and report closing on AUTO CLOSINGS/CONFLICTS Screen (W4139R). If not, report multiple involvements for individuals in both cases on AUTO CLOSINGS/CASE CONFLICTS Screen (W4139R).
CONFLICT QUALIFIER CODE	EXPLANATION
1	If Emergency Indicator (DE# 01061) is on for PA case, no action taken.
<b>NO LONGER USED</b> 2	<b>NO LONGER USED</b> If SSI Indicator (DE# 03145) is not equal to 1 (Active) for individual in HR/VA Case (Type 16 or 17), do not delete individual, but report involvement on AUTO CLOSINGS/CASE CONFLICTS Screen (W4139R).
3	If Food Stamp Code (DE# 01130) on a PA case is not 01 or 06, no action taken.
9	If the SSI Indicator is not equal to 1 (Active) or the Emergency Indicator is on and the target case is a PA case, then no action is taken.

## W4139R Inquiry Processing

The W4139R Inquiry process displays the results of the Automatic Closing/Case Conflict portion of Non-Services Batch Update for each district which has cases that are affected by Automatic Closing/Case Conflict. The results of the last five working days are available. Each day uses a separate dated screen with multiple pages if necessary.

The WMS Menu (WMSMNU) is used to select the W4139R - Auto Closing Case Conflict Initiator screen. This screen lists the special function (F) keys which can be used to access the information available for any or all of the previous five days activities.

When the appropriate F key is pressed, the system displays the W4139R - Auto Closing/Case Conflict screen for one of the previous five days. For example, F 7 displays the Auto Closing/Case Conflict activities which resulted from the previous days' Non-Services Batch Update. Any of the previous five day's activities may be accessed from any other day's screen by using the appropriate F key. If the entries for a single day require more than one screen, paging between these screens can be accomplished by using F1, F2 or F3.

On the W4139R Inquiry screen, the date following the field entitled ENTRIES CREATED ON is determined by the time of day the Batch Update is run. If the Batch Update is run between 6:00 p.m. and Midnight, then that day's date is set. If the Batch Update is earlier than 6:00 p.m., then the previous day's date is set.

Each Auto Closing/Case Conflict situation shown on the W4139R Inquiry screen for a particular date is numbered (01, 02, 03 etc.). The TARGET Case, i.e., the Case against which any action is to be taken (forced closing or forced deletion) or any warning given, is on the *first* line. The NEW Case, i.e., the Case which contains the individual(s) which cause the Auto Closing/Case Conflict situation, is shown on the *second* line.

Each of these numbered situations is followed by one of three "actions" listed under the ACTION column. The possible "actions" are:

- CLOSING
- DELETION
- WARNING

For each Auto Closing/Case Conflict situation there is also a message displayed on the line after the heading MSG. This message indicates what action was taken for a CLOSING or DELETION, or provides further information for situations which are only WARNINGS.

The following is a description of all possible ACTIONS and their associated Messages.

### **CLOSING**

MSG: CASE CLOSED - Forced Closing of the TARGET Case is automatically scheduled for the *next* run of Batch Update. A Pending Record for this Case has been established by the system. It has a Pending Data Status of AT/FCFD and a Transaction Type of 12. The Authorization Number of this Pending Record is shown on the screen.

## DELETION

MSG: INDIVIDUAL(S) DELETED FROM CASE - Forced Deletion of one or more individuals in the TARGET Case is automatically scheduled for the *next* run of Batch Update due to a Pending Data Status of AT/FCFD and a Transaction Type of 13. The Authorization Number of this Pending Record is shown on the screen.

## DELETION

MSG: INDIVIDUAL(S) IN CONFLICTING CASE. SSI ACTIVE INDIVIDUAL DELETED - Forced Deletion of one or more individuals in the TARGET Case (must be an MA-SSI Case) is automatically selected for the *next* run of Batch Update because the individual(s) on the NEW Case (must be HR or VA) has a SSI Status of 1. A Pending Record for this Case has been established by the system. It has a Pending Data Status of AT/FCFD and a Transaction Type of 13. The Authorization Number of this Pending Record is shown on the screen.

## WARNING

MSG: INDIVIDUAL(S) IN CONFLICTING CASE - Individual(s) in the TARGET Case have been made active in a conflicting Case Type by the NEW Case in this district. No automatic system action will take place, but the situation should be investigated.

## WARNING

MSG: INDIVIDUAL(S) IN CONFLICTING CASE IN OTHER DISTRICT - Individual(s) in the TARGET Case have been made active in a conflicting Case Type by the NEW Case in *another* district. No automatic system action will take place, but the situation should be investigated.

## WARNING

MSG: INDIVIDUAL(S) IN CONFLICTING CASE, ACTION IF PENDING - Individual(s) in the TARGET Case have been made active in a conflicting Case Type by the NEW Case in this district; however, the TARGET Case has a Pending Record. No automatic system action will take place, but the situation should be investigated.

## WARNING

MSG: POSSIBLE CONFLICT - AFFECTED CASE DISTRICT WAS NOT AVAILABLE - Individual(s) in the TARGET Case have been made active in a conflicting Case Type by the NEW Case in this or another district. The TARGET Case could not be accessed due to system problems. If a Forced Closing or Forced Deletion was appropriate, it will *not* take place. This situation will be rare.

## WARNING

MSG: ACTIVE INDIVIDUAL(S) WITH DECEASED STATUS IN OTHER CASE(S) - One or more individuals in a NEW Case has an Individual Status of 13 and also has an Individual Status of 07, 08 or 10 in one or more other cases.

**WARNING**

MSG: INDIVIDUAL(S) IN CONFLICTING CASE WHICH IS NOW CLOCKING DOWN - Individual(s) in the TARGET case have been made active in a conflicting Case Type by the NEW Case; however the TARGET Case has a Clockdown Status of C. The case is clocking down (awaiting final closing). No automatic system action will take place.

Situations presented on the W4139R Inquiry screen are sorted and presented in the order of "CLOSINGS", "DELETIONS", and then "WARNINGS". Five situations per screen are the maximum, with F2 used to page forward when there are more than five situations per day.

W4139R – Auto Closings/Case Conflicts Initiator 1

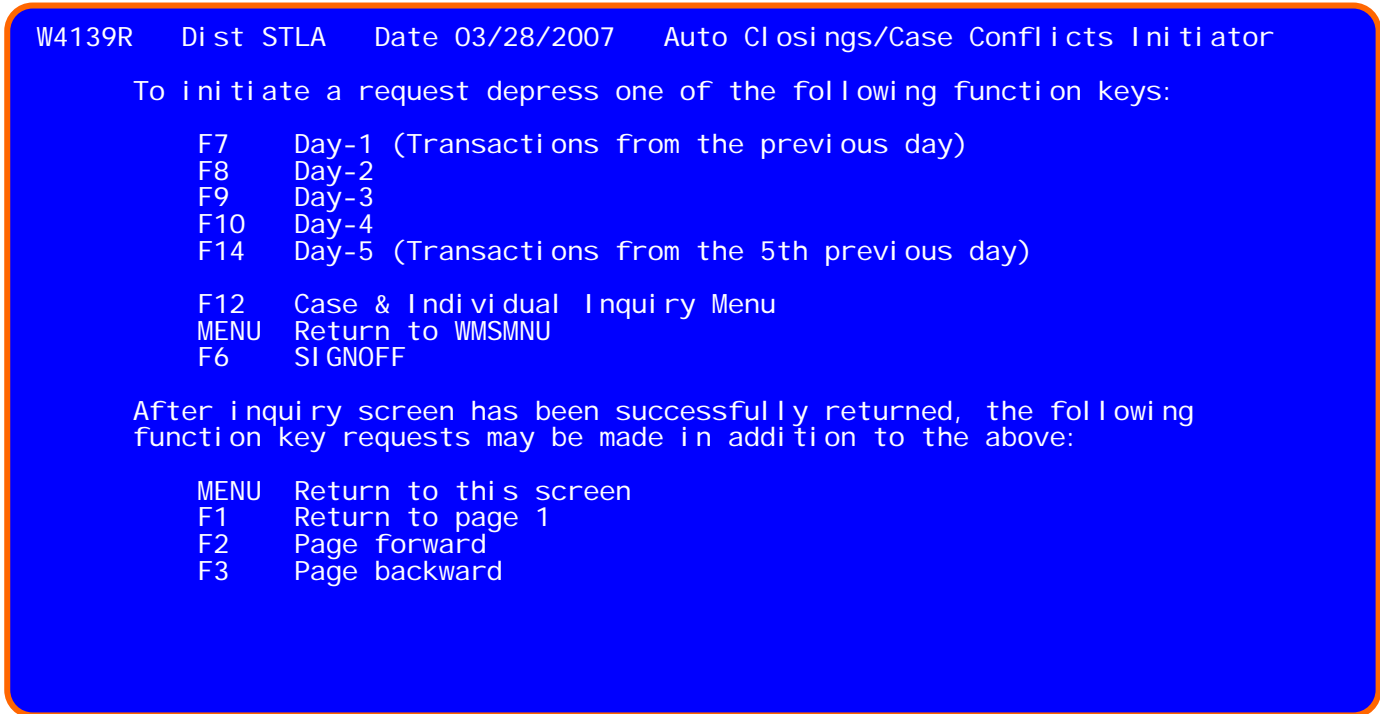


Figure 1 - Auto Closings/Case Conflicts Initiator 1 (W4139R)

Purpose

This screen is used to initiate an inquiry about cases affected by the Automatic Closing/Case Conflicts transactions of Non-Services Batch Update for any or all of the last 5 days.

Access

- Entering 21 on WMSMNU - WMS Menu.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - FUNCTION KEY NOT SUPPORTED (SF 1-5, 11-13, 15-22)
  - MSG WAIT key is not supported

- SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures.**

#### Printed Response

None

#### Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
F7	W4139R - Cases affected by transactions created the previous work day (yesterday)
F8	W4139R - Cases affected by transactions created day before yesterday
F9	W4139R - Cases affected by transactions created 3rd previous day
F10	W4139R - Cases affected by transactions created 4th previous day
Ctrl+F4	W4139R - Cases affected by transactions created 5th previous day
Ctrl+F6	WMSMNU – WMS Menu

#### Screen Field Description – W4139R

Not Applicable



W4139R – Auto Closings/Case Conflicts Initiator 2

W4139R Auto Closings/Case Conflicts		DISTRICT STLA		03/28/07		PAGE 01 OF 10		
ENTRIES CREATED ON 3/27/2007		TOTAL CLOSINGS 22		DELETIONS 1		WARNINGS 24		
		OVERALL TOTAL 47						
NO	ACTION	CASE #	AUTH #	CASE TYP	DI ST	LOC-OFF	UNI T	WRKR
1	CLOSING	F162575	05295240	NPS-FS	STLA	STL	FOODS	55555
	MSG :	P162575		FA	STLA	STL	FAFAM	22208
		CASE CLOSED						
2	CLOSING	F206218	05295241	NPS-FS	STLA	STL	FSHEA	55525
	MSG :	P206218		SN-CSH	STLA	STL	DRUGA	22238
		CASE CLOSED						
3	CLOSING	F223703	05295242	NPA-FS	STLA	STL	FSHEA	55525
	MSG :	P223703		SN-CSH	STLA	STL	SNI ND	22225
		CASE CLOSED						
4	CLOSING	F234910	05295243	NPA-FS	STLA	STL	FOODS	55555
	MSG :	P234910		FA	STLA	STL	FAFAM	22208
		CASE CLOSED						
5	CLOSING	F251571	05295244	NPS-FS	STLA	STL	FOODS	59999
	MSG :	P251571		FA	STLA	STL	FAFAM	22212
		CASE CLOSED						

Figure 2 - Auto Closings/Case Conflicts Initiator 2 (W4139R)

Purpose

This multi-page screen displays a list of all cases in a district affected by the Automatic Closing/Case Conflicts transaction for any of the last 5 days. The format of each of the 5 screens is the same. The date following the ENTRIES CREATED ON field will be different. If the screen has multiple pages, the message PAGE FOR MORE RESPONSES will appear. The message SEARCH COMPLETED appears on the last page of responses.

Access

- From W4139R Initiator or any W4139R Inquiry screen by pressing F7, F8, F9, F10 or F14.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE – F1 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE – F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE – F3 IGNORED
- FUNCTION KEY NOT SUPPORTED (SF 4-5, 11-13, 15-22)
- MSG WAIT key is not supported
- NO ENTRIES FOR DAY SELECTED (displayed on blank screen)
- SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F7	W4139R - Cases affected by transactions created the previous work day (yesterday)
F8	W4139R - Cases affected by transactions created day before yesterday
F9	W4139R - Cases affected by transactions created 3rd previous day
F10	W4139R - Cases affected by transactions created 4th previous day
Ctrl+F4	W4139R - Cases affected by transactions created 5th previous day
Ctrl+F6	W4139R – Auto Closings/Case Conflicts Initiator Screen 1

Screen Field Description – W4139R

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ENTRIES CREATED ON	24070 – AUDIT DATE (8)	Protected
TOTAL CLOSINGS	NONE	Protected; Summation of closings for the district on the requested date
DELETIONS	NONE	Protected; Summation of deletions for the district on the requested date
WARNINGS	NONE	Protected; Summation of warnings for the district on the requested date
OVERALL TOTAL	NONE	Protected Summation of TOTAL CLOSINGS + DELETIONS + WARNINGS

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>NO INFORMATION</b>		
NO	NONE	Protected; System generated
ACTION	00133 – CASE CONFLICT ACTION CODE (2)	Protected; Mnemonic
CASE #	01050 – CASE NUMBER (10)	Protected; Displayed for closed and open case
AUTH #	02040 – AUTHORIZATION NUMBER (8)	Protected
CASE TYP	01060 – CASE TYPE (2)	Protected; Displayed for closed and open case
DIST	01010 – TRANSACTION DISTRICT (2)	Protected; Mnemonic; Displayed for closed and open case
LOC-OFF	01020 – LOCAL OFFICE NUMBER (3)	Protected. Mnemonic. Displayed for closed and open case
UNIT	01030 – UNIT IDENTIFIER (5)	Protected; Displayed for closed and open case
WRKR	01040 – WORKER IDENTIFIER (5)	Protected; Displayed for closed and open case

## Data Migration

Data Migration was last run on the Upstate WMS in August 2003. The following description represents the data migration process as it existed at that time.

Periodically data for a case is removed ("Data Migration") from the on-line WMS database and placed in the WMS Archives. The data that is removed is supplied to local districts on microfiche.

The Data Migration process includes these activities:

1. Selection of a date prior to which all case data will be removed or "data migrated" from the data base. The date selected is called the Archive Date (DE #24900). Two years are subtracted from the Archive Date to determine the actual date used as the date prior to which data is migrated.
2. Flagging Case Records and Transactions which meet the criteria for data migration listed below. The Date that this flagging is done is the Run Date (DE #24903).
3. Removing (data migration) the flagged records. The period between flagging data and the actual removal of data may take from several weeks to several months depending on the amount of data to be migrated and the availability of the system.

### Criteria for Data Migration

For Non-Services cases with no Pending Records, data migration will be as follows:

- **Active Cases** (Case Status equals 10 or 21) - All transactions with an Auth Period TO Date equal to or earlier than the Archive Date minus two years will be data migrated. *Exceptions:* The last (most recent) transaction on an Active case will always remain on the system and will *not* be data migrated regardless of its Auth Period TO Date.
- **Inactive Cases** (Case Status Equal 14, 15, 22 or 23) - All inactive cases with the Auth Period TO Date (FROM Date if TO Date is blank or invalid) equal to or earlier than the Archive Date minus two years will have *all but* the following data migrated:
  - Case Number
  - Case Status
  - Transaction and Fiscal Districts
  - Case Type
  - Case Name

### Messages on Inquiry

When data for a case has been flagged for deletion, but prior to the actual removal of the data, the following message appears on inquiry screens WINQ07, WINQ08, WINQ11, WINQ12, WINQ15 and WINQ19-WINQ29:

- CASE DATE PRIOR TO mm/dd/yy FLAGGED FOR REMOVAL on mm/dd/yy

After data migration takes place, the following message appears on the inquiry screens:

- CASE DATA PRIOR TO mm/dd/yy REMOVED FROM DATABASE ON mm/dd/yy

When Medical Coverage data and/or data from one of the Medical Assistance Subsystems (Principal Provider, Restriction/Exception or Prepaid Capitation) have been migrated to the WMS Archives, one of the following messages will appear on WINQ55-MA COVERAGE HISTORY:

- MA-COV PRIOR TO mm/dd/yy REMOVED mm/dd/yy
- MA-COV/PROVDR PRIOR TO mm/dd/yy REMOVED mm/dd/yy
- MA-COV/MA-REST PRIOR TO mm/dd/yy REMOVED mm/dd/yy
- MA-COV/PCP PRIOR TO mm/dd/yy REMOVED mm/dd/yy
- MA-COV/MA-RETRO PRIOR TO mm/dd/yy REMOVED mm/dd/yy

The last message will appear only when more than one type of Medical Assistance record has been removed; i.e., both Principal Provider and Restriction/Exception data.

For each of the above messages, the first date is the Archive Date minus two years and the second date is the date the data was migrated.

Cases that have been closed or denied prior to the Archive Date will have all data except the following removed from all appropriate Inquiry screens:

- Case Number
- Case Status
- Transaction and Fiscal Districts
- Case Type
- Case Name

In addition, the last Authorization Period TO Date will appear in the Auth Period TO Date field on the appropriate screen. On WINQ08 - Transaction Disposition History, this date will appear accompanied by the message INACT (Inactive).

#### Reuse of Case Number

A Case Number for a Closed or Denied case that has been data migrated to the WMS Archives can be reused by the normal WMS procedure involving the Reuse Indicator, except during the period between the date the data is marked for deletion and the Run Date on which the data is actually deleted from the system.

During this period, if an attempt is made to reuse the Case Number, Fatal Error No. 0170 - CASE MARKED FOR MIGRATION - FATAL results.

#### Reporting of Data Migration Statistics

A summary of data migration processing for each district is available on the Special Transaction Processing screen which is obtained from the General Information System Menu. See **SRM General Information Processing**.

**External Interface Updates to WMS**

WMS receives information from several external entities. This information is used to perform automated transactions, update WMS data, and store data in WMS which is then available for viewing on-line. The major interfaces to WMS are listed below. Some of them contain a reference to other sections of the SRM where they are discussed in more detail.

FROM	INTERFACES	FREQ	DESCRIPTION	REPORTS
NYS Department of Health	Automated Newborn Activation	Daily	WMS receives data on births to mothers who are either on Medicaid or indicate they are on Medicaid. This data is used to decide whether to add the newborn to an existing case, open a new case for the newborn, or reject the transaction.	WINR5228 - Newborn Daily Update Report WINR5229 - Newborn Daily Hospital Report
	Vital Statistics Death Match Data	Monthly	Persons on record with the Dept. of Health as deceased are matched with clients on WMS. WMS is <u>not</u> updated.	RFXVITA - RFI Vital Statistics Listing
eMedNY	PCP Enrollment/Disenrollment	Daily	This file contains client data on enrollment in the Pre-paid Capitation Plan The WMS database is updated with these transactions. This information is viewable on the WMPCIQ - Prepaid Capitation Plan Inquiry Screen.	
	PCP Restriction/Exception Codes 90, 91, 92 Load	Request	These codes are posted to the data element 19050 (Individual MA Restriction/Exception Type) for the designated client. This information is viewable on the WMRRIQ - Restriction/Exception Inquiry Screen.	
NYS Office of Mental Health	PCP Restriction/Exception Codes 90, 94 Load	Request	These codes are posted to the data element 19050 (Individual MA Restriction/Exception Type) for the designated client. This information is viewable on the WMRRIQ - Restriction/Exception Inquiry Screen.	
NYS Office of Mental Retardation & Developmental	PCP Restriction/Exception Code 95 Load	Request	These codes are posted to the data element 19050 (Individual MA Restriction/Exception Type) for the	

FROM	INTERFACES	FREQ	DESCRIPTION	REPORTS
<b>Disabilities</b>			designated client. This information is viewable on the WMRRIQ - Restriction/Exception Inquiry Screen.	
<b>Office of Children and Family Services - CONNECTIONS</b> For details on CONNECTIONS/WMS interfaces see the <a href="#">CONNECTIONS Build 18 Job Aid: Interfaces</a>	WMS App/Reg	Immediate	When the WMS App Reg button is selected on the CONNECTIONS Family Services Stage window, information is sent to WMS to complete Application Registration for Case Type 40 - Services and to generate a Clearance Report. The App Reg number and version number are returned to CONNECTIONS. When FDE and Batch Update is completed in WMS, the Case Number and CINS are returned to CONNECTIONS.	
	WMS Synch	Immediate	While the WMS App Reg internal status is 'AVAIL' (prior to starting FDE), changes to application data made in CONNECTIONS will immediately be sent to WMS when the WMS Synch button (located on the Family Services Stage window) is selected.	
<b>MORPHO - OTDA Finger Imaging Contractor</b>	AFIS	Weekly	This file contains clients' CINS with their AFIS value which is used to update the value of the AFIS Indicator field on WMS.	
<b>NYS Department of Taxation and Finance</b>	WRS - Wage Reporting	Daily	<b>See SRM Resource File Integration.</b>	WINR09161 - New Hires Match Report
	NRH - New Hire Information	Daily		
<b>NYS Department of Labor</b>	UIB - Unemployment Insurance Benefits	Daily	<b>See SRM Resource File Integration.</b>	
<b>Social Security Administration</b>	SDX - SSI Benefits (MA/SSI and NYSNIP)	Daily	<b>See SRM Automated SDX/WMS Interface.</b>	SDX1 - Automated SDX-WMS Transaction Control Report SDX2 - Automated SDX - WMS Transaction Detail Report
	SDX - SSN Validation	Weekly	<b>See SSN Validation</b> topic in this SRM section.	WINR9311 - Social Security Number Validation
	SDX - 40 Quarter Matching	Daily	<b>See SRM SSA 40 Quarter Matching.</b>	
	BDX - Title II Benefits	Daily	<b>See SRM Resource File Integration.</b>	



## County To County Transfer

### Overview

As a result of litigation NYS DOH is required to establish a county to county case transfer process to satisfy legal requirements due to the “Luberto” civil suit. This statewide process affects all districts, WMS has implemented:

NYC to Upstate transfer

Upstate to NYC county transfer

Upstate to Upstate county transfer

### NYC to Upstate

DOH/OMM will create a monthly file from the NYC WMS that will be sent to the WMS Upstate, this file is based on individuals that closed with specific Luberto reason codes of E61, G61, and G62.

Moves from NYC to an Upstate District will be processed monthly. Opening transactions will be created on the first business day of the month following the end of their eligibility on the closed case.

For example, when a client moves from NYC to an Upstate district, whose eligibility on their closed case runs through May 31, 2008 would have their opening transaction in the Upstate district created on Monday June 2<sup>nd</sup>.

Each client in the closed NYC case must have a specific profile. Details can be found in the LCM (Local Commissioners Memorandum) developed by DOH.

A closing letter will be sent to the client’s new address informing them that they are no longer eligible to participate in the Medicaid program in district 66 (New York City).

This monthly file will be extracted from the monthly BASIS file, at the end of the month. Clients in this file will already have their NYC cases closed.

When run against the Upstate WMS database a program similar to a clearance search will check to see if the client is already active.

Clients not found to be Active on the Upstate database, will have a new case pending record created in the new district.

This new case will have the following unique identifiers:

Case Number – First two characters “NT”, Next five characters will be the Julian date of the run, YYDDD, final three positions will be a sequence number for that run. Example: If the record is the 3<sup>rd</sup> record processed on 5/13/08, the Case Number would be NT08134003.

Reason code – Opening reason code will be a system generated code of 898 “District Transfer Opening”

Authorization Number – A unique authorization number of “TRANMMYY” will be produced

If the search finds that a client is Active on a MA or TA case, they are identified on the BICS Case Control Transfer Report – WINR4648 as “NOT PROCESSED” and a new case is not opened. The case number of the active case will also be listed on the report.

**The NYC WMS file contains the following data elements:**

SCREEN CAPTION	D.E. NUMBER	REMARKS
DISTRICT MOVING TO	01010	Determined By Street & Zip.
NYC CASE NUMBER	01052	Required
CASE NAME	01070	Required
CASE TYPE	01060	Required
NOTICE INDICATOR	04001	All Will Be Set To A
LANGUAGE	04002	Required, Default = S If Language Is Not E
RVI	01143	Required If Ct = 20
AUTHORIZATION PERIOD	01100	Required, NYC Closing Auth Period
LAST RECERTIFICATION DATE	01910	Required, NYC Last Recert Date
NYC CIN	03010	Required
RESIDENCE STREET	01080	Required
RESIDENCE CITY	01082	Required
RESIDENCE STATE	01083	Required
RESIDENCE ZIP	01084	Required
IN CARE OF NAME	05110	
MAILING STREET	05120	
MAILING CITY	05130	
MAILING STATE	05140	
MAILING ZIP	05150	
NAME (FIRST, MI, LAST)	03030	Required Last Name
SEX	03050	Required, Default For Unborn = U
DOB	03060	Required, Default For Unborn = Blank
SSN	03201	
SSN CODE	03200	Required, Default = 1 If SSN Is Present, 2 If Not Present, Unborn = Blank
RELATIONSHIP CODE	03090	Required, Default = Blank
INDIVIDUAL CATEGORICAL CODE	03110	Required
EMPLOYABILITY CODE	03190	
AMERICAN INDIAN OR ALASKAN NATIVE	03054	Required, Default H = U

SCREEN CAPTION	D.E. NUMBER	REMARKS
ASIAN	03055	Required, Default For Unborn=Blank
AFRICAN AMERICAN	03056	
HAWAIIAN/PACIFIC ISLANDER	03057	
WHITE	03058	
HISPANIC/LATINO	03059	
CITIZENSHIP	03180	
VETERAN STATUS	09302	Required, Default=9 Except For Unborn=Blank
INDIVIDUAL DISPOSITION STATUS	03120	Required, Default=07
MA COVERAGE CODE	21090	Required
MA COVERAGE DATES	21110	Required - This Should Be The NYC's Closing Ma COV Dates
CARD CODE	21620	All Will Be Set To N Except For Unborn=Blank
ALIEN NUMBER	03171	
DATE OF STATUS	03172	
DATE OF STATUS	03172	
TASA CODE/PREGNANCY CODE	03514	Required If Age Is Greater Or Equal To 11 And Less Than 21

### Upstate to NYC

When clients move from an Upstate district to District 66 (New York City), the WMS Upstate system will create a (on the first business day of each month) monthly file to be sent to NYC WMS.

The Upstate processing ensures that the clients are still in the same status which originally identified them as Luberto, using specific reason codes mentioned above.

This client file will be processed to determine if the clients are already active on NYC WMS, either as Active or in AP status on a NYC WMS case.

In multiple person cases if even one client is active, the entire case will be excepted.

If the client is found not to be Active, an application will be stored to open an MA case.

**The Upstate WMS file contains the following data elements:**

SCREEN CAPTION	D.E. NUMBER	REMARKS
UPSTATE CASE NUMBER	01050	Upstate Case Number
UPSTATE DISTRICT	01010	Originating Upstate District
CASE NAME	01070	Case Name.
CASE ADDRESS	01080,01082 01083,01084	Case Address From The Upstate WMS Database.
MAILING ADDRESS	05120,05130 05140,05150	Mailing Address, If Present Else Blank.
CASE LANGUAGE (CNS)	04002	Required.
CLIENT INDICATOR		Indicator To Distinguish Multiple Active Clients Within The Case. Ex: If Only One Client Then Indicator Will Contain 1, Two Clients The Indicator Will Have A 2, Etc.
UPSTATE CIN	03010	Client's Identification Number.
FIRST NAME	03018	Client's First Name
MIDDLE INITIAL	03024	Client's Middle Initial.
LAST NAME	03019	Client's Last Name.
INDIVIDUAL CAT CODE	03110	Individual Categorical Code. See Appendix A.
SEX	03050	Client's Sex. For An Unborn Client It Will Be U.
SSN	03201	Client's Social Security Number. If Client Is An Unborn Child Then Blank
SSN VALIDATED CODE	03200	Client's Social Security Validation Code. If Client Is An Unborn Child Then Blank.
AMERICAN INDIAN OR ALASKAN NATIVE	03054	Required. Only Values Allowed Are N, U, Y.
ASIAN	03055	Required. Only Values Allowed Are N, U, Y.
AFRICAN AMERICAN	03056	Required. Only Values Allowed Are N, U, Y.
HAWAIIAN/PACIFIC ISLANDER	03057	Required. Only Values Allowed Are N, U, Y.
WHITE	03058	Required. Only Values Allowed Are N, U, Y.
HISPANIC/LATINO	03059	Required. Only Values Allowed Are N, U, Y.
ACI	03180	
ALIEN NUMBER	03171	Required If ACI Is Equal To A, B, F, G, H, J, K, M, R, S, T Or V
DATE OF STATUS (DOS)	03172	Required If ACI Is Equal To A, B, F, G, H, J, K, M, R, S, T Or V.
DATE ENTERED COUNTRY(DEC)	03072	Doe Received From Flat File If Available, Otherwise Override.
RVI	01043	Client's RVI. If Case Type Is Equal To 20.
TASA	03514	Required If Age Is Greater Or Equal To 11 And Less Than 21.
VETERAN CODE	09302	Required If Age Is Greater Or Equal To 18.
CASE TYPE	01060	For Ma Either 20 Or 24. No Other Values Are Allowed. For Pa Case Types 17 Or 19. No Other Values Are Allowed.
MA COVERAGE FROM DATE	21110	Required. The Ma Coverage From Date From The Flat File.
MA COVERAGE TO DATE	21110	Required. The Ma Coverage To Date From The Flat File.
DATE OF LAST RECERT	01910	Required.
EMPLOYMENT CODE	09308	If Present. Otherwise Calculate – See Translation Table In Appendix B, And Assignment Rules On Page 10, Individual Information, And Employability Code.
MSP CODE	15021	
EDC	01041 (AFA DATE)	Required. If Client Is A Pregnant Woman.
SP	03076	Chafee Indicator
TI	01067	Trust Indicator

## Upstate to Upstate

A weekly file will be created of clients moving from one Upstate district to another, based on the Luberto reason codes. This weekly file will be combined to create a monthly file.

Near the end of the month, this file will be processed to ensure that the client is still in the same status which originally identified them as Luberto.

The following search will occur for Luberto transfer cases:

If the client is found not active on a MA case in the move to district or any other district, a new case pending record will be created and processed by the next Batch Update. If the client is found Active on a Medicaid (MA) case, a new case is not opened, and the case is reported as an Exception on the BICS Case Control Transfer Report – WINR4648.

If an active Temporary Assistance (TA) case is found, a search is made to determine whether Medicaid is authorized on that TA case. If no MA coverage is found on the TA case; the case will transfer and a new case pending record will be created and processed with MA coverage by the next Batch Update. If MA is authorized on the TA case, the case is reported as an Exception on the BICS Transfer Control Report – WINR4648.

New cases will have the following unique identifiers:

Case Number – First two characters “UT”, next five characters will be the Julian date of the run, YYDDD, final three positions will be a sequence number for that run. Example: If the record is the 3<sup>rd</sup> record processed on 5/13/08, the Case Number would be UT08134003.

Reason code – Opening reason code will be a system generated code of 898 “District Transfer Opening”.

Authorization Number – A unique authorization number of “TRANMMYY” will be produced.

All new cases opened in the new district will be listed on the move to districts (determined by resident address at time of closing).

When the next Luberto run is done it will determine if the individual(s) is active on another MA or TA case.

If they are it will appear as "NOT PROCESSED" on the transfer county's Case Control Transfer Report.

If the individual is not found active they will have a pending opening created and will appear as "Processed" on the report.

The report is produced on the “Pending Day”. The pending day is when the district can modify case number or coverage or can cancel the pending transaction if they do not want it to open.

On the next business day, after the “Pending Day” the case will be opened.

See the “Operational Information and Management Reports” chapter in the SRM for details of the Case Control Transfer Report – WINR4648.

## Overview

Phase 1 of the Prisoner Eligibility process began in May 2008 and would suspended MA coverage for recipient's time of incarceration.

Currently two monthly files are received by OTDA, one from DOCS and one from DCJS. Both of these files contain all current prisoners in facilities maintained by both agencies.

## Match Criteria

OTDA merges these 2 files and compares the individuals to WMS. Individuals will be matched on the following:

<u>DEMOGRAPHIC DATA USED FOR MATCH</u>	<u>SCORE</u>
a. Complete Name, Sex, Date of Birth, and Social Security Number	106
b. Last Name, Social Security Number, First Name	104
c. Last Name, Social Security Number, Year/Month of Date of Birth	103
d. Date of Birth, Social Security Number	102
e. Date of Birth, Complete Name Excluding Middle Initial, Sex	101

As soon as a single match of 101 level (or better - used for tie breakers) is found, the match process will cease and the individual will be included in the suspension process, depending on Coverage Code (see below).

WMS will verify WMS coverage prior to incarceration.

The prisoner will remain the fiscal responsibility of the district of responsibility prior to incarceration for the entire prison stay and up to 4 months after the prison stay.

## PA/FS Case Processing

For single person PA and FS cases a pending record will be created on WMS to close the case.

For multiple person PA and FS cases a report is created and sent to the local district that has responsibility for the case. The report is WINR5611 - Prisoners Closing Case Eligibility Report.

## MA Case Processing

For PA cases with MA, the MA case is opened in suspended status. For single person MA cases a pending record will be created to auto-suspend the case or close the case if certain criteria exists and is reflected in report WINR5612 - Prisoners Closing Case Eligibility Report.

For multiple MA cases a report WINR5612 - Prisoners Closing Case Eligibility Report is sent to the NYS Department of Health and to the local district responsible for the case.

Report processing is described in the section below - [Report Processing](#).

A return file to DOCS is created by OTDA for the NYS Department of Health.

## Report Processing

- A.** WMS SDX Processing - After the automated closing or suspension, a series of reports will be created and made available to DOH and LDSS:
1. All MA-SSI (Case Type 22) individuals closed with an N22 reason code (individual is in non-pay status and therefore closed because they are an inmate of a correctional institution). They'll be sorted by District, State = "NY" (vs. State not = "NY"), and paged by 3 categories:
    - a. If the Payment Status Code is "N22" and State = 'NY', the individual is in a NYS prison
    - b. If the Payment Status Code is "N22" and State = 'NY', the individual is in a NYS prison but if Prison address is a Federal Penitentiary in NYS
    - c. If the Payment Status Code is "N22" and State not = 'NY', the Individual is in an Out-of-State Prison
  2. If the individual is in Upstate MA Prison Suspend Status (08 – Inactive Individual Status with 04 – Coverage - No MA Coverage), and a SDX Opening record is received through WMS (in a C01 Current Pay Status) (SDX Open), do not open Case Type 22 for this applicant and report to DOH-SDX.
- B.** The following WINR5612 report will also be provided to LDSS and State DOH:
1. All prisoners – suspended, closed, or changed with an Individual Status = 08 and MA Coverage Code = 04. Changed cases are not being reported to the LDSS, as they will be receiving a 3209 with changes.
  2. All prisoners with Coverage Code 07, 08, 09, 13, 14, 17
  3. All prisoners where CA (Case Count) field > 1 (multi-person case)

# Client Notices System

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## Client Notices System

### Introduction

The Client Notice System (CNS) prints and mails notices to clients informing them of actions proposed or actions taken on their Non-Services cases. Notices are initiated in three ways:

- through a WMS transaction, or
- without a WMS transaction through a CNS batch process, or
- through the Notice Authorization/Release function.

Notices generated as a result of a WMS transaction are called TAD-based notices. For example, information from a WMS Non-Services Closing or Denial transaction is used to generate a Notice to the client to report on the case action. Notifications that a Recertification is due for PA, MA, or FS are examples of CNS batch generated notices. The Notice Authorization/Release function is discussed later in this document.

The CNS Text Management System contains all of the paragraphs that could be used in a notice. Using information from WMS and CNS, paragraphs are combined with case data to create a notice tailored for the specific Case and Transaction.

Notices are generated, printed and mailed in Albany. Notices can be printed in both English and Spanish. Information about Fair Hearing Rights is printed on most notices. All necessary inserts and attachments (e.g., Child/Teen Health letter, FS recertification application) are also included. Each notice is available for on-line query and, if needed, a notice can be reprinted. See [Client Notices System](#) for further information on notice generation.

### TAD-Based Notices

TAD-based notices are those notices which are generated by a WMS transaction. After a Pending Record with an appropriate REASON CODE is accepted by WMS/BICS Batch Processing, CNS creates a notice. For most case actions, the WMS Transaction provides all the information needed. However, in some situations, additional information must be entered on screens in the Client Notice System. TAD-based notices are classified by the amount of information that must be entered on CNS.

There are three types of TAD-based notices: No Fill, Limited Fill and Extensive Fill.

#### No Fill

A worker does not need to enter any information on CNS to produce a No Fill Notice. All of the information needed to produce the notice is on the WMS database and/or is contained in the transaction undergoing Batch Update. This method can be used for many notices, but cannot be used if multiple REASON CODES are needed for the WMS transaction, even if all the REASON CODES are classified as “No Fill”.

For No Fill notices no pending notice record is created and no Supervisory Review Report is generated.

### Limited Fill

Limited Fill Notices are produced as a result of a transaction on WMS, but the WMS transaction alone does not contain enough information to generate a notice to the client. Some additional information, no more than two fields, must be entered on the Client Notices System. The information can be entered on the Client Notices Limited Fill Input Form - DSS-4487. For most Limited Fill notices entry on the WCN011 - Reason Code Screen and on the WCN012 - Notice Entry Screen, is all that is necessary. The Limited Fill option is not available for any transactions on MA cases.

### Extensive Fill

Extensive Fill Notices are produced as a result of a WMS transaction, but the WMS transaction does not contain enough information to generate a notice to the client. These notices have more data variables to be entered than are allowed on the Client Notices Limited Fill Input Form – DSS-4487. Information will have to be input on more than one CNS screen. The reason code(s) entered on the WCN011 screen will determine which additional screens are presented for data entry.

For both Limited Fill and Extensive Fill notices a pending notice record is generated and a Supervisory Review Report is created.

After being processed by Batch Update, the notice is generated and a notice history record is available for inquiry.

### Batch Notices

Batch notices are non-transaction based notices that need to be sent to a large number of clients. Examples are recertification notices, appointment notices, and notices to inform clients about program changes.

The WCN022 screen is used to enter batch notices. Reason codes for batch notices always begin with a 'Z' and the date the notices are to be mailed can be chosen by the user by entering a Process Date that is the day before the notices will be mailed.

### Reason Codes

The first letter of the REASON CODE identifies the type of notice (No Fill, Limited Fill or Extensive Fill) generated by that REASON CODE. The chart below shows what the first letter of the REASON CODE indicates, and the amount of information which must be entered on CNS. For information on the REASON CODE which should be used for a specific case situation, see the **Client Notice System Manual**.

Transaction Type	No Fill	Limited Fill**	Extensive Fill
Opening	A	K	Q, T
Undercare Maintenance	A, B, C, J	L	R, S, T, X
Closing/ Denials	E, F, G, H*	M, N, P	U, V, W, X

\* H is only used for MA cases.

\*\* Limited Fill is not available for MA cases.

In addition to the above chart the following letters/numbers are also used:

Z - Non-WMS Transaction based (Batch notices)

Y - Reason Codes that result in no notice being sent; Y20 is an exception. It generates a notice.

I - Individual Reason Code Required

9 - System Generated

Each reason code is linked to text that will be included in the notice. See the [Upstate CNS Codes and Text Catalog](#) for a listing of PA and FS reason codes with their associated text. MA reason codes and text can be found at the Office of Health Insurance Program's OHIP/CNS library webpage; however, a New York State Department of Health account user ID and password is required to access this page.

## Contact Data

Contact Data consists of LDSS addresses and telephone numbers, worker names and phone numbers, and Advocate names, addresses and phone numbers. This information is printed on notices. The combination of OFFICE ID, UNIT ID and WORKER ID which appear on either the WMS transaction or the CNS record are used to select the appropriate addresses and telephone numbers to print on the notice. Advocate Data is entered and maintained by State staff. Contact Data for an LDSS is entered and maintained by the staff in that LDSS.

The Contact Data for each LDSS is stored in CNS in two tables:


- The first table, the District Data Table, contains the LDSS address (or addresses) and phone numbers. This information appears on notices in the areas indicated by '1' on the partial notice below.
- The second table, the Office/Unit/Worker Table, contains a list of Office Numbers, Unit IDS and Worker IDS with a Unit or Worker Name and Phone Number for each. This information appears on notices in the Area indicated by '2' on the partial notice.

XL0218 (09/97) NOTICE NUMBER : U0100X6669 Page: 1 \*\*\*\*\*

1 ALBANY CO DSS  
100 FIRST ST  
40 HOWARD ST  
ALBANY, NY 12202

NOTICE OF DECISION ON YOUR  
MEDICAL ASSISTANCE.

SE LE ENVIARA UNA COPIA EN ESPANOL DE ESTA  
NOTIFICACION EN UN SOBRE APARTE

NOTICE NUMBER: U0100X6669		DATE: August 7, 2007		CASE NUMBER: EXTRACASE1	
2 OFFICE CNS	UNIT SUCB	WORKER CSS02	UNIT OR WORKER NAME DEFAULT MA		TELEPHONE NO. 518-474-9440
1 AGENCY TELEPHONE NUMBERS			CASE NAME / AND ADDRESS		
GENERAL TELEPHONE NO. FOR QUESTIONS OR HELP			CNS/SUCB/CSS02   JOE SPARECASE1 123 TEST ST. ALBANY, NY 12345		
OR Agency Conference					
Fair Hearing information and assistance					
Record Access					
Child/Teen Health Plan					

Information must be entered in both of these tables before any Client Notices can be mailed for an LDSS. If the Client Notices System cannot find the specified information or default district information in either of these tables, the notice will not be printed and mailed. See [Client Notices System](#) presentations for detail information on the District Data Table and the Office/Unit/Worker Table and entry of default records.

### Contact Data Menu

The WCN060 – CNS Contact Data Maintenance Menu Screen provides access to the screens which are used to add, change, delete and inquire on information in the District Data table and the Office/Unit/Worker Table. Update of Contact Data records on the tables is not a batch process. The tables are immediately updated after error-free transmission of an entry screen. The WCN060 – CNS Data Maintenance Menu Screen is obtained by entering 14 on the WCN000 – WMS/Client Notice Subsystem Menu.

Quarterly reports of the data in these files are sent through BICS. Samples of these reports appear in this section immediately after the screen descriptions. Since there are no nightly or weekly reports of the data in these files, it is recommended that screen prints be made when data is entered.

### District Data Table

District-wide contact information, i.e., the LDSS address, and agency phone numbers, is stored in the District Data Table. If an LDSS does not enter information in this table, CNS will not generate notices for that LDSS.

The following combinations of fields can be entered on the District Data Table for an LDSS. There must be an address and phone numbers entered for each combination:

- PROGRAM AREA, OFFICE ID and UNIT ID are blank. This is the District Default Record. Each LDSS must enter a District Default Record.
- Enter a PROGRAM AREA (PA, MA, FS). OFFICE ID and UNIT ID are blank.

- Enter a PROGRAM ID and an OFFICE ID. UNIT ID is blank.
- Enter an OFFICE ID. PROGRAM AREA and UNIT ID are blank.
- Enter an OFFICE ID and a UNIT ID. PROGRAM AREA is blank.

Because this information is vital for Notice generation, it is recommended that every LDSS enter a District Default Record, i.e. an address and phone number record with a blank PROGRAM AREA and blank Office/Unit Codes. A District Default Record must be entered, even if an LDSS prefers to list phone numbers by Program or Office.

Depending on local procedures, an LDSS may need to have an address and phone numbers in the District Data Table for each Program and for each Office. A district may also need to enter an address and phone numbers for each Program in each office.

Information for the District Data Table is entered on the WCN062 – District/Responsible Center Maintenance Screen.

#### WCN062 – District/Responsible Center Maintenance Screen

To enter, change or inquire on information in the District Data Table request the WCN062 – District/Responsible Center Maintenance Screen by entering Selection 1, on the WCN060 – CNS Contact Data Maintenance Menu Screen.

DISTRICT is pre-filled on the Menu. An I (Inquiry) or U (Update) is required in the ACTION field on the Menu. Except for WORKER ID, which is not allowed for Selection 1, other fields on the Menu are optional. The combination of fields entered depends on the records the LDSS decides it needs on the District Data Table (see the preceding section).

When the WCN062 – District/Responsible Center Maintenance Screen is displayed, data from the Menu is pre-filled and protected.

If a U (Update) was entered in ACTION on the Menu, and a record was not found for that data, an A is pre-filled in ACTION on this screen. If U (Update) was entered in ACTION on the Menu and a record was found, ACTION is blank on this screen. If ACTION is blank, inquiry is assumed, and any changes are not saved. If an existing record is to be changed or deleted, a C (Change) or D (Delete) must be entered in ACTION on this screen.

If two addresses are entered, both addresses will print on notices. Only the first Area Code needs to be entered. If the Area Code is the same for all of the Phone Numbers to be entered on this screen, the first Area Code will be used for subsequent Phone Numbers.

Successful transmissions of this screen with spaces, C (Change) or D (Delete) in ACTION is acknowledged with a message on the WCN060 – CNS Contact Data Maintenance Menu Screen.

After successful transmission of the WCN062 – District/Responsible Center Maintenance Screen, with an A (Add) in ACTION, the WCN064 – Office/Unit/Worker Data Entry Screen is automatically displayed for the optional entry of a list of Office/Unit/Worker codes with Names and Phone Numbers. Office/Unit/Worker information is stored in the Office/Unit/Worker Table described below.

#### Office/Unit/Worker Table

The Office/Unit/Worker table holds worker names and phone numbers for specific combinations of Office/Unit/Worker Codes. If an LDSS does not enter records in this table, notices will not be mailed for that LDSS.

If an Office/Unit/Worker combination for a Notice is not found in this table, CNS will search for default records which the LDSS should have entered. The following example illustrates the searches performed by CNS to find a name and Phone Number for one notice.

- 1) A notice has been authorized for an NPA Food Stamp case with the following Office/Unit/Worker combination: OF1/UN2/W123. CNS first looks for this Combination in the Office/Unit/Worker table.
- 2) If a record for that combination is not found, CNS will examine the table for the following combination: OF1/UN2/"blank". This is called the Unit Default Record.
- 3) If a Unit Default Record is not found, CNS will search for an Office Default Record: OF1/"blank"/"blank".
- 4) If an Office Default Record is not found, CNS will search for a Program Default Record: FS PROGRAM AREA and "blank"/"blank"/"blank". (Edits prohibit entry in the Office/Unit/Worker Table of any data in the OFFICE ID, UNIT ID, or WORKER ID fields with an entry in PROGRAM AREA.)
- 5) If a Program Default Record is not found, CNS makes one final search for a 'District Default Record': a blank PROGRAM AREA and "blank"/"blank"/"blank".

If none of these searches are successful, the notice will be put into an error status. Therefore, it is extremely important that each LDSS enter a District Default Record on the Office/Unit/Worker Table in addition to the District Default Record on the District Data Table.

Each LDSS is also encouraged to enter a default record either for each Program or for each Office and each Office/Unit combination.

Information for the Office/Unit/Worker Table is entered on one of two screens:

- WCN064 – Office/Unit Worker Data Entry Screen
- WCN063 – Office/Unit Worker Maintenance Screen

The next two sections describe these two screens and explains the differences between them.

#### WCN064 – Office/Unit/Worker Data Entry Screen

The WCN064 – Office/Unit/Worker Data Entry Screen allows entry of a list of various Office/Unit/Worker code combinations with a name and phone number for each combination. This screen cannot be used for inquiry or maintenance.

Every combination of OFFICE ID, UNIT ID and WORKER ID in the district should be entered with a name and phone number. If one combination is omitted, or if a typo is made, notices for that combination would contain the name and phone number of one of the default records entered by the LDSS.

A Program Default Record cannot be entered on this screen. The Menu has no edit prohibiting entry of a PROGRAM AREA when requesting this screen, but PROGRAM AREA is not saved for this screen. To enter a Program Default Record use the WCN063 – Office/Unit/Worker Maintenance Screen which is described in the next section.

To request the WCN064 – Office/Unit/Worker Data Entry Screen on the WCN060 – Contact Data Maintenance Menu, enter Selection 3, and ACTION U (Update). DISTRICT is pre-filled. No other fields need to be entered. If an

Office/Unit/Worker combination is entered on the Menu, it will be displayed on the first entry line of the WCN064 – Office/Unit Worker Data Entry Screen, otherwise the first line will be blank.

Up to sixteen combinations can be entered on the one screen, and additional screens can be requested.

If an Office/Unit/Worker combination being entered on this screen has the same Area Code as the combination on the line above, the Area Code does not need to be repeated. A matching Area Code and Exchange also need not be repeated, and the same is true for a matching Area Code and Phone Number.

Successful transmission of this screen is acknowledged with a message on the WCN060 – CNS Contact Data Maintenance Menu Screen.

### WCN063 – Office/Unit/Worker Maintenance Screen

The WCN063 – Office/Unit/Worker Maintenance Screen allows entry, maintenance or inquiry of one Office/Unit Worker combination or one Program Default Record each time the screen is requested.

If local procedures require entry of a Program Default Record in the Office/Unit/Worker Table, it must be entered on the WCN063 – Office/Unit/Worker Maintenance Screen. Although a record for a combination of PROGRAM AREA and an OFFICE ID can be entered for the District Data Table, edits on the Menu prevent entry of this combination when requesting the WCN063 screen to enter data to the Office/Unit/Worker Table.

On the WCN060 – Contact Data Maintenance Menu enter Selection 2, either I (Inquiry) or U (Update) in ACTION, and either a PROGRAM AREA or an Office/Unit Worker combination. District is pre-filled.

When the WCN063 – Office/Unit/Worker Maintenance Screen is displayed, DISTRICT, OFFICE ID, UNIT ID and WORKER ID are pre-filled with the data from the Menu and are protected. When this screen is requested to enter a Program Default Record, PROGRAM AREA is displayed in the RESPONSIBLE CENTER field on the WCN063 screen, and is protected.

If a record was not found for a PROGRAM AREA or an Office/Unit/Worker combination entered on the Menu with a U (Update), an A is pre-filled in ACTION on this screen. If a U (Update) was entered in ACTION on the Menu and a record was found, ACTION is blank on this screen. If ACTION is blank, inquiry is assumed, and the record is not changed. If an existing record is to be changed or deleted, a C (Change) or D (Delete) must be entered in ACTION on this screen.

Successful inquiry, entry or maintenance on this screen is acknowledged with a message on the WCN060 – CNS Contact Data Maintenance Menu Screen.

### Advocate Data

Advocate data is entered and maintained by State staff. The WCN061 – Advocate Maintenance Screen is used to enter this information. Enter Selection 5, an ACTION of I (Inquiry) or U (Update), and an ADVOCATE NUMBER on the WCN060 – CNS Contact Data Maintenance Menu Screen.

The WCN061 – Advocate Maintenance Screen is displayed with the ADVOCATE NUMBER pre-filled. If a U was entered in ACTION on the Menu and the ADVOCATE NUMBER entered was not found on the database, an A is pre-filled in the ACTION field on this screen. If a U (Update) was entered in ACTION on the Menu and a record was found, ACTION is blank on this screen. When ACTION is blank, inquiry is assumed and the record is not changed. If an existing record is to be changed or deleted, a C (Change) or D (Delete) must be entered in the ACTION field on this screen.



For each ADVOCATE NUMBER at least one District mnemonic (first four letters of the District Name) or Zip Code is required. Up to 25 DISTRICT/ZIP CODES can be entered on one screen for each ADVOCATE NUMBER. Additional screens can be requested if necessary.

Successful inquiry, entry or maintenance on this screen is acknowledged with a message on the WCN060 – CNS Contact Data Maintenance Menu Screen.

## Reprinting Notices

A reprint of a notice can be requested from the Pending Notice List Screen, Client Notice List Screen, and the Client Notice Detail Screen. Notice reprints requested from these screens will be printed on green-bar paper.

Reprints of notices can also be obtained from the Computer Output to Laser Disk (COLD) system which can be accessed from the DFA Intranet. The notices are in PDF format and can be viewed on-line. They can also be printed on regular 8 ½ x 11 inch paper. See [Computer Output to Laser Disk \(COLD\)](#) for more information.

## CNS Functions

The Client Notice Subsystem is selection 11 on the WMS Menu screen. Transmitting selection 11 will display the Client Notice Subsystem Menu screen, WCN000. The following functions are available on this screen.

### 01 – Notice Entry

Entering Selection 01 with a Case or Registry Number and transmitting will return the Reason Code Screen, WCN011, for data entry of new notice information.

### 02 – Notice Inquiry

Entering Selection 2 with notice number and transmitting, returns the WCN011 - Reason Code screen displaying information for the specified notice in inquiry mode. All fields on the screen will be protected.

### 03 – Notice Update

Entering Selection 3 with a notice number and transmitting returns the WCN011 screen displaying information for the specified notice. Changes can be made to the notice

### 04 – Pending Notice Inquiry

Entering Selection 4 with a Case or Registry Number and transmitting returns the WCN019 - Pending Notice List screen displaying all the notices for the specified case or registry number that are in pending status.

### 05 – Supervisory Review Print

Entering Selection 5 with a notice number and transmitting returns the WCN011 screen with the message, NOTICE NUMBER - XXXXXXXXXXXX HAS BEEN PRINTED.

### 06 – Signoff

Entering Selection 6 and transmitting function like pressing F6. It logs the user off WMS and renders the workstation inactive.

07 – Notice Authorization/Release

Entering Selection 7 and transmitting, returns the WCN021 - Notice Authorization/Release Screen.

08 – Batch Notice Entry

Entering Selection 8 and transmitting returns the WCN022 - Batch Notice Entry screen.

09 – Batch Notice Inquiry

Entering Selection 9 with Batch Number and transmitting returns the WCN022 - Batch Notice Entry screen in inquiry mode.

10 – Batch Notice Update

Entering Selection 10 with a batch number and transmitting returns the WCN022 screen.

11 – Notice History Inquiry

Entering Selection 11 with a case or registry number and transmitting, returns the WCN051 - Client Notice List Screen, listing all the notices for a case that have completed Batch Update and been mailed to the client.

Entering Selection 11 with a notice number and transmitting, returns the WCN052 - Client Notice Detail Screen displaying information about the notice whose number was entered.

12 – Notice History Reprint

Entering Selection 12 with a notice number and transmitting returns the WCN053 - Notice Reprint Cover Sheet Information screen.

13 –

Selection 13 is not currently in use.

14 – CNS Control Info Maintenance

Entering Selection 14 and transmitting returns the WCN060 - Contact Data Maintenance screen.

15 – NYC/Upstate Inquiry

Entering Selection 15 and transmitting returns the WCN161 - Matching Request Criteria Entry screen.

F16 – WMSNMU (Menu Key)

Entering Selection 16 and transmitting returns the WMSMNU - Welfare Management System Menu screen. This selection functions the same as pressing Ctrl+F6.

WCN000 – WMS/Client Notice Subsystem Menu

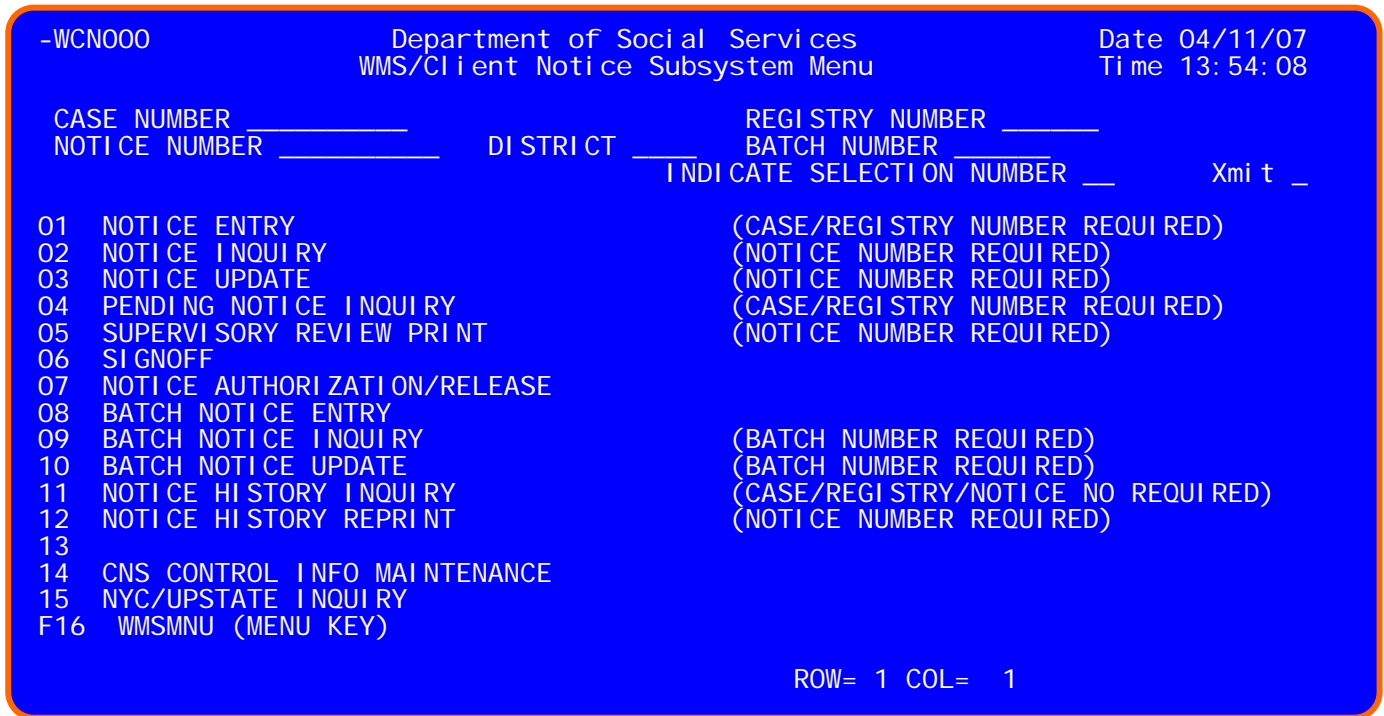


Figure 1 – WMS/Client Notice Subsystem Menu Screen (WCN000)

Purpose

This screen provides access to the Client Notice Subsystem functions by entry of a selection number and other required data as indicated on the screen.

Access

- F11 after sign-on, **or**
- F11 from WMSMNU - WMS Menu screen, and most Menu screens, **or**
- Entering 11 on WMSMNU - WMS Menu screen, **or**
- Ctrl+F6 from most CNS screens

Screen Response

Positive

- Selection 1 displays WCN011 - Reason Code Entry with all fields blank for entry of a new notice
- Selection 2 displays WCN011 - Reason Code Screen in inquiry mode with fields populated with notice data associated with entered notice number

- Selection 3 displays WCN011 - Reason Code Screen in update mode with fields populated with notice data associated with entered notice number
- Selection 4 displays WCN019 - Pending Notice List
- Selection 5 displays WCN000 - WMS/Client Notice Subsystem Menu with message
- Selection 6 renders the Workstation Inactive
- Selection 7 displays WCN021 - Notice Authorization/Release Screen
- Selection 8 displays WCN022 - Batch Notice Entry Screen for entry of a new batch
- Selection 9 displays WCN022 - Batch Notice Entry Screen in inquiry mode for the entered batch number
- Selection 10 displays WCN022 - Batch Notice Entry Screen in update mode for the entered batch number
- Selection 11 displays WCN051 - Client Notice List Screen if case or registry number entered; displays WCN052 - Client Notice Detail Screen if notice number is entered
- Selection 12 displays WCN053 - Notice Reprint Cover Sheet Information
- Selection 14 displays WCN060 - Contact Data Maintenance Menu
- Selection 15 displays WCN161 - Matching Request Criteria Entry Screen
- Selection 16 displays WMSMNU - Welfare Management System Menu

#### Negative

- Fields in error return highlighted with one of the following messages on line 24:
  - A DATABASE ERROR HAS OCCURRED ACCESSING RECORD
  - AN ERROR HAS OCCURRED ACCESSING TEXT MANAGEMENT
  - AN ERROR HAS OCCURRED IN CREATING THE BATCH-NOTICE
  - AN ERROR HAS OCCURRED IN CREATING THE NOTICE
  - BATCH NOTICE RECORD NOT FOUND
  - CAN NOT UPDATE NOTICE NUMBER FOR THIS DISTRICT
  - CASE NOT UPDATE NOTICE NUMBER FOR THIS DISTRICT
  - CASE NUMBER NOT FOUND
  - FUNCTION SELECTION NOT SUPPORTED
  - INVALID CHECK DIGIT
  - INVALID DISTRICT ENTERED
  - INVALID NOTICE NO INPUT

- INVALID SELECTION NUMBER
- NO NOTICE HISTORY FOR THIS CASE NUMBER
- NO NOTICE HISTORY FOR THIS REGISTRY NUMBER
- NO PENDING NOTICES FOR THIS CASE NUMBER
- NO PENDING NOTICES FOR THIS REGISTRY NUMBER
- NOTICE NUMBER NOT FOUND
- PLEASE ENTER BATCH NUMBER
- PLEASE ENTER A NOTICE NUMBER
- PLEASE ENTER CASE NUMBER OR REGISTRY NUMBER – NOT BOTH
- PLEASE ENTER CASE NUMBER OR REGISTRY NUMBER
- PLEASE ENTER CASE NUMBER OR REGISTRY NUMBER
- PLEASE ENTER REQUIRED IDENTIFER NUMBER
- REGISTRY NUMBER NOT FOUND
- SYSTEM ERROR DURING CNS LOOKUP
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu

Key	Description
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Care Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WCN000

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 - CASE NUMBER (10)	Selections 01, 04, and 11
REGISTRY NUMBER	01046 - REGISTRY NUMBER (6)	Selections 01, 04, and 11
NOTICE NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	Selections 02, 03, 05, 11, and 12
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Enter 4 letter mnemonic
BATCH NUMBER	04117 - NOTICE BATCH NUMBER (5)	Selection 09 and 10
INDICATE SELECTION NUMBER	NONE	Required



## Screen Response

### Positive

- The next CNS screen is returned as required by the system. Since these screens are built based on the entered Reason Codes, there are numerous variations that can be displayed when WCN011 is transmitted. Most of these do not appear in the SRM. See the ***Client Notices Subsystem Manual*** for information on screens not covered in this manual.
- A notice number and a pending notice record is generated. The WCN000 - Client Notice System Menu screen is displayed with the case or registry number and the notice number on line 23 if no other CNS screens are required for entry.

### Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CASE F/S ENTRY IS REQUIRED
  - CASE NOT IN CORRECT STATUS FOR THIS TRANSACTION TYPE
  - CASE REASON XXX REQUIRES REASON CODE(S) FOR LINE NUMBER
  - EMERGENCY IND IS OR WAS = X... MANUAL NOTICE REQUIRED
  - ENTRY ALLOWED ONLY FOR PA CASE TYPES
  - INDIVIDUAL LINE NUMBER MAY BE ENTERED ONLY ONCE
  - INDIVIDUAL REASON CODE ENTRY NOT ALLOWED
  - INDIVIDUAL REASON CODE ENTRY REQUIRED
  - INVALID CASE REASON
  - INVALID LINE NUMBER
  - INVALID PA/FS CODE
  - INVALID TRANSACTION TYPE
  - MA REASON CODES NOT ALLOWED ON PA CASE
  - MULTIPLE ENTRY OF SAME REASON CODE NOT ALLOWED
  - NO FS REASON CODE ENTRY ALLOWED UNLESS A PA/FS INDICATOR IS ENTERED
  - NO OTHER REASON CODE ALLOWED WITH PA XXX CASE REASON
  - PA BUDGET REQUIRED FOR THIS REASON CODE
  - PA-FS IND NOT ALLOWED FOR TRANS TYPE
  - PLEASE ENTER REASON CODE(S) FOR LINE NUMBER
  - REASON CODE XXX FOR USE IN DISTRICT 99 ONLY
  - SF-99 NOT SUPPORTED (99 = 1-5, 7-14, 17-22)
  - Other error messages as listed in the ***Client Notice System Manual***
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.



Printed Response

Positive

- Supervisory Review Report

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN000 - Client Notice System Menu with Case Number/Registry number field populated with latest entry
Ctrl+F6	WCN000 - Client Notice System Menu

Screen Field Description – WCN011

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 – CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	A registry number can be entered in this field for transaction types 02 and 03
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
PA/FS IND	01130 - PA FOOD STAMP CODE (2)	
<b>CASE REASONS</b>		
PA	02050 - REASON CODE (3)	3 occurrences
FS	02050 - REASON CODE (3)	3 occurrences
MA	02050 - REASON CODE (3)	3 occurrences
<b>INDIVIDUAL REASONS</b>		
LN	01045 - APPLICATION REGISTER LINE NUMBER (2)	10 occurrences
PA	03121 - PA/MA INDIVIDUAL REASON CODE (3)	30 occurrences - 3 per line number
FS	03014 - FS INDIVIDUAL REASON CODE (3)	30 occurrences - 3 per line number
MA	03015 - MA INDIVIDUAL REASON CODE (3)	30 occurrences - 3 per line number

WCN019 – Pending Notice List

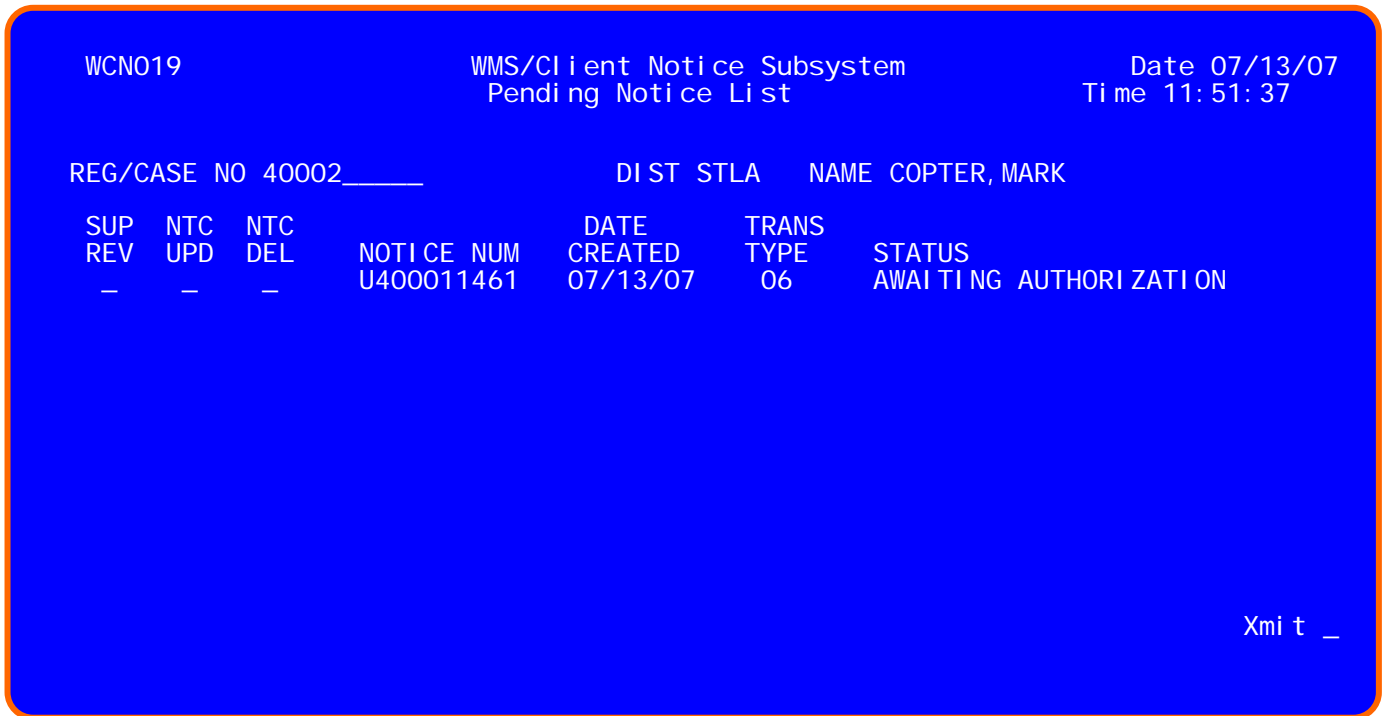


Figure 3 – Pending Notice List (WCN019)

Purpose

This screen lists all the pending notices for a case or registry number. From this screen a user can request a Supervisory Review Report for a pending notice, access screens for changing a pending notice, or delete a pending notice.

Access

- Successful transmission of Selection 04 on WCN000 – WMS/Client Notice Subsystem Menu

Screen Response

Positive

- If an 'X' is entered in a SUP REV field and transmitted, the WCN000 - WMS/Client Notice Subsystem menu is returned with the message, NOTICE NUMBER - XXXXXXXXXXXX HAS BEEN PRINTED
- If an 'X' is entered in a NTC UPD field and transmitted, the WCN011 - Reason Code Screen is returned in update mode displaying information for the notice that was selected from the Pending Notice List
- If a 'D' is entered in a NTC DEL field and transmitted, the WCN019 - Pending Notice List is refreshed with the Status of the deleted notice changed from Pending to Deleted

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CURRENT PAGE IS FIRST PAGE FKEY-03 IGNORED
  - CURRENT PAGE IS LAST PAGE FKEY-02 IGNORED
  - INVALID INPUT VALUE - ONLY "X" OR SPACE PERMITTED
  - PLEASE ENTER D TO DELETE A NOTICE
  - SF99 - NOT SUPPORTED (99 = 4-5, 7-14, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

Positive

- The WCN000 screen with the message NOTICE NUMBER - XXXXXXXXX HAS BEEN PRINTED when an X is entered in the SUP REV column and transmitted.

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN000 - Client Notice System Menu with Case Number/Registry number field populated with latest entry
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN019

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
REG/CASE NO	01046 - REGISTRY NUMBER (6) or 01050 – CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	
NAME	01070 - CASE NAME (28)	
SUP REV	NONE	Enter an 'X' and transmit to request a Supervisory Review Report
NTC UPD	NONE	Enter an 'X' and transmit to change a pending notice record
NTC DEL	NONE	Enter a 'D' and transmit to delete a pending notice record.
NOTICE NUM	04097 - NOTICE IDENTIFIER NUMBER (10)	
DATE CREATED	04128 - PENDING TRANSACTION DATE - MONTH (2)	
	04129 - PENDING TRANSACTION DATE - DAY (2)	
	04127 - PENDING TRANSACTION DATE - YEAR (2)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	

---

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
STATUS	04020 - NOTICE PROCESSING STATUS CODE (1)	

WCN021 – Notice Authorization/Release Screen

Figure 4 – Notice Authorization/Release Screen (WCN021)

Purpose

This screen is used to add notices to the nightly notice production process. This function is reserved for Non-Transaction reason codes (those allowed for Transaction Type 00) like Recertification Call-in and FS Application/Recertification Appointment Reminders. These notices do not require a WMS transaction in order to be produced.

If Office-Unit-Worker values are entered on this screen they will override those associated with the case/notice numbers. ALL notices released will print with the worker name and phone number associated with the values entered.

Access

- Successful transmission of Selection 07 on WCN000 - WMS/Client Notice Subsystem Menu.

Screen Response

Positive

- WCN000 - Client Notice System Menu screen if “N” is entered in the More to Authorize field when the screen is transmitted
- A blank WCN021 - Notice Authorization/Release Screen if “Y” is entered in the More to Authorize field when the screen is transmitted

Negative

- One of the following messages displayed on line 24:
  - INCOMPLETE CASE/NOTICE PAIR - PLEASE CORRECT
  - NO ENTRIES ON SCREEN
  - NOTICE CONTAINS REASON CODE(S) THAT ARE NOT AUTHORIZED FOR BATCH USE
  - NOTICE NUMBER NOT FOUND
  - SF99 - NOT SUPPORTED (99 = 1-5, 7-15, 17-22)
  - WRONG CASE NUMBER FOR NOTICE
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN021

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
CASE #	01050 - CASE NUMBER (10)	32 occurrences
NOTICE #	04097 - NOTICE IDENTIFIER NUMBER (10)	32 occurrences

WCN022 – Batch Notice Entry Screen

-WCN022 WMS/CLIENT NOTICE SUBSYSTEM Date 04/11/07  
Batch notice entry screen Time 14:01:35  
BENEFIT CATEGORY \_\_\_ REASON CODE \_\_\_ PROCESS DATE 041107  
OFFICE \_\_\_ UNIT \_\_\_ WORKER \_\_\_

CASE #	USER VARIABLE # 1	USER VARIABLE # 2	USER VARIABLE # 3
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

More notices to create (Y/N) \_ Xmit \_

Figure 5 – Batch Notice Entry Screen (WCN022)

Purpose

This screen is used to create appointment/renewal notices for several cases at once. Information on the top of the screen, Benefit Category, Reason Code, and Process Date will apply to all of the cases entered on this screen. The Process Date is the day before you want the notices to be mailed. It will default to today's date but can be changed. If a Saturday or Sunday date is entered, the notices will be mailed on the following Tuesday unless Monday is a holiday, in which case they will be mailed on Wednesday.

Entry in Office, Unit, and Worker does not need to be made unless the information for the notices should be different from that in the case records. The date of the appointment is entered in User Variable # 1. It must be at least seven days after the Process Date. As required based on the Reason Code entered, the time of the appointment and an Office Code are entered in User Variable # 2 and User Variable # 3. Variable information for additional cases only needs to be entered if it is different from that entered on the previous line

Access

- For entry of new batch, entering selection 8 on WCN000 and transmitting, **or**
- For batch inquiry, entering selection 9 and a batch number on WCN000 and transmitting, **or**
- For update of a batch, entering selection 10 and a batch number on WCN000 and transmitting

## Screen Response

### Positive

- BATCH NOTICE RECORD 99999 CREATED (where 99999 is the batch number)
- BATCH NOTICE RECORD 99999 HAS BEEN MODIFIED (where 99999 is the batch number)
- BATCH NOTICE RECORD 99999 HAS BEEN DELETED (where 99999 is the batch number)

### Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CASE MUST BE ACTIVE
  - CASE NUMBER NOT FOUND
  - DATE ENTERED MUST BE GREATER THAN/EQUAL PROCESS + 7 DAYS
  - DATE ENTERED MUST BE GREATER THAN/EQUAL PROCESS + 15 DAYS
  - DATE FIELD REQUIRED
  - FIELD IS REQUIRED
  - FIELD MUST BE A VALID TIME
  - INVALID BENEFIT CATEGORY
  - INVALID CASE NUMBER
  - INVALID REGISTRY NUMBER
  - PA CASE WITH FS AUTHORIZED CANNOT BE USED FOR REASON CODE
  - PROCESS DATE IS REQUIRED AND MUST BE A VALID DATE IN THE FORMAT MMDDYY
  - PROCESS DATE MAY NOT BE GREATER THAN MMDDYY ( where MMDDYY = current date + 3 months)
  - PROCESS DATE MAY NOT BE LESS THAN CURRENT DATE
  - REASON CODE ABOVE CANNOT BE USED ON THIS CASE BECAUSE OF ITS TYPE
  - REASON CODE INVALID FOR BENEFIT CATEGORY
  - REASON CODE NOT VALID FOR BATCH ENTRY
  - SF 99 - NOT SUPPORTED (99 = 1-5, 7-8, 10-1517-22) (Note: Ctrl+ F4 is supported when screen is in inquiry or update mode. See **Function Keys** below.)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

## Printed Response

None



Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
F9	Auto Print
Ctrl+F4	Deletes Batch - only when screen is in inquiry or update mode; otherwise not supported
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN022

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
BENEFIT CATEGORY	28003 - BENEFIT CATEGORY CODE (2)	
REASON CODE	02050 - REASON CODE (3)	Required; Must begin with a 'Z'
PROCESS DATE	00042 - BATCH NOTICE PROCESSING MONTH (2)	
	00043 - BATCH NOTICE PROCESSING DAY (2)	
	00033 - BATCH NOTICE ROCESSING YEAR (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
CASE #	01050 - CASE NUMBER (10)	
USER VARIABLE # 1	04121 - BATCH NOTICE VARIABLE TEXT (20)	
USER VARIABLE # 2	04121 - BATCH NOTICE VARIABLE TEXT (20)	
USER VARIABLE # 3	04121 - BATCH NOTICE VARIABLE TEXT (20)	
MORE NOTICES TO CREATE (Y OR N)	NONE	Entry of 'Y' and transmitting returns a blank WCN022 screen for additional batch notice entry.

WCN051 – Client Notice List

>WCN051		WMS/Client Notice Subsystem					Date 01/21/07	
CASE # CNS999		Client Notice List Screen					Time 11:24:26	
NAME SMITH, JOHN		DIST STLA						
		TYPE MA					STATUS ACTIVE	
		OFFICE 223 UNIT MA11					WORKER CST51	
R D	NOTICE #	FAIR HEAR #	MAIL DT	TRANS	TYPE	AUTH #	AFFECTED IND	
P T	PA ACTION	EFF DT	FS ACTION	EFF DT		MA ACTION	EFF DT	
--	U30000986		01/20/07	05-	CHNGE	30003812	AA09067T	
						CHANGE		
--	U300K2934		01/19/07	05-	CHNGE	30009231	AA09067T	
						CHANGE		

Xmit \_

Figure 6 – Client Notice List (WCN051)

Purpose

This screen(s) lists all the notices for a case or registry. These notices have already gone through batch update and been mailed, i.e. they are no longer pending. From this screen a user can request a reprint of the notice or view details of a notice

Access

- Successful transmission of Selection 11 with a case or registry number on WCN000 – WMS/Client Notice Subsystem Menu

Screen Response

Positive

- If an 'X' or 'Y' is entered in the DT field and transmitted, the WCN052 - Client Notice Detail Screen is returned displaying details of the selected notice.
- If an 'X' or 'Y' is entered in the RP field, the WCN053 - Notice Reprint Cover Sheet Information screen is returned.

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:

- CURRENT PAGE IS FIRST PAGE FKEY-03 IGNORED
- CURRENT PAGE IS LAST PAGE FKEY-02 IGNORED
- PLEASE CHOOSE ONLY ONE SELECTION
- SF-99 NOT SUPPORTED (99 = 4-5, 7-14, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN000 - Client Notice System Menu with Case Number/Registry number field populated with latest entry
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN051

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	
NAME	01070 - CASE NAME (28)	
TYPE	01060 - CASE TYPE (2)	
STATUS	02090 - CASE STATUS (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
RP	NONE	Enter an 'X' or a 'Y' and transmit to reprint a notice
DT	NONE	Enter an 'X' or a 'Y' and transmit to view details of a notice
NOTICE #	04097 - NOTICE IDENTIFIER NUMBER (10)	
FAIR HEARING #	57000 - FAIR HEARING NUMBER (8)	
MAIL DATE	04049 - NOTICE MAILING DATE GROUP (8)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
AUTH #	02040 - AUTHORIZATION NUMBER (8)	
AFFECTED IND	03010 - CLIENT IDENTIFICATION NUMBER (8)	
PA ACTION	28006 - NOTICE ACTION CODE (2)	
EFF DATE	04042 - EFFECTIVE DATE GROUP (8)	
FS ACTION	28006 - NOTICE ACTION CODE (2)	
EFF DATE	04042 - EFFECTIVE DATE GROUP(8)	
MA ACTION	28006 - NOTICE ACTION CODE (2)	

---

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
EFF DATE	04042 - EFFECTIVE DATE GROUP (8)	

WCN052 – Client Notice Detail

```

-WCN052                WMS/Client Notice Subsystem                Date 08/06/07
                        Client Notice Detail Screen                Time 10:12:14
Notice # U0100B2399
CASE # V17MEDATT2      DIST ALBA  TRANS CH      STATUS CHANGE
NAME WHI TE SHELIA    OFF/UNIT/WRKR  /MA  /CSS02  MAIL 07/05/03
ADDR 109 MAIN STREET  AUTH NO 01203051  HEARING #
CITY ALBANY          ST NY ZIP 12111-0000
ASSC 1                ASSC 3
ASSC 2                ASSC 4
                        AID STATUS  ENG/SPN  S NOT IND T ONLINE N
                        FOOD STAMPS  MEDICAL ASSI STANCE
CASE ACTION          PUBLIC ASSI STANCE
REASON CODES
EFFECTIVE DATE
BUDGET VERSION
IND CIN AX69303B  IND CIN AX65780H  IND CIN AX69493D  IND CIN 003
EFF DATE 04/01/03  EFF DATE          EFF DATE          EFF DATE
PA          PA          PA          PA
FS          FS          FS          FS
MA V17      MA C05      MA C05      MA
Print _
Xmit _
  
```

Figure 7 – Client Notice Detail (WCN052)

Purpose

This screen displays information about a notice that has been mailed to a client.

Access

- Successful transmission of Selection 11 with notice number on WCN000 – WMS/Client Notice Subsystem Menu, **or**
- Entering a 'Y' or 'X' in the DT column beside a notice and transmitting the WCN051 - Client Notice List Screen.

Screen Response

Positive

- If a 'Y' is entered in the Print field and transmitted, the WCN053 - Notice Cover Sheet Information screen is returned with the message, INPUT IGNORED - XMIT TO MAKE NOTICE AVAILABLE OVERNIGHT FOR ONLINE REPRINT

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CURRENT PAGE IS FIRST PAGE FKEY-03 IGNORED

- CURRENT PAGE IS LAST PAGE FKEY-02 IGNORED
- MUST BE A Y FOR A REPRINT REQUEST
- SF-99 NOT SUPPORTED (99 = 4-5, 7-14, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

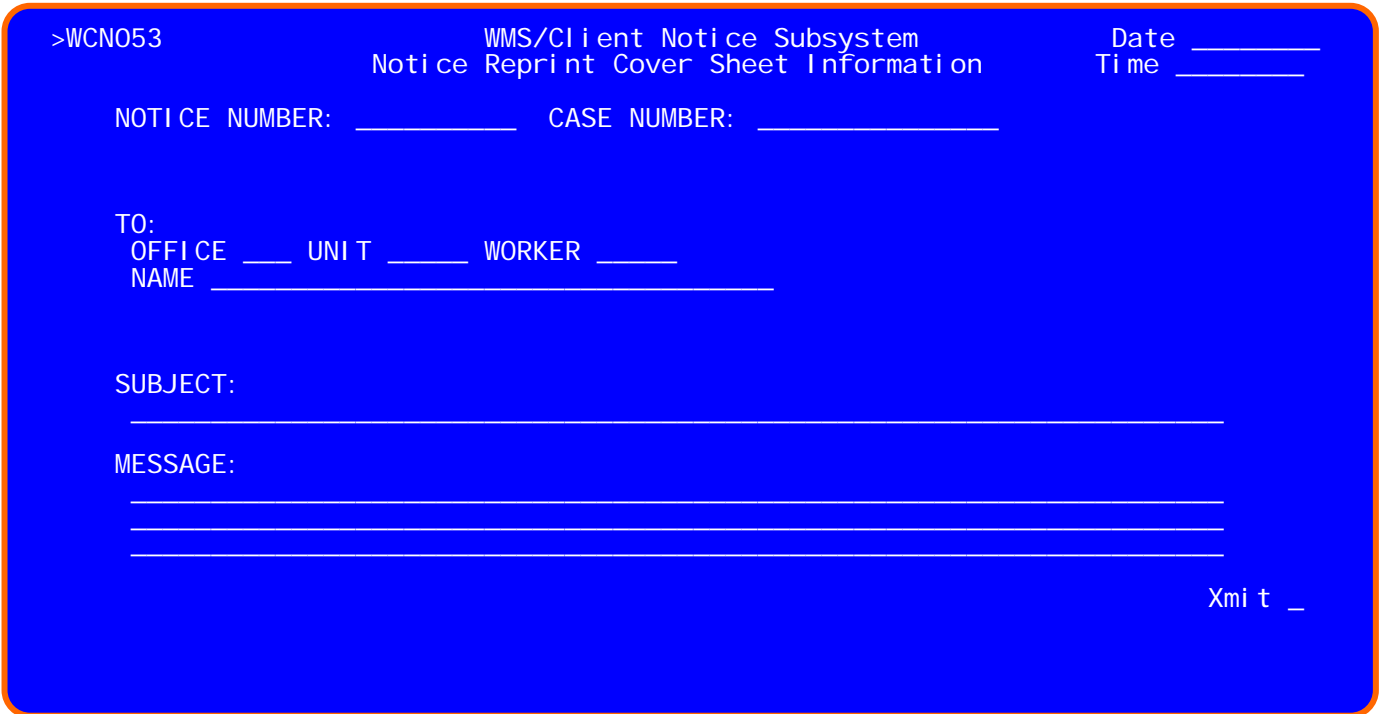
Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN051 - Client Notice List Screen
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN052

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NOTICE #	04097 - NOTICE IDENTIFIER NUMBER (10)	
CASE #	01050 - CASE NUMBER (10)	
TRANS	02010 - TRANSACTION TYPE (2)	
STATUS	02090 - CASE STATUS (2)	
NAME		
MAIL	04049 - NOTICE MAILING DATE GROUP (8)	
ADDR	05120 - MAILING STREET (35)	
AUTH NO	02040 - AUTHORIZATION NUMBER (8)	
HEARING #	57000 - FAIR HEARING NUMBER (8)	
CITY	05130 - MAILING CITY/TOWN (15)	
ST	05140 - MAILING STATE (2)	
ZIP	04092 - MAILING ADDRESS-ZIP-5 DIGIT (5) - 04093 - MAILING ADDRESS-ZIP-4 DIGIT (4)	
ASSC 1	05011 - ASSOCIATED NAME (28)	
ASSC 3	05011 - ASSOCIATED NAME (28)	
ASSC 2	05011 - ASSOCIATED NAME (28)	
ASSC 4	05011 - ASSOCIATED NAME (28)	
AID STATUS	57014 - AID STATUS (1)	Indicates whether aid is to be continued through the fair hearing process
ENG/SPN	04002 - LANGUAGE OF NOTICE FLAG (1)	
NOT IND	04001 - TIMELY OR ADEQUATE NOTICE INDICATOR (1)	A - Adequate notice required T - Timely notice required
ONLINE	NONE	Either "Y" or "N" is displayed
CASE ACTION	28006 - NOTICE TEXT CONTROL ACTION CODE (2)	3 occurrences
REASON CODES	02050 - REASON CODE (3)	9 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
EFFECTIVE DATE	04042 - EFFECTIVE DATE GROUP (8)	3 occurrences
BUDGET VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
IND CIN	03010 - CLIENT IDENTIFICATION (8)	4 occurrences
EFF DATE	04148 - INDIVIDUAL NOTICE EFFECTIVE DATE (12)	4 occurrences
PA	03121 - PA/MA INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN
FS	03014 - FS INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN
MA	03015 - MA INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN
PRINT	NONE	Enter a 'Y' to request a notice reprint

WCN053 – Notice Reprint Cover Sheet Information



```
>WCN053                                     WMS/Client Notice Subsystem
                                           Notice Reprint Cover Sheet Information
                                           Date _____
                                           Time  _____

NOTICE NUMBER: _____ CASE NUMBER: _____

TO:
OFFICE ____ UNIT ____ WORKER ____
NAME _____

SUBJECT:
_____

MESSAGE:
_____  
_____  
_____

Xmit _
```

Figure 8 – Notice Reprint Cover Sheet Information (WCN053)

Purpose

This screen is used to request a notice reprint and to enter information that will appear on the cover sheet for the reprint. The Notice Number and Case Number are always displayed on this screen and are protected. Depending on the notice type the other fields on this screen may or may not be displayed.

Access

- Successful transmission of Selection 12 with notice number on WCN000 – WMS/Client Notice Subsystem Menu, **or**
- Successful transmission of WCN052 when a 'Y' has been entered in the PRINT field, **or**
- Successful transmission of WCN051 when an 'X' or 'Y' has been entered in the RP column next to the notice to be reprinted.

Screen Response

Positive

- The WCN000 - Client Notice System Menu screen is displayed with the message, REPRINT FOR NOTICE - XXXXXXXXXXXX PROCESSED on line 24.



Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - ENTER OFFICE/UNIT/WORKER OR NAME
  - ENTER OFFICE/WORKER OR NAME
  - SF-99 NOT SUPPORTED (99 = 1-5, 7-14, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

Positive

- Reprint of the requested notice with a cover sheet.

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN051 - Client Notice List Screen with message, REPRINT FOR NOTICE - XXXXXXXXXXXX HAS BEEN ABORTED, if WCN051 was accessed from WCN053, <b>or</b>  WCN162 - Client Notice List Screen with message, REPRINT FOR NOTICE - XXXXXXXXXXXX HAS BEEN ABORTED, if WCN053 was accessed from WCN162
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN053

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NOTICE NUMBER:	04097 - NOTICE IDENTIFIER NUMBER (10)	
CASE NUMBER:	01050 - CASE NUMBER (10)	
<b>TO:</b>		
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
NAME	NONE	
SUBJECT:	NONE	
MESSAGE:	NONE	

WCN060 – Contact Data Maintenance Menu

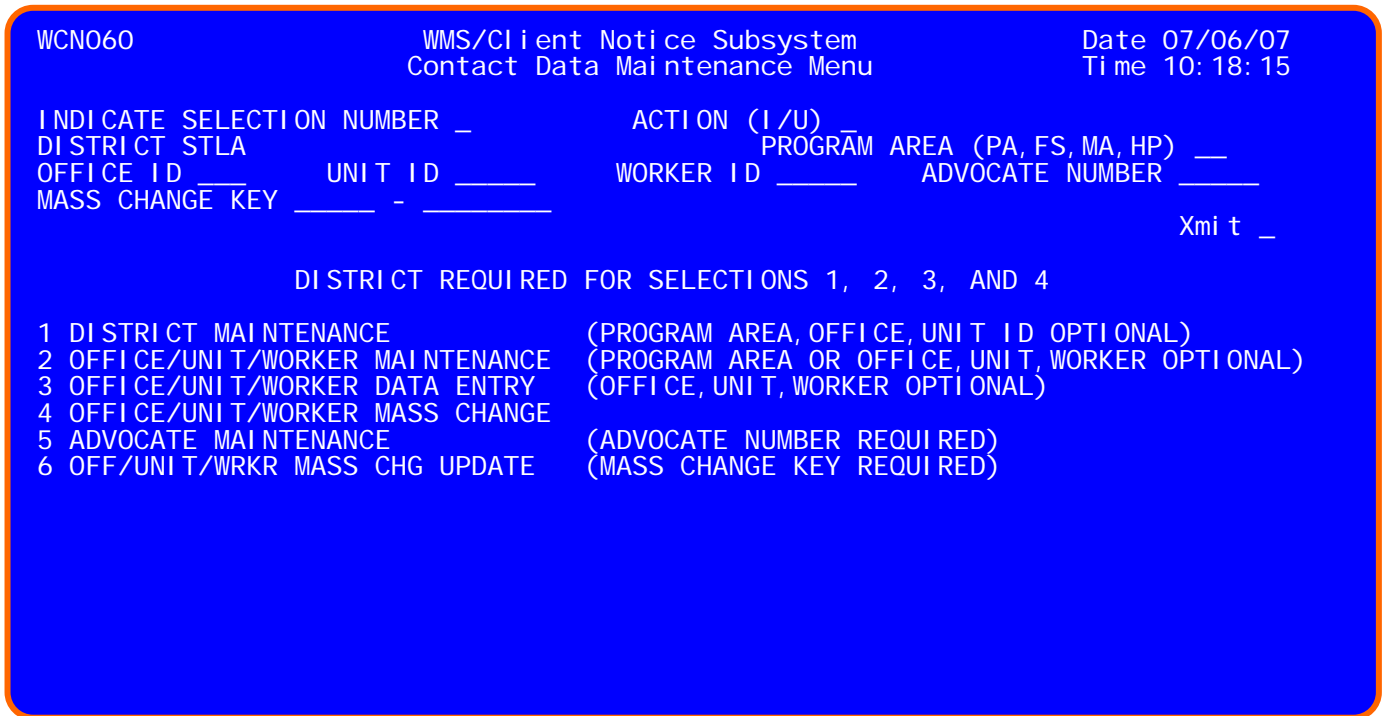


Figure 9 – Contact Data Maintenance Menu (WCN060)

Purpose

This screen is used to access screens which allow entry, update or inquiry to:

- District/Responsible Center record
- Office/Unit/Worker record
- Advocate record.

Selections 4 and 5 are not used at this time.

Access

- Entering 14 on WCN000 WMS/Client Notice Subsystem Menu

Screen Response

Positive

- Selection 1 displays WCN062 – District/Responsible Center Maintenance Screen,
- Selection 2 displays WCN063 – Office/Unit/Worker Maintenance Screen,
- Selection 3 displays WCN064 – Office/Unit/Worker Data Entry Screen,

- Selection 5 displays WCN061 – Advocate Maintenance Screen,

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - One of the Contact Error Data messages listed at the end of this section.
  - SF99 NOT SUPPORTED – REXMT (99 = 1-5, 7-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN060

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
INDICATE SELECTION NUMBER	NONE	Required
ACTION (I/U)	NONE	Required; Enter “I” for Inquiry or “U” for Update
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Protected; Mnemonic -first 4 letters of district name
PROGRAM AREA (PA, FS, MA, HP)	NONE	
OFFICE ID	01020 - LOCAL OFFICE NUMBER (3)	
UNIT ID	01030 - UNIT IDENTIFIER (5)	
WORKER ID	01040 - WORKER IDENTIFIER (5)	
ADVOCATE NUMBER	04026 - ADVOCATE GROUP NUMBER (5)	Required for Selection 5
MASS CHANGE KEY	NONE	Currently not used

WCN061 – Advocate Maintenance Screen

```

-WCN061                WMS/Client Notice Subsystem                Date 04/11/07
Advocate Maintenance Screen                Time 14:18:23
ADVOCATE NUMBER 22781                ACTION (A, C, D) A                Page 1 of 1

NAME _____
ADDRESS 1 _____
ADDRESS 2 _____
CITY _____ STATE NY ZIP _____
PHONE NUMBER ____-____-____

                DI STRI CTS Advocate Serves

                _____
                _____
                _____
                _____
                _____
                MORE DI STRI CTS (Y/N) N

                Xmi t _
  
```

Figure 10 – Advocate Maintenance Screen (WCN061)

Purpose

This screen is used to inquire, add, change, delete or inquire on Advocate contact data.

Access

- Successful transmission Selection 5 on WCN060 – Contact Data Menu.

Screen Response

Positive

- WCN060 - Contact Data Menu with one of the following messages:
  - ADVOCATE RECORD HAS BEEN SUCCESSFULLY ADDED
  - ADVOCATE RECORD HAS BEEN SUCCESSFULLY DELETED
  - ADVOCATE RECORD HAS BEEN SUCCESSFULLY ENTERED
  - ADVOCATE RECORD HAS BEEN SUCCESSFULLY INQUIRED
- If a Y is entered for MORE DISTRICT/ZIP CODES, the next DISTRICT/ZIP CODES are displayed.

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:

- One of the Contact Error Data messages listed at the end of this section
- SF99 NOT SUPPORTED – REXMT (99 = 1-5, 7-15, 17-22)
- Any Universal Screen Message – see **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN061

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ADVOCATE NUMBER	04026 - ADVOCATE GROUP NUMBER (5)	
ACTION (A, C, D)	NONE	Enter "A" to add a record, "C" to change a record, "D" to delete a record, or a space for inquiry.
NAME	04027 - ADVOCATE GROUP NAME (60)	Required
ADDRESS 1	04029 - ADVOCATE ADDRESS LINE 1 (35)	Required
ADDRESS 2	04030 - ADVOCATE ADDRESS LINE 2 (35)	
CITY	04031 - ADVOCATE ADDRESS - CITY (24)	Required
STATE	04032 - ADVOCATE ADDRESS - STATE (2)	Required
ZIP	04033 - ADVOCATE ADDRESS - ZIP (11)	First 5 digits required
PHONE NUMBER	04034 - ADVOCATE AREA CODE (3)	
	04035 - ADVOCATE PHONE (7)	
DISTRICTS ADVOCATE SERVES	04092 - ADVOCATE DOMAIN (4)	25 occurrences
MORE DISTRICTS (Y OR N)	NONE	Defaults to "N"; Enter "Y" and transmit to enter more districts

WCN062 – District Maintenance Screen

```

-WCN062                WMS/Client Notice Subsystem                Date 04/11/07
                        DI STRI CT MAI NTENANCE SCREEN                Time 14:06:51

DI STRI CT STLA        PROGRAM AREA
OFFI CE                UNI T        ACTI ON (A, C, D) _

NAME                   ST_LAWRENCE_COUNTY_____
ADDRESS                NOTI CE_ADDR_LI NE_1_____
                       NOTI CE_ADDR_LI NE_2_____
CITY                   POTSDAM_____ STATE NY        ZIP 13676

                                DI STRI CT Phone Numbers
                                GENERAL 315 555 1000 EXT. _____
                                CONFERENCE 315 555 2000 EXT. _____
                                FAI R HEARINGS 315 555 3000 EXT. _____
                                RECORD ACCESS 315 555 4000 EXT. _____
                                CHI LD/TEEN HEALTH 315 555 5000 EXT. _____
                                FS RECERTI FI CATI ON _____ EXT. _____
                                EMPLOYMENT 315 555 7000 EXT. _____
                                FS REPAYMENT 315 555 8000 EXT. _____
                                MA RECERTI FI CATI ON 315 555 9000 EXT. _____

                                                                Xmi t _
  
```

Figure 11 – District Maintenance Screen (WCN062)

Purpose

This screen is used to add, change, delete or inquire on District-wide Contact information which is stored in the District Data Table.

Access

- Successful Transmission of Selection 1 on WCN060 – Contact Data Menu.

Screen Response

Positive

- WCN060 – Contact Data Menu with one of the following messages:
  - DISTRICT RECORD HAS BEEN SUCCESSFULLY CHANGED
  - DISTRICT RECORD HAS BEEN SUCCESSFULLY DELETED
  - DISTRICT RECORD HAS BEEN SUCCESSFULLY INQUIRED
  - ENTRY OF DISTRICT HAS BEEN ABORTED
- WCN064 – CNS Office/Unit/Worker Data Entry Screen, if A (Add) is entered in ACTION field

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - One of the Contact Error Data messages listed at the end of this section
  - SF99 NOT SUPPORTED – REXMT (99 = 1-5, 7-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN062

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Protected; Mnemonic - first 4 letters of district name
PROGRAM AREA	28018 - BENEFIT PROGRAM AREA CODE (2)	
OFFICE	04016 - NOTICE ORIGINATING OFFICE NUMBER (3)	
UNIT	04114 - NOTICE ORIGINATING UNIT IDENTIFIER (5)	
ACTION (A, C, D)	NONE	
NAME	95907 - DISTRICT NAME (28)	
ADDRESS	95901 - DISTRICT ADDRESS 1 (25)	
	95902 - DISTRICT ADDRESS 2 (25)	
CITY	95903 - DISTRICT CITY (15)	
STATE NY	NONE	Protected
ZIP	95904 - DISTRICT ZIP (9)	
<b>DISTRICT PHONE NUMBERS</b>		
GENERAL	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
CONFERENCE	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
FAIR HEARINGS	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
RECORD ACCESS	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
CHILD/TEEN HEALTH	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
FS RECERTIFICATION	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
EMPLOYMENT	04076 - DISTRICT PHONE NUMBER (10)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
FS REPAYMENT	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	
MA RECERTIFICATION	04076 - DISTRICT PHONE NUMBER (10)	
EXT.	00044 - PHONE EXTENSION NUMBER (5)	



WCN063 – Office/Unit/Worker Maintenance Screen

```
-WCN063                WMS/Client Notice Subsystem                Date 04/11/07
                        Office/Unit/Worker Maintenance Screen          Time 14:09:08

DISTRICT STLA                PROGRAM AREA
OFFICE ID                UNIT ID                WORKER ID                ACTION (A, C, D) _

PHONE NUMBER 315 555 9999 EXT. 4444
NAME                WORKER, DEFAULT _____

Xmit _
```

Figure 12 – Office/Unit/Worker Maintenance Screen (WCN063)

Purpose

This screen is used to add, change, delete or inquire on contact information in the Office/Unit/Worker Table.

Access

- Successful transmission of Selection 2 on WCN060 – Contact Data Menu

Screen Response

Positive

- WCN060 – Contact Data Menu with one of the following messages:
  - ENTRY OF OFFICE/UNIT/WORKER RECORD(S) HAS BEEN ABORTED
  - OFFICE /UNIT/WORKER RECORD HAS BEEN SUCCESSFULLY ADDED
  - OFFICE /UNIT/WORKER RECORD HAS BEEN SUCCESSFULLY CHANGED
  - OFFICE /UNIT/WORKER RECORD HAS BEEN SUCCESSFULLY DELETED
  - OFFICE /UNIT/WORKER RECORD HAS BEEN SUCCESSFULLY INQUIRED

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:

- One of the Contact Error Data messages listed at the end of this section
- SF99 NOT SUPPORTED – REXMT (99 = 1-5, 7-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description – WCN063

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Protected; Mnemonic - first 4 letters of district name
PROGRAM AREA	28018 - PROGRAM AREA (2)	
OFFICE ID	04016 - NOTICE ORIGINATING OFFICE NUMBER (3)	
UNIT ID	04114 - NOTICE ORIGINATING UNIT IDENTIFIER (5)	
WORKER ID	04112 - NOTICE ORIGINATING WORKER IDENTIFIER (5)	
ACTION (A, C, D)	NONE	Enter "A" for add, "C" for change, or "D" for delete the record
PHONE NUMBER	04080 - UNIT/ WORKER PHONE NUMBER (10)	Required unless inquiry mode
EXT	00044 - PHONE EXTENSION NUMBER (4)	
NAME	04079 - UNIT/ WORKER NAME (28)	Required unless inquiry mode

WCN161 – Matching Request Criteria Entry Screen

WCN161 WMS/Client Notice Subsystem DATE 07/13/07  
 MATCHING REQUEST CRITERIA ENTRY SCREEN TIME 10:28:28

SEARCH BY:

NOTICE NUMBER \_\_\_\_\_

CLIENT NUMBER \_\_\_\_\_ DISTRICT \_\_\_\_\_

CASE NUMBER \_\_\_\_\_ DISTRICT \_\_\_\_\_ SUFFIX \_\_\_\_\_ (FOR NYC ONLY)  
 (O WILL LIST ALL THE NOTICES)

SOC SEC NUMB \_\_\_\_\_ DISTRICT \_\_\_\_\_

NAME LAST \_\_\_\_\_ FIRST \_\_\_\_\_ MI \_ SEX \_ DISTRICT \_\_\_\_\_

OPTIONAL NAME SEARCH CRITERIA: BIRTH DATE MM DD YYYY N RANGE CHECK (Y/N)

1 YEAR TRANSACTION HISTORY (Y/N) Y

XMIT \_

Figure 13 – Matching Request Criteria Entry Screen (WCN161)

Purpose

Criteria for searching notice information is entered on this screen. Depending on the criteria entered one of three screens can be returned as explained under the Positive Screen Response below. Both Upstate and New York City notices/individuals are included in searches initiated from this screen.

Access

- Entering selection 15 on the WCN000 - Client Notice Subsystem Menu screen and transmitting.

Screen Response

Positive

- If Notice Number is entered, the WCN164 - Client Notice Detail Screen is returned displaying information about the entered notice.
- If Client Number/District or Case Number/District or Case Number/District/Suffix is entered, the WCN162 - Client Notice List Screen is returned displaying all notices associated with the entered criteria.
- If Soc Sec Numb/District or any Name fields are entered, the WCN163 - Possible Matched Within District of XXX (where XXXX is the district mnemonic) is returned displaying a list of individuals matching the entered criteria.

### Negative

- One of the following messages on Line 24:
  - CASE NUMBER NOT FOUND
  - CLIENT ID NUMBER NOT FOUND
  - FIRST NAME IS REQUIRED
  - INVALID BIRTHDAY ENTERED
  - INVALID CHECK DIGIT ON CLIENT NUMBER
  - INVALID DISTRICT ENTERED
  - INVALID ENTRY FOR 1 YR TRANSACTION HISTORY
  - INVALID ENTRY FOR BIRTHDATE RANGE INDICATOR
  - INVALID NOTICE NO INPUT
  - INVALID RANGE INDICATOR OF “Y” FOR NO BIRTHDAY
  - LAST NAME IS REQUIRED
  - NAME MATCH NOT FOUND
  - NO MATCH FOUND ON NYC SYSTEM
  - PLEASE CLIENT ID NUMBER
  - PLEASE ENTER CASE NUMBER
  - PLEASE ENTER DISTRICT
  - PLEASE ENTER SOCIAL SECURITY NUMBER
  - PLEASE FILL IN AT LEAST ONE FIELD
  - PLEASE FILL IN DATA ON ONE LINE ONLY
  - SEX MUST BE “M” OR “F”
  - SF99 - NOT SUPPORTED (1-5, 7-15, 17-22)
  - SOCIAL SECURITY NUMBER NOT FOUND
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WCN000 – Client Notice System Menu

Screen Field Description - WCN161

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>SEARCH BY:</b>		
NOTICE NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	
CLIENT NUMBER	03010 - CLIENT IDENTIFICATION (8)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
CASE NUMBER	01050 - CASE NUMBER (10)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
SUFFIX	01904 - SUFFIX (2)	For NYC Only
SOC SEC NUMB	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
<b>NAME</b>		
LAST	03030 - NAME (LAST) (17)	Characters 12-28.
FIRST	03030 - NAME (FIRST) (10)	Characters 1-10.
MI	03030 - NAME (MI) (1)	Character 11
SEX	03050 - SEX (1)	SEX
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
<b>OPTIONAL NAME SEARCH CRITERIA:</b>		
<b>BIRTH DATE</b>		
MM	03060 - DATE OF BIRTH (2)	Characters 1-2
DD	03060 - DATE OF BIRTH (2)	Characters 3-4
YYYY	03060 - DATE OF BIRTH (4)	Characters 5-8
RANGE CHECK (Y/N)	NONE	
1 YEAR TRANSACTION HISTORY (Y/N)	NONE	

WCN164 – Client Notice Detail Screen

```

-WCN164                                WMS/Client Notice Subsystem           Date 08/03/07
                                        Client notice detail screen           Time 11:46:35
                                        Client notice detail screen           Page 1 of 1
Notice # U010079921
CASE # V17MEDATT2                      DIST ALBA  TRANS 05  STATUS CHANGE
NAME SMYTH CALVIN                      O/U/W
ADDR                                     AUTH NO 01199742  HEARING #
CITY          ST  ZIP  -
ASSC 1
ASSC 2                                ASSC 3
                                        ASSC 4
                                        ENG/SPN S NOT IND T ONLINE N
CASE ACTION  PUBLIC ASSISTANCE  FOOD STAMPS  MEDICAL ASSISTANCE
REASON CODES                                     CH
                                                I 89 1 IRC REQUIR

EFFECTIVE DATE
BUDGET VERSION
IND CIN AX65779T  IND CIN AX65780H  IND CIN          IND CIN          3
EFF DATE 11/01/02  EFF DATE 11/01/02  EFF DATE          EFF DATE
PA  ___ ___ ___  PA  ___ ___ ___  PA  ___ ___ ___  PA  ___ ___ ___
FS  ___ ___ ___  FS  ___ ___ ___  FS  ___ ___ ___  FS  ___ ___ ___
MA  V17 ___ ___  MA  ___ ___ ___  MA  ___ ___ ___  MA  ___ ___ ___
Notice Reprint  _
                                                Xmit  _
  
```

Figure 14 – Client Notice Detail Screen (WCN164)

Purpose

This screen displays information about a notice that has been mailed to a client. All fields on this screen are protected.

Access

- Successful transmission of WCN161 - Matching Request Criteria Entry Screen with a Notice Number, or
- Successful transmission of WCN162 - Client Notice List Screen when an 'X' has been entered in the DT field

Screen Response

Positive

- WCN053 - Notice Reprint Coversheet Information screen if 'Y' is entered in the Notice Reprint field and the screen is transmitted

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- INVALID SELECTION - SPACE, Y, N ONLY
- PLEASE PERFORM A FUNCTION OR SELECT ONE OF THE ABOVE
- SF99 - NOT SUPPORTED (5, 7-14, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F4	WCN162 - Client Notice List Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN161 - Matching Request Criteria Entry Screen with search criteria fields populated with latest entries
Ctrl+F6	WCN161 - Matching Request Criteria Entry Screen

Screen Field Description – WCN164

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NOTICE #	04097 - NOTICE IDENTIFIER NUMBER (10)	
CASE #	01050 - CASE NUMBER (10)	
SUFFIX	01904 - SUFFIX (2)	Displayed for NYC only cases only; This field is not visible for Upstate cases
DIST	01010 - TRANSACTION DISTRICT (2)	
TRANS	02010 - TRANSACTION TYPE (2)	
STATUS	02090 - CASE STATUS (2)	
NAME		
O/U/W	04016 - NOTICE ORIGINATING OFFICE NUMBER (3)/ 04114 - NOTICE ORIGINATING UNIT IDENTIFIER (5)/ 04112 - NOTICE ORIGINATING WORKER IDENTIFIER (5)	Office/Unit/Worker
MAIL	04049 - NOTICE MAILING DATE GROUP (8)	
ADDR	05120 - MAILING STREET (35)	
AUTH NO	02040 - AUTHORIZATION NUMBER (8)	
HEARING #	57000 - FAIR HEARING NUMBER (8)	
CITY	05130 - MAILING CITY/TOWN (15)	
STATE	05140 - MAILING STATE (2)	
ZIP	04092 - MAILING ADDRESS-ZIP-5 DIGIT (5) - 04093 - MAILING ADDRESS-ZIP-4 DIGIT (4)	
ASSC 1	05011 - ASSOCIATED NAME (28)	
ASSC 3	05011 - ASSOCIATED NAME (28)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ASSC 2	05011 - ASSOCIATED NAME (28)	
ASSC 4	05011 - ASSOCIATED NAME (28)	
ENG/SPN	04002 - LANGUAGE OF NOTICE FLAG (1)	
NOT IND	04001 - TIMELY OR ADEQUATE NOTICE INDICATOR CODE (1)	A - Adequate notice required T - Timely notice required
ONLINE	NONE	Either "Y" or "N" is displayed
CASE ACTION	28006 - NOTICE TEXT CONTROL ACTION CODE (2)	3 occurrences
REASON CODES	02050 - REASON CODE (3)	9 occurrences
EFFECTIVE DATE	04042 - EFFECTIVE DATE GROUP (8)	3 occurrences
BUDGET VERSION	24732 - PA BUDGET VERSION NUMBER (3)	
IND CIN	03010 - CLIENT IDENTIFICATION (8)	4 occurrences
EFF DATE	04148 - INDIVIDUAL NOTICE EFFECTIVE DATE (12)	4 occurrences
PA	03121 - PA/MA INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN
FS	03014 - FS INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN
MA	03015 - MA INDIVIDUAL REASON CODE (3)	12 occurrences; 3 for each CIN



WCN162 – Client Notice List Screen

-WCN162		WMS/Client Notice Subsystem					DATE	08/03/07	
CASE # V17MEDATT2		CLIENT NOTICE LIST SCREEN					TIME	11:16:22	
NAME WHITE SHELIA		DIST ALBA					PAGE	01 OF 01	
R D	NOTICE #	OFFICE	UNIT MA	TYPE FHP	STATUS	ACTIVE			
P T	PA ACTION	FAIR HEAR #	MAIL DT	TRANS TYPE	WORKER	CSS02	AUTH #	AFFECTED	IND
— —	U0100B2399	EFF DT	FS ACTION	05 CHANGE	EFF DT	MA ACTION	01203051	AX69303B	*
							I 89-1	IRC REQUI	
							01199824	AX66132K	*
							I 89-1	IRC REQUI	
							01199742	AX65779T	*
							I 89-1	IRC REQUI	

Xmit \_

Figure 15 – Client Notice List Screen (WCN162)

Purpose

This screen(s) lists all the notices for a case or registry. These notices have already gone through batch update and been mailed, i.e. they are no longer pending. From this screen a user can request a reprint of the notice or view details of a notice

Access

- Successful transmission of WCN161 – Matching Request Criteria Entry Screen with either a Client Number and District or a Case Number and a District or a Case Number, District, and Suffix

Screen Response

Positive

- If an 'X' is entered in the DT field and transmitted, the WCN164 - Client Notice Detail Screen is returned displaying details of the selected notice.
- If an 'X' is entered in the RP field, the WCN053 - Notice Reprint Cover Sheet Information screen is returned.

Negative

- Field(s) in error return highlighted with one of the following messages on Line 24:

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- PLEASE SELECT A NOTICE
- PLEASE SELECT ONLY ONE NOTICE
- SF99 - NOT SUPPORTED (5, 7-14, 17-22)
- YOU MAY NOT SELECT FROM BOTH COLUMNS
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous Page if there are multiple pages
F4	WCN163 - Possible Matched Within District of XXXX
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN161 - Matching Request Criteria Entry Screen with search criteria fields populated with latest entries
Ctrl+F6	WCN161 - Matching Request Criteria Entry Screen

Screen Field Description – WCN162

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
SUFX	01904 - SUFFIX (2)	Displayed only for NYC cases; This field is not visible for Upstate cases.
DIST	01010 - TRANSACTION DISTRICT (2)	
NAME	01070 - CASE NAME (28)	
TYPE	01060 - CASE TYPE (2)	
STATUS	02090 - CASE STATUS (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
RP	NONE	Enter an 'x' and transmit to reprint a notice
DT	NONE	Enter an 'X' and transmit to view details of a notice
NOTICE #	04097 - NOTICE IDENTIFIER NUMBER (10)	
FAIR HEARING #	57000 - FAIR HEARING NUMBER (8)	
MAIL DATE	04049 - NOTICE MAILING DATE GROUP (8)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
AUTH #	02040 - AUTHORIZATION NUMBER (8)	
AFFECTED IND	03010 - CLIENT IDENTIFICATION NUMBER (8)	
PA ACTION	28006 - NOTICE ACTION CODE (2)	
EFF DATE	04042 - EFFECTIVE DATE GROUP (8)	
FS ACTION	28006 - NOTICE ACTION CODE (2)	
EFF DATE	04042 - EFFECTIVE DATE GROUP (8)	
MA ACTION	28006 - NOTICE ACTION CODE (2)	
EFF DATE	04042 - EFFECTIVE DATE GROUP (8)	

WCN163 – Possible Matched Within District of XXXX (where XXXX is the district mnemonic)

-WCN163		WMS/Client Notice Subsystem					DATE
		POSSIBLE MATCHED WITHIN DISTRICT OF UPS					TIME
N	SEARCH NAME	CASE NAME	CASE NUM	CIN	SSN	SEX	DOB
T	OTH	MI	LAST				
C	NAM	FIRST					
	CALVIN		WHITE	V17MEDATT201	AX65779T	123-45-6789	M 03/13/72
	GEORGE		HANSEN	07DVV22	07 AY06025F	123-45-6789	M 01/01/11
	PERSON		TWO	SMSTEST1	53 AX84907H	123-45-6789	F 02/01/63
	PERSON		TWO	BUD004	53 AX84907H	123-45-6789	F 02/01/63
			MR66A	MRB-66A	01 AW90071Y	123-45-6789	M 11/11/13
	CROSSB		MACHINE	MA517-092953	AX33608Y	123-45-6789	F 01/12/58
	CROSSB		MACHINE	MA517-090353	AX33608Y	123-45-6789	F 01/12/58
	CROSSB		MACHINE	517CNS	53 AX33608Y	123-45-6789	F 01/12/58
	FIRST	J	DUPI ND1	DUPI ND1	01 AX83739A	123-45-6789	M 06/04/46
	CROSS		MACHINE	MA518-111353	AX33610M	123-45-6789	M 02/12/55
	CROSS		MACHINE	MA518-090353	AX33610M	123-45-6789	M 02/12/55
	CROSS		MACHINE	MA518	53 AX33610M	123-45-6789	M 02/12/55
	CROSS		MACHINE	518CNS	53 AX33610M	123-45-6789	M 02/12/55
	CARA	G	BORECKI	BCC01	99 AX62769Z	123-45-6789	F 07/24/96
	ETHEL		TEW	15	99 AX08486C	123-45-6789	F 04/11/65
	CROSS		MACHINE	MA516-012653	AX25816F	123-45-6789	F 08/24/48
	CROSS		MACHINE	MA516-091253	AX25816F	123-45-6789	F 08/24/48
							XMIT _

Figure 16 – Possible Matched Within District of XXXX (WCN163)

**Purpose**

This screen(s) lists all the matches for the individual criteria entered on the WCN161 - Matching Request Criteria Entry Screen. To view a list of notices for a client enter an 'X' in the NTC field and transmit.

**Access**

- Successful transmission of WCN161 – Matching Request Criteria Entry Screen with criteria entered in either the Soc Sec Numb/District field or the Name search fields.

**Screen Response**

**Positive**

- If an 'X' is entered in the NTC field and transmitted, the WCN162 - Client Notice List Screen is returned displaying a list of notices for the selected client.

**Negative**

- Field(s) in error return highlighted with one of the following messages on Line 24:
  - CASE NUMBER NOT FOUND (if selected case has no notices)
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- PLEASE A CASE
- PLEASE SELECT ONLY ONE CASE
- SF99 - NOT SUPPORTED (4-5, 7-14, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages
F3	Previous if there are multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WCN161 - Matching Request Criteria Entry Screen with search criteria fields populated with latest entries
Ctrl+F6	WCN161 - Matching Request Criteria Entry Screen

Screen Field Description – WCN163

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SEARCH NAME	NONE	
NTC	NONE	Enter an 'X' and transmit to display a list of notices for the client
OTH NAM	NONE	
FIRST	03030 - NAME (FIRST) (10)	Characters 1-10; 17 occurrences
MI	03030 - NAME (MI) (1)	Character 11; 17 occurrences
LAST	03030 - NAME (LAST) (17)	Characters 12-28; 17 occurrences
CASE NUM	01050 - CASE NUMBER (10)	17 occurrences
CIN	03010 - CLIENT IDENTIFICATION (8)	17 occurrences
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	17 occurrences
SEX	03050 - SEX (1)	17 occurrences
DOB	03060 - DATE OF BIRTH (8)	17 occurrences

## Subsystem Processing

### Error Messages

#### Contact Data Error Messages

(listing is alphabetical by Message)

#### **ACTION NOT VALID WHILE IN INQUIRY MODE**

If I (Inquiry) was entered in Action Code on the Contact Data Menu, A (Add), C (Change) or D (Delete) cannot be entered on the entry screen.

#### **ACTION SELECTED DOES NOT MATCH PREVIOUS ACTION**

The Action Code entered on this screen does not match the Action Code entered on the Contact Data Menu; **or**

There are more than 25 District/Zip Codes. On the first screen a C (Change) was entered in Action Code, but on the second screen a D (Delete) or A (Add) was entered in Action Code; **or**

An Action Code of C (Change) or D (Delete) is entered for a record which does not exist.

#### **ACTION WOULD CAUSE DISTRICT XXXX TO BE WITHOUT AN ADVOCATE**

The District/Zip Code Action is D (Delete) and there is no other Advocate Record for this District; **or**

The Action Code is D (Delete) and there is no other Advocate Record for this District.

#### **ADVOCATE RECORD NOT FOUND**

For Selection 5, Advocate Maintenance, the Action Code is I (Inquiry) and the Advocate Number was not found.

#### **CONTINUE CANNOT BE "Y" UNLESS SCREEN IS FULL**

Y cannot be entered in Continue unless the screen is full.

#### **DISTRICT MNEMONIC INVALID**

If a District/Zip Code is entered, it must be a valid District mnemonic.

#### **DISTRICT RECORD NOT FOUND**

For Selection 1, District Maintenance, the Action Code is I (Inquiry) and the district/Program Area/Office ID/Unit ID combination was not found.

#### **DISTRICT/ZIP CODE ACTION INVALID**

If the Action Code on the Menu was U (Update), the District/Zip Code Action must be A (Add) or D (Delete) or spaces; **or**

If the Action Code is C (Change), the District/Zip Code Action must be A (Add), D (Delete) or spaces.

**DISTRICT/ZIP CODE ACTION SHOULD BE SPACE FOR ADD**

If the Action Code is A (Add), the District/Zip Code Action must be spaces.

**DISTRICT/ZIP CODE TABLE NOT FULL, MORE = Y NOT ALLOWED**

If the 25 District/Zip Codes are not filled, a Y is not allowed in More.

**ENTRY MUST BE "Y" OR "N"**

The valid codes for Continue are Y and N.

**FIELD MUST BE GREATER THAN 99**

The Phone Exchange must be greater than 99.

**FIELD SHOULD BE BLANK WHEN WORKING UPSTATE**

Upstate an entry is not allowed in Responsible Center on the Menu.

**FIELD REQUIRED WHEN PROGRAM AREA IS FS**

If Program Area FS was entered on the Contact Data Menu, all eight district Phone Numbers are required on this screen.

**FUNCTION NOT YET AVAILABLE**

Function 4, OFFICE/UNIT/WORKER mass change, is not yet available.

**INVALID ACTION CODE**

Action Code must be A (Add), C (Change) or D (Delete) or Spaces; **or**

Action Code must be I (Inquiry) or U (Update).

**INVALID ACTION SELECTED**

Action Code must be A (Add), C (Change) or D (Delete) or Spaces.

**INVALID AREA CODE**

The valid Area Codes for Phone Numbers are: 212, 315, 516, 518, 607, 716, 718, 800 and 914.

**INVALID DISTRICT**

If a district mnemonic has been entered, it must be a valid mnemonic.

**INVALID MORE OPTION**

More must be Y, N or Spaces.

**INVALID PROGRAM AREA**

Program Area must be PA, FS, MA or blank.

**INVALID SELECTION NUMBER**

Selection number must be one of the following:

- 1 - District Maintenance
- 2 - Office/Unit/Worker Maintenance
- 3 - Office/Unit/Worker Data Entry
- 4 - Not Available
- 5 – Advocate Maintenance

**INVALID STATE CODE**

State must be NY

**OFFICE/UNIT/WORKER COMBINATION ALREADY EXISTS**

One of the Office/Unit/Worker combinations entered is on the database.

**OFFICE/UNIT/WORKER RECORD NOT FOUND**

For Selection 2, Office/Unit/Worker Maintenance, the Action Code is I (Inquiry) and the District/Office ID/Unit ID/Worker ID combination was not found.

**PROGRAM AREA OR OFFICE/UNIT/WORKER FIELDS MUST BE BLANK FOR SELECTION 2**

Either Program Area or an Office/Unit/Worker combination may be entered for Selection 2 – Office/Unit/Worker Maintenance, but both cannot be entered.

**RECORD ALREADY EXISTS**

The Action Code is A (Add) and the record already exists on the database.

**RECORD DOES NOT EXIST**

The Action Code is C (Change) or D (Delete) and the record is not found on the database.

**REQUIRED FIELD MISSING**

Name, Address 1, City, State and Zip Code are required; **or**

If Program Area PA, or MA was entered on the Contact Data Menu, the first five Phone Numbers are required on this screen; **or**

Selection Number and Action Code are required; **or**

If Selection 5, Advocate Maintenance, is requested, an Advocate Number is required; **or**

District is required for District Maintenance Office/Unit/Worker Maintenance, and for

Office/Unit/Worker Data Entry; **or**

Name and Phone Number are required; **or**



Name, Address 1, City and the first five digits of Zip Code are required; **or**

Phone Number is required; **or**

Entry of one District/Zip Code is required.

**SPACES ARE NOT ALLOWED IN NUMERIC FIELD**

A Phone Number may not include a space.

**TERMINAL NOT CONFIGURED TO UPDATE THIS DISTRICT**

If the Action Code is U (Update) the District entered must match the district in which the terminal is located.

**ZIP CODE IS OUT OF RANGE**

The valid range of Zip Codes is 10001 through 14999.

# Closed Case Activity

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## Overview

Closed Case Activity includes **Case Reactivation** and **Closed Case Maintenance**. These two WMS processes allow certain actions to be taken on a previously closed case.

**Case Reactivation** allows a closed case to be reopened without the necessity of registering another application and going through an eligibility determination (documentation, interviews, etc.) all over again. Cases can be reactivated until the end of the month following the month in which the case was closed.

**Closed Case Maintenance** allows the worker to add or change certain information on a case that was closed within the last 120 days. Closed Case Maintenance is used when the case does not have to be reopened to provide on-going assistance. Writing of payment lines is allowed as part of closed case maintenance.

Both Case Reactivation and Closed Case Maintenance are selections on the WDXMNU - Non-Services Data Entry and Transaction Disposition Menu screen which is selection 7 on the WMSMNU - WMS Menu.

## Case Reactivation

Case Reactivation is the process of making a closed case active. To be reactivated, the Case Record of the closed case must meet all of the following conditions:

- Case Status is CLOSED or CLOOVRD and Pending Data Status is NO PEND.
- Case must not have been closed by an Open/Close transaction of 09.
- The Authorization Period TO Date of the closed case must not be more than 30 days earlier than Today's date, or, if Case Type is 31 or 32 and Transaction Type was 08, then the Authorization Period TO Date must not be more than 60 days earlier than Today's date. Cases closed in the future meet this condition and may be reactivated. This condition is not required if Case Type is 60 - HEAP, the case is opened for the current HEAP season, and the individual on Line 01 is 60 years of age or older.
- An MA or FS Pending Record created from the closed case by the MA Extension/FS Separate Determination process must not exist.

Individuals associated with the closed case will be reactivated if:

- Their Individual Status was changed to 20 on the same transaction date on which the case was closed. Since only an Individual Status of 07, 08 or 10 will be changed to 20 as a result of a case closing, it follows that for an individual to be returned in case reactivation, their status at the time of closing must have been 07, 08 or 10.
- The individuals who are being reactivated are not involved in a conflicting case type. See Error No. 806.

To reactivate a closed case Function G, the case number, and the closing authorization number must be entered on WDXMNU and transmitted. The Authorization Number is not required if the local district has not selected the Automatic Authorization Printing Option 1 (See **SRM Standards, Conventions, and General Information.**)

If the transaction is successful, the WSYSAK - System Acknowledgement Screen is returned with the message TRANSACTION ACCEPTED. This creates a pending record with a Pending Data Status of REAU/UM with a new Authorization Number. If the case being reactivated has unresolved RFI data, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on the WSYSAK screen. See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

The pending record created by a successful reactivation transaction requires a follow-up transaction via the Undercare/Maintenance Error Correction and Pending Data Change transaction sequence WKUMER. (See **SRM Undercare Changes and Recertification** for more information on WKUMER.)

Some unique considerations when using the WKUMER transaction sequence to complete a Case Reactivation are as follows:

- On WKUM01, the Reason Code must be one of the following:
  - 088 - Begin Extension of MA Coverage after ineligible for PA (Case Type = 20 Only)
  - 978 - Transferred from FA, SN-FP to CAP
  - 984 - Transferred from CAP
  - 991 - Fair Hearing - Aid to Continue
  - 992 - Court Order to Enjoin Closing
  - 993 - Closed in Error
  - 994 - Cancel Closing
- Case Type cannot be changed.
- Transaction Type 11 on WKUM01 is system generated and cannot be changed. Individuals cannot be added during the first Undercare/Maintenance of a reactivated case. The Authorization Period FROM Date of the new case must be either earlier than, equal to, or no more than one day later than the Authorization TO Date of the old case. Other restrictions on the Authorization Period are the same as for Transaction Type 06 (Recertification).

An unsuccessful Case Reactivation transaction is acknowledged by the WSYSAK screen with the message TRANSACTION REJECTED FATAL ERROR DETECTED. No pending record is created. A Case Comprehensive Report and/or an Error Report may be requested from the WSYSAK screen. WKERQY error inquiry is also available from the WSYSAK screen by using Function Key 4. See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Closed Case Maintenance

Closed Case Maintenance is the process which allows a limited number of changes to be made to a Non-Services Case that has been closed. For Closed Case Maintenance, the Case Record of the closed case must meet all of the following conditions:

- Case Status is 14-CLOSED or 22-CLOSED OVERRIDE (CLOOVRD).
- If the Case Type is 60-HEAP, the Authorization Period TO Date must be for the current HEAP year.

To perform maintenance on a closed case function G, the Case Number, and Closing Authorization Number must be entered on the WDSMNU screen. Screen 1(WKUM01) is always returned. If other screens are desired, they must be selected by entering an X beside the screen.

Screen WKUM01 is returned with a system-generated Transaction Type of 14 which cannot be changed. All the original data of the case is returned on each screen requested.

Only certain entries or changes are allowed:

**WKUM01** - the following may be changed depending on the Case Type

- \*Case Reason
- PA/FS RC
- SafeNet Indicator
- Client Notice Ind and Number
- HII (Case Types 20 and 24 only)
- RVI (Case Type 20 only)
- Recert Date
- PA/FS Code
- HEAP Income
- TOP
- LFLN
- Office Code (both Transaction and Responsible Worker)
- Unit ID (both Transaction and Responsible Worker)
- Worker ID (both Transaction and Responsible Worker)
- Residence Address
- Phone
- Mailing Address
- Local Data

\* For a PA case, the Reason Code must be: 960, 965 or 966.

### **WKUM02**

No changes allowed.

### **WKUM03**

- Employability Code
- PA/MA Individual Reason Code
- Other fields may be changed depending on Case Type.

#### **WKUM04**

- AFA Code and Date

#### **WKUM05**

- Card Code
- EBICS
- PA/MA Effective Date

If the Card Code is changed and the individual is active in a PA, MA or FS case with a different card code, then the Card Code will not be changed on the data base and Warning 518 will result (See **SRM Full Data Entry and Undercare Error Messages.**)

#### **WKUM06**

- All payment lines allowed
- HVND/ACCT
- VND/ACCT

If a payment line is written, then the Payment Issuance Code must be 2 (Once Only) or P (Prorate).

Unless the Local Action Code is 9 (Void), Food Stamp Payment Types 91 (Expedited FSB), 93 (Single FSB), 94 (FS Retroactive) 96 (FS Ongoing), or 97 (FS Supplemented) cannot be authorized more than 10 days after the FS Authorization Period TO Date on the Case.

Food Stamp Payment Type 95 (Restored Benefits) can be authorized more than 10 days after the FS Authorization Period TO Date.

Entry is also allowed in Recoupment and Energy Rst fields.

#### **WKUM07**

No restrictions.

#### **WKUM08**

No restrictions.

#### **WKUM09**

- All Child Care payment lines allowed

Successful transmission of the undercare screens will result in a WSYSAK - System Acknowledgement Screen with the message TRANSACTION ACCEPTED. This creates a pending record with a Pending Data Status of AT/UM and a new Authorization Number. A pending record created with Non-Fatal errors will have a pending Data Status of UM/ERR. Changes or corrections to the pending record are done via the Undercare/Maintenance Error Correction and Pending Data Change transaction sequence WKUMER. (See **SRM Undercare Changes and Recertification.**)

Error-free Closed Case Maintenance transactions are processed through BICS File Maintenance and WMS Batch Update that evening.

Closed case transactions can be cancelled by pressing Ctrl+F5. The WSYSAK screen will be displayed with the message, TRANSACTION CANCELLED BY OPERATOR.

Unsuccessful transmission of the undercare screens is acknowledged by the WSYSAK screen with the message TRANSACTION REJECTED FATAL ERROR DETECTED. No pending record is created. A Case Comprehensive Report and/or an Error Report may be requested from the WSYSAK screen. WKERQY error inquiry is also available from the WSYSAK screen by using Function Key F4. See **SRM Standards, Conventions and General Information** for further information on the WSYSAK screens.

WDXMNU - Non-Services Data Entry and Transaction Disposition Menu

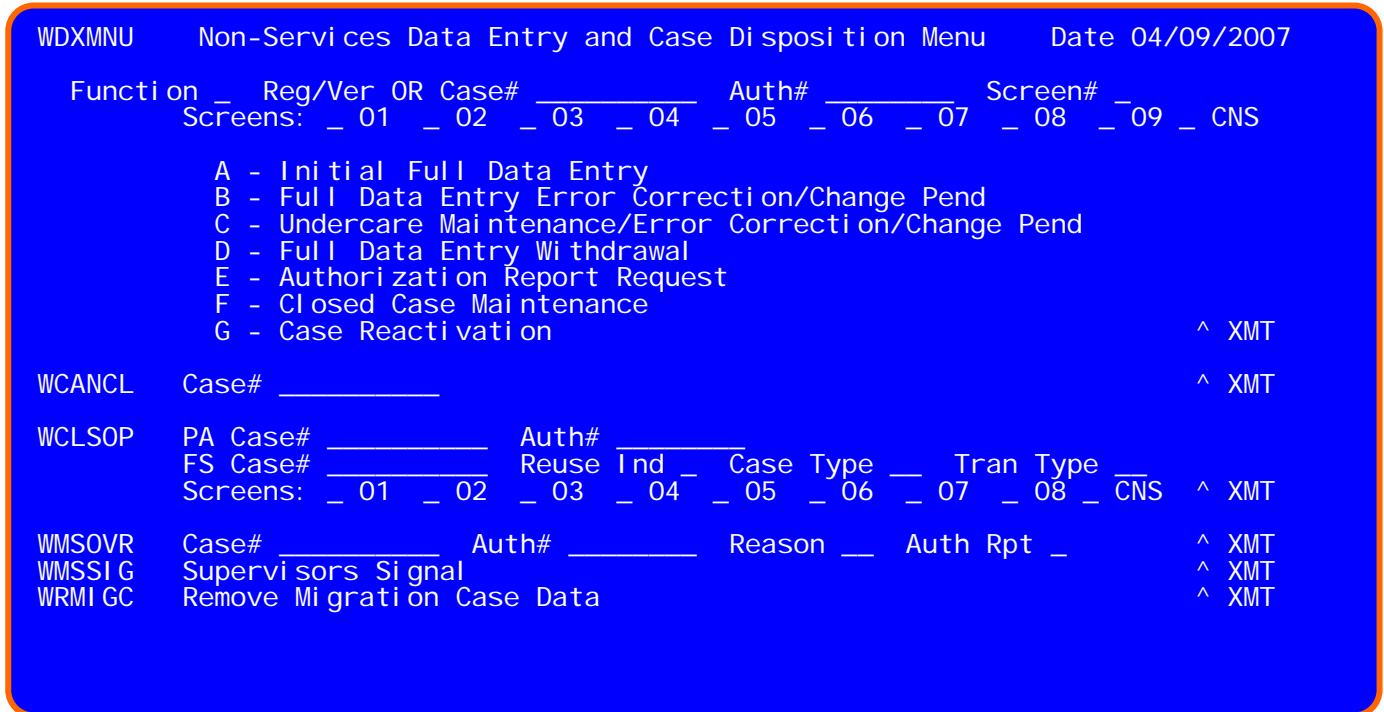


Figure 1 – Non-Services Data Entry and Transaction Disposition Menu (WDXMNU)

Purpose

Access to closed cases for the purpose of closed case maintenance is allowed from this screen by entering function F, the closed case number and authorization number, and transmitting. If screens other than screen 01, which is always returned, need to be accessed, an X must be entered next to the screen numbers.

This screen also allows access to the WREACT screen, WMS Case Reactivation, by entering function G, the closed case number and authorization number, and transmitting. See **Case Reactivation** in this section for further information.

Access

- Entering 07 on (or F7 from) WMSMNU – WMS Menu, or
- F7 from SIGNON COMPLETE screen, or
- F7 from all Menus except
  - WSEMNU – Services Full Data Entry,
  - WSUMNU – Services Undercare/Maintenance Menu,
  - LDMENU – LDMIP Menu.



## Screen Response

### Positive

- For Closed Case Maintenance, Function F, the WKUM01 screen is displayed.
- For Case Reactivation, Function G, the WSYSAK screen is displayed with the message, TRANSACTION ACCEPTED.

### Negative

- For Case Reactivation, Function G, the WSYSAK screen is displayed with the message, TRANSACTION REJECTED FATAL ERROR DETECTED
- One of the following messages on line 24:
  - AUTH/ACCEPT NUMBER MISSING
  - AUTH NO/ACCEPT NO INVALID
  - CASE NOT FOUND
  - CASE NUMBER MISSING
  - CASE STATUS IS NOT CLOSED (14) OR CLOOVRD (22)
  - NO MATCH ON AUTH/ACCEPT NO
  - PENDING DATA STATUS INVALID
  - SERVICES CASE TYPE NOT ALLOWED
  - SF99 KEY NOT SUPPORTED (99 = 8, 13)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

The following messages are specific to Function F, Closed Case Maintenance:

- CASE NUMBER INVALID
- CLOSED CASE MAINTENANCE NOT ALLOWED ON A HEAP CASE FROM A PRIOR HEAP YEAR
- INDIVIDUAL AUX IS BEING MIGRATED
- INVALID CALL TO INDIV PULLDOWN
- INVALID CALL TO MED-CASE PULLDOWN
- INVALID CASE TYPE FOR THIS PROCESS
- PLEASE SELECT SCREENS
- SCREEN 8 NOT ALLOWED

The following messages are specific to Function G, Case Reactivation:

- CASE CANNOT BE REACTIVATED WHEN SEP DET PENDING XXXXXX, XXXXXX (XXXXXX = First Case Number, then second Case Number of pending Sep. Det. case)
- CASE NOT CLOSED WITHIN 30 DAYS

- CASE NOT CLOSED WITHIN 60 DAYS FOR FS RECERT
- CASE STATUS IS NOT CLOSED (14) OR CLOOVRD (22)
- DATA MIGRATED CASE FOUND
- PREVIOUS TRANSACTION WAS OPEN/CLOSE

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WDXMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Valid values are A through G.
REG/VER or CASE #	01046 - REGISTRY NUBER (6) and 01047 - VERSION NUMBER (2) Or 01050 - CASE NUMBER (10)	Required.
AUTH #	02040 - AUTHORIZATION NUMBER (8)	Required.
SCREEN #	NONE	User entered to move to a specific data entry screen. Valid values are 1-9.
<b>SCREENS:</b>		
01	NONE	Enter an 'X' to return WKUM01.
02	NONE	Enter an 'X' to return WKUM02.
03	NONE	Enter an 'X' to return WKUM03.
04	NONE	Enter an 'X' to return WKUM04.
05	NONE	Enter an 'X' to return WKUM05.
06	NONE	Enter an 'X' to return WKUM06.
07	NONE	Enter an 'X' to return WKUM07.
08	NONE	Enter an 'X' to return WKUM08.
09	NONE	Enter an 'X' to return WKUM09.
CNS	NONE	Enter an 'X' to return WCN011.

## Subsystem Processing

### Error Messages

#### Case Reactivation Error Number and Message Listing

##### **806 - FATAL - INDIVIDUAL ACTIVE IN A CONFLICTING CASE**

The individual is Active in a conflicting case if:

- This is a MA case (Case Type is 20, 21, 22, or 24) and the individual is Active (07, 08 or 10) in another PA case (Case Type is 11-13, 16, 17) or MA case (Case Type is 20 or 22), **or**
- This is a PA case (Case Type is 11-13, 16, 17) and the individual is Active (07, 08 or 10) in another PA case (Case Type is 11-13, 16, 17), **or**
- This is a FS case (Case Type is 31 or 32) and the individual is Active (07, 08 or 10) in another FS case (Case Type is 31 or 32), **or**
- This is a FS case (Case Type is 31 or 32) and the individual is receiving Food Stamps in another PA case (Case Type is 11-13, 16, 17), **or**
- This is a HEAP case (Case Type is 60) and the individual is Active (07, 08 or 10) in another HEAP case (Case Type is 60).

##### **809 - FATAL - NO INDIVIDUALS HAVE BEEN REACTIVATED**

No individual in the case had an Individual Status of 07, 08 or 10 just prior to the closing transaction.

## Denials and Closings

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## Case Denial/Closing

### Overview

To close or deny a non-services case entry of an appropriate Transaction Code and Case Reason Code is required on WKUM01, Screen 1 of the Full Data Entry or Undercare Maintenance screens. In some situations entry of an Individual Reason Code on WKUM03, Screen 3 of the Full Data Entry or Undercare Maintenance screens, is also required. (For information on closing or denying services cases see information at [CONNECTIONS](#).)

Each Transaction Type, 03 (Full Data Entry Denial), 07 (Closing) or 08 (Recertification/Closing), has a set of permissible Reason Code(s) that may be entered. See [WMS Card Code Index](#) for a complete list of Reason Codes for each Transaction Type. Other requirements for each transaction are:

- FDE Denial (03) - the Authorization FROM Date must be entered (no later than today's date)
- Case Closing (07) or Recertification Closing (08) - the Authorization TO Date must be entered (no later than the end of the month following the transaction date month)

Entry of up to five Reason Codes may be required for the above transactions. Section 1 of the Authorization Change Form (LDSS - 3209) contains the Case Reason Code (required for data entry), the PA/MA Reason Code (system generated at a PA closing or denial if all Case members have the same code), and the PA/FS Reason Code (data entered in certain circumstances).

The two other fields for Reason Codes are in Section 3 of the Authorization Change Form. They are for data entry of either the PA/MA Individual Reason Code or the FS Individual Reason Code. The exception to this is that the PA/MA Individual Reason Code field for the MA extension case may display the PA/MA Reason Code that was system generated and displayed on Section 1 of the PA denial or closing Authorization. This will be displayed only once. See the section in this document entitled, MA Extension Process, for more information on this process.

The Reason Code(s) used may require that a separate eligibility determination be made for MA and/or FS. See **Charts J-1** through **J-4** in this document for allowable PA closing and denial Reason Codes and the results concerning MA.

Certain system responses are triggered by the Case Type and the Reason Code entered. In some instances a code is system generated and displayed indicating what action is to be taken and what text is to be used for a client letter to be initiated by the Client Notice System. (See **SRM Client Notice System** for more information.) The action may require that a separate determination needs to be made concerning eligibility for a Case Type other than the one for which the client applied or that an extension of medical eligibility needs to be made.

Another type of system response is in relation to the closing of a case with a future Authorization TO Date. This starts a system response of a Clocking Down process.

### Data Element Terminology

The five Reason Codes used in WMS are labeled in different ways on the APP TAD and Authorization Forms, and on the Data Entry screens. The following table shows the Data Element Number and Name of each type of Reason Code; the term used for that Reason Code in this Section and in Section E of the System Reference Manual, the field

label for that Reason Code on the APP TAD and Authorization forms, and the screen label for that Reason Code on the data entry screens.

DE Number - Name	Term Used in This Section and Section E	Field Label on APP TAD and Authorization Form	Screen Label on FDE or UM Data Entry Screen
02050 - REASON CODE	CASE REASON CODE	PA REASON CODE (Section 1)	REASON CODE (Screen 1)
02005 - PA/MA REASON CODE	PA/MA REASON CODE	MA REASON CODE (Section 1)	PA/MA REASON CODE (Screen 1)
02006 - PA/FS REASON CODE	PA/FS REASON CODE	FS REASON CODE (Section 1)	FS REASON CODE (Screen 1)
03121 - PA/MA INDIVIDUAL REASON CODE	PA/MA INDIVIDUAL REASON CODE	PA/MA INDIV (Section 3)	INDIV REAS PA/MA (Screen 3)
03014 - FS INDIVIDUAL REASON	FS INDIVIDUAL REASON CODE	FS INDIV (Section 3)	INDIV REAS FS (Screen 3)

## MA Extensions

At the time of a PA case closing, an MA Extension Case may be opened in order to extend the MA coverage. When the PA case is closed, the system determines whether any individual in the case is eligible for an extension based on the closing Case Reason Code that is data entered on Screen 1. If this code indicates that an extension should occur, and there is also a PA/MA Individual Reason Code on Screen 3, then the PA/MA Individual Reason Code takes precedence over the extension given for the Case Reason Code.

Most Family Assistance cases will have an extension of MA coverage for at least one month depending on the Case Reason Code entered for the PA closing. Generally speaking, most Safety Net Assistance cases will not receive an extension of MA coverage. Certain conditions in a PA case will always cause an MA case to be opened to extend MA coverage. These conditions are:

- **Prepaid Capitation Plan/PCP Guarantee**

If the case has Prepaid Capitation Plan (PCP) enrollees with an MA Coverage Codes of 30, then an MA Extension case is opened for the balance of the PCP Guarantee Thru Date if:

- there is no other MA extension that is greater than the PCP Guarantee Thru Date, and
- the PCP Thru Date is more than 10 days after the PA Closing Transaction date.

The MA Coverage Code is system changed to 31 if the MA Coverage Code on the closing is 30. If the MA Coverage TO Date is set to the closing Transaction Date plus 10 days for the PA closing, then the MA Extension case is opened with the MA Coverage FROM Date set to the first day of the Transaction Month of the PA Closing.

If the closing resulted in setting the MA Coverage TO Date at the end of the next month, then the MA Coverage FROM Date for the Extension will be the beginning of the month after the month of closing.

- **FP Individuals (Federally Participating)**

An MA Extension case is opened if the case includes any one of the following:

- Pregnant Women - the extension period is to the end of the month of the sixty days post partum
- Infants up to Age 1
- Aged, Blind, Disabled
- SNA-FP (Federally Participating) father
- Individuals under 19 and Unborns.

■ **SSI**

If all individuals on a PA case have PA/MA Individual Reason code of E94 (SSI) and the PA case is closed, the system will open an MA Extension case and generate an MA Coverage Code of 01. The Categorical Code will be 12 (Disabled) and the Case Type will be changed to 22 (MA-SSI) with an Authorization TO Date of 12/31/49.

If the individuals with the E94 code are in a case with individuals who have different codes, they will get a notice stating their PA case is closing but they have an 823 MA extension. A case type of 22 continues for them.

■ **Continuous Coverage**

Infants up to age one will get one year continuous coverage extensions.

**TMA (Transitional Medical Assistance) Situations**

If a PA Case is closed using Reason Code E31, M92 or M93, the case gets a 764 extension which is for 6 months. If the PA case is closed with Reason Code E32, the case gets a 763 extension which for only 4 months because the increase in child or spousal support exceeds the household's budgeted needs.

The PA case must have been active for at least 3 of the past 6 months prior to the closing (called the 3/6 test) and the case must include at least two individuals, one of whom must be under age 21. If these conditions are not met but there is a child under 21, then a separate determination of MA eligibility must be made.

**MA Extension Process**

If there is to be an extension of MA coverage, the worker must make the following required entries in the MA Extension fields at the bottom of Section 1: A Case Number for the MA Case, and an Office and/or a Worker and/or Unit ID.

The system will generate a Case Reason Code for the MA Extension Opening which will be displayed in the Case Reason Code field on the MA case in Screen 1. At the same time the system will generate a PA/MA Reason Code that indicates what language is to be used in the Client Notice. This PA/MA Reason Code is displayed in the PA/MA Reason Code field in Screen 1 on the PA Closing Authorization if all individuals in the case have the same code. If they do not, the field is left blank.

The PA/MA Reason Code is also displayed in the PA/MA Individual Reason Code field on Screen 3 of the MA opening authorization in order to generate the appropriate Client Notices. After the first transaction is completed on



the MA case, the PA/MA Reason Code will disappear from Screen 3 on the MA case because it is not an Individual PA/MA Reason Code and also because it is no longer needed. It remains on the PA Closing Authorization and the associated Inquiry screens if it was originally displayed on the PA closing Authorization.

In addition, the MA Extension process automatically transfers most data elements from the PA Closing case to the new MA Extension case.

When the PA case is closed with no errors, the System Acknowledgment Screen is displayed. If an MA Extension Case has been generated, the following message appears on the WSYSAK screen:

MA EXTENSION CASE XXXXXX GENERATED WITH AT/FDE PENDING STATUS

If a PCP Guaranteed Extension is generated, the following message appears on the WSYSAK screen:

MA GUARANTEE CASE XXXXXX GENERATED WITH AT/FDE PENDING STATUS

The PA Closing and MA Extension Pending Records will both go through Batch Update processing that night if there are no errors. A PA closing Pending Record with errors must be corrected before either Pending Record can proceed to the Batch Update process.

The message NO INDIVIDUALS MEET CRITERIA FOR MA EXTENSION will be displayed if certain Reason Codes are entered that indicate that an MA Extension case will not be automatically opened. See **SRM Standards, Conventions, and General Information** for more information on the WSYSAK screen.

#### Data Entry Restrictions on a Pending MA Extension Record

The Pending Record for the MA Extension case *cannot* be accessed (except for screen 8) until the MA Extension Pending Record completes Batch Update. After the MA case is Active any corrections or changes can be done as an Undercare Maintenance transaction.

### FS Separate Determination

The FS Separate Determination process provides the opportunity 1) to open a FS case when the associated PA case is closed and 2) deny a case when the PA/FS code is changed to '09'. This may be done either at the time of the PA case closing or after the PA case completes Batch Update after the closing. This process allows the opening of a new FS case without the need for data entry of a new application and with entry of minimal new case data due to the automatic transfer of most data elements from the PA closing case to the new FS case. If there is a current Food Stamp Budget it will be transferred as well. The form, DSS-3558 - FS Separate Determination Input form (see [LDSS e-Forms](#)), is used for entry of data for a separate determination.

When a PA case is closed with no errors, the System Acknowledgment screen, WSYSAK, is displayed with the message, "TRANSACTION ACCEPTED". Pressing F9 on WSYSAK displays the WDXMNU - Non-Services Data Entry and Disposition Menu screen with the Case Number and Authorization Number fields adjacent to the WCLSOP label populated with the case number and closing authorization number of the closing PA Case. The Case Number, Case Type, and Transaction Type of the new FS case must be entered. Upon transmission FDE Screens 1, 3, 5, and 6 will always be returned. If the user wants any FDE screens returned in addition to these, they must be selected prior to transmission.

A FS case may be opened using the Separate Determination process after the PA case closure transaction. However, the opening of the new FS case must be completed prior to the end of the month following the closure

transaction (Transaction Type "07" or "08") date month. This is accomplished by manually entering all required fields (as described above) for the WCLSOP transaction on the WDXMNU screen.

#### Transfer of FS Budget

When a new FS case is opened by the FS Separate Determination process, the FS budget can be transferred by the system from the closed PA case to the new FS case. This transfer will take place if the following conditions are met:

- The PA case must have Case Type of 11, 12, 16 or 17.
- The FS budget to be transferred must
  - have a FROM Date of the first of the month and not overlap Food Stamp coverage on PA case
  - have been updated to reflect all information pertinent only to the new FS case
  - have an X entered in the SD (Separate Determination) field
  - have been stored using the PA case number.

When the new FS case opening goes through Batch Update, the corrected and stored FS budget previously linked to the PA case will now be linked to the new FS case. This FS budget will now have the FS Case Number and Case Type, a Transaction Type of 05, and the current budget Version Number will be maintained. The X in the SD field will be deleted.

#### Transitional Benefit Allowance (TBA)

When a case is closed it may be eligible for TBA Food Stamps. The eligibility process may be performed automatically or manually. The TBA Food Stamp case eligibility process will be performed automatically when a case is closed if:

- Case type = 11 or 12
- Emergency Indicator = *blank*
- Transaction type = 07 or 08 with the PA/FS Indicator changed to 08 or 09 (FS authorized prior)
- Applicable Temporary Assistance (TA) and FS case reason codes are entered
- No disqualifying TA or FS individual reason codes are present or entered
- A current FS budget must be present meeting the following conditions: (a new budget should not be stored)
  - Number in Case on FS budget must = sum of: individuals with status 07 + individuals with status 10 and FS Individual reason code = *blank* (prior to the 07, 08 transaction)
  - FS Separate Determination Indicator must = *blank*
  - FS FROM Date must not be greater than FS Authorization TO Date
  - If TA reason is Excess Income, the FS budget is not updated AFTER the PA budget has been stored

If the above TBA requirements are met, additional SCREEN 1 entries are required before a TBA FS case can be opened automatically. The first required entry is the FS Extension Case Number. If this field is filled, an entry in the FS Extension Unit or Worker must be made. Entry in the FS Extension Office is optional.

As mentioned above, the correct FS case reason code must be entered in order for the Auto TBA process to be performed. Barring the entry of TBA–ineligible TA or FS case reason codes or the presence/entry of TBA–ineligible TA or FS individual reason codes workers will be required to enter an FS Case reason code equal to J05 or J06. Both reason codes produce notice text that tells the client a separate notice will be sent regarding their food stamps.

If ALL Auto TBA requirements are met and an FS Case reason code of J05 is entered, WMS will create/open an NTA/FS case and send a change notice (separate from the TA closing notice) to the client informing them of their eligibility for TBA. The System Acknowledgement (WSYSAK) screen displays the message:

“FS TBA EXTENSION CASE (case number) GENERATED WITH AT/UM PENDING STATUS”

Entry of a J06 FS Case reason code informs the system that the worker will conduct the TBA eligibility and/or Separate Determination process and all TBA-related WMS edits are bypassed.

If the Auto TBA FS process determines a case is TBA eligible, the following actions are taken:

- an NTA/FS case (case type 31) for a five-month authorization period beginning the month following the TA Authorization TO Date month is opened
- a five-month TBA FS ABEL budget (with S/D Ind = “T”) is generated and stored
- an FS change notice using FS reason code B17 (Auto TBA FS Opening) is generated and mailed
- FS payment lines (payment type 93 for the initial month, payment type 96 for any remaining months) are written
- TA Employability codes are converted to corresponding FS values

The new TBA FS Budget will be stored on the TA case until Batch Update occurs. This new budget will be for a period of 5 months and will have the TA Grant amount deleted from it. The Budget Version Number will be incremented by one. If a FS claim allotment reduction is present on the FS budget associated with the TA case, it will be recalculated and carried over to the TBA FS case. If the allotment reduction ends prior to the end of the usual 5-month TBA budget period, then the TBA FS budget and pay lines will be truncated to the end of the allotment reduction period. Anticipated Future Action (AFA) Code 307, ‘END OF RECOUPMENT’, will also be posted if the TBA period is truncated. This AFA code will notify workers to re-budget benefits when the allotment reduction ends.

## Clockdown Closings

Clockdown Closing is a process which allows a case to remain Active on WMS after entry of a Closing Transaction Type (07 or 08) with a future Authorization To Date (the effective date of the closing). The case remains Active on WMS until the effective date of the closing which is usually ten days after the Transaction Date but no later than the end of the month following the transaction date month. Until the effective date, Undercare Maintenance can be performed on the case, or the closing can be stopped. If the closing is not stopped, the case will be automatically closed on the effective date.

Following are the only Non-Services cases which are *not* subject to the Clockdown process:

- HEAP cases (Case Type 60)
- Cases closed by WMS Auto Closings
- Cases with a closing effective date that is not in the future;
- Cases with only deceased individuals that have been worker entered

The Clockdown Closing process is begun by entering a closing Transaction Type (07 or 08) and Reason Code on the WMS Undercare Maintenance screens along with the appropriate Authorization To Date and payment line dates. This transaction truncates the MA Coverage Dates to 10 days after the Transaction Date if the worker does nothing. If an Authorization is printed immediately after the closing transaction and prior to Batch Update, the Transaction Type will show as Closing (07 or 08), and the message CLOCKDOWN CLOSING EFFECTIVE MM/DD/YY will be printed in the non-shaded area in the lower left-hand corner of the authorization.

WMS Batch Update changes the Transaction Type on the Pending Record of the Clockdown Closing from Closing (07 or 08) to Change (05). This Pending Record is transmitted to BICS and other system interfaces as a Change (05) transaction. The Authorization available the next day on BICS will have a Transaction Type of Change (05), and the message CLOCKDOWN CLOSING EFFECTIVE MM/DD/YY will be printed in the non-shaded area in the lower left-hand corner of the authorization.

After Batch Update the Case Status and Individual Statuses remain Active, and there is no Pending Record for the case. A Disposition Type of STRT-CLK (Start Clock) identifies a Clockdown Closing transaction on the Transaction History Inquiry screen. All inquiry screens will display the message CLOCKING DOWN - MM/DD/YY on line 24.

Generally, the Batch Update which runs the night before the effective date of the closing will generate a Pending Record with a Transaction Type of Closing (07 or 08). This Pending Record cannot be changed. It exists for one day, the effective date of the closing. The next night this closing transaction will be transmitted to BICS and other system interfaces, and Batch Update will close the case. If the effective date of the closing falls on a Saturday or Sunday, the Pending Record for the closing transaction will be available on WMS on the prior Friday, and the case will be closed by Batch Update on that Friday night.

The Authorization available the next business day on BICS will have a Closing Transaction Type (07 or 08). A Disposition Type of CLK-CLOS (Clockdown Closing) will identify these transactions on the Transaction Disposition History screen.

#### Undercare/Maintenance While a Case is Clocking Down

Limited Undercare/Maintenance can be performed on a case that is Clocking Down without stopping the Clockdown process by using Reason Codes 960, 965 or 966. The data is entered and processed the same as any other U/M activity, but only certain data elements can be changed on the Authorization. These data elements, listed with the screen on which they occur, are:

- **WKUM01**
  - Notice Indicator
  - Notice Number

- SafetyNet Indicator
- Language Code
- Case Name
- Residence Address
- TOP
- Phone No
- HEAP Income
- LFLN
- Mailing Address
- Office Code (both Transaction and Responsible Worker)
- Unit ID (both Transaction and Responsible Worker)
- Worker ID (both Transaction and Responsible Worker)
- Transaction Type
- Reason Code
- **WKUM02 - No Changes Allowed**
- **WKUM03**
  - Employability Code
  - PA/MA Individual Reason Code
  - FS Individual Reason Code
- **WKUM04**
  - AFA Code and Date
- **WKUM05**
  - Card Code
  - EBICS Code
  - PA/MA Effective Date
  - FS Effective Date
- **WKUM06**
  - All Payment Lines
  - HVND/ACCT
  - VND/ACCT
- **WKUM09**

- All Child Care Payment Lines

The closing Pending Record that is system generated by Batch Update the night before the effective date of the closing cannot be changed. If it is necessary to do U/M on the case at this time, the Pending Record must be canceled, and a new U/M transaction must be entered. Canceling the Pending Record does not cancel the Clockdown Closing; the next Batch Update that finds the case with no Pending Record will generate a new closing Pending Record. The following chart compares a Clockdown Closing with and without a U/M change:

<b>Normal processing of a Clockdown Closing Pending Record without a U/M Change Compared to Processing of the Clockdown Closing Pending Record with a U/M Change</b> (Authorization TO Date = Thursday, October 20, 2006)		
	<b>Normal processing <i>without</i> a U/M change</b>	<b>Processing with a U/M change</b>
<b>Night 1 (Oct 19)</b>	The Pending Record for the closing is generated by Batch Update.	The Pending Record for the closing is generated by Batch Update.
<b>Next Day (Oct 20)</b>	The closing Pending Record is on the system for one day.	If it is necessary to make a change to the case, the Pending Record for the closing must be canceled. The U/M transaction is entered onto WMS, creating a Pending Record.
<b>Night 2 (Oct 20)</b>	Batch Update closes the case.	If free of errors, the U/M Pending Record will be processed by Batch Update which then creates a new Pending Record for the closing transaction.
<b>Next Day (Oct 21)</b>	WMS inquiry shows the closing.	The Pending Record for the closing transaction is on WMS for one day.
<b>Night 3 (Oct 21)</b>		Batch Update closes the case.

## Stopping a Clockdown Closing

There are two ways to stop a Clockdown Closing after the initial closing transaction has been processed by Batch Update:

- Initiate a Change (05) or a Recertification (06) Transaction which extends the Authorization Period beyond the effective date of the closing.
- Initiate a Change (05) Transaction using Reason Code 994. This transaction stops the Clockdown and the case remains active. The next transaction for this case must extend the Authorization Period.

Either of these two methods of stopping a Clockdown Closing will result in the Disposition Type of STOP-CLK (Stop Clockdown) on the Transaction Disposition History Inquiry screen. The Authorization produced as a result of these transactions will have the message CLOCKDOWN STOPPED plus the message ACTION REQUIRED if the Clockdown was stopped by using Reason Code 994.

### Stopping a Clockdown Closing/Restarting the Clock

A Clockdown Closing can be stopped and a new Clockdown Closing started by entering a new Closing Transaction (07 or 08) on the case. After an initial Clockdown Closing transaction has been processed by Batch Update, the case begins Clocking down to the closing effective date. Before the final Closing Pending Record is created, a new closing transaction with a new Reason Code will stop the initial Clockdown and start a new Clockdown Closing for the new Reason Code and new transaction date. A new client notice will be generated based on the new Case Reason Code and new effective date of the closing.

When a Clockdown Closing is stopped and a new Clockdown Closing started, the system will look for an MA Extension case and/or an FS Separate Determination case which may have been generated by the *first* Clockdown Closing. One of the following may occur:

- If an MA Extension case is *not* found, but any individuals are found eligible for an MA Extension, an MA Extension case will be generated.
- If an MA Extension case is found, it will be updated and the following ALERT message will be printed on the new MA 3209 Authorization: PA CL UPDATED, MA SYSTEM MODIFIED
- If an MA Extension case is found and it is in a Pending Status, e.g., AT/UM, the existing MA Pending Record will be canceled. A new updated Pending Record for the MA Extension case will be created with a new Authorization Number and the following ALERT message will be printed on the new MA Authorization: PA CL UPDATED, MA SYSTEM MODIFIED.
- If an MA Extension case is found, and an Undercare Maintenance transaction has been completed by a worker and the MA case has completed Batch Update, then the system will generate a new MA Authorization with a new Authorization Number. In the ALERT section of the new Authorization, the following message will appear: PA CL RC(S) CHANGED, EVAL EXTENSIONS.
- If a FS Separate Determination case exists, the following ALERT message will be printed on the PA 3209 Authorization: FS SEP DETERMINATION CASE EXISTS.

### Fleeing Felon/Prisoner Auto-Close Process

Audit and Quality Improvement (A&QI) receives files from correctional facilities containing information on prisoners and fleeing felons. A monthly and quarterly matching is done between individuals reported on these files and WMS. This matching data is used by the monthly Prisoner and Fleeing Felon auto-close process to identify prisoners and fleeing felons who are in single-individual PA and FS cases. A single-individual case is defined as a case in which there is only one active person (Individual Status = 07).

The following cases will be subject to auto-closing:

- Single-individual cases that have a Case Type of 11, 12, 16, or 17 and have been identified as Fleeing Felon cases
- Single-individual cases that have a Case Type of 18, 19, or 31 and have been identified as either Fleeing Felon or Prisoner cases

The Authorization To Date on these cases will be set to the end of the Transaction Month, and the Transaction Type will be set to '07'. Other codes and dates will be set as follows:

- Case Reason Code = I92 - “No Eligible Individual” for Case Types 11, 12, 16, 17, and 31
- Case Reason Code = 179 - “Other” for Case Types 18 and 19
- PA/FS Reason Code = I92 - “No Eligible Individual” for TA cases that also have FS authorized
- PA/FS Indicator = 08 - “Closed Both PA and FS” for TA cases that also have FS authorized
- CNS Notice Indicator = T - “Timely” for Case Types 11, 12, 16, 17, and 31
- PA/MA Individual Reason Code = F35 - “Fleeing Felon/Probation-Parole Violator for Case Types 11, 12, 16, and 17
- PA/MA Individual Reason Code = F35 - “Fleeing Felon/Probation-Parole Violator” or F63 - “In Prison” for Case Types 18 and 19
- FS Individual Reason Code = F35 - “Fleeing Felon/Probation-Parole Violator” or F63 - “In Prison” for TA cases that also have FS authorized
- Individual Status will change to 20 - “Case Closed” when the closing clock down date is reached
- PA/MA Individual Effective Date (and the FS Individual Effective Date if the case is also authorized for FS) = last day of the Transaction Month for Case Types 11, 12, 16, 17, 18, and 19
- FS Individual Effective Date = last day of the Transaction Month plus one day for Case Type 31
- MA Coverage To Date = last day of the Transaction Month
- all payment lines will be shortened to the last day of the Transaction Month; any future payment lines will be cancelled

MA Extensions will be generated for case types 11, 12, 16, and 17 in which the single individual has been identified as a fleeing felon and the Emergency Indicator does not equal ‘X’. MA coverage will continue through the 12<sup>th</sup> month following the original PA Authorization From Date, and the MA Reason Code will be 821. However, if the TA closing occurs in the 12<sup>th</sup> month following the original PA Authorization From Date, MA coverage will only be extended for one month immediately following the month of the closing and the MA Reason Code will be set to 758.

A system-generated case number will be assigned to these MA extensions using the following format:

- the first character is an “M”
- the next two digits represent the fiscal district
- the fourth character is an “F”
- the following four digits are the month and year the MA Extension case is opened in the format, mmyy
- the last two digits are a sequential number generated by the system



M01F020706 is an example of a case number assigned to an Albany fleeing felon MA Extension for a case opened in February of 2007.

### WMS Inquiry

WMS Inquiry on the PA case being closed will display the Case Numbers of any associated MA Extension case and/or FS Separate Determination case on the following screens:

- WINQ12 - Case Involvement if the PA Case closing is in a pending data status.
- WINQ07 and WINQ37 - Case Make-Up (under MA EXT/SEP DET)
- WINQ19 and WINQ49 - Case Comprehensive - Screen 1 (displays MA extension and FS case numbers in the lower left hand corner)

In addition, WMS Inquiry on WINQ07 or WINQ37 Case Make-Up for any MA Extension Case or FS Separate Determination Case will display the PA Case Number from which they were created under MA EXT/SEP DET.

The system generated PA/MA Reason Code from the PA closing will be displayed for the MA Extension case on WINQ21 and WINQ51 - Case Comprehensive Screen 3 until the first transaction on the MA Extension case.

### PA Denial Matrix – Case Level Reason Codes

The following chart shows the allowable Case Level reason codes when denying a PA application. This includes the Medicaid Insert language Codes which produce a notice via CNS providing accurate determination of MA eligibility when denied PA benefits. A similar chart showing PA Denials (Individual Level) is in the process of being updated.

PA RC	DEFINITIONS	CAT CD	SEP DET INSERT RC	NO SEP DET INSERT RC	EXCEPT
E10	Failure to Keep/Complete Interview: No Scheduled Appointment	All		754	
E30	Excess Income (Sep. Deter. if appropriate (TT 03))	All	753		
E34	Excess Income Receipt of SSI - Single Individual (CT16)		753		
E60	Unable to Locate	All		754	
E61	Not a Resident of District	All		754	
E63	Not a Resident of State	All		754	
E64	Moved Out of District Before Determination	All		754	
F33	Excess Income - Deemed Income of Alien Sponsor (CT 11)	All	753		
F52	Failure to Provide Information - Federal Reporting	All	753		
F53	Refusal by Parent to Apply for Child (CT 11, 12 Only)	All	753		
F81	Refused Photo ID - Single Individual (CT 16)		753	754	<21

F98	Client Requests Child Care in Lieu of TA (CT 11, 12, 16, 17)	All	753		
I92	No Eligible Individual (Individual - R/C Required)	Defaults to Ind RC-Index B			
M15	Failure to Sign Repayment Agreement/Earnings Assignment (CT 12, 16, 17)	All	753		
M25	Failure to Respond to a Computer Match Call-In	All	753		
M35	Lump Sum - No Good Reason Provided	All	753		
M37	Lump Sum - Shortened Ineligibility Period	All	753		
M40	Intentionally Providing Incorrect Information	All	753		
M48	Parent's Offer of a Home - Minor Not Pregnant or Parenting (CT 16, 17)	All	753		
M66	Receiving PA in Another Case	All		754	
M67	Part of Another PA Application	All		754	

Updated 6/2009

M88	Failure to Comply with Finger Imaging Requirement - Legally Responsible	All	753		
M90	Client Request - Written - PA and MA	All		793	
M91	Client Request - Verbal - PA and MA	All		793	
M94	Client Request - Written - PA Only	All	753		
M95	Client Request - Verbal - PA Only	All	753		
N10	Failure to Keep/Complete Appointment	All	753		
N13	Failure to Use/Apply for Benefit/Resource	All	753		
N14	Filing Unit Member Failed to Apply	All	753		
N15	Failure to Keep Appointment - for Home Visit Including EVR/FEDS	All	753		
N16	Failure to Contact Agency	All	753		
N17	Failure to Complete Eligibility Process	All	753		
N19	Failure to Comply with Requirement to Look for Work	All	753		
N21	Failure to Keep Employment Assessment Appointment	All	753		
U40	Excess Resources	All	753		
U41	Transfer of Resources (CT 12, 16, 17)	All	753		
U42	Excess Resources - Refusal to Sell Property	All	753		
U44	Excess Resources - Deemed Resources of Alien Sponsor (CT 11)	All	753		
V21	Failure to Provide Verification	All	753		
V23	Failure to Provide Verification - Parent/Spouse	All	753		
V24	Failure to Provide Verification - Step/Grandparent	All	753		
V25	Failure to Provide Verification - Filing Unit	All	753		
W10	Failure to Keep Investigatory Appointment	All	753		
W11	Failure to Keep Appointment for DSS Medical Assessment	All	753		

Y95	Application for Emergency Assistance Only	Manual Notice	N/A		
Y99	Other - Manual Notice Required	Manual Notice	N/A		

*753 PA Denial, MA Separate Determination*

*754 Combined PA/MA Denials*

*793 PA/MA Denial – Client's Request*

WCLSOP – FS Separate Determination

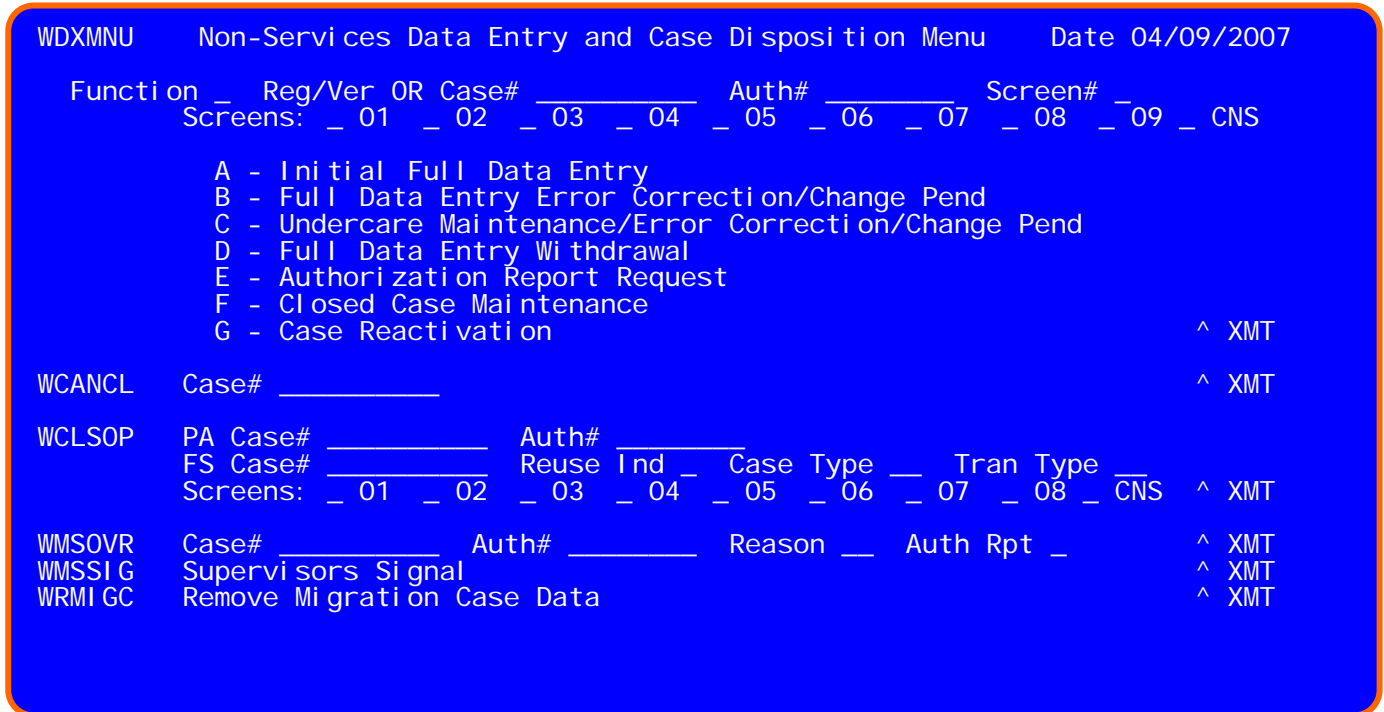


Figure 1 – WCLSOP on the Non-Services Data Entry and Case Disposition Menu (WDXMNU)

Purpose

The FS Separate Determination Transaction, WCLSOP, is located on the WDXMNU - Non-Services Data Entry and Case Disposition Menu screen.

Access

- Entering 7 on WMS Menu - WMSMNU, **or**
- F9 from WSYSAK - System Acknowledgment screen resulting from a lockdown closing of a PA case, **or**
- Pressing the Ctrl+F6 from WSYSAK - System Acknowledgment screen resulting from the creation of a Pending Record for a FS case opening which used the WCLSOP

Screen Response

Positive

- WKER01 - Full Data Entry Error Correction & Pending Data Change

Negative

- Field(s) in error return highlighted. One of the FS Separate Determination Error Messages will appear on line 24, or

- Any of the following messages on line 24:
  - SF99 KEY NOT SUPPORTED (99 = 8, 13)
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Services
Ctrl+F10	WMEEMN - EEDSS Host Menu System
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WCLSOP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PA CASE #	01050 - CASE NUMBER (10)	System returned if accessed via F9 on the WSYSAK; otherwise, required entry.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FS CASE #	01050 - CASE NUMBER (10)	System returned if accessed via F9 on the WSYSAK; otherwise, required entry.
AUTH #	02040 - AUTHORIZATION NUMBER (8)	System returned if accessed via F9 on the WSYSAK; otherwise, required entry.
REUSE IND	01051 - CASE NUMBER REUSE INDICATOR (1)	No longer supported.
CASE TYPE	01060 - CASE TYPE (2)	Required entry
TRAN TYPE	02010 - TRANSACTION TYPE (2)	Required entry of 01 or 10
SCREENS	NONE	An 'X' is placed by all FDE screens to be returned; an 'X' by CNS will return the Client Notices System menu.

## Subsystem Processing

### Error Messages

#### FS Separate Determination Error Messages

(Listing is alphabetical by message)

**AUTH NO/ACCEPT NO INVALID**

Authorization must be entered and must be numeric.

**AUTHORIZATION NUMBER INVALID**

Authorization must be entered and must be numeric.

**CASE DOES NOT QUALIFY FOR SEP DET**

The combination of Case Type, PA/FS Reason Code, Transaction Type, and PA Food Stamp Code for the case does not permit separate determination.

**CASE IS BEING MIGRATED**

Data for this Case Record has been flagged for migration. The case may not be accessed until after data migration has been run.

**CASE NOT FOUND**

PA Case Number entered is not known to the system.

**CASE # CANNOT BE REUSED WHEN PENDING DATA EXISTS**

The new Case Number cannot be a reused Case Number because that case has a Pending Record.

**CASE # HAS MA EXT AND/OR SEP DET PENDING**

The Case Number of the PA Closing cannot be reused if there is a pending MA Extension or FS Separate Determination case.

**CASE PENDING STATUS INVALID FOR SEP DET**

If PA Case Status is 10 - Active or 21 - Active Override, then Pending Data Status must be AT/UM, AT/UMOV, AU/UM, UM/BUP or UM/OVER, or

If PA Case Status is 14 - Closed or 22 - Closed Override, then Pending Data Status must be 00 (No Pend).

**CASE STATUS INDICATES CASE CANNOT BE REUSED**

If Reuse Indicator is X, then new Case Status must be 14, 15, 22 or 23.

**CASE STATUS INVALID FOR SEP DET**

PA Case Status must be 10, 14, 21 or 22.

**CASE TYPE INVALID FOR SEP DET**

PA Case Type must be 11-13, 16 or 17.

**MA EXT/SEP DET HAS BEEN ENTERED FOR PA CASE**

An MA Extension or FS Separate Determination case has already been generated from the PA closing.

**NEW CASE NUMBER CANNOT BE PA CASE NUMBER**

New Case Number cannot be the same as the PA Case Number.

**NEW CASE NUMBER INVALID**

First character of new Case Number may not be "S".

**NEW CASE NUMBER REQUIRED**

A new Case Number must be entered.

**NEW CASE TYPE INVALID**

New Case Type must be 31 or 32.

**NEW CASE TYPE REQUIRED**

New Case Type must be entered.

**NEW TRAN TYPE INVALID**

New Transaction Type must be 02 or 10.

**NEW TRAN TYPE REQUIRED**

New Transaction Type must be entered.

**NO MATCH ON AUTHORIZATION NUMBER**

The authorization number entered for the PA Case is not the Authorization Number of a closing transaction for an active case, or is not the Authorization Number of a closed case.

**PA CASE FOOD STAMP CODE INVALID FOR SET DET**

If new Case Type is 31 or 32, then Food Stamp Code on PA case must be 07 or 08.

**PA CASE INVALID FOR SEP DET**

Conditions of PA case do not allow Separate Determination.

**PA CASE NUMBER INVALID**

First Character of PA Case Number must not be "S".

**PA CASE NUMBER REQUIRED**

PA Case Number must be entered.

**PA CASE SEP DET INDICATOR INVALID FOR SEP DET**

Case Type of Separate Determination case must be

- 31 or 32, or



- 20 or 22 with Separate Determination Indicator equal A, or
- Separate Determination Indicator must be A or B.

**PA CASE TRANSACTION DATE INVALID FOR SEP DET**

A FS case cannot be established from a PA case if today's date is later than the last day of the month following the PA Closing Transaction Date month.

**PA CASE TRANSACTION TYPE INVALID FOR SEP DET**

Transaction Type of PA Case Pending Record must be 07 or 08.

**RE-USE INDICATOR INVALID**

If entered, Reuse Indicator must be X.

**SCREEN 8 NOT ALLOWED**

Screen 8 is not allowed in a non-LDF district.

**SEP DET OF EMERGENCY CASE NOT ALLOWED**

Separate Determination cannot be made on an emergency PA case.

**UNRESOLVED CINTRAK DATA EXISTS**

At least one individual on the PA Case has unresolved SDX data.

# Automated SDX/WMS Interface

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## Automated SDX/WMS Interface

### Overview

The Automated System Data File/WMS Interface (Auto SDX) uses data supplied by the Social Security Administration (SSA) and data in WMS to ensure:

- 1) all New York State residents who are eligible to receive Supplemental Security Insurance (SSI) benefits are made eligible for Medicaid, and
- 2) all single New York State residents who are eligible for Live Alone SSI are made eligible to receive food stamps. (This program is referred to as NYSNIP, the New York State SSI Nutrition Improvement Project.)

Auto SDX processes both MA/SSI and Live Alone SSI Food stamp cases in the same daily program run. In this document these two processes will be referred to as the Automated SDX/WMS Interface for MA/SSI and the Automated SDX/WMS Interface for NYSNIP, respectively. Both processes operate in a similar manner.

### Automated SDX/WMS Interface for MA/SSI

An individual residing in New York State who is eligible for Supplemental Security Income (SSI) from the Federal Social Security Administration (SSA) is automatically eligible for Medicaid. The Auto SDX process ensures that these individuals are in a WMS case eligible for Medical Assistance (MA). Conversely, if an individual becomes ineligible for SSI benefits, the Auto SDX process ends that individual's MA/SSI eligibility.

The data supplied by the SSA to WMS may result in the following types of WMS transactions being done automatically as part of Auto SDX.

- Opening a new MA/SSI case.
- Closing of an existing MA/SSI case.
- Changing an MA case (Case Type = 20, 21, or 24) to an MA/SSI case (Case Type = 22).
- Changing an MA/SSI case (Case Type = 22) to an MA case (Case Type = 20).
- Changing an SSI Indicator Code from 1 (Active) to 4 (Deemed Eligible), 3 (Closed/Denied/Suspended), or 5 (Closed SSI, Continue OASDI/Disabled Adult Child/Zebly Child) in MA/SSI cases.

For each one of these transactions, a Pending Record is produced (see CREATION OF PENDING RECORDS later in this section). Local districts will be able to make certain changes on this Pending Record before it goes through Local Data Feedback (LDF) and Batch Update. The WMS Inquiry process can be used to review these Pending Records. See **SRM Inquiry** for more information.

Certain situations will result in exceptions that will not produce a Pending Record. These exceptions will be included in the printed Automated SDX/WMS Interface Transaction Control Report which will be sent to local districts. This report contains two sections. Section I - Transaction Control Report is a summary of all transactions for the district based on the current SDX process. Section II - Auto SDX - WMS Interface Report is the detailed data for each

individual affected by the SDX process. See **SRM Informational and Management Reports** for an example of this report.

### Automated Clearance

Using the data supplied by SSA, the Auto SDX process starts with an automated clearance process on each SSN supplied by the SSA. This does the following:

- If the SSN is not found on WMS, a CIN is assigned to the individual. (Openings only).
- If the SSN is found, but year of birth does not match, no further action is taken. This individual is reported on the Auto SDX Report.
- If there is an exact match on WMS of SSN and year of birth, the individual's current CIN is used. An analysis of the individual's WMS case involvement is then made.

### Opening of a New MA/SSI Case

A new MA/SSI case will be opened on WMS if one of the following conditions is met:

- The individual is not known to WMS as a result of the automated clearance process, **or**
- The individual is known to WMS and has "Current MA Eligibility" ("Current MA Eligibility" is defined as Individual Status of 07 - Active in a case with Case Status of 10 - Active or 21 - Active-Override with the SDX Processing Date within or prior to the individual's MA Coverage Period) and is in a Case Type other than 11-13 - ADC, 16 - SN-CSH, 17 - SN-FNP, 20 - MA, 21 - Medical Presumptive Eligibility, 22 - MA-SSI, 24 - FHP, or 40 - Services (SERMA), **or**
- The individual is known to WMS and does not have "Current MA Eligibility" in any case type and individual status is not 13 - Deceased.

An MA/SSI case opened while the individual is active in a multiple individual MA case will be reported through the Automatic Closing - Case Conflict process. See **SRM Batch Processing**.

### Changes to Existing Cases

If the individual is known to WMS and has "Current MA Eligibility" in Case Types 11- FA, 12 - SN-FP, 13 - ADC-FC, 16 - SN-CSH, 17 - SN-FNP, 20 - MA, 21 - Medical Presumptive Eligibility, 24 - FHP, or 40 - Services (SERMA), then the following processing takes place in the sequence shown:

1. If the individual is in a case with Case Type = 20 - MA, 21 - Medical Presumptive Eligibility, or 24 - FHP, is the only individual in the case, and has an Individual Status = 07 - Active, 08 - Inactive Excess Restricted Income, or 10 - Inactive-Sanctioned, then the Case Type is changed from 20, 21, or 24 to 22 - MA/SSI.
2. If the individual is in a case with Case Type = 16 - SN-CSH, 17 - SN-FNP, then the SSI Indicator Code is changed to '1' (Active), Categorical Code is changed to either 10, 11, or 12, and the case reported on the Auto SDX Report. If the SSI Status Code is already '1' and the Categorical Code is already 10, 11 or 12, no further action is taken.
3. If the individual is in a case with Case Type = 40 - Services (SERMA), no action is taken, but the situation is reported on the Auto SDX Report.

4. If the individual is in a case with Case Type = 11, 12, or 13, no action is taken but the situation is reported on the Auto SDX Report.

### Closing of Cases Due to Termination of SSI Benefits

If the individual is known to WMS, then one of the following takes place:

1. If the individual does not have "Current MA Eligibility" in a case with Case Type = 20 - MA, 21 - Medical Presumptive Eligibility, 22 - MA-SSI, 24 - FHP, 16 - SN-CSH, 17 - SN-FNP or 40 - Services (SERMA), no action is taken but the situation is reported on the Auto SDX Report.
2. If the individual is in a case with Case Type = 22 - MA/SSI; with "Current MA Eligibility", then:
  - a) If the SSI termination of benefits is due to death; the individual has moved out of state; or the individual is outside U.S., then the individual is closed but MA eligibility is extended for 35 days from the SDX record processing date, and the CBIC Card Code is set to 'X' (No Card). If the individual is the only person in the case, the case is also closed, or
  - b) If the SSI termination of benefits is not for the situations in a), and the individual is the only person in the case, the case type is changed to 20 - MA and the MA eligibility is extended 1 year. If the case has multiple individuals, the situation is reported on the Auto SDX Report.
3. If the individual is in a case with Case Type = 16 - SN-CSH, 17 - SN-FNP with "Current MA Eligibility", then:
  - a) If the SSI termination of benefits is due to death; the individual has moved out of state; or the individual is outside the U.S, no action is taken but the situation is reported on the Auto SDX Report, or
  - b) If the SSI termination of benefits is not for the situations in a), and the SSI Indicator Code and Categorical Code on the WMS case are not appropriate, they are updated. This situation is also reported on the Auto SDX Report.
4. If the individual is in any other case type and has "Current MA Eligibility", then no action is taken but the situation is reported on the Auto SDX Report.

### Creation of Pending Records

For new cases, and for cases to be changed or closed, the Auto SDX process will generate a Pending Record. (If the case already has a Pending Record as the result of a non-Auto SDX transaction, the Auto SDX process will not generate an additional Pending Record, but the situation will be reported on the Auto SDX Report.)

The Pending Data Status depends on whether the case is new, or is being changed or closed.

- **New Cases** - The Pending Data Status will be FDE/ERR. The Pending Record will retain this status until changed to AT/FDE by being manually signed-off by the Auto SDX Transaction Signoff process or being automatically signed-off at the start of the sixth working day.
- **Changed or Closed Cases** - The Pending Data Status will be AT/UM. The Pending Record will be processed the following night by Batch Update.

All Pending Records created by the Auto SDX process are given a new Authorization Number and a Reason Code of 922 - Inmate Correctional Institution, 941 - Moved out of State/County, 942 - Death, or 988 - AUTO-SDX.

Changes to these Pending Records by the regular Error Correction or Pending Data Change transactions are not allowed except for screen 8 in LDF districts. Certain changes can be made to these Pending Records by the Auto SDX Transaction Signoff process which is described later in this section.

Pending Records created by the Auto SDX process go through Batch Update regardless of whether or not BICS finds any LDF errors. If BICS finds any LDF errors, the case will be on the FM-UNSAT Report File and the BICS database will not be updated. Such cases will require an Undercare Maintenance transaction or Reopening on WMS to correct the error(s) found by BICS.

### Automated SDX/WMS Interface for NYSNIP

A single individual residing in New York State who is eligible for Live Alone Supplemental Security Income (SSI) from the Federal Social Security Administration (SSA) is automatically eligible for Food Stamps. They will be automatically opened as NYSNIP standardized benefit cases on WMS through the automated SDX/WMS Interface for NYSNIP process

The Auto SDX for NYSNIP process uses data supplied by the SSA to automatically ensure that all New York State residents who are Code A SSI Live Alone individuals are made eligible for FS. Conversely, if an individual becomes ineligible for Code A SSI Live Alone benefits, the Auto SDX for NYSNIP will indicate that the individual is no longer eligible for NYSNIP. The NYSNIP case will then either be auto closed or subject to manual closing and possible non-NYSNIP case opening.

Data supplied from the SDX may result in the following types of transactions automatically taking place on WMS as part of the Auto SDX for NYSNIP process.

- Opening a new NYSNIP case.
- Closing an existing NYSNIP case.
- Changing an FS case to a NYSNIP case.
- Changes to SSI Status, Income, or Address.

For each one of these transactions, a Pending Record is produced. Local Districts will be able to make certain changes on this Pending Record before it goes through LDF and Batch Update. The WMS Inquiry process can be used to review these Pending Records.

Certain situations will result in Exceptions that will not produce a Pending Record. These Exceptions will be included in the printed Automated SDX-WMS Interface Auto SDX for NYSNIP Report from BICS, which will be sent to local Districts. The report will contain a summary of all transactions for the district as well as detailed information for each individual affected by the SDX process. See **SRM Informational and Management Reports** for an example of this report.

### Automated Clearance

Using the data supplied by SSA, the Auto SDX for NYSNIP process starts with an automated clearance process on each SSN supplied by the SSA which does the following:

- If the SSN is not found on WMS, a CIN is assigned to the individual. (Openings Only)

- If the SSN is found, but year of birth does not match, no further action is taken. This individual is reported as an Exception on the Auto SDX for NYSNIP Report.
- If there is an exact match on WMS of SSN and year of birth, the individual's current CIN is used. An analysis of the individual's WMS case involvement is then made.

### Opening of a New NYSNIP Case

A new NYSNIP case will be opened on WMS if one of the following conditions is met:

- The individual is not known to WMS as a result of the Automated clearance process, **or**
- The individual is known to WMS and currently has an active FS case (Individual Status of 07 and Case Status 10-Active or 21-Active Override) in case types 31 or 32. The case will be converted to a NYSNIP case at new benefit standards, **or**
- The individual is known to WMS, is not IPV sanctioned, and not active in a FS case.

### Closing of NYSNIP Cases Due to SSI Terminations or Status Change of SSI Benefits

If the individual is known to WMS, then one of the following takes place:

1. If a SSI termination of benefits is due to death, or the individual has moved to New York City, out of State, or outside the U.S., then the individual's NYSNIP case will be auto closed.
2. If there is a SSI status change from Live Alone or if a SSI termination is not for a situation in #1, the NYSNIP case will be subject to manual closing and a possible non-NYSNIP case opening.

### Creation of Pending Records

For new cases and for cases to be changed or closed, the Auto SDX for NYSNIP will generate a Pending Record. If the case already has a Pending Record as a result of a non-Auto SDX for NYSNIP transaction, the Auto SDX for NYSNIP process will not generate an additional Pending Record, but the situation will be reported as an Exception on the Auto SDX for NYSNIP Report. The Pending Data Status depends on whether the case is new, or is being changed or closed.

- *New Cases* – The Pending Data Status will be FDE/ERR. The Pending Record will retain this status until changed to AT/FDE by being manually signed-off by the Auto SDX Transaction signoff process or being automatically signed-off at the end of the fifth working day.
- *Changed or Closed Cases* – The Pending Data Status will be AT/UM. The Pending Record will be processed the following night by Batch Update.

All Pending NYSNIP Opening Records created by the Auto SDX Process are given a new Authorization Number and either Reason Code B27 or B28 for Phase I and A39 for Phase II. On an ongoing basis all NYSNIP Opening Pending Records created by the Auto SDX for NYSNIP process will be given either reason code B27, B28, or A39 as appropriate. All NYSNIP undercare transactions will be given the reason code of B20 or 960 - address change.

Changes to these Pending Records by the regular Error Correction or Pending Data Change transactions are not allowed except for screen 8 in LDF districts. Certain changes can be made to these Pending Records by the Auto SDX Transaction Signoff process, which is described in **Processing Auto SDX Created Pending Records** below.

Pending Records created by the Auto SDX process go through Batch Update regardless of whether or not BICS finds any LDF errors. If BICS finds any LDF errors, the case will be on the FM-UNSAT Report File and the BICS database will not be updated. Such cases will require an Undercare Maintenance transaction or Reopening on WMS to correct the error(s) found by BICS.

### Processing Auto SDX Created Pending Records (Both MA/SSI and NYSNIP)

Pending Records created by the Auto SDX process can be reviewed via the Auto SDX screens and WMS Inquiry. For new cases created by the Auto SDX process, certain data elements can be changed.

The WASI01 - Auto SDX/WMS Interface Menu is obtained by entering selection No. 18 on the WMSMNU - Welfare Management System Menu and transmitting.

On the WASI01 screen, make sure that the menu is set up to display MA/SSI transactions. The letter following the label "SF-4 TO CHANGE MA/FS: " must be 'M'. If it is 'F', press the F4 key to change it to 'M'. The following function keys will return the WASI02 - Auto SDX/WMS Transactions screens which list the Pending Records created by Auto SDX during the last 6 working days as follows:

- F7 - Displays all Open Transactions
- F8 - Displays all Closed Transactions
- F9 - Displays all Change Transactions
- F10 - Displays all Transactions

Transactions will be displayed in order of date created with most recent date first. The standard Function Keys for paging, F1, F2 and F3 are supported. In addition F12 will return WINQ01/WINQ02 - Application and Case Inquiry Menu.

The WASI02 screen contains the following information:

- **LN** - Line Number

A sequential number to uniquely identify the case for further access.

- **S-O IND** - Sign-off Indicator

This is initially blank for all Opening transactions and 1 for all other transactions. After a Pending Record for an Opening is signed off, as described below, the S-O IND is changed to a 1. After the Pending Record goes through Batch Update, the 1 is changed to a 2.

- **District/State Case No**

The District Case Number is the number given to the case by the local district. The State Case Number is the number generated by the Auto SDX process for Openings of new cases. For MA/SSI cases the format is **aa SDX bbbbbb**. For NYSNIP Food Stamp cases the format is **aa SDF bbbbbb**. In both cases **aa** is the District Code and **bbbbbb** is a sequential number.



- **Authorization Number**

- **TX/CASE TYPE**

This is the Transaction Type and Case Type on the Auto SDX created Pending Record.

- **SSN and Name**

The SSN and Name of the SSI individual in the case.

- **TITLE XIX**

The numeral 1 in this column indicates that this individual resides in a Title XIX Facility. This field is for MA/SSI cases only.

Transactions are displayed on the WASI02 screen for six days. Further processing for case openings on the WASI02 screen is accomplished by entering the line number of the desired case on line 23 and transmitting.

The WASI03 - Auto SDX/WMS Transaction Signoff screen is returned. The Local Office, Worker and Unit can be changed for any case prior to signoff and Batch Update. The Case Number can be changed only for new cases being opened.

New cases must also be signed-off by entering the new Auto SDX generated Authorization Number on line 17 of the WASI03 screen and transmitting. This will change the Pending Data Status from FDE/ERR to AT/FDE in LDF Districts or FDE/BUP in Non-LDF Districts.

WASI01 – Auto SDX/WMS Interface Menu

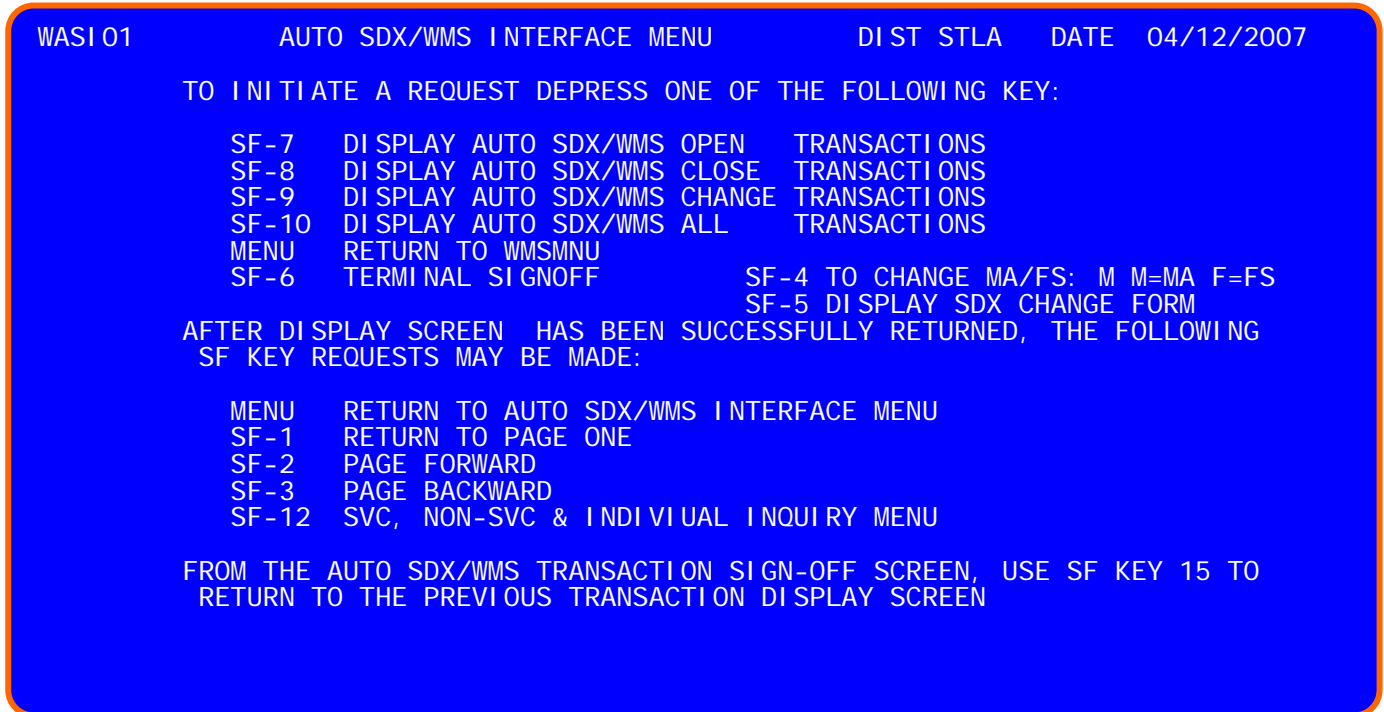


Figure 1 – Auto SDX/WMS Interface Menu Screen (WASI01)

Purpose

This screen is used to select the desired display of Automatic SDX/WMS Transactions for the last six working days (including today). Function keys as listed on this screen are used to select the category, either MA or FS, and type (Open, Close, Change, or All) transactions to display.

Access

- Entering 18 on the WMSMNU - WMS Menu.

Screen Response

Positive

See **Functions Keys**.

Negative

- One of the following messages on line 24:
  - USE DESIRED KEY
  - NO OPEN TRANSACTIONS EXIST TODAY
  - NO CLOSE TRANSACTIONS EXIST TODAY

- NO CHANGE TRANSACTIONS EXIST TODAY
- SF 99 NOT SUPPORTED-REXMT (99= 1-3, 11, 13-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F4	Changes inquiry parameter from M (MA) to F (FS) and vice versa
F5	WASI04 - Online SDX Change Form
F6	<i>Renders Workstation Inactive</i>
F7	WASI02 - Auto SDX/WMS Transactions displaying "open" Transactions
F8	WASI02 - Auto SDX/WMS Transactions displaying "close" Transactions
F9	WASI02 - Auto SDX/WMS Transactions displaying "change" Transactions
F10	WASI02 - Auto SDX/WMS Transactions displaying "all" Transactions
Ctrl+F2 or F12	WINQ01 - Application and Case Inquiry
Ctrl+F6	WMSMNU - WMS Menu

Screen Field Description – WASI02

Not Applicable

WASI02 – Auto SDX/WMS Transactions

LN	S-0	DI ST/STATE	AUTH	TX/CASE	SSN	NAME	TITLE
NO	IND	CASE NO	NO	TYPE			XI X
01		09SDX00010	01000169	02/22	873714652	THOMSON	LESLIE C
02		09SDX00009	01000168	02/22	772438821	GARRISON	SARAH K
03		09SDX00008	01000167	02/22	562984917	GASTON	MARY G
04		09SDX00007	01000166	02/22	523921341	SCAGGS	RAYMOND
05		09SDX00006	01000165	02/22	317246233	ANDERSON	JEFFREY W
06		09SDX00005	01000164	02/22	721799287	WESTON	JAMES G
07		09SDX00004	01000163	02/22	137294378	MORRISON	MARGARET P
08		09SDX00003	01000162	02/22	373835267	HOLT	ANGELA
09		09SDX00002	01000161	02/22	329473992	WARREN	DANNIELLE H
10		09SDX00001	01000160	02/22	027439926	THURMAN	JOANN
11	2	MATRAI N001	01000159	07/22	473984444	CHILDERS	GARY C
12	2	MATRAI N004	01000158	05/22	413477793	JACOBS	MI CHAEL
13	2	MATRAI N003	01000157	05/22	973224332	MADISON	ELAINE
14	2	MATRAI N002	01000156	07/22	919552291	CURAM	SHELBY R

ENTER DESIRED LINE NUMBER FOR TRANSACTION UPDATE ^^ XMT ^

Figure 2 – Auto SDX/WMS Transactions (WASI02)

Purpose

This screen displays Auto SDX transactions for last six working days (including today). The types of transactions displayed (MA or FS, and Open, Close, Change, or All) depend on the selection made on the Auto SDX/WMS Interface Menu, WASI01. See **Access** below.

A transaction can be selected for further processing by entering its line number and transmitting. All fields on this screen are protected.

Access

- F7, F8, F9 or F10 from WASI01 - Auto SDX/WMS Interface Menu:
  - F7 - Returns WASI02 with only OPEN Transactions
  - F8 - Returns WASI02 with only CLOSE Transactions
  - F9 - Returns WASI02 with only CHANGE Transactions
  - F10 - Returns WASI02 with ALL Transactions

Screen Response

Positive

- WASI03 - Auto SDX/WMS Transaction Signoff screen with data for case corresponding to Line Number entered on WASI02.

Negative

- One of the following messages on line 24:
  - CURRENT PAGE DISPLAYED IS PAGE ONE - SF 1 IGNORED
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF2 INGORED
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE - SF3 INGORED
  - INVALID SELECTION
  - PEND STATUS DOES NOT ALLOW UPDATE
  - SF 99 NOT SUPPORTED - REXMT (99 = 4 - 5, 7-11, 13 -15)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F2 or F12	WINQ01 - Application and Case Inquiry
Ctrl+F6	WMSMNU - WMS Menu

Screen Field Description – WASI02

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first four letters of district name; Protected
DATE	NONE	System Supplied; Protected
LN NO	NONE	14 occurrences
S-0 IND		14 occurrences
DIST/STATE CASE NO	01050 - CASE NUMBER (10)	14 occurrences
AUTH NO	02040 - AUTHORIZATION NUMBER (8)	14 occurrences
TX/CASE TYPE	02010 - TRANSACTION TYPE (2)/ 01060 - CASE TYPE (2)	14 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
NAME	03030 - NAME (LAST) (17)	Characters 12-28.
	03030 - NAME (FIRST) (10)	Characters 1-10.
	03030 - NAME (MI) (1)	Character 11
TITLE XIX	NONE	Used only for MA/SSI cases; a '1' in this field indicates the individual resides in a Title XIX facility.

WASI03 – Auto SDX/WMS Transaction Signoff

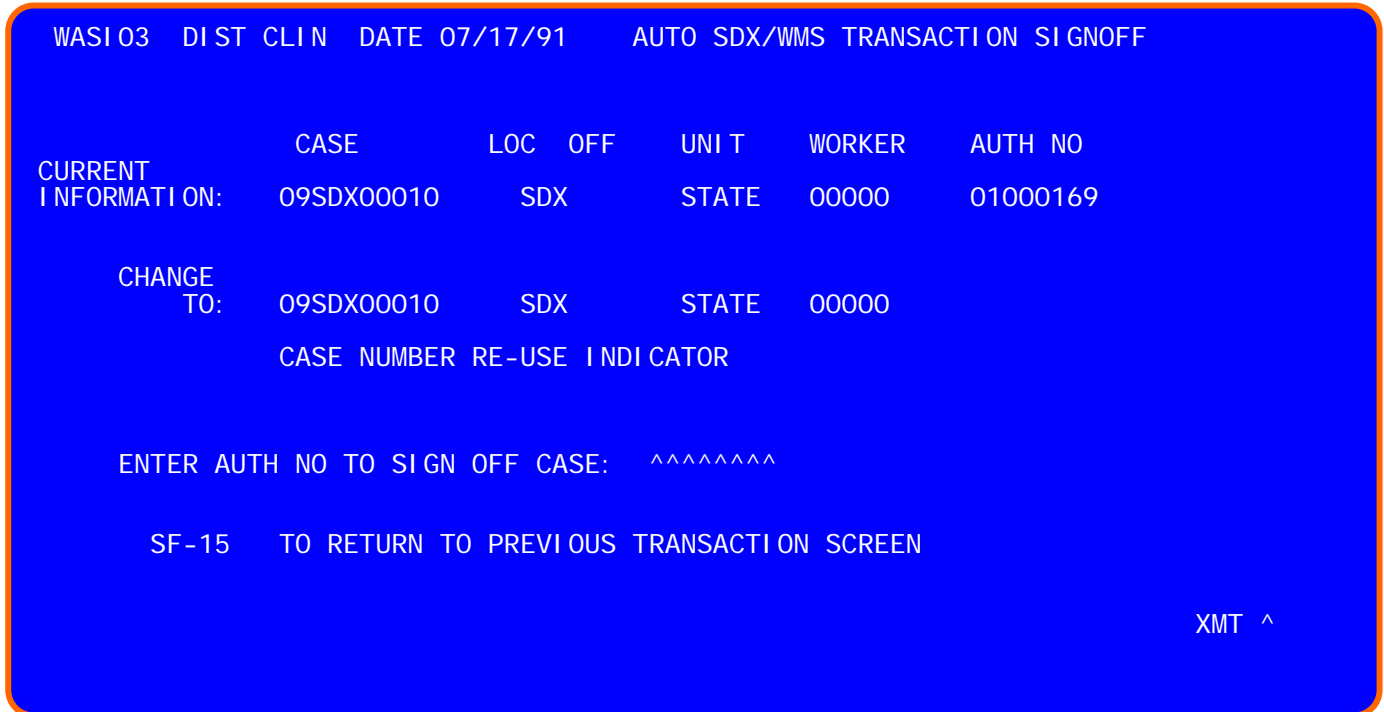


Figure 3 – Auto SDX/WMS Transaction Signoff (WASI03)

Purpose

This screen displays selected data for an Auto SDX created Pending Record, permits changes to this data, and provides a means of signing off new MA/SSI or NYSNIP cases being opened.

Access

- Entering a valid Line Number on WASI02 and transmitting.

Screen Response

Positive

- The following message on line 24: UPDATES IN EFFECT.

Negative

- One of the following messages on line 24:
  - CASE NUMBER REUSE INDICATOR = X WHEN 'ON'
  - EXAMINE BLINKING FIELDS: 999 (999 is one of the error messages as shown on The Auto SDX/WMS Signoff Error Message pages)
  - SECURITY VIOLATION/TRANSACTION NOT ALLOWED

- SF 99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
- UPDATES IN EFFECT
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WASI02 - Auto SDX/WMS Transactions Screen
Ctrl+F6	WASI01 - Auto SDX/WMS Interface Menu

Screen Field Description – WASI03

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Protected; Mnemonic - first four letters of district name
DATE	NONE	System Supplied; Protected
<b>CURRENT INFORMATION:</b>		
CASE	01050 - CASE NUMBER (10)	Protected
LOC OFF	01020 - LOCAL OFFICE NUMBER (3)	Protected
UNIT	01030 - UNIT IDENTIFIER (5)	Protected
WORKER	01040 - WORKER IDENTIFIER (5)	Protected
AUTH NO	02040 - AUTHORIZATION NUMBER (8)	Protected
<b>CHANGE TO:</b>		
CASE	01050 - CASE NUMBER (10)	
LOC OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	



WASI04 – Online SDX Change Form

Figure 4 – Online SDX Change Form (WASI04)

Purpose

Data entry of SDX record changes to case number and district can be done on this screen. Multiple lines proved for up to sixteen changed entries. These changes are applied to SDX records in that evenings batch run.

For Districts 97 (OMH) and 98 (OMRDD) the label CASE NUMBER will be replaced with the label CONSECUTIVE# and an additional field labeled FAC will be displayed to the right of the Dist field.

Access

- Pressing F5 on WASI01 - Automated SDX/WMS Interface Menu

Screen Response

Positive

- The following message on line 24: UPDATES IN EFFECT.

Negative

- One of the following messages on line 24:
  - ENTRY REQUIRED BY OMH/OMRDD
  - INVALID DIST MNEMONIC

- INVALID SSN
- LAST, OR FIRST, NAME = SPACES
- NO DATA ENTERED
- NYC NOT ALLOWED USE BRON BKLN MAHN QEEN OR RICH
- SF 99 NOT SUPPORTED - REXMT (99 = 1-4, 7-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F5	Message on line 24: DATA ENTERED
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WASI01 - Auto SDX/WMS Interface Menu

Screen Field Description – WASI04

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	Protected; Mnemonic - first four letters of district name
DATE	NONE	System Supplied; Protected
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	16 occurrences
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28; 16 occurrences
FIRST	03030 - NAME (FIRST) (10)	Characters 1-10; 16 occurrences
MI	03030 - NAME (MI) (1)	Character 11; 16 occurrences
CASE NUMBER or CONSECUTIVE#	01046 - CASE NUMBER (10)	16 occurrences
DIST	01011 - FISCAL DISTRICT (2)	Mnemonic - first four letters of district name; 16 occurrences
FAC	01020 - LOCAL OFFICE NUMBER (3)	16 occurrences; displayed for districts 97 and 98 only

## Subsystem Processing

### Auto SDX Status Codes

The following ASWI Status Codes are printed on the ASWI Transaction/Exception Report. See **SRM Information and Management Reports** for examples of ASWI Reports.

#### Auto SDX Status Codes

**CFS - FS Closing Transaction**

AN FS Closing Transaction was created.

**CMI - Closed the MA/SSI individual**

A SDX closing transaction has closed a MA/SSI individual in a multi-individual case.

**CMS - Closed a MA/SSI case**

A SDX closing transaction has closed a MA/SSI case.

**FMF - SDX MA Eff. Date is in future**

The SDX Medical Effective Date on a SDX open or close transaction is too far in the future.

**FMN - Med Elig = N, PSC is not N24**

The SDX Medicaid Eligibility Code N is valid for Payment Status Code of N24.

**FMP - SDX MA Eff. Date is in the past**

The SDX Medicaid Effective Date on a SDX open or close transaction is too far in the past.

**FSC - Susp. Indiv. exists on WMS**

An SSI opening for an individual who has a Payment Status of S06 or S08, and is active in a MA or SafetyNet case. At this time, the ASWI has not been instructed how to process this type of SSI opening.

**NAD - NYC Indiv. exists in ADC case**

A NYC SSI recipient is active in an upstate ADC case.

**NEM - NYC Indiv. in Upstate WMS case**

A NYC SSI recipient is active in an upstate case other than MA/SSI, MA, SafetyNet, ADC, or Services.

**NHR - NYC Indiv. exists in HR case**

A NYC SSI recipient is active in an upstate SafetyNet case.

**NMA - NYC Indiv. exists in MA case**

A NYC SSI recipient is active in an upstate MA case.

**NMM - NYC Individual known on WMS Upstate**

A NYC SSI recipient is involved in two or more open or closed upstate WMS cases.

**NPM - NYC Individual known on WMS Upstate**

A NYC SSI recipient's SSN is known as an Upstate WMS case (Date of birth and/or Sex do not match).

**NSI - NYC Individual exists in MA/SSI Case**

A NYC SSI recipient is active in an upstate MA/SSI case.

**NSV - NYC Indiv. exists in SRVS case**

A NYC SSI recipient is active in an upstate Services case.

**OFS - FS Opening Transaction**

FS opening transaction created.

**OMD - Open MA/SSI Effective Date in Past**

A MA/SSI case was opened with an Authorization From Date with today's date. The original SDX Effective Date was more than six months in the past.

**OMS - Opened a MA/SSI case**

A SDX open transaction opened a MA/SSI case.

**RDC - SDX Dist Chg/Chg WMS FS Dist**

SDX District change/change WMS FS District

**RLS - State Living Arrangement Chg**

SSI State Living Arrangement change

**RRI - SDX Closing/Rec ID from I to C**

SDX closing occurred - Record ID changed from Individual to Couple

**RSI - SDX Closing/Payment Status XXX**

SDX closing occurred - Payment Status changed to a Non-pay, Suspended or Terminated

**UAD - U/M SDX Address Change**

MA and FS undercare transaction due to SDX Address change

**UBI - U/M SDX Income Change**

FS undercare transaction due to SDX SS Income change

**UBP - Rev Break in Payment Lines**

220 Review break in payment lines

**UBS - U/M SDX Shelter Type Change**

FS undercare transaction due to SDX Shelter Type change

**UFB - BDGT Rec CS Type Chg 32 to 31**

E - Budget Record Care Type change '32' to '31'

**UFC - FS Claim Balance Adjustment**

C - FS Claim balance adjustment

**UFH - Review Break in Issuance Mos**

H - Review break in issuance months

**UFN - FS Case Converted NYSNIP**

FS case converted to NYSNIP

**UFP - FAP Case**

210 FAP Case

**UFS - Case Rec CS Type Chg 32 to 31**

W - Case Record Case Type change from '32' to '31' (NYSNIP)

**UFX - Review Bdgt Possible Supp**

X - Review Budget for possible supplement

**ULA - Prior Non Live Alone Status**

K - Prior Non Live Alone Status

**UMA - Change MA to MA-SSI**

Occurs when ASWI changes a case to MA/SSI when there is a currently open MA case and a new SSI case comes in.

**UMB - UM on MASSI, due to 1619B**

Occurs when ASWI changes the SSI Indicator, due to an individual's SSI 1619B status in an existing case

**UMC - MA SSI Case Individual Change**

Occurs when ASWI created an undercare transaction for the SSI individual in a MA/SSI case.

**UMD - MA to MA/SSI Effective Date in Past**

A MA only case was changed to a MA/SSI case Today's date was moved to the authorization From Date because the SDX Effective Date was more than six months in the past.

**UME - SSI Payment Status is E01**

A MA/SSI case was changed to a MA only case. The SSI individual is SSI eligible but is not currently in receipt of a SSI payment.

**UMN - Multiple CINS**

Z - Multiple CINS

**UMR - MRA Error 019**

MRA Error '019'

**UMS - Change MA/SSI to MA Case**

Occurs when ASWI changes a case to MA only, per Stenson court decision. This exception report is produced even though the case is processed without interruption.

**UMU - Changes to MA (Potential RR Coverage)**

Occurs when ASWI changes a case to MA only. The former SSI recipient is potentially eligible for restricted MA coverage.

**URC – Recert Contact Sent**

Recert Contact Letter Sent

**W31 - Individual Exists in FS/SSI case**

Occurs when ASWI received a SDX Update and no change was required to an existing FD (NYSNIP) case.

**WAD - Individual is active in ADC case**

Occurs when there is a SSI opening and an active ADC type case exists.

**WAP - Case in Application**

An individual in Case Types 11, 12, 16, 17, 31, or 32 in Application Status

**WAR - Reduced Benefit**

Reduced Benefit

**WBL - BL Budget**

Bottom-line Budget

**WC2 - 2/More Individuals in Case for Close**

Occurs when ASWI attempts to close an individual and he/she is in a case with another person. That person will have to be deleted via the usual WMS deletion process.

**WCA - Individual in multiple ADC cases**

A SDX open transaction found the SSI recipient in 2 or more ADC cases.

**WCC - Clockdown Closing in Progress**

An attempt was made to update a SafetyNet case because the individual has become active or inactive on SSI or to change MA/SSI case to MA only case type because the individual has become inactive on SSI. However, the target WMS case is in clockdown status due to a closing.

**WCD - SSI Closing Date older than MA coverage**

A SDX close transaction due to moved out of the U.S., had a SDX Medicaid date equal to or prior to the individual's MA Coverage From Date.

**WCH - Individual in multiple HR cases**

A SDX transaction found the SSI recipient in 2 or more HR cases.

**WCI - Individual in multiple MA/SSI cases**

A SDX transaction found the SSI recipient in 2 or more MA/SSI cases.

**WCM - Individual in mult. MA only cases**

A SDX transaction found the SSI recipient in 2 or more MA only cases.

**WCO - Individual in multiple districts**

A SDX transaction found the SSI recipient in cases, other than MA/SSI, MA, SafetyNet, ADC and Services, and in two different districts.

**WCS - Individual in multiple Serv. cases**

A SDX transaction found the SSI recipient in 2 or more Services cases.

**WC2 - 2/more individuals in case for close**

Occurs when ASWI attempts to close an individual and he/she is in a case with another person. Person will have to be deleted via usual WMS deletion procedures.

**WDD - WMS District not on database**

A SDX transaction found the SSI recipient in a district that is not on the database. (This occurs only on Development, Baseline and Training Systems.)

**WDE - SSI Death date older than MA coverage**

A SDX close transaction, due to death, has a date equal to or older than the individual's MA Coverage From Date.

**WDI - WMS District Code invalid**

An invalid district code was detected on the database. (Primarily used while testing.)

**WDM - WMS Deceased - Check/Contact SSA**

Occurs when an SSI individual who is not deceased according to the SDX record is found to be deceased in a WMS case. SSA should be alerted.

**WFB - No FS [Budget] Record**

No FS Budget Record on WMS

**WFC - FS Future Bdgt with Claim**

FS future budget has a claim.

**WFH - FHP to SSI - LDSS Review**

SSI recipient was found in an active FHP case - referred to local district for review.

**WFI - FS IPV Disq Individual**

FD IPV disqualified individual

**WFR - FAP Case Reduced Benefit**

FAP Case reduced benefit

**WFS - Household Size > 1**

An individual in open Case Types '31' or '32' with a household size greater than one

**WFT - FS IPV/Sanction/Other Failure**

A FS IPV sanctioned individual in Case Types '11', '12', '16', '17', '31', or '32'

**WHH - More Than One in Household**

Household size is greater than one.

**WHO - SSI out of U.S. - HR case exists**

A SDX close transaction occurs because the SSI recipient is outside the U.S. and he is active in a HR case.

**WHR - SSI death/MOS - HR case exists**

Occurs when ASWI receives a closing, due to death or move to another state, and an HR case exists.

**WIN - No SSI Income**

No income from SSI

**WLA – SSI State Living Arrangement Change**

State Living Arrangement Change.

**WMA - Active MA only - SSI closing**

A SDX close transaction found the SSI individual in an active MA only case.

**WMC - Change Month Budget Conflict**

There is a month budget conflict.

**WME - SDX FLD 55 Date older than MA cov**

A SDX close transaction due to "moved out of state" or "death" had a SDX Record Receipt Date equal to or older than the individual's MA Coverage FROM Date.

**WMF - MA with future MA coverage dates**

Occurs when ASWI attempts an opening and finds an active MA case with future coverage.

**WMM - Clearance found multiple recipients**

Occurs when ASWI attempts an open or close transaction and clearance finds person on database with 2 CINs.

**WMR - Manual Recert**

Manual recertification



**WMS - Opened MA/SSI - MA only exists**

A SDX open transaction found the SSI individual in a MA only case with other active individuals. A new MA/SSI case was opened for the SSI individual.

**WNB - No Budget Record**

No budget record.

**WNP Non Project Case Status Chg**

Non Project Case Status Change

**WNR - FS Closed M90, M91, etc**

Prior FS Closing with reason code M90, M91, M20, or Y11

**WOI - SDX Other Inc Reduced Benefit**

SDX other income reduced benefit

**WPA - Act Ind Case Type 11, 12, 16, 27**

An Active individual in case types '11', '12', '16', '17'

**WPC - FS Past Budget with Claim**

There is an FS past budget with a claim.

**WPD - Pending data already exists**

Occurs on any ASWI transaction when there is a pending record on WMS.

**WPE - WMS Pending Pulldown RTN Error**

Occurs when ASWI receives an error return from the WMS pending pulldown subroutine

**WPM - Failed clearance on DOB or Sex**

Person found on database by social security match but there is a mismatch on DOB and/or Sex.

**WPS - No category code for pay status**

Occurs when ASWI change is done and the system matrix can't find an appropriate categorical code for this particular pay status.

**WRB - Reduced Benefit no SSI Update**

Reduced Benefit no SSI update

**WSC - Prior Out of State Closing**

Case closed due to individual moving out of state.

**WSD - SDX district does not agree with WMS**

Occurs when ASWI transaction finds a case in a county different than the SDX. This report will go to the district listed on SDX. (See WWD).

**WSF - MA/SSI w/Future MA Cov. Dates**

Occurs when ASWI attempts an opening and finds an active MA/SSI case with future coverage.

**WSI – SDX Closing Occurred-Payment Status XXX**

SDX closing due to Payment Status Change.

**WSV - Individual is active in SERMA**

Occurs when ASWI attempts an opening or closing and finds a Services case with MA coverage.

**WWD - WMS District does not agree with SDX**

Occurs when attempting an ASWI opening, change or closing, and during clearance, the case is found active in another county. Notification goes to both counties.

The following “F” exception status codes indicate a bad data element in the SDX record from the SSA. The SSA District Office should be alerted for correction of the affected record.

**F04 - SDX SSN is not numeric**

**F06 - SDX Master File Type Code is invalid**

**F07 - SDX Individual’s Name is blank**

**F08 - SDX Sex Code is invalid**

**F10 - SDX Date of Birth is invalid**

**F11 - SDX Number of Payee Address lines is invalid**

**F12 - SDX Payee Address line number is invalid**

**F16 - SDX Payee Name line number is invalid**

**F32 - SDX Medicaid Effective Date is invalid**

**F37 - SDX Application Date is Invalid**

**F43 - SDX Number of Residence Address lines is invalid**

**F50 - SDX Medicaid Eligibility Code is invalid for Payment Status Code**

**F74 - SDX Date Residence Began is invalid**

**FAD - SDX Address problem**

**FAP - SDX Medicaid Effective Date is prior to SSI Application Date**

**FCC - SDX County Code of Jurisdiction (State) is invalid**

**FDO - SSI Applicant does not appear to be a NYS**

**FIC - Institution Code is in error (OMH/OMRDD)**

Auto SDX/WMS Signoff Error Messages

<b>Error #</b>	<b>Cause/Remedy</b>
900	New Case Number may only be changed for new MA/SSI openings.
905	If entered, the Re-Use Indicator must be X.
910	The New Case Number may not begin with S.
915	There must be an entry for the Unit or Worker.
920	The Authorization Number entered is not the Authorization Number for this Pending Record.
925	The screen was transmitted with no changes and no Auth No.
930	The Case Number Re-Use Indicator is X and the Case Number entered is not known to the system.
935	The Case Number is for a case being migrated.
940	The Case Number entered is known to the system.
945	A case may be signed off only if the Pending Data Status is FDE/ERR.
950	Case Number entered must be for a case with a Case Status of CLOSED, DENIED, CLOSED OVER RIDE, or DENIED OVERRIDE.
955	Case Number entered has a Pending Record.
960	Case Number has a Pending Record created by the MA/FS Separate Determination process.
965	The Pending Record for this case has already been updated by another user.
970	The Case Number entered must not match an other potentially assigned ASWI Case Number.
975	The Pending Data Status must be FDE/ERR, UM/BUP, or AT/UM to be updated.
980	The Case Number may be changed only if the Pending Data Status is FDE/ERR.

## Domestic Violence

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## Domestic Violence

### Overview

Entries are made into the Domestic Violence (DV) Data Collection subsystem for all Temporary Assistance clients that check “Yes” on the DV screening form. All completed forms should be kept by the Domestic Violence Liaison (DVL) without regard to the screening result.

### Assessment

An Assessment Status code (C, N, F, P, or D) is determined for each client that screens as ‘YES’. Reassessments may occur periodically and the Assessment Status code may differ from the initial value.

The Assessment Status values are:

- C – Credible
- F – Failure to Show
- N – Not Credible
- P – Pending
- D – Declined (to see the DVL or declined a waiver)

The Assessment Status code assigned determines further processing:

- If ‘C’ is entered, the user should proceed to the applicable waiver screens.
- If ‘P’ is entered, this indicates that the assessment decision is pending. When a determination is made, the user should replace the ‘P’ with the appropriate value and proceed as necessary.
- The values ‘N’, ‘F’ and ‘D’ require no further entries.

### Waiver Processing

When the Assessment Status equals ‘C’, any applicable waivers are then assigned. Placing the cursor next to the appropriate waiver label and transmitting will bring the user to a specific waiver screen where necessary waiver information is entered.

Waiver Status values are:

- A – Approved
- P – Partially Approved (generally used with Employment and IV-D waivers)
- D – Denied
- R – Requested

The Waiver Status code defines additional entries:

- 'R' means that a waiver has been requested and a decision is pending. When the decision has been made, users should enter the appropriate code to replace the 'R'; or
- 'A' or 'P' means that the waiver has been approved or partially approved. Start and end dates associated with the waiver are required. Initial waivers must be at least 4 months in duration. Optionally, the Approving Worker Id may be entered as well; or
- If the user enters 'D', a Denial Reason Code must be entered as well.

The Denial Reasons are:

- C – Fraudulent Claim
- D – Failure to Provide Documentation
- F – Failure to Show
- N – Not Credible
- O – Other
- P – No Program Requirement
- R – Client Request
- T – No Threat of Danger

### Reassessment

When a client with an approved waiver is reassessed, the initial Assessment Status code should not be modified. The user must enter a new Transaction Date and a new Assessment Status code. Processing continues in the same manner as the Initial Assessment with the exception that the Reassessment Ind should have a value of 'X' placed in it. New start and end dates as well as the appropriate Waiver Status code also need to be entered.

If a client (still active in Public Assistance) does not return for a reassessment, the waiver will expire and the User does not need to enter any new information. The user should contact the Unit that is responsible for the program requirement that is waived to inform them that the waiver has expired. A notice should NOT be sent to the client (for safety reasons) informing them that the waiver has expired. It is the responsibility of the appropriate unit to contact the client so that the program requirements can be reinstated.

### Navigation

Each data entry screen permits access to every other screen listed on the menu (WDV000).

### Data Correction/Deletion

On the waiver screen where data is to be corrected, users must depress the SF4 key to enter "data correction" mode. This allows corrections to be made to the last waiver entry.

To delete a waiver entry, users must first enter “data correction” mode (SF4) then use the SPACE BAR to blank out the prior entry. Users must also type the word “DELETE” in the Apprvl Wrkr ID field before transmitting. A message will appear that the waiver has been deleted. This series of steps may be repeated multiple times in order to delete the necessary waiver line, however valid lines deleted to get to the invalid entry should be re-entered.

WDV000 – Domestic Violence Data Collection Menu

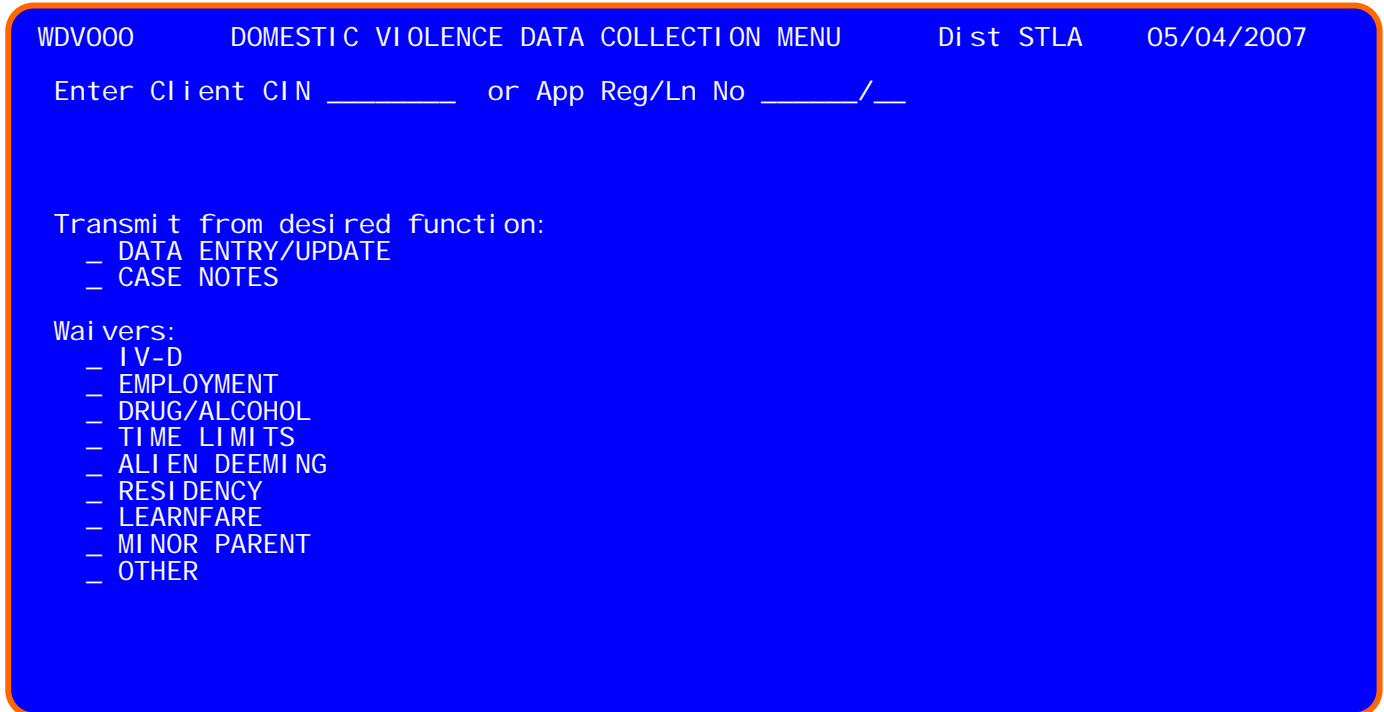


Figure 1 – Domestic Violence Data Collection Menu (WDV000)

Purpose

The purpose of this screen is to present the user with the eleven data entry selections that are possible for the Domestic Violence Data Collection subsystem. Users can access the data entry/update function, case notes or any of the waivers listed.

Access

- Enter 22 on WMSMNU - WMS Menu, or
- Ctrl+F6 from:
  - **WDV010 – Domestic Violence Data Collection**
  - **WDV020 – Domestic Violence Waivers**
  - **WDV030 – Domestic Violence Case Notes.**

Screen Response

Positive

- **See Function Keys.**



### Negative

- One of the following messages on Line 24:
  - COMPLETE DATA ENTRY FIRST
  - ENTRY IN CLIENT CIN REQUIRED
  - ENTRY IN EITHER CIN OR APP REG REQUIRED
  - Waivers only – transmit from selected waiver
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WDV000

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ENTER CLIENT CIN	03010 – CLIENT IDENTIFICATION NUMBER (8)	Enter the CLIENT IDENTIFICATION NUMBER (CIN).
APP REG/LN NO	01046 – REGISTRY NUMBER (6) and 01047 – VERSION NUMBER (2)	Enter the APPLICATION-REGISTRATION NUMBER/LINE NUMBER.
TRANSMIT FROM DESIRED FUNCTION	NONE	Move the cursor to the desired selection and then press the ENTER key. Users do NOT need to enter and “X”.
WAIVERS	NONE	Move the cursor to the desired selection and then press the ENTER key. Users do NOT need to enter and “X”.

WDV010 – Domestic Violence Data Collection

```

WDV010      DOMESTIC VIOLENCE DATA COLLECTION      Dist STLA      05/04/2007
DV Liaison ID _____
Referring Worker ___/___/___  ___/___/___  ___/___/___

Name HOWARD      LISA      A      CIN AX830970      SSN 547-87-4541
Sex F      Date of Birth 12/12/1955      Ind Stat ACT      Employ CD 45      Children

      PA Case No HOWARD0001      Case Type SN-FP      Case Status ACTIVE

Addresses:      Street      City      St      Zip
Residence      1 AVE A      PORT      NY      12203
Mailing
Shelter _____

CPS Referral Date _____
TX Date/Assessment:
050407/___

Waiver Status/GO TO: IV-D: /_ EMPLOYMENT: /_ DRUG/ALC: /_
TIME LIMITS: /_ ALIEN DEEMING: /_ RESIDENCY: /_ OTHER: /_
LEARNFARE: /_ MINOR PARENT: /_
GO TO: CASE NOTES _

                        DATA CORRECTION: F4
xmt ^
    
```

Figure 2 – Domestic Violence Data Collection (WDV010)

Purpose

The purpose of this screen is to capture and maintain domestic violence referral and assessment information. This data entry screen must be completed for each client who screens as a “Yes”. This screen records the date and outcome of the initial assessments and all reassessments of the client’s domestic violence claims. It also displays the current status of each of the nine program requirement waivers.

Access

- DATA ENTRY/UPDATE selection from **WDV000 – Domestic Violence Data Collection Menu.**

Screen Response

Positive

- See **Function Keys.**

Negative

- One of the following messages on Line 24:
  - ASSESSMENT DATE THAT OLD IS NOT ALLOWED
  - ASSESSMENT INDICATOR INVALID

- COMPLETE ASSESSMENT
- COMPLETE ASSESSMENT BEFORE GOING TO CASE NOTES
- COMPLETE ASSESSMENT BEFORE GOING TO WAIVER
- DATA ENTRY REQUIRED
- DV LIAISON REQUIRED ENTRY
- INPUT REQUIRED
- INVALID CPS REFERRAL DATE
- INVALID TX DATE - CANNOT BE IN FUTURE
- INVALID TX DATE - EARLIER THAN EXISTING
- SF99 NOT SUPPORTED – REXMT (99 = 1-3, 5, 7-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F4	Data Correction – If it is necessary to edit the case information previously entered (DV Liaison ID, TX Date/Assessment only) use the Function Key 4 to make the required changes.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description – WDV010

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DV LIAISON ID	03031 - DOMESTIC VIOLENCE LIAISON ID TEXT (6)	Enter the DVL identification as determined by local social services district procedures.
REFERRING WORKER	01020 – LOCAL OFFICE NUMBER (3)	3 occurrences. Enter the identification of the local office that refers the client to the DVL.
	01030 – UNIT IDENTIFIER (5)	3 occurrences. Enter the identification of the unit that refers the client to the DVL.
	01040 – WORKER IDENTIFIER (5)	3 occurrences. Enter the identification of the worker who refers the client to the DVL.
NAME	03030 – NAME (28)	Protected.
CIN	03010 – CLIENT IDENTIFICATION NUMBER (8)	Protected.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Formatted as 999-99-9999
SEX	03050 – SEX (1)	Protected.
DATE OF BIRTH	03060 – DATE OF BIRTH (8)	Protected. Formatted as MM/DD/YYYY
IND STAT	03120 – INDIVIDUAL STATUS (2)	Protected. Mnemonic.
EMPLOY CD	03190 – EMPLOYABILITY CODE (2)	Protected.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CHILDREN	NONE	Protected. Indicates if children are involved in the case.
PA CASE NO	01050 – CASE NUMBER (10)	Protected.
CASE TYPE	01060 – CASE TYPE (2)	Protected. Mnemonic.
<b>ADDRESSES: RESIDENCE</b>		
STREET	01080 – RESIDENCE STREET (35)	Protected.
CITY	01082 – RESIDENCE CITY/TOWN (15)	Protected.
ST	01083 – RESIDENCE STATE (2)	Protected.
ZIP	01084 – RESIDENCE ZIP (5)	Protected.
<b>ADDRESSES: MAILING</b>		
STREET	05120 – MAILING STREET (35)	Protected.
CITY	05130 - MAILING CITY/TOWN (15)	Protected.
ST	05140 – MAILING STATE (2)	Protected.
ZIP	05150 – MAILING ZIP (5)	Protected.
<b>ADDRESSES: SHELTER – This set of fields is optional.</b>		
STREET	05005 – DOMESTIC VIOLENCE SHELTER STREET ADDRESS (35)	Enter: 1. An alternate mailing address, PO Box Number of other indicator when notices and other information should <b>NOT</b> be sent to the client's address a listed on WMS. 2. The address of the public or private residential group facility where the client is living at the time of the initial DV assessment.
CITY	05006 – DOMESTIC VIOLENCE SHELTER CITY ADDRESS (15)	Enter: 1. An alternate mailing address, PO Box Number of other indicator when notices and other information should <b>NOT</b> be sent to the client's address a listed on WMS. 2. The address of the public or private residential group facility where the client is living at the time of the initial DV assessment.
ST	05007 – DOMESTIC VIOLENCE SHELTER STATE ADDRESS (2)	Enter: 1. An alternate mailing address, PO Box Number of other indicator when notices and other information should <b>NOT</b> be sent to the client's address a listed on WMS. 2. The address of the public or private residential group facility where the client is living at the time of the initial DV assessment.
ZIP	05008 – DOMESTIC VIOLENCE SHELTER ADDRESS ZIP CODE (5)	Enter: 1. An alternate mailing address, PO Box Number of other indicator when notices and other information should <b>NOT</b> be sent to the client's address a listed on WMS. 2. The address of the public or private residential group facility where the client is living at the time of the initial DV assessment.
CPS REFERRAL DATE	03032 – CHILD PROTECTIVE SERVICES REFERRAL DATE (8)	The date of the last referral to the SSD Child Protective Services unit. If there have been no prior referrals, the field will be blank. Formatted as MM/DD/YY.
<b>TX DATE ASSESSMENTS</b>		
TX DATE	02020 – TRANSACTION INPUT DATE (6)	10 occurrences. The Assessment Date can be changed for interviews held in the past. The transaction date is filled in by the system at screen presentation.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ASSESSMENT	03038 – DOMESTIC VIOLENCE ASSESSMENT CODE (2)	<p>10 occurrences. The user must enter the appropriate assessment status code to record the initial DV assessment and to make all subsequent changes to the client's assessment status.</p> <p>After each subsequent screen presentation, the transaction date and assessment code entries will move "right" to the next available vacant field. When changing information, the user must use the Function Key 4 to return the most recent date and assessment code to the first occurrence of the field. <u>Changes to the date and assessment status can be made only in the first occurrence of the field.</u></p> <p>An exception to this procedure occurs when the prior assessment = "P" – Pending. This assessment code and its corresponding transaction date will appear in the first occurrence.</p>
<p><b>WAIVER STATUS/GO-TO – This section will display the current status of each of the nine program-related waivers for which the client can apply. This section cannot be used to change a waiver status. Use these fields only to move to the appropriate waiver data entry screen.</b></p>		
IV-D	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
EMPLOYMENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
DRUG/ALC	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
TIME LIMITS	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
ALIEN DEEMING	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
RESIDENCY	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
OTHER	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
LEARNFARE	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
MINOR PARENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
CASE NOTES	NONE	Use this field to go to the Case Notes data entry screen.

WDV020 – Domestic Violence Waiver - Program

```

WDV020      DOMESTIC VIOLENCE WAIVER: IV-D      Dist STLA      05/16/2007
DV Liaison ID 10      IV-D Waiver Status _

Name HOWARD      LISA      A      CIN AX830970      SSN 547-87-4541
PA Case No HOWARD0001      Case Type SN-FP      Case Status ACTIVE
Reassess      Start      End
Tx Date      Stat      Ind      R/C      Date      Date      Apprvl      Wrkr Id      Children's Ln#s
051607      _      _      _      _      _      _      _      _      _      _

Waiver Status/GO TO: IV-D: /_      EMPLOYMENT: /_      DRUG/ALC: /_      xmt ^
TIME LIMITS: /_      ALIEN DEEMING: /_      RESIDENCY: /_      OTHER: /_
LEARNFARE: /_      MINOR PARENT: /_
GO TO: CASE NOTES _      DATA CORRECTION: F4
    
```

Figure 3 – Domestic Violence Waiver - Program (WDV020)

Purpose

This screen must be completed for each client who requests one or more waivers from specific program requirements. The user will record the outcome of the initial assessment and all reassessments of the client's waiver status. Also, each screen will display the current status of all program waivers which social services districts can approve for the client. The nine program waivers are:

- IV-D
- Employment
- Drug/Alcohol
- Time Limits
- Alien Deeming
- Residency
- Learnfare
- Minor Parent

- Other

#### Access

- By placing the cursor next to any waiver type in the WAIVER STATUS/GO-TO section of:
  - **WDV010 – Domestic Violence Data Collection**
  - **WDV020 – Domestic Violence Waiver (By Program)**
  - **WDV030 – Domestic Violence Case Notes, or**
- By placing the cursor next to any waiver type and transmitting on the **WDV000 – Domestic Violence Data Collection Menu**.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - BLANKS NOT ACCEPTED
  - DATES MUST BE BLANK
  - DENIAL CANNOT BE BLANK FOR D STATUS
  - INVALID LINE NUMBER
  - INVALID REASON CODE
  - INVALID START/END DATE
  - INVALID WAIVER STATUS
  - LINE NUMBER ENTRY REQUIRED
  - OVERALL IV-D STATUS INVALID
  - REASON CODE REQUIRED FOR THIS STATUS
  - REASON MUST BE BLANK FOR THIS STATUS
  - REASSESSMENT INVALID
  - START/END DATES REQUIRED
  - WAIVER PERIOD < 4 MNTH
  - SF99 NOT SUPPORTED – REXMT (99 = 5, 7-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None



Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages. (There can be a maximum of six pages for each program area.)
F3	Previous Page if there are multiple pages.
F4	Data Correction – If it is necessary to view or to edit the case information previously entered use the Function Key 4 to make the required changes.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description – WDV020

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DV LIAISON ID	03031 – DOMESTIC VIOLENCE LIAISON ID TEXT (6)	Protected. The Domestic Violence Liaison's Identification number appears as entered on WDV010.
IV-D WAIVER STATUS	03039 - IV-D DOMESTIC VIOLENCE WAIVER STATUS CODE (1)	Only appears on IV-D waivers. Users are asked to enter the "Overall" IV-D waiver status here. This value will appear on the waiver status bar of all other DV screens
NAME	03030 – NAME (28)	Protected. The Client's Names as listed on WMS.
CIN	03010 – CLIENT IDENTIFICATION NUMBER (8)	Protected. The Client's Identification Number (CIN)
SSN	03201 – SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. The Client's Social Security Number. Formatted as 999-99-9999.
PA CASE NO or APP REG/ LN NO	01050 – CASE NUMBER (10) or 01046 – REGISTRY NUMBER (6) and 01047 – VERSION NUMBER (2)	Protected. The client's public assistance Case Number or the applicant's registry number and line number. The screen caption varies based on what was entered in WDV000.
CASE TYPE	01060 – CASE TYPE (2)	Protected. Mnemonic. The client's public assistance.
CASE STATUS	02090 – CASE STATUS (2)	Protected. Mnemonic.
<b>TRANSACTION INFORMATION</b>		
TX DATE	02020 – TRANSACTION INPUT DATE (6)	10 occurrences. The entry date.
STAT	03033 – DOMESTIC VIOLENCE WAIVER STATUS CODE (1)	10 occurrences. The status of the waiver request. For IV-D waivers the field reflects the waiver as it applies to one absent parent. If an individual requests a waiver from IV-D requirements for two absent parents, two status codes would need to be entered. This is a required field if the client requests a waiver from IV-D program requirements.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
REASSESS IND	03034 – DOMESTIC VIOLENCE REASSESSMENT CODE (1)	10 occurrences. During the client's initial assessment interview, this field is left blank. The work must complete the field with an "X" when the waiver request is evaluated during a reassessment interview.
R/C	03035 – DOMESTIC VIOLENCE WAIVER REASON CODE (3)	10 occurrences. The reason code for a denial. If the client's request for a waiver is denied, the user must enter one of the valid denial reason codes. This is a required field is the client's waiver status is D for Denied.
START DATE	03036 – DOMESTIC VIOLENCE WAIVER START DATE (8)	10 occurrences. The first date of the waiver period. At the initial assessment, the waiver period must be at least four months from start date to end date. The user must decide the start date of the waiver period and extend the date for four months. At each reassessment, the waiver period can be less than four months from start date to end date. Again, the user must decide the start date and determine the length of the waiver period. NOTE: This is a required field is the client's waiver status is A – Approved or P – Partially Approved.  NOTE: If there is an "X" in the REASSESS IND field, the waiver period can be less than four months. Otherwise, the waiver period must be equal to or greater than four months.
END DATE	03037 – DOMESTIC VIOLENCE WAIVER END DATE (8)	10 occurrences.
APPRVL WRKR ID	02017 – DOMESTIC VIOLENCE APPROVAL ID TEXT (6)	10 occurrences. The identification code of the worker who approves the waiver request if different from the Domestic Violence Liaison.
CHILDREN'S LN#S	03045 – LINE NUMBER OF HOUSEHOLD MEMBER (2)	Occurs five times for each transaction line. Only applied to IV-D waivers. The line number of each child corresponding to the IV-D program requirements which are being waived. NOTE: If there is an entry in the STAT field, there must be a valid line number entry in this field. The number "99" may be used to designate SSI children not present on the WMS case record.
<b>WAIVER STATUS/GO-TO - This section will display the current status of each of the nine program-related waivers for which the client can apply. This section cannot be used to change a waiver status. Use these fields only to move to the appropriate waiver data entry screen.</b>		
IV-D	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
EMPLOYMENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DRUG/ALC	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
TIME LIMITS	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
ALIEN DEEMING	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
RESIDENCY	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
OTHER	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
LEARNFARE	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
MINOR PARENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
CASE NOTES	NONE	Use this field to go to the Case Notes data entry screen.

WDV030 – Domestic Violence Case Notes

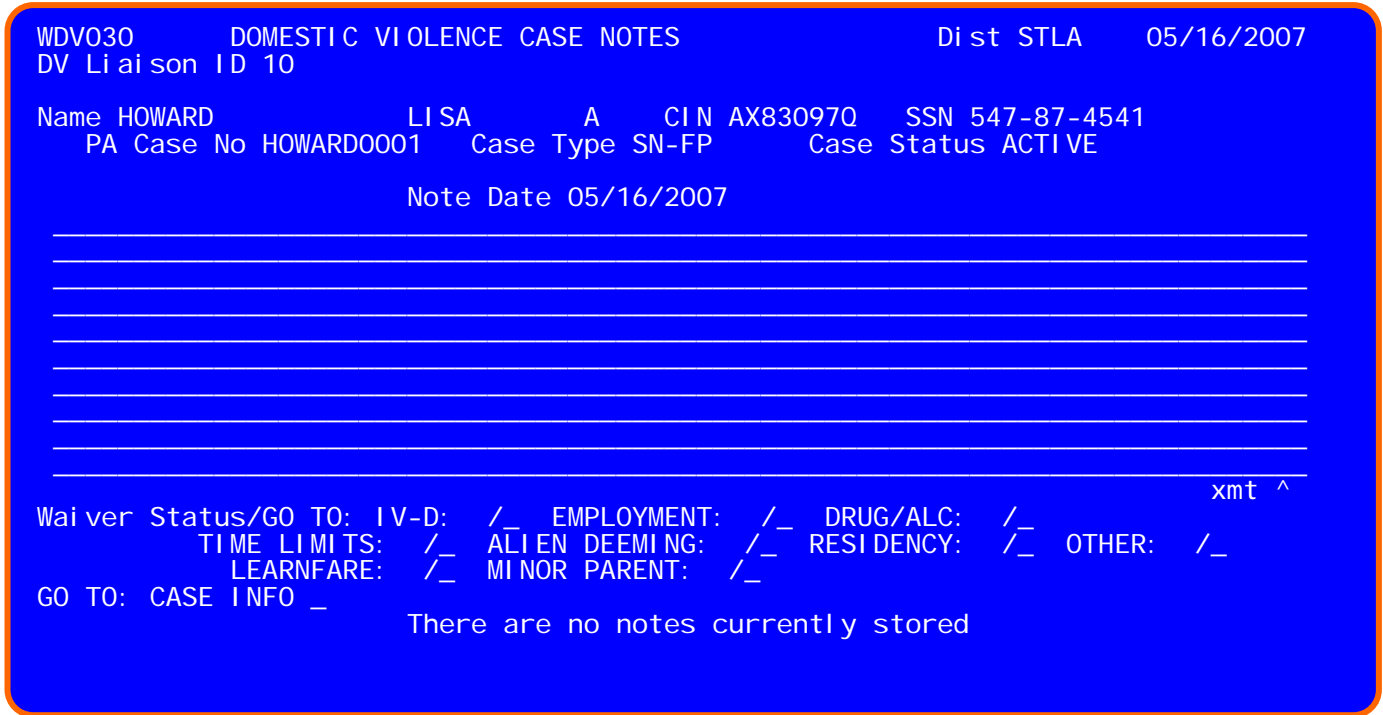


Figure 4 – Domestic Violence Case Notes (WDV030)

Purpose

This screen is used to record the dates, the outcomes and the case specific information from all client contacts related to domestic violence claims. Also, it will display the current status of each of the nine waivers from program requirements which the social services district can approve for the client.

Access

- By placing the cursor next to GO TO: CASE NOTES on
  - **WDV010 – Domestic Violence Data Collection**
  - **WDV020 – Domestic Violence Waiver (By Program), or**
- By placing the cursor next to CASE NOTES on **WDV000 – Domestic Violence Data Collection Menu.**

Screen Response

Positive

- See **Function Keys.**

Negative

- One of the following messages on Line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST SCREEN – SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE – SF03 IGNORED
- SF99 NOT SUPPORTED – REXMT (99 =4, 5, 7-22)
- THERE ARE NO NOTES CURRENTLY STORED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages. (There can be a maximum of six pages for each program area.)
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description – WDV030

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DV LIAISON ID	03031 – DOMESTIC VIOLENCE LIAISON ID TEXT (6)	Protected. The Domestic Violence Liaison's Identification number appears as entered on WDV010.
IV-D WAIVER STATUS	03039 – IV-D DOMESTIC VIOLENCE WAIVER STATUS CODE (1)	The client's current IV-D waiver status. At the initial assessment, this field will be blank. If an IV-D waiver has been requested, entry is required indicating the client's current overall IV-D waiver status.
NAME	03030 – NAME (28)	Protected. The Client's Names as listed on WMS.
CIN	03010 – CLIENT IDENTIFICATION NUMBER (8)	Protected. The Client's Identification Number (CIN)
SSN	03201 – SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. The Client's Social Security Number. Formatted as 999-99-9999.
PA CASE NO	01050 – CASE NUMBER (10)	Protected. The client's public assistance Case Number.
CASE TYPE	01060 – CASE TYPE (2)	Protected. Mnemonic. The client's public assistance.
CASE STATUS	02090 – CASE STATUS (2)	Protected. Mnemonic.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NOTE DATE	02018 – TRANSACTION DATE AND TIME STAMP (16)	Protected. Today's date or the date a notation was entered. Only the date value is entered/displayed.
(NONE)	01023 – CASE NOTE TEXT (80)	This area consists of ten blank lines where the user can enter information concerning the client's domestic violence claims. When this section is filled completely, moves the cursor to XMT and presses ENTER. The WMS identifying case information will be carried over to the second screen. The additional screen(s) can be used to continue entering information concerning the client's domestic violence claims. There can be up to six screens for each program area.
<b>WAIVER STATUS/GO-TO - This section will display the current status of each of the nine program-related waivers for which the client can apply. This section cannot be used to change a waiver status. Use these fields only to move to the appropriate waiver data entry screen.</b>		
IV-D	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
EMPLOYMENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
DRUG/ALC	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
TIME LIMITS	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
ALIEN DEEMING	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
RESIDENCY	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
OTHER	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
LEARNFARE	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
MINOR PARENT	NONE	Place the cursor in the appropriate waiver field and press the ENTER key to display the screen.
CASE INFO	NONE	Use this field to go to the Case Notes data entry screen.

## Employment Tracking (WMS)

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## Employment Tracking

### Overview

#### WMS Employment Subsystem

The WMS Employment Subsystem was an automated system used to input and access employment activity information about specific individuals. The WMS Employment Subsystem was also used to calculate and report Welfare Grant Savings. The reviewer should note that as of 2007, it has been at least ten years since Welfare Grant Savings have been calculated.

After Batch Update, for case opening and maintenance, information entered on WMS was available to establish an Employment Record for individuals in Case Types 11, 12, 14, 16, 17, 31 and 32 who had specific Employability Codes. Employment Records established using the WMS Employment Subsystem were kept on the database until there had been no entry of employment activity for an individual for two years. At this point employment records were removed from the database and stored on microfiche.

#### Replaced by the Welfare to Work Caseload Management System (WTWCMS)

The WMS Employment Subsystem, described above, was replaced by the Welfare to Work Caseload Management System. The WTWCMS was implemented in local districts between the fall of 2003 and the fall of 2005. It is a browser-based application that tracks all employment related activity of each client.

More information about the WTWCMS can be found in the WTWCMS training manuals on the WTWCMS homepage.

This chapter of the SRM describes the WMS Employment Subsystem functions that are still available from the WMS Main Menu. For a limited time, historical information will be available on WMS using the WMS Employment Subsystem Inquiry functions. It should be noted that although update functions are still shown on the WMS Employment Subsystem menu, they cannot be used.

### Relationship of WMS Employment Subsystem to WTWCMS

The WMS Employment Subsystem inquiry capabilities may be used to inquire on information that was saved on the WMS Employment Subsystem, prior to district conversion to WTWCMS. Current employment information must be queried using WTWCMS capabilities. There is no interface between the WMS Employment Subsystem and WTWCMS. The Welfare Reporting Subsystem (WRTS) is the database that contains both historical and current employment information.



## Information Flow between WMS, WRTS, and WTWCMS

The real time interface between WMS and WRTS only sends data from WRTS to WTWCMS for budget and income data.

Once a day, at approximately 5:00 PM data is sent to WTWCMS from WRTS, and after that process is completed, data is sent from WTWCMS to WRTS.

## Inquiry

There are three types of Inquiry that can be accessed on WEMMNU - Employment Menu:

- Local District Employment Record.
- Statewide District Employment Record.
- WMS Case Make-up Screen or Case Involvement Screen.

### District Inquiry

Entering X before District Inquiry and entering 1, 2, 3 or Blank in SCREEN field returns WEMIN1, 2 or 3 as requested. WEMIN1 displays the date as entered on WEMUP1. WEMIN2 displays data as entered on WEMUP2 and WEMIN3 displays a chronological listing of Welfare Grant Savings.

### Statewide Inquiry

Access for Statewide Inquiry screen, WEMINS, is obtained by entering X before Statewide Inquiry and All fields or entering X before Statewide Inquiry and entering a specific county code. A WEMINS screen will be returned for each county in which the individual has a record or for the specific county, if that is requested. WEMINS displays Employment Participation History.

### Case/Individual Inquiry

Access to WINQ07 - Case Make-up screen or WINQ12 - Case Involvement screen is obtained by entering X before Case/Individual Inquiry. If CIN is entered (Case Number may be entered or blank), WINQ12 will be returned. If Case Number (CIN field must be Blank) is entered, WINQ07 is returned. These modules are documented in the **SRM Inquiry** section.

WEMMNU - Employment Menu



Figure 1 - Employment Menu (WEMMNU)

Purpose

This screen is used to access district and statewide employment inquiry or WMS case/individual inquiry.

Access

- Entering 28 on WMSMNU - WMS Menu, **or**
- Pressing the Ctrl+F6 Key or Ctrl+F5 from any Employment Subsystem Screen. (Ctrl+F5 displays **WEMMNU - Employment Menu** screen with CIN and Case Number in place.), **or**
- F5 from WINQ07 - Case Makeup if WINQ07 is accessed via the Employment System. (Displays **WEMMNU - Employment Menu** screen with Case Number in place.), **or**
- F5 from WINQ12 - Case Involvement if WINQ12 is accessed via the Employment System. (Displays **WEMMNU - Employment Menu** screen with CIN in place.), **or**
- If Statewide Inquiry and no entry in All or District. (The District Code(s) for which the individual has an employment record will be displayed above the message: INDIVIDUAL HAS EMPLOYMENT RECORD IN DISTRICTS LISTED ABOVE ONLY.)

## Screen Response

### Positive

- WEMIN1 - Employment Program Participation Screen is District Inquiry selected and Screen field is blank or 1,
- WEMIN2 - Employment Program Participation Screen is District Inquiry selected and Screen field is 2,
- WEMIN3 - Historical WGS Screen if District Inquiry selected and Screen field is 3,
- WEMINS - Employment Program Participation Statewide Inquiry if Statewide Inquiry selected and ALL field is X; or if Statewide Inquiry selected and DISTRICT field is 99 (99 = District Code in which an individual has an employment record),
- WEMMNU - Employment Menu screen (with message) if Statewide Inquiry selected and ALL field and DISTRICT field are Blank. (The District Code(s) for which the individual has an employment record will be displayed above the message: INDIVIDUAL HAS EMPLOYMENT RECORD IN DISTRICTS LISTED ABOVE ONLY.),
- WINQ07 - Case Make-up Screen if Case/Individual Inquiry selected and Case Number entered. (Entry of Case Number required - CIN field must be blank.),
- WINQ12 - Case Involvement Screen if Case/Individual Inquiry selected and CIN entered. (Entry of CIN required - Case Number may be entered or blank.)

### Negative

- Fields in error return highlighted followed by one of the error messages as shown on the **Employment Menu** error message page(s):
  - SF99 Not Supported - REXMT (99 = 8, 13)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
  - The screen captions "**Update**" "**Screen**" are no longer supported.

## Printed Response

None

## Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu

Key	Description
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WEMMNU

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
DIST	01010 - TRANSACTION DISTRICT DATE (2)	Protected
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Entry required for District Inquiry, Statewide Inquiry, and Case/Individual Inquiry Entry required for display of WINQ12 - Case Involvement Screen. For display of WINQ12, Case Number may be entered or blank.  Entry required for Case/Individual Inquiry for display of WINQ07 - Case Make-Up Screen. For display of WINQ07, CIN field must be blank.
CASE NO	01050 - CASE NUMBER (10)	Entry required for Case/Individual Inquiry for display of WINQ07 - Case Make-Up Screen. For display of WINQ07, CIN field must be blank.  For multiple case involvements, entry of both CIN and Case Number required for Update (no loner supported) and District Inquiry.
<b>UPDATE - THIS FUNCTON IS NO LONGER SUPPORTED. IT HAS BEEN REPLACED BY WTWCMS.</b>		
UPDATE	NONE	This activity is no longer supported.

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
<b>DISTRICT</b>		
DISTRICT INQUIRY	NONE	Valid values are "X" or blank.
SCREEN	NONE	Valid values are 1, 2, or 3. Only filled if DISTRICT INQUIRY has an "X"
<b>STATEWIDE</b>		
STATEWIDE INQUIRY	NONE	Valid values are "X" or blank.
ALL	NONE	Valid values are "X" or blank. Only filled if STATEWIDE INQUIRY has an "X"
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
<b>CASE/INDIVIDUAL INQUIRY</b>		
CASE/INDIVIDUAL INQUIRY	NONE	Valid values are "X" or blank.

WEMINI - Employment Program Participation

WEMINI DIST ALBA EMPLOYMENT PROGRAM PARTICIPATION 06/05/2007 PAGE 01 OF 01							
CIN	AX44981A	INDIV STATUS	07	CASE #	EMPDT01	CASE STATUS/TYPE	10/31
NAME	EMPDT01	JANE		CASE NAME	EMPDATE	01	
DOB	02/02/1952	SEX	F	SSN	STREET	121 B ST	
EMP CD	WR	ED	12	VET	9	RACE	W
CITY	ALBANY	STATE	NY	ZIP	15427		
DOT #1	1	#2		PHONE #	-	PA FS CODE	
WTWTG	EM	WRKR	CM	IM OFC		UNIT DOL	WRKR CM
WELFARE GRANT* SAVINGS * MANUAL: PA AMT ORG LN							
LN	ACTIVITY	STATUS	SOURCE	EFFECTIVE DATE	ANTIC COMP DATE	CASE TYPE	STORAGE DATE
02	JR-TR-FS	FS-EX-BE		11/04/99		NPA-FS	11/09/99
01	JR-TR-FS	ENRLD		11/01/99		NPA-FS	11/05/99

Figure 2 - Employment Program Participation (WEMINI)

Purpose

This screen is used to display historical employment record information related to Employment Program Participation. All data elements fields on this screen are protected and cannot be updated.

Access

- Selecting District Inquiry and Screen field is Blank or 1 on **WEMMNU - Employment Menu**, or
- F8 from **WEMIN2 - Employment Program Participation**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST SCREEN SF08 IGNORED
- SF KEY 99 NOT SUPPORTED - REXMT (99 = 4, 5, 8-14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F7	WEMIN2 - Employment Program Participation starting with page 01
Ctrl+F5	WEMMNU - Employment Menu (CIN and Case Number displayed)
Ctrl+F6	WEMMNU - Employment Menu

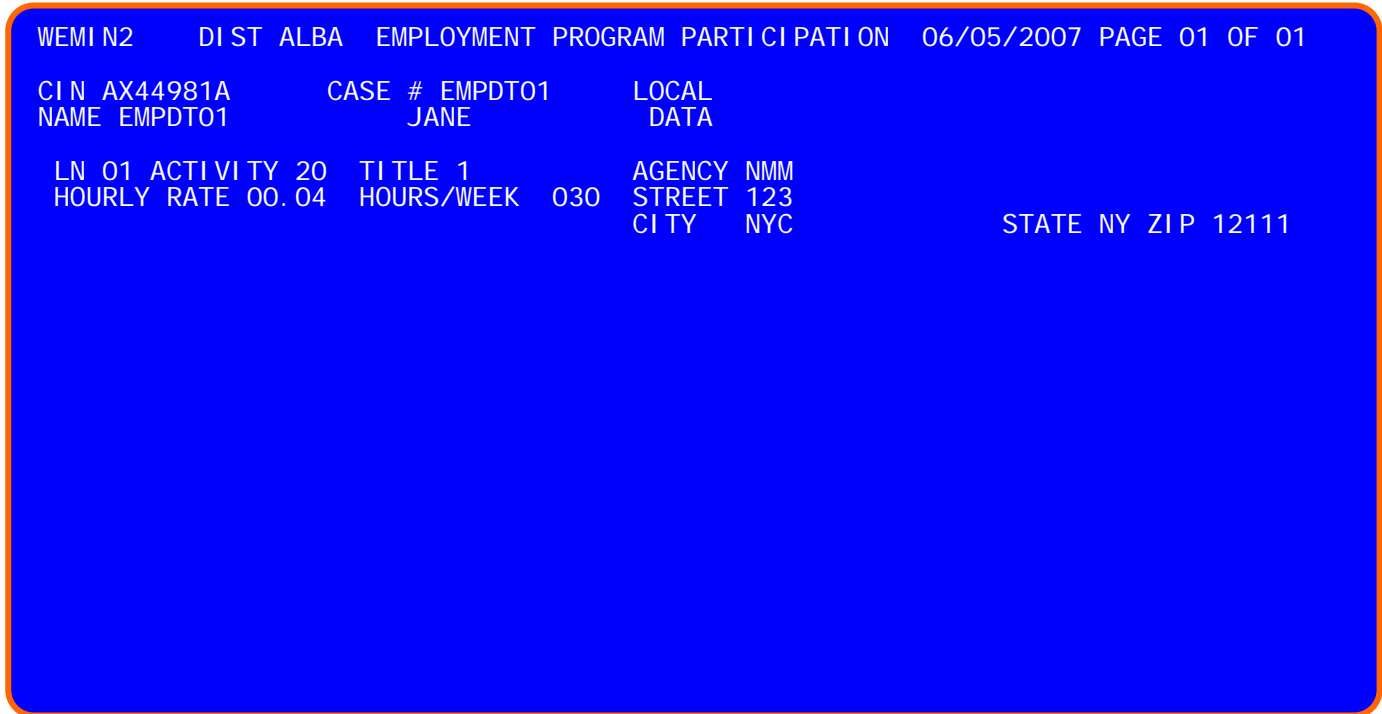
Screen Field Description - WEMINI

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
INDIV STATUS	03120 - INDIVIDUAL STATUS (2)	
CASE #	01050 - CASE NUMBER (10)	
CASE STATUS	02090 - CASE STATUS (2)	
TYPE	01060 - CASE TYPE (2)	
NAME	03030 - NAME (28)	
CASE NAME	01070 - CASE NAME (28)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCT. NO. (9)	
STREET	01080 - RESIDENCE STREET (35)	
EMP CD	03190 - EMPLOYABILITY CODE (2)	
ED	09304 - EDUCATION LEVEL (2)	
VET	09302 - VETERAN STATUS (1)	

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
RACE	09303 - INDIVIDUAL RACE/ETHNIC AFFILIATION (1)	
CITY	01082 - RESIDENCE CITY/TOWN (15)	
STATE	01083 - RESIDENCE STATE (2)	
ZIP	01084 - RESIDENCE ZIP (5)	
DOT #1	09305 - DICT OF OCCUPATIONAL TITLES CODE (10)	
DOT #2	09305 - DICT OF OCCUPATIONAL TITLES CODE (10)	
PHONE #	01085 - TELEPHONE NUMBER (10)	
PA FS CODE	01130 - PA FOOD STAMP CODE (2)	
VOLUN	09306 - VOLUNTEER STATUS (2)	
EM WRKR	09301 - EMPLOYMENT WORKER (5)	
IM OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
<b>WELFARE GRANT</b>		
AUTO: PA AMT	09332 - PA AUTOMATIC WELFARE GRANT SAVINGS (WGS) (6)	
ORG	09331 - PA AUTOMATIC WGS ORIGIN CODE (6)	
LN	09307 - EMPLOYMENT LINE NUMBER (2)	
<b>SAVINGS</b>		
MANUAL: PA AMT	09337 - PA MANUAL WELFARE GRANT SAVINGS (WGS) (6)	
ORG	09336 - PA MANUAL WGS ORIGIN CODE (1)	
LN	09335 - PA MANUAL WGS LINE NUMBER (2)	
LN	09307 - EMPLOYMENT LINE NUMBER (2)	
ACTIVITY	09308 - EMPLOYMENT ACTIVITY CODE (2)	Mnemonic.
STATUS	09309 - EMPLOYMENT STATUS (2)	Mnemonic
SOURCE	09320 - EMPLOYMENT AGENCY SOURCE (1)	Mnemonic
EFFECTIVE DATE	09310 - EMPLOYMENT EFFECTIVE DATE (6)	
ANTIC COMP DATE	09311 - EMPLOYMENT ANTICIPATED COMPLETION DATE (6)	
CASE TYPE	01060 - CASE TYPE (2)	
STORAGE DATE	12056 - EMPLOYMENT STORAGE DATE	



WEMIN2 - Employment Program Participation



The screenshot shows a terminal-style interface with a blue background and white text. The text is organized into several lines of data. The first line is a header: 'WEMIN2 DIST ALBA EMPLOYMENT PROGRAM PARTICIPATION 06/05/2007 PAGE 01 OF 01'. The second line contains 'CIN AX44981A CASE # EMPDT01 LOCAL', with 'NAME EMPDT01 JANE DATA' on the line below. The third line shows 'LN 01 ACTIVITY 20 TITLE 1 AGENCY NMM', with 'HOURLY RATE 00.04 HOURS/WEEK 030 STREET 123' on the line below, and 'CITY NYC STATE NY ZIP 12111' on the line below that.

```
WEMIN2 DIST ALBA EMPLOYMENT PROGRAM PARTICIPATION 06/05/2007 PAGE 01 OF 01
CIN AX44981A CASE # EMPDT01 LOCAL
NAME EMPDT01 JANE DATA
LN 01 ACTIVITY 20 TITLE 1 AGENCY NMM
HOURLY RATE 00.04 HOURS/WEEK 030 STREET 123
CITY NYC STATE NY ZIP 12111
```

Figure 3 - Employment Program Participation (WEMIN2)

Purpose

This screen is used to display the participation site data (if any) for specific activities from information on WEMUP2 - Employment Program Participation. See Data Elements on the following pages for all possible fields. All data elements fields on this screen are protected and cannot be updated.

Access

- Selecting District Inquiry and Screen field is 2 on **WEMMNU - Employment Menu**, or
- F7 from **WEMINI - Employment Program Participation**, or
- F8 from **WEMIN3 - Employment Program Participation**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST SCREEN SF08 IGNORED
  - SF KEY 99 NOT SUPPORTED - REXMT (99 = 4, 5, 9-14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F7	WEMIN3 - Employment Program Participation starting with page 01
F8	WEMIN1 - Employment Program Participation starting with page 01
Ctrl+F5	WEMMNU - Employment Menu (CIN and Case Number displayed)
Ctrl+F6	WEMMNU - Employment Menu

Screen Field Description - WEMIN2

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
CASE #	01050 - CASE NUMBER(10)	
NAME	03030 - NAME (FIRST) (10)	
	03030 - NAME (MI) (1)	
	03030 - NAME (LAST) (17)	
<b>LOCAL DATA</b>		
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 1-2.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 3-4.

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 5-6.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 7-8.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 9-11.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 12-14.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 15-17.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 18-21.
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences. Character position 22-27.
<b>LINE INFORMATION</b>		
LN	09307 - EMPLOYMENT LINE NUMBER (2)	7 occurrences per page.
ACTIVITY	09308 - EMPLOYMENT ACTIVITY CODE (2)	7 occurrences per page.
TITLE	09312 - EMPLOYMENT TITLE (9)	7 occurrences per page.
AGENCY	09315 - EMPLOYMENT PARTICIPATING AGENCY (28)	7 occurrences per page.
HOURLY RATE	09321 - EMPLOYMENT HOURLY RATE (4)	7 occurrences per page.
HOURS/WEEK	09322 - COUNT OF EMPLOYMENT HOURS PER WEEK (3)	7 occurrences per page.
STREET	09316 - EMPLOYMENT AGENCY STREET (35)	7 occurrences per page.
CITY	09317 - EMPLOYMENT AGENCY CITY (15)	7 occurrences per page.
STATE	09318 - EMPLOYMENT AGENCY STATE (2)	7 occurrences per page.
ZIP	09319 - EMPLOYMENT AGENCY ZIP (5)	7 occurrences per page.

WEMIN3 - Historical WGS



WEMIN3 DIST ALBA PA WELFARE GRANT SAVINGS HISTORY 06/05/2007 PAGE 01 OF 01				
CIN AX45109V		NAME EMPDT6 JAY		
FILE DATE	CASE #	ORIGIN	AMOUNT	STORAGE DATE

Figure 4 - Historical WGS (WEMIN3)

Purpose

This screen was used to display the chronological listing of Welfare Grant Savings (WGS). Up to 14 WGS occurrences were listed per page. (WGS Savings from employment were listed for one year. WGS savings from TEAP or Sanctions were listed for the duration of the sanction or contract.) All data elements fields on this screen are protected and cannot be updated.

Access

- Selecting District Inquiry and Screen field is 3 on **WEMMNU - Employment Menu**, or
- F7 from **WEMIN2 - Employment Program Participation**.

Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST SCREEN SF07 IGNORED
- SF KEY 99 NOT SUPPORTED - REXMT (99 = 4, 5, 7, 9-14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F8	WEMIN2 - Employment Program Participation
Ctrl+F5	WEMMNU - Employment Menu (CIN and Case Number displayed)
Ctrl+F6	WEMMNU - Employment Menu

Screen Field Description - WEMIN3

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
NAME	03030 - NAME (FIRST) (10)	
	03030 - NAME (MI) (1)	
	03030 - NAME (LAST) (17)	
<b>PA INFORMATION</b>		
FILE DATE	09330 - EMPLOYMENT WGS FILE DATE (6)	16 occurrences per page.
CASE #	01050 - CASE NUMBER (10)	16 occurrences per page.
ORIGIN	09331 - PA AUTOMATIC WGS ORIGIN CODE (1)	16 occurrences per page.
AMOUNT	09332 - PA AUTOMATIC WELFARE GRANT SAVINGS (WGS) (6)	16 occurrences per page.
STORAGE DATE	12056 - EMPLOYMENT STORAGE DATE (6)	16 occurrences per page.

WEMINS - Employment Program Participation

WEMINS DIST ALBA EMPLOYMENT PROGRAM PARTICIPATION 06/05/2007 PAGE 01 OF 01						
STATEWIDE INQUIRY						
CIN	AX44981A		ED 12	VET 9	RACE W	
NAME	EMPDT01	JANE	DOT #1	1	#2	
DOB	02/02/1952	SEX F	SSN	EM WRKR	CM	
ACTIVITY	STATUS	SOURCE	EFFECTIVE DATE	ANTIC COMP DATE	CASE TYPE	STORAGE DATE
JR-TR-FS	FS-EX-BE		11/04/99		NPA-FS	11/09/99
JR-TR-FS	ENRLD		11/01/99		NPA-FS	11/05/99

Figure 5 - Employment Program Participation (WEMINS)

Purpose

This screen is used to display client employment participation history for any District that has an employment record for that individual. All data elements fields on this screen are protected and cannot be updated.

Access

- Selecting Statewide Inquiry and ALL field is X, or
- Selecting Statewide Inquiry and District field is 99 (99 = District Code in which an individual has an Employment Record).

Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST DISTRICT SF07 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST DISTRICT SF08 IGNORED
- SF KEY 99 NOT SUPPORTED - REXMT (99 = 4, 5, 9-14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE USED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F7	Next District
F8	Previous District
Ctrl+F5	WEMMNU - Employment Menu (CIN and Case Number displayed)
Ctrl+F6	WEMMNU - Employment Menu

Screen Field Description - WEMINS

SCREEN CAPTION	D.E. NUMBER, NAME, SIZE	REMARKS
CIN	03010 -CLIENT IDENTIFICATION NUMBER (8)	
ED	09304 - EDUCATION LEVEL (2)	
VET	09302 - VETERAN STATUS (1)	
RACE	09303 - INDIVIDUAL RACE/ETHNIC AFFILIATION (1)	
NAME	03030 - NAME (LAST) (17)	
	03030 - NAME (FIRST) (10)	
	03030 - NAME (MI) (1)	
DOT #1	09305 - DICT. OF OCCUPATIONAL TITLES CODE (10)	
DOT #2	09305 - DICT. OF OCCUPATIONAL TITLES CODE (10)	
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	

SSN	03201 - SOCIAL SECURITY ACCT. NO (9)	
EM WRKR	09301 - EMPLOYMENT WORKER (5)	
<b>ACTIVITY INFORMATION</b>		
ACTIVITY	09308 - EMPLOYMENT ACTIVITY CODE (2)	14 occurrences per page.
STATUS	09309 - EMPLOYMENT STATUS (2)	14 occurrences per page.
SOURCE	09320 - EMPLOYMENT STATUS SOURCE (1)	14 occurrences per page.
EFFECTIVE DATE	09310 - EMPLOYMENT EFFECTIVE DATE (6)	14 occurrences per page.
ANTIC COMP DATE	09311 EMPLOYMENT ANTICIPATED COMPLETION DATE (6)	14 occurrences per page.
CASE TYPE	01060 - CASE TYPE (2)	14 occurrences per page.
STORAGE DATE	12056 - EMPLOYMENT STORAGE DATE (6)	14 occurrences per page.



## Subsystem Processing

### Error Messages

#### Employment Menu Error Messages

(Listing is alphabetical by error message; these error messages occur as a result of menu processing)

#### **CASE DATA PRIOR TO 99/99/99 REMOVED FROM DATABASE**

If Update Function is selected (no longer supported), then the individual must not have been "data migrated" from the case with the Employment Record. 99/99/99 is the date the individual case was flagged for migration. The Employment Record may be accessed by District Inquiry after migration.

#### **CASE NO SHOULD NOT BE ENTERED FOR STATEWIDE INQUIRY**

If Statewide Inquiry Function is selected, then case number field must not be entered.

#### **CASE NO SHOULD NOT BE ENTERED FOR INACTIVE CIN**

If District Inquiry Function is selected and Case Number field entered, then the CIN must not be flagged as having been consolidated (unduplicated) on the WMS Database.

#### **CASE NO NOT FOUND**

If Case Number field has entry, then the case must be known on the WMS Database in the transaction district.

#### **CIN NOT FOUND**

If there is an entry in the CIN field, then the CIN must be known on the WMS Database.

#### **CIN OR CASE NO REQUIRED**

If Case/Individual Inquiry is selected, then CIN or Case Number must be entered.

#### **DISTRICT NOT ACTIVE IN EMPLOYMENT SYSTEM**

Terminal Control Record must indicate terminal is in district that is active in the Employment Subsystem.

#### **EMPLOYMENT CODE INVALID FOR EMPLOYMENT ENTRY**

If Case Type of the case with the Employment Record is 11, 12, 14, 16, or 17, then the CIN entered must be for an individual with an Employability Code of 17, 20, 21, 33, 63 or 73,

or

If Case Type of the case with the Employment Record is 31 or 32, then the CIN entered must be for an individual with an Employability Code of WR or WE.

#### **EMPLOYMENT RECORD NOT FOUND**

If Update Function (no longer supported) and Screen 2 selected or District Inquiry Function selected or Statewide Inquiry Function selected, then there must be an Employment Record in the Transaction District.

**ENTER "X" FOR STATEWIDE INQUIRY**

If Statewide Inquiry selected, then ALL field must be X or blank.

**ENTER "X" TO MAKE A SELECTION**

Any value, other than X, must not be entered in the Employment Menu selection fields.

**ENTRY OF CIN REQUIRED**

If Case/Individual Inquiry Function resulting in WINQ07 is not selected, then CIN must be entered.

**INDIVIDUAL HAS EMPLOYMENT RECORD IN DISTRICTS LISTED ABOVE ONLY**

If Statewide Inquiry Function is selected and District field entered, then there must be an Employment Record for the individual in the District entered. Other District Code(s) in which the individual has an Employment Record is (are) also displayed above the message.

**INDIVIDUAL NOT IN A NON-SERVICES CASE IN DISTRICT**

If Update Function (no longer supported) and Screen 1 are selected and Case Number Field is blank, then there must be an individual in a Non-Services Case in the Transaction District.

**INDIVIDUAL NOT A MEMBER OF CASE NO ENTERED**

If Update (no longer supported) or District Inquiry Function is selected and the Case Number is entered, then the CIN entered must be for an Individual who is a member of that case.

**INVALID CIN**

If CIN field is entered, then CIN must be valid CIN format of 8 characters (2 alpha characters followed by 5 numeric characters followed by 1 alpha character check digit).

**INVALID DISTRICT**

If Statewide Inquiry Function and District Field are selected, then District Field must be blank or a valid WMS District.

**MORE THAN ONE SELECTION HAS BEEN CHOSEN**

Only one Menu Function selection may be entered.

**MULTIPLE CASE INVOLVEMENT - ENTRY OF CASE NO REQUIRED**

If Update (no longer supported) or District Inquiry Function is selected and Case Number Field is blank, then the Individual must not be in more than one Non-Services Case in the Transaction District.

**OLD CIN ENTERED - NEW CIN IS AA99999A**

If Update Function (no longer supported) or Case/Individual Inquiry Function is selected, then the entered CIN must not be flagged as having been consolidated (unduplicated) on the WMS Database. AA99999A equals the retained (New) CIN for the Individual after CIN consolidation (unduplication).

**PLEASE MAKE A SELECTION**

There must be an entry in Menu Function selection field.

**PLEASE SELECT ONE DISTRICT OR ALL DISTRICTS**

If Statewide Inquiry Function is selected, then there must be an entry in either All or District field but not in both. The District Code(s) for which the individual has an Employment Record will be displayed above the message.

**SELECT SCREEN 1 OR 2**

If Update Function (no longer supported) is selected, then Screen selection field must be Blank, 1 or 2.

**SELECT SCREEN 1, 2 OR 3**

If District Inquiry Function selected, then Screen selection field must be Blank, 1, 2 or 3.

**SERVICES CASE TYPE INVALID FOR EMPLOYMENT ENTRY**

If there is an entry in Case Number field, then Case Number must not begin with "S".

## Medical Assistance

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## Medical Assistance

### Overview

The Medical Assistance system in WMS currently consists of four separate subsystems:

- Principal Provider (P)
- Restriction/Exception (R)
- Prepaid Capitation (C)
- Pay-In/Excess Income (X)

This section begins with a general overview of the procedure used in each subsystem followed by a discussion of the main Medical Assistance menu. Each subsystem is then described in an overview, followed by screen descriptions and lastly the error messages.

Medical Assistance is designed to provide improved controls of cases for individuals in need of medical care by focusing on the processing of Principal Provider, Restriction/Exception, and Prepaid Capitation Plan data from WMS to the eMedNY system. This data is used by the fiscal agent to validate bills received from providers. The data is also used by the Electronic Medicaid Eligibility Verification System (EMEVS) in the production of Medicaid ID Cards and the maintenance of the EMEVS database.

Each subsystem provides a way to add data, as well as modify or delete existing data already on the database. Each subsystem is recipient-specific.

The Principal Provider subsystem is for MA only cases, while the Restriction/Exception and Prepaid Capitation Plan subsystems are for PA and MA cases.

### Principal Provider

The **Principal Provider** subsystem provides control of cases which include recipients who are in either nursing homes or long-term care or who are hospitalized and obligated to contribute to the cost of their care. It provides a method of controlling and tracking placement, discharge and deletion of, and any changes in information for, clients who require medical care from these various facilities (nursing homes, home health agencies, psychiatric centers, hospitals, etc.). It also provides a method of recording recipient's financial liability for the cost of medical care or LTC facilities.

### Restriction/Exception

The **Restriction/Exception** subsystem provides controls to (1) restrict recipients to designated medical providers when the recipient has a history of inappropriate use of medical facilities, (2) to authorize exception services in cases of specific need, and (3) to exempt or exclude recipients from being auto-assigned to Managed Care. As a result of the NYS DSS Bureau of Surveillance and Utilization Review (SURS) a Medical recipient may be restricted to a designated pharmacy, physician, or clinic. A maximum of two SURS restrictions may be entered for an individual at a given time.

Restriction information is available to Providers via the Electronic Medicaid Eligibility Verification System (EMEVS).

### Prepaid Capitation

The **Prepaid Capitation** subsystem provides special controls for recipients enrolled in a comprehensive health service plan, such as a Health Maintenance Organization (HMO). Such plans provide a comprehensive benefit package of health services for a pre-paid fixed monthly fee.

Beginning April 1, 2008 employers that meet set criteria will be able to offer FHP (Family Health Plus) coverage their employees. Each employer participating in the program will be assigned a unique 8 character provider ID number supplied by eMedNY.

The employer file will be submitted the second week of each month via a secure DOH server. The file will be retrieved and processed generating the values for EPI (Employee Purchased FHP) which may impact an individual's coverage and trigger a transaction in the PCP subsystem.

WMS pending records are generated for reason codes (Y99 for EPI only update, 720 for EPI/PCP update).

Processed files are returned to the employer via CHP (Child Health Plus).

VALUE	DESCRIPTION
1	1199 Employee in 1199 Managed Care Plan (system generated)
2	Client no longer eligible for Partnership for FHP (system generated)
3	Employer withdrew from plan (system generated)
4	1199 Employee in non-1199 Managed Care Plan (system generated)
5	1199 Employee not enrolled in Managed Care Plan (system generated)
B	Client no longer eligible for Partnership for FHP (worker entered)
C	Employer withdrew from plan (worker entered)
D	1199 Employee in non-1199 Managed Care Plan (worker entered)
E	1199 Employee not enrolled in Managed Care Plan (worker entered)
F	1199 Employee in 1199 Managed Care Plan (worker entered)

### Employer File

ELEMENT	REMARKS
LITERAL VALUE	Header
CREATION-DATE	CCYYMMDD
CREATION-TIME	HHMMSS
COMPANY NAME	
IN/OUT SWITCH	Incoming file tag: 0 Outcoming file tag: 1

TRANSACTION INDICATOR	N – New Members A – Adding to an existing family C – Change to existing R – Reinstate existing
EFFECTIVE DATE	CCYYMMDD. Effective date for member's coverage
TERMINATION DATE	CCYYMMDD. Last date on which member is covered
TERMINATION REASON	Termination reason for member. Required with termination date
ENROLLEE LAST NAME	Last Name
ENROLLEE FIRST NAME	First Name
ENROLLEE MI	Middle Initial
SIGNATURE DATE	Date employee signed application for insurance coverage. These will be blank on the file from 1199
RECEIVED DATE	CCYYMMDD. These will be blank on the file from 1199
STREET ADDRESS 1	Street address
STREET ADDRESS 2	Street address
CITY	Street address
STATE	Street address
ZIP	Street address
COUNTY	County in which resides
PHONE 1	Primary phone number
ENROLLEE SSN	SSN
ENROLLEE DOB	CCYYMMDD. Date of Birth
ENROLLEE GENDER	Gender
ENROLLEE MEDICAID NUMBER	CIN for Medicaid members, if available.
ENROLLEE RELATIONSHIP TO UNION MBR.	1199 will pass values M,S and D M – Employee S – Spouse D - Dependant
UNIQUE FAMILY IDENTIFIER	1199 stores an alternate ID for some members that appear on their ID cards. Will be blank if not available.
PHONE 2	Secondary phone number
COB EFFECTIVE DATE	Date of other insurance is effective(if known)
COB PRIMARY INDICATOR	Proper values: P – Other Insurance in Primary S - Other Insurance in Secondary
COB CARRIER NAME	Name of the other insurance carrier
COB CARRIER ADDRESS	Address of the other insurance carrier
COB CARRIER CITY	City of the other insurance carrier
COB CARRIER STATE	State of the other insurance carrier



COB CARRIER ZIP	ZIP of the other insurance carrier
COB CARRIER PHONE	Phone number of the other insurance carrier
GROUP PLAN ID	Populated by 1199
FAMILY SIZE	Must be two numbers. If less than '10', must be prefaced by zero – '01', '02', '03' etc.
HOUSEHOLD INCOME GROSS	This data will be compared to the State Income file when available
ENROLLEE PCP LAST NAME	Primary Care Physician last name. Blank-filled for the enrollment file
ENROLLEE PCP FIRST NAME	Primary Care Physician first name. Blank-filled for the enrollment file
ENROLLEE PCP ADDR1	Office address for PCP Blank-filled for the enrollment file
ENROLLEE PCP CITY	Office address for PCP Blank-filled for the enrollment file
ENROLLEE PCP STATE	Office address for PCP Blank-filled for the enrollment file
ENROLLEE PCP ZIP	Office address for PCP Blank-filled for the enrollment file
ENROLLEE PCP NPI	National Provider Identifier for PCP. Blank-filled for the enrollment file
ENROLLEE PCP LICENSE NUMBER	Provider License Number. Blank-filled for the enrollment file.
ENROLLEE PCP TAX ID	Provider Tax ID. Blank-filled for the enrollment file.
PCP ID IN QNXT OR BASIS	Provider Identifier Assigned ny 1199 in BASIS or QNXT. Blank-filled for the enrollment file.
RESPONSIBLE PERSON LAST NAME	Head of Household/Employee Last Name
RESPONSIBLE PERSON FIRST NAME	Head of Household/Employee First Name
RESPONSIBLE PERSON ADDRESS 1	Head of Household Address
RESPONSIBLE PERSON ADDRESS 2	Head of Household Address
RESPONSIBLE PERSON CITY	Head of Household Address
RESPONSIBLE PERSON STATE	Head of Household Address
RESPONSIBLE PERSON ZIP	Head of Household Address
RESPONSIBLE PERSON SSN	Employee SSN. Housed to capture wages from the State.
RESPONSIBLE PERSON PHONE	Head of Household phone number
FIDELIS PLAN ID	Plan for client which is currently enrolled at Fidelis. Populated by Fidelis. CHP FHP FHP Non-Subsidized Other
CHP ENROLLEE RECERT DATE	CCYYMMDD. Date member will lose coverage if recertification is not completed. Can be supplied by SDOH, if they choose.

DOH ENROLLEE RECERT DATE	CCYYMMDD. Date member is due to have paperwork to LDSS to continue coverage
CIN	Client's ID This field is to be populated by OTDA only.
CHP RESPONSE INDICATOR	Response Indicator from State Medicaid/FHP office. Codes to be supplied by State
MESSAGE TYPE	Values specified below 01 – Member of 1199 PCP 02 – Member of non-1199 PCP 03 – Not enrolled/eligible for managed care 10 – No match on WMS 11- Line/case closed or lapsed on WMS 12 – No current eligible coverage This field is to be populated by OTDA only.
STATE COUNTY CODE	State-assigned county code for member based on address.
CHP ENROLLMENT DATE	CCYYMMDD. Effective date of CHPlus enrollment in the 1199 Plan/Fidelis Plan. Supplied by the State
CHP PAYMENT CODE	Payment code from the State that corresponds to the child's subsidy and federal poverty level category. Values: A - Full subsidy (< 120% FPL) B - Full subsidy (120 - 150% FPL) C - Full subsidy (151 - 159% FPL) H - Partial subsidy (160 - 222% FPL, for the first three children in family) I - Full subsidy (160 - 222% FPL, full subsidy amount for fourth and greater child in family) L - Partial subsidy (223 - 250% FPL, for the first three children in family) M - Full subsidy (223 - 250% FPL, full subsidy amount for the fourth and greater child in family) S - Self-pay (>250% FPL)
DOH PLAN EFFECTIVE DATE	CCYYMMDD. Effective date of FHP enrollment in the 1199 Fidelis Plan. Supplied by the State
EPI	Employer Purchased FHP Indicator. This field is to be populated by OTDA only. Acceptable values are 'Y' for present and blank for absent.
PROCESS INDICATOR	Indicates if DOH processed the Record. Acceptable values are "Y" (means processed) and "N" (means not processed). This field is to be populated by OTDA only.

## Pay-In/Excess Income

The **Pay-In/Excess Income** subsystem provides support for tracking and reconciling the amount of payments made to the district by a recipient to cover the amount by which the recipient's net income exceeds MA income standards.

## Functions

Three functions are available for the Principal Provider, Restriction/Exception, and Prepaid Capitation subsystems:

- Input
- Inquiry
- Audit

Third Party Health Insurance functions are no longer supported except for inquiry purposes. eMedNY performs third party insurance functions.

## Input

The Input function is used to enter an initial transaction. It allows the transaction to be stored and can also be used to modify data already on the database. Each subsystem has an input document.

- Principal Provider (DSS 3477)
- Restriction/Exception (DSS 3478)
- Prepaid Capitation Plan (DSS 3783)

In order to access the Input function, the following five fields of data must be entered on WMAMNU - Medical Assistance Menu:

- The appropriate letter for the desired subsystem:
  - P for Principal Provider
  - R for Restriction/Exception
  - C for Prepaid Capitation
- I for the Input function
- CIN
- Case Number
- Worker ID

The CIN must be for an active individual who currently has or has had MA Coverage in the transaction district (D.E. #01010).

The INPUT screens are divided into three sections containing identifying information, data entry line and historical records if there are any. All the data above the entry line is system generated from WMAMNU - Medical Assistance Subsystem menu. When the data from the entry line is transmitted and stored, it is placed in the History Section below the data entry line. When the data is stored it becomes a permanent record on the database.

### Inquiry

The **Inquiry** screens are selected by entering the following information on the Medical Assistance Menu:

- The appropriate letter for the desired subsystem:
  - P for Principal Provider
  - R for Restriction/Exception
  - C for Prepaid Capitation
- Q for the Query function
- CIN

The INQUIRY function for the subsystems is statewide and the screens display the appropriate record of Medical Assistance information. Some modifications to the stored lines (such as deletions) will not be displayed.

Accessing Inquiry screens for CINS other than the one entered on WMAMNU can be accomplished by entering a CIN in the NEXT CIN field on Line 23 of the Inquiry screen. If the CIN entered has a record in the subsystem selected, the Inquiry screen with the record will be displayed. Inquiry displays all information entered on the Input screen but does not allow data entry.

### Audit

The **Audit** screens are selected by entering the following information on the Medical Assistance Menu:

- The appropriate letter for the desired subsystem:
  - P for Principal Provider
  - R for Restriction/Exception
  - C for Prepaid Capitation
- A for the Audit function
- CIN

The AUDIT function for a subsystem is statewide. The Audit screens display all transactions on a record-by-record basis. The Audit screens display all information entered and stored on the Input Screen, even information that was in error and has been deleted. It provides a complete history of the Medical Assistance data input.

Accessing AUDIT screens for CINS other than the CIN entered on WMAMNU can be accomplished by entering a CIN in the NEXT CIN field on Line 23 of the Audit screen. If the CIN entered has a record in the subsystem selected, the Audit screen with the record will be displayed.

## Pay-In/Excess Income

The Pay-In and Excess Income Program Subsystem provides Input and Inquiry screens in order to track and reconcile the amount of pre-payments made to the district by a recipient. These payments are used to cover the amount by which the recipient's net income exceeds the MA income standards.

The Pay-In/Excess Income plan is an optional plan that can last for periods from one to six months. The payments can be made in full or in monthly installments.

These payments are periodically reconciled with the amount of Medicaid claims paid on behalf of the recipient. Unused pay-in amounts are refunded to the recipient or credited toward a pay-in amount for a subsequent excess income period.

### Input

The INPUT screen is selected in order to enter and store data concerning the recipient's paid and/or incurred medical bills. This data provides a method for keeping track of the balance and is supplied to EMEVS to be used by the Medicaid Management Information System (MMIS) fiscal agents to identify possible duplication.

In order to access the INPUT screen, the following five fields of data must be entered on WMAMNU - MEDICAL ASSISTANCE MENU:

- X for SUBSYSTEM
- I (input) for FUNCTION
- CIN
- WORKER ID
- PAY-IN START DATE (month and year-mmyy)

The INPUT screens are divided into three sections containing identifying information, the data entry line, and historical record, if there is one. All of the data above the entry line is system generated from WMAMNU - MEDICAL ASSISTANCE SUBSYSTEM MENU. When the data from the entry line is transmitted and then stored (using Ctrl+F3) it is placed in the History Section below the data entry line. When the data is stored it becomes a permanent record on the database.

### Inquiry

The INQUIRY screens are selected by entering the same data as for the INPUT screen (except for the FUNCTION which is Q - Inquiry) and transmitting. The INQUIRY function for the subsystem is statewide.

Accessing Inquiry screens for CINS other than the one entered on WMAMNU can be accomplished by entering a CIN in the NEXT CIN field on Line 23 of the Inquiry screen. If the CIN entered has a record in the SUBSYSTEM selected, the Inquiry screen with the record will be displayed.

## General Processing

Each subsystem is accessed by inputting Selection Number 25 (Medical Assistance Menu) on screen WDXMNU - WMS Main Menu. Upon selection of an MA Subsystem and function the WMS computer will load into its primary memory one of the nine MA subsystem programs. The workstation will then be under the control of that program. The WMS computer is responsible for displaying the appropriate screen requested. The WMS computer will collect and perform edits on data entered on the screen such as presence, validity and cross element edits. All editing is done after transmission of the screen. If the data is in error, the appropriate error message or error number will be displayed on the screen.

Errors are indicated by highlighted field(s) when invalid data is entered or by highlighted asterisks when data is not entered in required fields. A corresponding error message or error number is displayed on line 24. Errors must be corrected before data entered can be accepted and stored by the WMS computer.

If data processes successfully and is stored, the WMS database is updated immediately. The information entered through these subsystems is maintained in the MA Provider Restriction areas of the database. There are four records in the MA Provider Restriction area of the database:

- MA Individual Line Record (owners)
- Principal Provider Record
- MA Restriction Record
- Prepaid Capitation Record

The storing of Prepaid Capitation Plan (PCP) data also updates another area of the database immediately. The MA coverage code is immediately updated to a "30" on the screen but the record is placed in AT-UM status and waits for overnight batch processing. The MA Coverage history will be changed permanently during the overnight batch process.

The MA Subsystem provides information to the Interim Recipient Eligibility File (IREF) for the Medicaid Management Information System (MMIS). IREF contains data on all individuals in New York State who are eligible for Medicaid. MA Subsystem information is passed to IREF monthly. IREF supplies this information to the MMIS Claims Processing Fiscal Agent. The Fiscal Agent weekly receives information on clients who are enrolled in the Principal Provider and Prepaid Capitation Plan programs. It also receives monthly restriction information on what restrictions apply to recipients enrolled in the Restriction/Exception program.

IREF also supplies information to the Electronic Medicaid Eligibility Verification System (EMEVs). IREF updates the EMEVs database daily. EMEVs is responsible for permanent plastic Medicaid ID card production and for maintaining the EMEVs database. The database enables providers to obtain current and accurate Medicaid eligibility verifications including Principal Provider, Restrictions, PCP, TPHI coverage, Medicare coverage and other pertinent data for a specific date.

## Principal Provider

### Introduction

The Principal Provider subsystem is limited to individuals who have or have had MA coverage or to PA cases. It provides special controls when recipients require nursing home care or other types of long-term care, or are hospitalized and obligated to contribute to the cost of their care.

### Input

Principal Provider data is initially entered and/or modified or deleted on screen **WMPPIN (Principal Provider Input Screen)**. Access to WMPPIN is obtained by entering P - Principal Provider for SUBSYSTEM, I for FUNCTION, CIN, CASE NO., and WORKER ID on WMAMNU - MEDICAL ASSISTANCE MENU and transmitting.

If there is no prior stored Principal Provider data, the WMPPIN input screen is returned with system generated data (listed below) but no historical data. If prior data was stored, the WMPPIN input screen displays the historical data as well as the following system generated data:

- CIN
- Name
- Case Number
- Transaction Input Date
- Transaction District
- Worker ID

The appropriate data from the Principal Provider Data Input Form (DSS-3477) is entered on the input line and transmitted. A successful input transaction is acknowledged by the message INPUT ACCEPTED and the accepted data is moved below the input line. If there are system-detected errors, the fields in error are returned highlighted and either an error message or the error number(s) corresponding to the error(s) will be displayed at the bottom of the screen. A maximum of 12 error numbers will be displayed. If changes are necessary, Function key F12 (or Ctrl+F2) will cancel the transaction and display a clean input screen containing only the stored data.

Successful input transactions may be stored using Ctrl+F3. The accepted data and the accompanying system-generated data are returned on the line(s) below the input line. The message DATA SUCCESSFULLY STORED ON DATABASE acknowledges the stored transaction. The database is updated immediately. Data that is not stored via the Ctrl+F3 is not retained on the database.

Principal Provider stored data may be deleted or corrected using the following procedures:

### Deleting a Placement

All data pertinent to a placement that was incorrectly recorded may be deleted. To delete, the user must follow these steps:

- Enter the following fields:
  - Principal Provider Code - enter a DL
  - Principal Provider Number
  - Date of Service From Date
- Transmit
- Ctrl+F3 must be used to store the deletion on the database.

### Deleting Available Amount and Available Amount From Date

When AVAILABLE AMOUNT and AVAILABLE AMOUNT FROM DATE appear alone on a line, they may be changed. To change this information, the user must enter the following fields:

- Principal Provider Code - enter a DL
- Correct Available Amount
- Correct Available Amount From Date
- Transmit
- Ctrl+F3 must be used to complete deletion and store it on the database.

### Correcting Data

Erroneously entered fields may be corrected by the end user following the step described below:

- Enter the line number containing the erroneously entered field in the CL field.
- Enter the correct data in the appropriate field.
- Transmit
- Ctrl+F3 must be used to store the corrected data on the database.

A DATE OF SERVICE FROM DATE may be corrected only by using the Delete (DL) function and then re-entering the pertinent data with the correct DATE OF SERVICE FROM DATE.



## Inquiry

Screen **WMPPIQ (Principal Provider Inquiry Screen)** displays a historical record of Principal Provider information for an individual. Some data is not displayed when deletions and/or corrections are made. Since this inquiry is statewide, the transaction district is displayed on each line of data. The data is displayed in chronological order. Transactions with the most recent FROM Date are displayed at the top of the stack.

The WMPPIQ screen is accessed by entering P for SUBSYSTEM, Q for FUNCTION and the CIN on **WMAMNU** or by depressing F5 from **WMPPAQ - Principal Provider Audit** screen. The inquiry screen displays a maximum of 18 lines of data per screen. As on all inquiry screens, the data displayed cannot be changed and special function keys may be used to page forward and backward if there are multiple pages. Inquiry screens for CINS with Principal Provider records (in Transaction District and Cross District) are accessed by entering desired CIN in the NEXT CIN field. Depressing F5 returns the user to **WMPPAQ - Principal Provider Audit** screen.

## Audit

Screen **WMPPAQ (Principal Provider Audit Screen)** displays a record of all transactions ever stored on the database for an individual including those transactions that were deleted and/or corrected. Similar to inquiry, the audit screens list transaction in chronological order with the most recent FROM Date displayed at the top of the stack.

WMPPAQ screen is accessed by entering P for SUBSYSTEM, A for FUNCTION and the CIN on **WMAMNU** or depressing F5 from **WMPPIQ - Principal Provider Inquiry** screen. The audit screen displays a maximum of 18 lines of data per screen. The data displayed cannot be changed and special function keys may be used to page forward and backward if there are multiple pages. To perform Inquiry/ Audit functions for a different client, enter the individual's CIN in the NEXT CIN field on **WMPPAQ**.

## Automatic System Changes

When the Individual Status for an individual with an active Principal Provider record is changed to 13 (deceased), 15 (deleted) or 20 (closed), a batch update transaction will automatically terminate service to that provider. When the system generates this termination of the service, the Principal Provider Inquiry and Audit screen will display the following system-generated data:

SCREEN CAPTION	DISPLAYED DATA
DATE	TODAY'S DATE
WORKR	NYSDSS
PP	00
DATES OF SERVICE FROM	MA COVERAGE "TO" DATE

WMAMNU - Medical Assistance Subsystem Menu

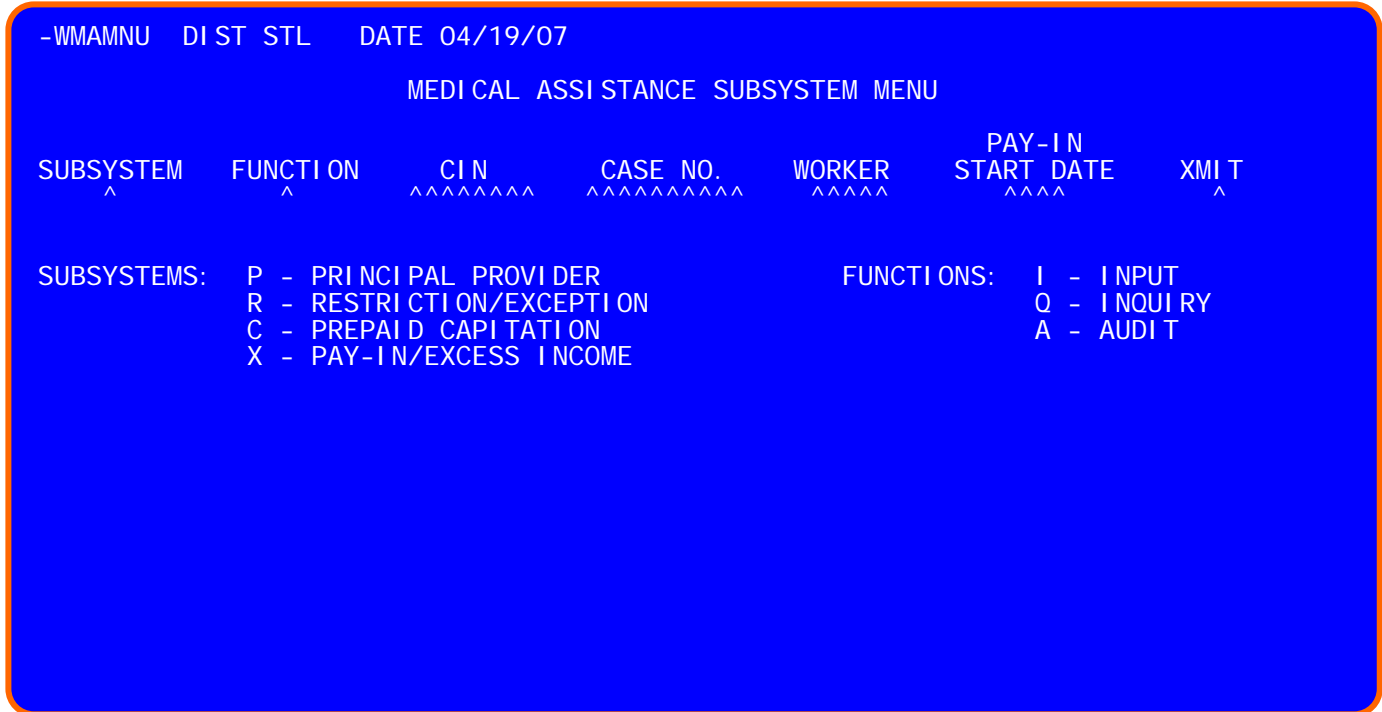


Figure 1 - Medical Assistance Subsystem Menu (WMAMNU)

Purpose

WMAMNU is the Medical Assistance submenu. It is used to select the desired Medical Assistance Subsystem and the desired function of that Subsystem: Input, Inquiry or Audit.

Access

- Entering 25 on WMSMNU - WMS MENU, **or**
- Ctrl+F5 from all Principal Provider, Restriction/Exception, Prepaid Capitation, and Pay-In/Excess Income subsystem screens, **or**
- Ctrl+F6 from all Principal Provider, Restriction/Exception, Prepaid Capitation, and Pay-In/Excess Income subsystem screens.

Screen Response

Positive

- WMPPIN if P - PRINCIPAL PROVIDER and I - INPUT are entered, **or**
- WMPPIQ if P - PRINCIPAL PROVIDER and Q - INQUIRY are entered, **or**
- WMPPAQ if P - PRINCIPAL PROVIDER and A - AUDIT are entered, **or**

- WMRRIN if R - RESTRICTION/EXCEPTION and I - INPUT are entered, or
- WMRRIQ if R - RESTRICTION/EXCEPTION and Q - INQUIRY are entered, or
- WMRRAQ if R - RESTRICTION/EXCEPTION and A - AUDIT are entered, or
- WMPCIN if C - PREPAID CAPITATION and I - INPUT are entered, or
- WMPCIQ if C - PREPAID CAPITATION and Q - INQUIRY are entered, or
- WMPCAQ if C - PREPAID CAPITATION and A - AUDIT are entered, or
- WMPXIN if X - PAY-IN/EXCESS INCOME and I - INPUT are entered, or
- WMPXIQ if X - PAY-IN/EXCESS INCOME and Q - INQUIRY are entered, or
- WMPXAQ if X - PAY-IN/EXCESS INCOME and A - AUDIT are entered.

#### Negative

- Errors are indicated by the cursor being placed in the first data entry position on the screen. A corresponding message is displayed on line 24
  - CASE NO AND WORKER REQUIRED FOR INPUT FUNCTION
  - CASE NOT FOUND
  - CIN NOT FOUND
  - CIN UNKNOWN TO MA SUBSYSTEMS
  - INSUFFICIENT SYSTEM AREA FOR ANY FURTHER ENTRIES FOR CIN
  - INVALID CIN ENTERED
  - INVALID FUNCTION ENTERED
  - INVALID FUNCTION AND CIN ENTERED
  - INVALID SUBSYSTEM ENTERED
  - INVALID SUBSYSTEM AND CIN ENTERED
  - INVALID SUBSYSTEM AND FUNCTION ENTERED
  - INVALID SUBSYSTEM, FUNCTION AND CIN ENTERED
  - MA COVERAGE NOT FOUND

- NO MA INFORMATION FOR THIS CIN
- NO PREPAID CAPITATION RECORDS FOUND
- NO PRINCIPAL PROVIDER RECORDS FOUND
- NO RESTRICTION/EXCEPTION RECORDS FOUND
- OLD CIN ENTERED - INQUIRY NOT ALLOWED - NEW CIN IS ...
- PLEASE TAB BEYOND ALL REQUIRED FIELKD BEFORE TRANSMITTING
- REQUIRED DATA MISSING
- SERVICES CASE IS NOT ALLOWED FOR RR OR PCP INPUT
- SERVICES CASE NUMBER NOT ALLOWABLE ENTRY
- SF99 KEY NOT SUPPORTED (99 = 08, 13)
- TCR WRITE COMPLETE
- THIS INDIVIDUAL ACTIVE ON REST/EXC SYSTEM - PCP ENTRY NOT PERMITTED
- THIS WORKER ID RESERVED FOR INTERNAL SYSTEM USE
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Applications Register
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WMAMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SUBSYSTEM	NONE	Must be entered. Valid values are P, R, C, X
FUNCTION	NONE	Must be entered. Valid values are I, Q, A
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Must be entered.
CASE NO.	01050 - CASE NUMBER (10)	Must be entered for INPUT function only. Not required for Pay-In/Excess Income.
WORKER	01040 - WORKER IDENTIFIER (5)	Must be entered for INPUT function only.
PAY-IN START DATE	NONE	MMYY - Must be entered for Pay-In/Excess.

WMPPIN - Principal Provider Input

```
>WMPPIN          PRINCIPAL PROVIDER INPUT SCREEN          06/01/89
CLIENT-ID      AB2378ST  NAME ANDY          TAYLOR          CASE-NUM TRNCI NCMA
TX
CL  DATE      DST WORKR  PP  PROVIDER  DATES OF SERV EXCEPTION  AVAI LABLE AMT
060189  12  PN          FROM    THRU      FROM          AMT      FROM XMT
```

Figure 2 - Principal Provider Input (WMPPIN)

Purpose

WMPPIN is used to input, change or delete data from WMS using the Principal Provider Input Form.

Access

- Entering P for SUBSYSTEM, I for FUNCTION, CIN, CASE NO., and WORKER ID on **WMAMNU - Medical Assistance Subsystem Menu**.

Screen Response

Positive

- One of the following message on Line 24:
  - INPUT ACCEPTED (if input messages was transmitted and accepted)
  - DATA SUCCESSFULLY STORED ON DATBASE (if accepted data was stored using Ctrl+F3)
  - CANCEL ACCEPTED (if data was cancelled using Ctrl+F2)

Negative

- Fields in error return highlighted. One or more of the error messages on Line 24 as shown on the Principal Provider Error Messages Listing pages or
- The message EXAMINE BLINKING FIELDS on Line 24 followed by one or more of the error numbers as shown on the Principal Provider Error Listing pages, or
- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-11, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F12	Displays message CANCEL ACCEPTED
Ctrl+F3	Displays message DATA SUCCESSFULLY STORED ON DATABASE (only if input had been accepted)
Ctrl+F5	WMAMNU - With previously entered CIN, Case Number and Worker ID appearing in appropriate fields
Ctrl+F6	WMAMNU - Medical Assistance Subsystem menu. A blank screen is displayed.

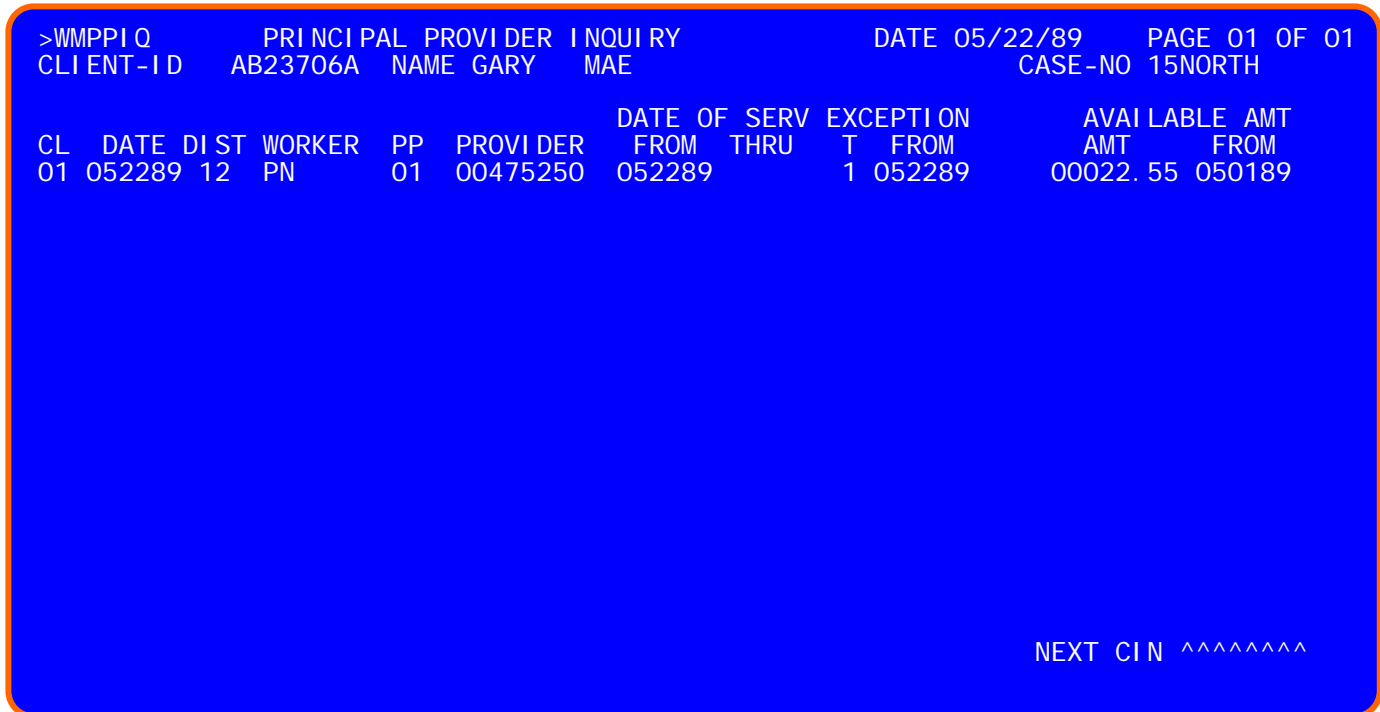
Screen Field Description - WMPPIN

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT-ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
CASE-NUM	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
<b>INPUT TRANSACTION</b>		
CL	NONE	Correction Line. System generated.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>TRANSACTION DATA</b>		
DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	Come from entries on WMAMNU.
PP	21550 - PRINCIPAL PROVIDER CODE (2)	
PROVIDER	21068 - PRIMARY PRVIDER NUMBER (8)	
<b>DATES OF SERV</b>		
FROM	21560 - PRINCIPAL PROVIDER FROM DATE OF SERVICE (6)	
THRU	21570 - PRINCIPAL PROVIDER THRU DATE OF SERVICE (6)	
<b>EXCEPTION</b>		
T	21580 - PRINCIPAL PROVIDER PAYMENT EXCEPTION TYPE (2)	
FROM	21590 - PRINCIPAL PROVIDE EXCEPTION FROM DATE (6)	
<b>AVAILABLE AMT</b>		
AMT	21600 - AVAILLABLE INCOME AMT (7)	
FROM	21610 - AVAILABLE EFFECTIVE FROM DATE (6)	
<b>HISTORY</b>		
CL	NONE	Protected. 16 occurrences. Correction Line. System generated.
DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 16 occurrences. System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	Protected. 16 occurrences. System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	Protected. 16 occurrences. Come from entries on WMAMNU.
PP	21550 - PRINCIPAL PROVIDER CODE (2)	Protected. 16 occurrences.
PROVIDER	21068 - PRIMARY PRVIDER NUMBER (8)	Protected. 16 occurrences.
FROM	21560 - PRINCIPAL PROVIDER FROM DATE OF SERVICE (6)	Protected. 16 occurrences.
THRU	21570 - PRINCIPAL PROVIDER THRU DATE OF SERVICE (6)	Protected. 16 occurrences.
T	21580 - PRINCIPAL PROVIDER PAYMENT EXCEPTION TYPE (2)	Protected. 16 occurrences.
FROM	21590 - PRINCIPAL PROVIDE EXCEPTION FROM DATE (6)	Protected. 16 occurrences.
AMT	21600 - AVAILLABLE INCOME AMT (7)	Protected. 16 occurrences.
FROM	21610 - AVAILABLE EFFECTIVE FROM DATE (6)	Protected. 16 occurrences.



WMPPIQ - Principal Provider Inquiry



```
>WMPPIQ          PRINCIPAL PROVIDER INQUIRY          DATE 05/22/89          PAGE 01 OF 01
CLIENT-ID      AB23706A  NAME GARY    MAE          CASE-NO 15NORTH

CL  DATE DIST WORKER  PP  PROVIDER  DATE OF SERV  EXCEPTION  AVAILABLE AMT
01 052289 12  PN        01  00475250  052289      1 052289      AMT FROM
                                00022.55 050189

                                NEXT CIN ^^^^^^^
```

Figure 3 - Principal Provider Inquiry (WMPPIQ)

Purpose

WMPPIQ displays past and current Principal Provider information. The WMPPIQ Restriction/Exception Data Input Form is DSS 3478. All fields are protected.

Access

- Entering P for SUBSYSTEM, Q for FUNCTION, CIN on **WMAMNU - Medical Assistance Subsystem Menu, or**
- F5 from **WMPPAQ - Principal Provider Audit.**

Screen Response

Positive

- See **Function Keys.**

Negative

- One of the following messages displayed on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- F99 - NOT SUPPORTED - REXMT (99 = 4, 7-13, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPPAQ - Principal Provider Audit
F6	<i>Renders Workstation Inactive</i>
Ctrl+F4	MMIMNU - MMIS Menu
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field
Ctrl+F6	WMAMNU - Medical Assistance Subsystem menu. A blank screen is displayed.

Screen Field Description - WMPPIO

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT-ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
CASE-NUM	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
<b>TRANSACTION DATA</b>		
CL	NONE	16 occurrences. Correction Line. System generated.
<b>TRANSACTION</b>		
DATE	02020 - TRANSACTION INPUT DATE (6)	16 occurrences. System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	16 occurrences. System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	16 occurrences. Come from entries on WMAMNU.
PP	21550 - PRINCIPAL PROVIDER CODE (2)	16 occurrences.
PROVIDER	21068 - PRIMARY PRVIDER NUMBER (8)	16 occurrences.
<b>DATES OF SERV</b>		
FROM	21560 - PRINCIPAL PROVIDER FROM DATE OF SERVICE (6)	16 occurrences.
THRU	21570 - PRINCIPAL PROVIDER THRU DATE OF SERVICE (6)	16 occurrences.
<b>EXCEPTION</b>		
T	21580 - PRINCIPAL PROVIDER PAYMENT EXCEPTION TYPE (2)	16 occurrences.
FROM	21590 - PRINCIPAL PROVIDE EXCEPTION FROM DATE (6)	16 occurrences.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>AVAILABLE AMT</b>		
AMT	21600 - AVAILLABLE INCOME AMT (7)	16 occurrences.
FROM	21610 - AVAILABLE EFFECTIVE FROM DATE (6)	16 occurrences.

WMPPAQ - Principal Provider Audit

```

>WMPPAQ          PRINCIPAL PROVIDER INQUIRY          DATE 05/24/89          PAGE 01 OF 01
CLIENT-ID      AB23700P  NAME MARY      MAE          CASE-NO 05NORTH

CL  DATE  DIST  WORKER  PP  PROVIDER  DATE OF SERV  EXCEPTION  AVAILBLE AMT
01 052489 12  PN      01  00475434 070189      1 070189    00022.55 070189
02 052489 09  S      07  00354467 060189
  
```

NEXT CIN ^^^^^^^^

Figure 4 - Principal Provider Audit (WMPPAQ)

Purpose

WMPPAQ displays all Principal Provider data entered for an individual including data erroneously entered and later corrected or deleted.

Access

- Entering P for SUBSYSTEM, A for FUNCTION and CIN on **WMAMNU - Medical Assistance Subsystem Menu, or**
- F5 from **WMPPIQ - Principal Provider Inquiry.**

Screen Response

Positive

- See **Function Keys.**

Negative

- One of the following messages displayed on line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- SF99 - NOT SUPPORTED - REXMT (99 = 4, 7-13, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPPIQ - Principal Provider Inquiry Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F4	MMIMNU - MMIS Menu
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field.
Ctrl+F6	WMAMNU - Medical Assistance Subsystem Menu

Screen Field Description - WMPPAQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT-ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
CASE-NUM	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
<b>TRANSACTION DATA</b>		
CL	NONE	Protected. 16 occurrences. Correction Line. System generated.
<b>TRANSACTION</b>		
DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 16 occurrences. System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	Protected. 16 occurrences. System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	Protected. 16 occurrences. Come from entries on WMAMNU.
PP	21550 - PRINCIPAL PROVIDER CODE (2)	Protected. 16 occurrences.
PROVIDER	21068 - PRIMARY PRVIDER NUMBER (8)	Protected. 16 occurrences.
<b>DATES OF SERV</b>		
FROM	21560 - PRINCIPAL PROVIDER FROM DATE OF SERVICE (6)	Protected. 16 occurrences.
THRU	21570 - PRINCIPAL PROVIDER THRU DATE OF SERVICE (6)	Protected. 16 occurrences.
<b>EXCEPTION</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
T	21580 - PRINCIPAL PROVIDER PAYMENT EXCEPTION TYPE (2)	Protected. 16 occurrences.
FROM	21590 - PRINCIPAL PROVIDE EXCEPTION FROM DATE (6)	Protected. 16 occurrences.
<b>AVAILABLE AMT</b>		
AMT	21600 - AVAILLABLE INCOME AMT (7)	Protected. 16 occurrences.
FROM	21610 - AVAILABLE EFFECTIVE FROM DATE (6)	Protected. 16 occurrences.

## Error Messages and Edits

### Errors for Which Full Messages are Displayed (Listing is alphabetical by Message)

#### **ATTEMPT TO DELETE COMBINED LINE WITHOUT REFERENCING PROVIDER**

When attempting to delete a line containing both Provider and Available Amount data, all data associated with that line must be entered on the input line.

#### **CIN UNKNOWN TO MA SUBSYSTEMS**

CIN entered is not known to the Subsystem.

#### **CORRECTION ATTEMPTED TO NON-EXISTENT LINE NUMBER**

The line number referenced for correction contains no Provider or Available Amount data.

#### **CORRECTION LINE NUMBER MAY NOT BE ENTERED FOR DELETE**

If Correction Line Number is entered, the Principal Provider Code must not be DL.

#### **CORRECTION LINE NUMBER IS OUT OF RANGE**

If entered, the correction line number must be between 01 and 03.

#### **CROSS DISTRICT CORRECTIONS OR DELETIONS NOT ALLOWED**

Correction or deletions may only be performed on Provider and Available Amount records in the transaction district.

#### **ENTER AVAILABLE AMOUNT AS AN ORIGINAL ENTRY INSTEAD OF AS A CORRECTION**

If Available Amount data does not exist for a referenced line number, it cannot be entered during a correction transaction. The Available Amount must be input as an initial entry transaction.

#### **ENTER PRINCIPAL PROVIDER EXCEPTION TYPE "2" AS AN ORIGINAL ENTRY INSTEAD OF AS A CORRECTION**

When changing Principal Provider Exception Type from "1" to a "2", the exception type "2" cannot be entered during a correction transaction. The Exception Type "2" must be input as an initial entry transaction.

#### **ERROR RETURN FROM MONDAY GENERATION ROUTINE - (99)**

There is an internal system-related problem. Document and contact WMS Operations Hotline.

Errors for Which Only Numbers are Displayed

(Listing is numerical by system-returned Error Number)

- 001 - DATE OF SERVICE FROM DATE AND PROVIDER NUMBER MUST BE ENTERED WHEN THE PRINCIPAL PROVIDER CODE IS 01 THRU 10, 12, 14 or 16**  
If Principal Provider Code 01-10, 12, 14 or 16, then Provider ID Number and Principal Provider FROM Date of Service must be entered.
- 002 - DATE OF SERVICE FROM DATE MUST BE ENTERED AND ALL OTHER FIELDS MUST BE BLANK IF PRINCIPAL PROVIDER CODE IS 00**  
If Principal Provider Code is 00, then Principal Provider FROM Data of Service must be entered and all other fields must be blank.
- 003 - IF A PROVIDER NUMBER IS ENTERED, THE DATE OF SERVICE FROM DATE MUST BE ENTERED**  
If Provider ID Number is entered, then Principal Provider FROM Date of Service must be entered.
- 004 - DISTRICT CODE MUST BE 97 OR 98 FOR PRINCIPAL PROVIDER CODE 05**  
If Principal Provider Code is 05, the District entering the code must be 97 or 98.
- 006 - NO EXCEPTION TYPE IS PERMITTED FOR PRINCIPAL PROVIDER CODES 05-10, 12, 14, OR 16**  
If Principal Provider Code is 05-10, 12, 14 or 16, then Principal Provider Payment Exception Type must be blank.
- 007 - EXCEPTION TYPE 1 OR 2 IS REQUIRED FOR PRINCIPAL PROVIDER CODES 01 OR 03**  
If Principal Provider Code is 01 or 03, then Principal Provider Payment Exception Type must be 1 or 2.
- 008 - NO EXCEPTION TYPE IS PERMITTED FOR DISTRICT 97 OR 98**  
If Principal Provider Code is 02 or 04 and District Code is 97 or 98, then Principal Provider Payment Exception Type must be blank.
- 009 - EXCEPTION TYPE 1 OR 2 IS REQUIRED FOR PRINCIPAL PROVIDER CODES 02 OR 04**  
If Principal Provider Code is 02 or 04, then Principal Provider Payment Exception Type must be 1 or 2.
- 010 - PAYMENT EXCEPTION FROM DATE, PROVIDER NUMBER AND DATE OF SERVICE FROM DATE ARE REQUIRED FOR EXCEPTION TYPE 1 AND 2**  
If Principal Provider Payment Exception Type is 1 or 2, then Principal Exception FROM Date, Provider ID Number and From Date of Service must be entered.
- 011 - PAYMENT EXCEPTION FROM DATE CANNOT PRECEDE THE DATE OF SEVICE FROM DATE**  
If Principal Provider Exception FROM Date is entered, it must not be earlier than the Principal Provider FROM Date of Service.
- 012 - AVAILABLE AMOUNT MUST BE ENTERED - RANGE (.00 - 99999.99)**  
If Principal Provider Code 01-07, 12, 14 or 16 and Available Amount is not entered, then a Principal Provider record must exist which has an Available Amount Effective FROM Date that is less than or equal to the Principal Provider FROM Date of Service entered, or



If Principal Provider data is not entered and Available Effective FROM Date is entered, then Available Income Amount must be entered.

**013 - AVAILABLE AMOUNT DATE MUST BE PRESENT FOR PRINCIPAL PROVIDER CODES 01 THRU 07, 10, 12, 14 OR 16**

If Principal Provider Code 01-07, 12, 14, or 16 and Available Amount Effective FROM Date is not entered then a Principal Provider record must exist which has an Available Amount FROM Date that is less than or equal to the Principal Provider FROM Date of Service entered, or

If Principal Provider data is not entered and Available Effective FROM Date is entered, then Available Effective FROM Date must be entered.

**014 - AVAILABLE AMOUNT DATE DAY MUST BE THE FIRST DAY OF THE MONTH**

If entered, Available Amount Effective FROM Date must be the first day of the month.

**015 - DATE OF SERVICE THRU DATE IS REQUIRED FOR PRINCIPAL PROVIDER CODES OF 08 AND 09**

If Principal Provider Code is 08 and 09, then Principal Provider Thru Date of Services must be entered.

**016 - PAYMENT EXCEPTION FROM DATE FOR EXCEPTION TYPE 2 RECORD PRECEDES THE PAYMENT EXCEPTION FROM DATE OF ITS ASSOCIATED EXCEPTION TYPE 1 RECORD**

If Correction Line No. is entered and Principal Provider Payment Exception Type is 2 and the record to be corrected has a Principal Provider Payment Exception Type of 1, then the entered Principal Provider Exception FROM Date must not be earlier than the Principal Provider Exception FROM Date of the record to be corrected.

**017 - FOR PRINCIPAL PROVIDER CODES 01-05 OR 12, MA COVERAGE 01, 09, 11 OR 30 IS REQUIRED FOR THE DATE SPECIFIED**

If Principal Provider Code 01-05 or 12, then an MA Coverage Code of 01, 09, 11 or 30 must be present for the date entered.

**019 - FOR PRINCIPAL PROVIDER CODE 09, CATASTROPHIC OR EMERGENCY SERVICES MA COVERAGE (03, 07 OR 11) IS REQUIRED FOR THE DATE SPECIFIED**

If Principal Provider FROM Date of Service is entered, valid and falls within the MA Coverage Period and Principal Provider Code is 09, then Recipient MA Coverage Code must be 03, 07 or 11.

**020 - PRINCIPAL PROVIDER CODE OF 08 OR 09 CANNOT IMMEDIATELY FOLLOW (IN HISTORICAL ORDER) A PRINCIPAL PROVIDER RECORD WITH A CODE OF 01 THROUGH 05 OR 12**

If Principal Provider Code is 08 or 098, then it may not immediately follow an existing Principal Provider record which has a code of 01-05 or 12.

**021 - NO MA COVERAGE EXISTS FOR THE DATE ENTERED**

If the Available Amount FROM Date is entered and valid, and there is no Principal Provider data entered, then the individual must have MA Coverage in your district with an MA Coverage Code of 01-10, 13-17, 30-33 and the Available Amount FROM Date must be within the MA Coverage Period, or

If the Date of Service FROM Date is entered and the individual has MA Coverage in your district within an MA Coverage Code of 01-11, 13-15, 17-24, or 30 then the MA Coverage TO Date must be later than or equal to the Date of Service FROM Date. If the MA Coverage TO Date is earlier than the DATE of Service

FROM Date, then the Principal Provider Code must be 00 and the Date the Service FROM Date must be later than the MA Coverage TO Date by at least one day.

**022 - AVAILABLE AMOUNT DATE MONTH AND YEAR MUST EQUAL DOS FROM DATE MONTH AND YEAR WHEN ENTERED ON THE SAME LINE**

If Principal Provider FROM Date of Service and Available Amount Effective FROM Date are entered on the same line, then the month and year of the two dates must be equal.

**023 - DATE OF SERVICE FROM DATE CANNOT EXCEED FOUR MONTHS BEYOND TRANSACTION MONTH**

If Principal Provider FROM Date of Service is entered, the FROM Date month may not be later than four months beyond transaction date month.

**024 - PAYMENT EXCEPTION FROM DATE CANNOT EXCEED FOUR MONTHS BEYOND TRANSACTION MONTH**

If Principal Provider Exception FROM Date is entered, the FROM Date month may not be later than four months beyond the transaction date month.

**025 - AVAILABLE AMOUNT DATE CANNOT EXCEED FOUR MONTHS BEYOND TRANSACTION MONTH**

If Available Amount Effective FROM Date is entered, the FROM Date month may not be later than four months beyond the transaction date month.

**026 - DATE OF SERVICE FROM DATE CANNOT BE EARLIER THAN AUGUST 1, 1979 (UPSTATE ONLY)**

If entered, Principal Provider FROM Date of Service must be equal to or later than August 1, 1979.

**027 - PAYMENT EXCEPTION FROM DATE CANNOT BE EARLIER THAN AUGUST 1, 1979 (UPSTATE ONLY)**

If entered, Principal Provider Exception FROM Date must be equal to or later than August 1, 1979.

**028 - AVAILABLE AMOUNT DATE CANNOT BE EARLIER THAN AUGUST 1, 1979 (UPSTATE ONLY)**

If entered, Available Amount Effective FROM Date must be equal to or later than August 1, 1979.

**029 - DATE OF SERVICE THRU DATE MUST HAVE AN ASSOCIATED DOS FROM DATE**

If Principal Provider THRU Date of Service is entered, and the Principal Provider FROM Date of Service is not entered, then a Correction Line Number must be entered.

**030 - PAYMENT EXCEPTION FROM DATE MUST HAVE AN ASSOCIATED DOS FROM DATE**

If Principal Provider Exception FROM Date and Principal Provider FROM Date of Service are entered, then a Correction Line Number must be entered.

**031 - PRINCIPAL PROVIDER CODE MUST BE ENTERED**

If Principal Provider data is entered, then Principal Provider Code must be entered.

**032 - NO ACTIVE PROVIDER RECORD ON FILE**

If Principal Provider Code is 00, then there must be an existing active Principal Provider record which has a Date of Service FROM Date earlier than the entered Date of Service FROM Date.

**033 - ENTERED AVAILABLE AMOUNT DATE IS ALREADY ON FILE**

If Available Amount Effective FROM Date is entered, it must not equal an existing Available Amount FROM Date Month/Year.

**034 - PRINCIPAL PROVIDER NUMBER IS ALREADY ON FILE FOR THIS DATE**

If Principal Provider FROM Date of Service is entered and equals an existing Principal Provider FROM Date of Service, then the Provider ID Number for these dates must also be equal.

**036 - DATE OF SERVICE FROM DATE MAY NOT BE CORRECT USING CORRECTION LINE (CL) NUMBER. IF CORRECTION IS NECESSARY, USE DELETE FUNCTION (PP CODE DL)**

If a line number is entered in the CL column, and a Principal Provider FROM Date of Service is entered, then it must be the same as the Principal Provider FROM Date of Service existing for the line number entered.

**037 - ENTRY OF DOS THRU DATE, PAYMENT EXCEPTION TYPE AND EXCEPTION FROM DATE NOT ALLOWED FOR DELETION**

If 'DL' is entered in Principal Provider Code field, then Principal Provider THRU Date of Service, Payment Exception Type and Exception FROM Date must all be blank.

**038 - MATCHING PROVIDER RECORD ALREADY ON FILE**

If Principal Provider Code is 00-10, 12, or 14, the entered Principal Provider FROM Date of Service must not be the same as that on an existing Provider record.

**039 - DATE OF SERVICE THRU DATE NOT ALLOWED FOR PP CODES 00 THRU 07, 10, 12, 14 OR 16**

If Principal Provider Code is 00-07, 10, 12 or 14 and Principal Provider THRU Date of Service is entered, then the Transaction District must be 97.

**040 - AVAILABLE AMOUNT AND AVAILABLE AMOUNT DATE MUST BE ENTERED**

If Available Income Amount or Available Amount Effective FROM Date is not entered but a Principal Provider Code of 01-07, 10, 12, 14 or 16 is entered and there is an existing record with a Principal Provider Code of 00 and a Date of Service FROM Date earlier than the entered Date of Service FROM Date, then there must be a record that has an Effective FROM Date that equals the entered Effective FROM Date month/year.

**041 - NO ASSOCIATED PLACEMENT RECORD ON FILE FOR THIS AVAILABLE AMOUNT DATE**

If only Available Amount and Available FROM Date are entered and if there are any existing Principal Provider records with a Date of Service FROM Date earlier than or equal to the entered Available Amount FROM Date, then the Principal Provider Code of the first such existing record must be 00.<sup>4</sup>

**042 - ENTRY OF AVAILABLE AMOUNT DATE NOT ALLOWED FOR PP CODES 08 AND 09**

If Principal Provider Code is 08, then Available Amount Effective FROM Date must not be entered.

**043 - PAYMENT EXCEPTION FROM DATE MUST EQUAL DOS FROM DATE FOR INITIAL PROVIDER ENTRY**

If Principal Provider Payment Exception Type is 1 or 2 and no Provider Record is on file that matches the entered Provider ID Number and Principal Provider FROM Date of Service, then the entered Exception FROM Date must equal the entered FROM Date of Service.

**044 - PAYMENT EXCEPTION FROM DATE MUST HAVE AN ASSOCIATED EXCEPTION TYPE**

If Principal Provider Payment Exception Type is not entered, then Principal Provider Exception FROM Date must not be entered.

**045 - AVAILABLE AMOUNT IS REQUIRED FOR PRINCIPAL PROVIDER CODES 08 AND 09**

If Principal Provider Code is 08, then Available Income Amount must be entered.

**046 - ENTERED DATE(S) OF SERVICE FALL WITHIN PLACEMENT PERIOD ALREADY ON FILE**

If Principal Provider FROM Date of Service is entered, and if any Provider Records exist which have a Principal Provider THRU Date of Service, then the entered FROM Date must not be later than or equal to the FROM Date or earlier than the THRU date of any of the existing records, or

If Principal Provider THRU Date of Service is entered, then any existing Provider Records FROM Date of Service must not be later than or equal to the FROM Date or earlier than the THRU Date of the entered dates.

**047 - PRINCIPAL PROVIDER RECORD WITH PROVIDER CODE 00 ALREADY ON FILE FOR THIS PLACEMENT**

If Principal Provider Code of 00 is entered, and if there exists any active Principal Provider records which have Date of Service FROM Date earlier than the date entered, then the Principal Provider Code of the first such existing record must not be 00.

**048 - PLACEMENT MAY BE TERMINATED ONLY BY INITIATING DISTRICT**

If Principal Provider Code is 00, the Transaction District must be the same as the Transaction District that initiated the placement which is now being terminated.

**049 - ENTERED DOS FROM DATE PRECEDES AN EXISTING PAYMENT EXCEPTION FROM DATE**

If Date of Service FROM Date is entered and if there exists any active Principal Provider records which have a Date of Service FROM Date earlier than the date entered, then the Principal Provider Exception FROM Date of the first such existing record must be earlier than the entered Date of Service FROM Date.

**050 - PAYMENT EXCEPTION FROM DATE IS NOT WITHIN ITS ASSOCIATED PLACEMENT PERIOD**

If both Correction Line No. and Principal Provider Exception FROM Date are entered and there are any active provider records with a Date of Service FROM Date later than Date of Service FROM Date of the record being corrected, then the Date of Service FROM Date of the earliest such record must be later than the entered Principal Provider Exception FROM Date.

**051 - THE CORRECTED AVAILABLE AMOUNT DATE IS EARLIER THAN AN AVAILABLE AMOUNT DATE BELOW IT IN THE HISTORY STACK**

If both Correction Line No. and Available Amount FROM Date are entered, the entered date may not be earlier than the Available Amount FROM Date or Date of Service FROM Date of any active record which precedes the record being changed.

**052 - THE CORRECTD AVAILABLE AMOUNT DATE IS LATER THAN THE AVAILABLE AMOUNT DATE ABOVE IT IN THE HISTORY STACK**

If both Correction Line No. and Available Amount FROM Date are entered, the entered date may not be later than the Available Amount FROM Date or Date of Service FROM Date of any active record which precedes the record being changed.

**053 - AVAILABLE AMOUNT AND AVAILABLE AMOUNT DATE MAY NOT BE ENTERED WHEN DELETING PRINCIPAL PRVIDER DATA**

If Principal Provider Code is 'DL' and if any Principal Provider data is entered, then Available Amount and Available Amount FROM Date must not be entered.

**054 - FOR PRINCIPAL PROVIDER CODE 14, MA COVERAGE CODE MUST EQUAL 01, 02, 08-11, 13-15, 19, 21 or 23**

If Principal Provider FROM Date of Service is entered and valid and falls within the individual's MA Coverage Dates, and if Principal Provider Code is 14, then MA Coverage Code must be equal 01, 02, 08-11, 13-15, 19, 21 or 23.

**055 - PRINCIPAL PROVIDER DATE OF SERVICE FROM DATE MUST NOT FALL BETWEEN EXISTING FROM AND THRU DATE OF AN EXISTING PRINCIPAL PROVIDER 08**

If Principal Provider FROM Date of Service is entered and valid and falls within the individual's previous 08 From and Thru date of Service, the new Principal Provider From Date of Service cannot be entered.

**056 - DATE OF SERVICE FROM DATE CANNOT BEEARLIER THAN JANUARY 1, 1986 (NYC ONLY)**

If entered, Principal Provider Date of Service FROM Date must not be earlier than January 1, 1986. (NYC Only)

**057 - PAYMENT EXCEPTION FROM DATE CANNOT BE EARLIER THAN JANUARY 1, 1986 (NYC ONLY)**

If entered, Principal Provider Date of Service FROM Date must not be earlier than January 1, 1986 (NYC Only).

**058 - AVAILABLE AMOUNT CANNOT BE EARLIER THAN JANUARY 1, 1986 (NYC ONLY)**

If entered, Available Amount Effective FROM Date must not be earlier than January 1, 1986 (NYC Only).

**059 - DISTRICT CODE MUST BE 98 FOR PP CODE 12**

If Principal Provider Code is 12, then Transaction District must be 98.

**060 - MA COVERAGE CODE NOT VALID WITH THIS PRINCIPAL PROVIDER**

If Principal Provider Code is 00, then MA Coverage Code must be 01-36, or

If Principal Provider Code is 01 or 03, then MA Coverage Code must be 01, 02, 08, 09, 11, 19-22, 24, or 30, or

If Principal Provider Code is 02 or 04, then MA Coverage Code must be 01, 08, 09, 11, or 30, or

If Principal Provider Code is 05, then MA Coverage Code must be 01, 09, 11, or 30, or

If Principal Provider Code is 06 or 10, then MA Coverage Code must be 01, 09, 10, 11, 24, 30, or

If Principal Provider Code is 07, then MA Coverage Code must be 01, 09, 10, 11, 19, 20, or 24, or

If Principal Provider Code is 08, the MA Coverage Code must be 01, 07, 10, 11, 19, 20, or 24, or

If Principal Provider Code is 09, then MA Coverage Code must be 03, 07, or 11, or

If Principal Provider Code is 12, then MA Coverage Code must be 01, 09, 11, or 30, or

If Principal Provider Code is 16, then MA Coverage Code must be 01, 02, 10, 11, 19, 21, or 23.

**061 - DATE OF SERVICE END DATE CANNOT EXCEED 30 DAYS FROM THE DATE OF SERVICE FROM DATE OF SERVICE FOR COVERAGE CODES 19-22**

The date of service From Date entered with a PP 00 (no Principal Provider) for cases with coverage codes 19-22, must be 30 days or less than the previous PP From Date entered.

**062 - PRINCIPAL PROVIDER FROM DATE CANNOT BE EARLIER THAN 1/1/94 FOR ENTRY OF PRINCIPAL PROVIDER CODE 16**

Principal Provider Code 16 requires FROM Date later than 1/1/94.

**901 - PRINCIPAL PROVIDER CODE IS INVALID**

If entered, Principal Provider Code must be 00-10, 12, 14, 16, or DL.

**902 - PROVIDER NUMBER MUST BE NUMERIC**

If entered, Provider ID Number must be all numeric.

**903 - EXCEPTION TYPE CODE IS INVALID**

If entered, Principal Provider Exception Type must be 1 or 2.

**904 - PAYMENT EXCEPTION FROM DATE IS INVALID**

If entered. Principal Provider Exception FROM Date must be valid calendar date.

**905 - AVAILABLE AMOUNT MUST BE NUMERIC**

If entered, Available Income Amount must be numeric and left justified.

**906 - AVAILABLE AMOUNT IS INVALID**

If entered, Available Amount Effective FROM Date must be a valid calendar date.

**907 - DOS FROM DATE AND/OR THRU DATE IS INVALID**

Principal Provider FROM Date of Service must be a valid calendar date. If Principal Provider THRU Date of Service is entered, then THRU Date must be a valid calendar date and not be earlier than FROM Date of Service.

**909 - NO MATCH ON PROVIDER NUMBER**

If Provider ID Number is entered and numeric it must be on the Provider File.

**910 - PRINCIPAL PROVIDER CODE/PRIVIDER CATEGORY OF SERVICE MISMATCH**

If Provider ID Number and Code are entered on the Provider File, then Provider ID Number must have a Category of Service consistent with Principal Provider Code entered.

## Restriction/Exception

### Introduction

The Individual Restriction/Exception subsystem includes the following classifications/exceptions:

- Restrictions administered under the supervision of NYSDSS Bureau of Surveillance and Utilization Review (SURS)
- Exceptions to the normal coverage and normal reimbursement rate for waiver services
- Exceptions to exempt and/or exclude recipients from auto-assignment into managed care

Recipients can have all three classifications and/or exceptions. New districts cannot enter a restriction that conflicts with a previous districts open restrictions/exceptions. A worker should close all existing restrictions/exceptions for a recipient when they close the case. However, closing a case does not automatically close or end a restriction/exception. A restriction/exception may be current although the case is closed (case status = 14, CLOSED).

When a PA/MA case closes, the recipient dies, or the recipient move to a different district, all WMS system restriction/exception entries should be end dated by the local district user. If this has been done, no automated action will be initiated by WMS. If the Restriction/Exception end dating has been overlooked, a monthly process automatically closes and open-ended Restrictions/Exceptions and a report (PUPM70 and MUP970 - R/E End Date Report) are generated and sent via BICS on the results of the automated process.

The process end dates Restrictions/Exceptions utilizing the following criteria:

- When the WMS Individual Status (Workbook Screen 5) is changed to a value of 13 (deceased), the Restriction/Exception Thru Date will be set to the Individual Status Effective Date.
- For all Exception Codes (Except Exception Codes 92 - AIDS and 95 - OMRDD Recipients)
  - The Exception code will be end dated if the MA Coverage TO Date is 180 days or more prior to the “run date” of the automated closing of the Restriction/Exception. WMS will automatically end date all exception codes (except 92 and 95) when the MA Coverage To Date is over 180 days in the past and no action has been taken to reinstate coverage in the 180 days that have passed.
  - Restriction/Exception 92 and 95 will remain with a 999999 THRU Date unless a Restriction/Exception Thru Date is input by the responsible local district worker.
- The Restriction Code will be end dated if the PA/MA Coverage TO Date is three years or more prior to the Run date of the automated closing of the Restriction/Exception. WMS will automatically end date all restrictions codes when the MA Coverage TO Date is over three years in the past and no action has been taken to reinstate the coverage.



## Input

Restriction/Exception data is initially entered and/or modified on the input screen WMRRIN - RESTRICTION/EXCEPTION Input screen. Access to WMRRIN is obtained by entering R for SUBSYSTEM, I for FUNCTION, CIN, CASE NUMBER, WORKER ID, on WMAMNU - MEDCAL ASSISTANCE subsystem menu and transmitting. The individual must currently have MA Coverage in the transaction district.

If there is no prior stored restriction/exception data, the WMRRIN screen is returned with system generated data (listed below) but no historical data. If prior data was stored, a maximum of two current restrictions will be displayed below the input line as well as the following system generated data:

- CLIENT ID
- NAME
- The Restriction/Exception Effective FROM Date. This date (which is always the first of the week) is the date of the first MA ID card on which the transaction being entered will appear.
- WORKER ID
- CASE NUMBER
- TRANSACTION DISTRICT
- ENTRY DATE - Date transaction was originally entered.
- TRANSACTION INPUT DATE

The appropriate date from the Restriction/Exception Input Form (DSS-3478) is entered on the input line and transmitted. A successful Input transaction is acknowledged by the message INPUT ACCEPTED and the accepted data is moved below the Input line. If there are system-detected errors, the fields in error are returned highlighted with the associated error number(s) and message(s) displayed at the bottom of the screen. A maximum of four (4) errors will appear on the screen. If a clean input screen is desired Ctrl+F2 will cancel the transaction, return a clean input screen displaying any stored data and the messages CANCEL ACCEPTED. If there are no system-detected errors, the accepted data and the accompanying system-generated data are returned on the line(s) below the input line.

Successful input transactions (message INPUT ACCEPTED) may be stored using Ctrl+F3. The message DATA SUCCESSFULLY STORED ON DATABASE acknowledges the stored transaction. The database is updated immediately; no batch update is required. Data that is not stored via Ctrl+F3 is not retained on the database. Depressing F4 from WMRRIN returns WMRRIQ - RESTRICTION/EXCEPTION INQUIRY screen.

## Inquiry

Screen **WMRRIQ (Restriction/Exception Inquiry Screen)** displays a historical record of past and current restriction/exception data for an individual. However, if a record has been inactivated prior to appearing on the CBIC card, this record will not be shown on inquiry. It will, however, be displayed on the audit screen.

The data is displayed in chronological order. The most current restrictions will be displayed first. The inquiry screen displays a maximum of 17 lines of data per screen. If there are multiple pages, special function keys 1, 2, and 3 may

be used to page forward and backward. Depressing F5 will display WMRRAQ. The data displayed cannot be changed.

The WMRRIQ screen is accessed by entering R in SUBSYSTEM, Q in INPUT, CIN on WMAMNU and transmitting or by depressing F4 on WMRRIN input screen or by depressing F5 on WMRRAQ audit screen.

Inquiry screens for CINS with Restriction/Exception records (in both Transaction District and Cross District) are accessed by entering desired CIN in NEXT CIN field.

## Audit

Screen **WMRRAQ (Restriction/Exception Audit Screen)** displays a record of all transactions stored on the database for an individual including those transactions that were modified. The data is displayed in chronological order. Transactions with the most recent From Date are displayed first.

The audit screen displays a maximum of 17 lines of data per screen. The data displayed cannot be changed.

The WMRRAQ screen is accessed by entering R in SUBSYSTEM, A in INPUT, and CIN on WMAMNU and transmitting or by depressing F5 on WMRRIQ inquiry screen. Special function keys 1, 2, and 3 may be used to page backward and forward if there are multiple pages. Depressing F5 will display WMRRIQ.

WMRRIN - Restriction/Exception Input

```
>WMRRIN          RESTRI CTI ON/EXCEPTI ON  I NPUT  SCREEN          10/28/91
CLIENT ID AB23706A      NAME GARY              MAE              PAGE 1
RESTR/EXCPT EFFECTIVE FROM DATE 09/16/91

   TX   TX   CASE   WORKER   RE/EXC   PROVI DER   RE/EXC   PERI OD
  DATE DI ST NUMBER   ID      TYPE      ID      FROM     THRU   XMT  ^
100491  12   012345666  PNJ


```

Figure 5 - Restriction/Exception Input (WMRRIN)

Purpose

This screen is used to input, change or delete data from the Restriction/Exception Data Input Form.

Access

- Entering R for SUBSYSTEM, I for FUNCTION, CIN. CASE NUMBER and WORKER ID on **WMAMNU - Medical Assistance Subsystem Menu.**

Screen Response

Positive

- One of the following messages on Line 24:
  - INPUT ACCEPTED (if input data was transmitted and accepted), or
  - DATA SUCCESSFULLY STORED ON DATABASE (is displayed if accepted data was stored using Ctrl+F3, or
  - CANCEL ACCEPTED (if accepted data cancelled using Ctrl+F2)

Negative

- Fields in error return highlighted. One or more of the messages on Line 24 as shown on the Restriction/Exception Error Messages Listing pages, or
- The messages ERRORS on Line 24 followed by one or more of the Error Numbers and messages as shown on the Restriction/.Exception Error No. and Messages Listing Pages, or
- One of the following messages on Line 24:
  - F99 NOT SUPPORTED - REXMIT (99 = 1-3, 5, 7-11, 14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F4	WMRRIQ - Restriction/Exception Inquiry Screen
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	Displays message CANCEL ACCEPTED
Ctrl+F3	Displays message DATA SUCCESSFULLY STORED ON DATABASE (only if input had been accepted)
Ctrl+F5	WMAMNU - With previously entered CIN, Case Number and Worker ID appearing in the appropriate fields
Ctrl+F6	WMAMNU - Medical Assistance Subsystem Menu

Screen Field Description - WMRRIN

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
RESTR/EXCPT EFFECTIVE FROM DATE	21510 - RESTRICTION/EXCEPTION EFFECTIVE FROM DATE (6)	System generated.
<b>TRANSACTION INPUT</b>		
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	System generated.
CASE NUMBER	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
WORKER ID	01040 - WORKER IDENTIFIER (5)	Come from entries on WMAMNU.
RE/EXC TYPE	19050 - INDIVIDUAL MA RESTRICTION/EXCEPTION TYPE (2)	
PROVIDER ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	
<b>RE/EXC PERIOD</b>		
FROM	21520 - RESTRICTION/EXCEPTION FROM DATE (6)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
THRU	21530 - RESTRICTION/EXCEPTION THRU DATE (6)	
<b>HISTORY</b>		
TX DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 14 occurrences. System generated.
TX DIST	01010 - TRANSACTION DISTRICT (2)	Protected. 14 occurrences. System generated.
CASE NUMBER	01050 - CASE NUMBER (10)	Protected. 14 occurrences. Come from entries on WMAMNU.
WORKER ID	01040 - WORKER IDENTIFIER (5)	Protected. 14 occurrences. Come from entries on WMAMNU.
RE/EXC TYPE	19050 - INDIVIDUAL MA RESTRICTION/EXCEPTION TYPE (2)	Protected. 14 occurrences.
PROVIDER ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	Protected. 14 occurrences.
FROM	21520 - RESTRICTION/EXCEPTION FROM DATE (6)	Protected. 14 occurrences.
THRU	21530 - RESTRICTION/EXCEPTION THRU DATE (6)	Protected. 14 occurrences.

WMRRIQ - Restriction/Exception Inquiry

```

>WMRRIQ          RESTRICTION/EXCEPTION INQUIRY          DATE 10/28/91          PAGE 01 OF 01
CLIENT ID AB77976U NAME ANNE B. HOLLAND          CASE-NO PA 2347781
RESTRICTED RECIPIENT EFFECTIVE FROM DATE 10/14/91
ENTRY TX          DIST CASE NO          WRKR R/EX          PROVIDER          FROM          THRU
DATE DATE          DATE          DATE          DATE          DATE          DATE          DATE
081691 081691 55 PA 2347781 PA125 05 00351166 081991 999999
052891 081691 55 PA 2347781 PA125 05 00508407 070191 081891
052891 052891 55 PA 2347781 PA125 05 00508407 040191 063091
031591 052891 55 PA 2347781 PA125 05 00849023 040191 063091
031591 031591 55 PA 2347781 PA125 06 00134689 040191 999999
    
```

NEXT CIN ^^^^^^

Figure 6 - Restriction/Exception Inquiry (WMRRIQ)

Purpose

This screen displays past and current Restriction/Exception information. All fields are protected.

Access

- Entering R for SUBSYSTEM, Q for FUNCTION and CIN on **WMAMNU - Medical Assistance Subsystem Menu, or**
- F4 from **WMRRIN - Restriction/Exception Input** screen, or
- F5 from **WMRRAQ - Restriction/Exception Audit** screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REMXT (99 = 4, 7-14, 17-22)
- YOU MUST USE AN SF-KEY
- Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMRRAQ - Restriction/Exception Inquiry Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously entered CIN, Case Number, and Worker ID appearing in the appropriate fields.
Ctrl+F6	WMAMNU - Medical Assistance Subsystem Menu

Screen Field Description - WMRRIO

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER(8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
CASE NUMBER	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
RESTRICTED RECIPIENT EFFECTIVE FROM DATE	21510 - RESTRICTION/EXCEPTION EFFECTIVE FROM DATE (6)	System generated.
ENTRY DATE	21500 - ENTRY DATE (6)	System generated.
<b>TRANSACTION INFORMATION</b>		
TX DATE	02020 - TRANSACTION INPUT DATE (6)	16 occurrences. System generated.
DIST	01010 - TRANSACTION DISTRICT (2)	16 occurrences. System generated.
CASE NUMBER	01050 - CASE NUMBER (10)	16 occurrences. Come from entries on WMAMNU.
WRKR	01040 - WORKER IDENTIFIER (5)	16 occurrences. Come from entries on WMAMNU.
R/EX	19050 - INDIVIDUAL MA RESTRICTION/EXCEPTION TYPE (2)	16 occurrences.
<b>PROVIDER INFORMATION</b>		
PROVIDER	21068 - PROVIDER IDENTIFICATION NUMBER (8)	16 occurrences.
FROM DATE	21520 - RESTRICTION/EXCEPTION FROM DATE (6)	16 occurrences.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
THRU DATE	21530 - RESTRICTION/EXCEPTION THRU DATE (6)	16 occurrences.



WMRRAQ - Restriction/Exception Audit

```

>WMRRAQ          RESTRICTION/EXCEPTION AUDIT          DATE 10/08/91    PAGE 01 OF 01
CLIENT ID AB77976U  NAME ANNE B. HOLLAND              CASE-NO PA 2347781
RESTRICTED RECIPIENT EFFECTIVE FROM DATE 10/14/91
ENTRY TX          DATE DATE  DIST  CASE NO  WRKR  R/EX  PROVIDER  FROM  THRU
DATE DATE          DATE DATE          DATE DATE
081691 081691    55  PA 2347781  PA125  05  00351166  081991  999999
081691 081691    55  PA 2347781  PA125  05  00508407  070191  081891
052891 052891    55  PA 2347781  PA125  05  00508407  070191  999999
052891 052891    55  PA 2347781  PA125  05  00508407  040191  063091
052891 052891    55  PA 2347781  PA125  05  00849023  040191  063091
031591 031591    55  PA 2347781  PA125  05  00849023  040191  999999
031591 031591    55  PA 2347781  PA125  06  00134689  040191  999999

NEXT CIN ^^^^^^
    
```

Figure 7 - Restriction/Exception Audit (WMRRAQ)

Purpose

This screen displays a history of all Restriction/Exception data on a record-by-record basis. All fields are protected.

Access

- Entering R for SUBSYSTEM, A for FUNCTION, CIN on **WMAMNU - Medical Assistance Subsystem Menu**, or
- F5 from **WMRRIQ - Restriction/Exception Inquiry** screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REMXT (99 = 4, 7-14, 17-22)
- YOU MUST USE AN SF-KEY
- Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMRRIQ - Restriction/Exception Inquiry Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously enter CIN appearing in the appropriate field.
Ctrl+F6	WMAMNU - Medical Assistance Subsystem Menu

Screen Field Description - WMRRAQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER(8)	Come from entries on WMAMNU.
NAME	03030 - NAME (28)	Come from entries on WMAMNU.
CASE NUMBER	01050 - CASE NUMBER (10)	Come from entries on WMAMNU.
RESTRICTED RECIPIENT EFFECTIVE FROM DATE	21510 - RESTRICTION/EXCEPTION EFFECTIVE FROM DATE (6)	System generated.
<b>TRANSACTION HISTORY</b>		
ENTRY DATE	21500 - ENTRY DATE (6)	16 occurrences. System generated.
TX DATE	02020 - TRANSACTION INPUT DATE (6)	16 occurrences. System generated.
DIST	01010 - TRANSACTION DISTRICT (2)	16 occurrences. System generated.
CASE NUMBER	01050 - CASE NUMBER (10)	16 occurrences. Come from entries on WMAMNU.
WRKR	01040 - WORKER IDENTIFIER (5)	16 occurrences. Come from entries on WMAMNU.
R/EX	19050 - INDIVIDUAL MA RESTRICTION/EXCEPTION TYPE (2)	16 occurrences.
<b>PROVIDER INFORMATION</b>		
PROVIDER	21068 - PROVIDER IDENTIFICATION NUMBER (8)	16 occurrences.
FROM DATE	21520 - RESTRICTION/EXCEPTION FROM DATE (6)	16 occurrences.
THRU DATE	21530 - RESTRICTION/EXCEPTION THRU DATE (6)	16 occurrences.

## Error Messages and Edits

### Errors for Which Full Messages are Displayed

(Listing is alphabetical by Message)

#### **CASE NO. OR WKRK-ID MISSING - F4 INVALID**

This message appears on WMRRIQ when the AUDIT screen was accessed via WMAMNU with just the CIN and then F4 is pressed to access WMRRIN.

#### **CIN UNKNOWN TO MA SUBSYSTEMS**

The system was not able to successfully retrieve an MA-INDIV-LINK record using the user-supplied CIN.

#### **NO RECORDS TO BE STORED/F13 USE INVALID**

No request for insert or updates have been made, therefore a user cannot request a cancellation using the Ctrl+F3 key.

#### **NO RESTRICTION/EXCEPTION RECORDS FOUND**

There are no existing restriction/exception records to be displayed on the inquiry screen.

#### **NO TARGET RECORD FOUND FOR CLOSE/INACT**

There is no existing record with the appropriate database keys that can be found for closing/inactivation.

#### **NO TARGET RECORD FOUND FOR RETRO**

There is no existing restriction/exception record that can be retro activation.

#### **SECURITY VIOLATION/F13 NOT ALLOWED**

The USERID/PASSWORD entered is not authorized to store data.

#### **TRANSACTION CANNOT BE COMPLETED - USE STORE KEY THEN REXMT THIS SCREEN**

The TCR Hold Area was filled. The user is instructed to store the transaction and then re-transmit.

#### **TRANSACTION SEQUENCING ERROR - USE MENU KEY**

A transaction was placed in an incorrect sequence (system error). The user is instructed to return to the menu and redo their transaction.

#### **USE STORE KEY BEFORE ATTEMPTING ANOTHER TRANSACTION FOR THIS INDIVIDUAL**

A transaction has been built but no request for storage has been made. The user is instructed to complete the store before moving on to other transactions. .

#### **WARNING - MULTIPLE PROVIDERS BEING INACTIVATED FOR SAME TIME PERIOD**

The requested transaction will inactivate multiple providers in the same time frame. Please review.

#### **WARNING - INACTIVATION DONE DURING SAME PERIOD AS ENTRY.**

An inactivation request is being done during the same period as the insertion. Please review.

Errors for Which Only Numbers are Displayed  
(Listing is numerical by system-returned Error Number)

**001 - RSTRCT/EXC MUST BE ENTERED**

MA RSTRCT/EXC Type must be entered.

**002 - RSTRCT/EXC TYPE INVALID**

MA RSTRCT/EXC Type must be 02, 03, 04, 05, 06, 08, 25, 26, 27, 28, 31, 32, 35, 38, 39, 40-45, 50, 51, 53, 54, 55, 56, 58, or 62-71, 81, 83, 90, 91, 94, 95, or 96.

**003 - PROVIDER ID NUMBER MUST BE ENTERED**

If MA RSTRCT/EXC Type is 02, 03, 04, 05, 06, 08, 09, 10-13, 35, 49, 50, 51, 55, 56, 58, 59, or 84-86 then the Provider ID Number must be entered and all numeric.

**004 - ENTRY OF PROVIDER ID NUMBER NOT ALLOWED**

If MA Exception Type is 21, 22, 25, 30, 38, 39, 46-48, 60, 62-77, 81, 83, 90, 91, 94, 95, or 96, then the Provider ID Number must not be entered.

**007 - PROVIDER NOT PRESENT ON PROVIDER FILE**

If MA RSTRCT/EXC Type 02, 03, 04, 05, 06, 08, 09, 10-13, 35, 49, 50, 51, 55, 56, 58, 59, or 84-86 and transaction is an open or a retro add, then Provider ID Number must be on provider file.

**008 - NO MATCH ON CATEGORY OF SERVICE FOR THIS PROVIDER**

IF MA RSTRCT/EXC Type 02, 03, 04, 05, 06, 08, 09, 10-13, 35, 49, 50, 51, 55, 56, 58, or 59, or a retro add, then Provider ID Number must have a Category of Service consistent with the MA RSTRCT/EXC type entered.

**011 - CURRENT NON-SURS EXCEPTION ALREADY ON FILE**

IF MA Restriction Type 02, 03, 04, 05, 06, 08, 09, 55, 56, 58 or 59 and Thru Date is not entered, then current MA Exception Type must not be 31, 32, 40-45, or 62-71, or

If MA Restriction Type 02, 03, 04, 05, 06, 08, 09, or 10-13 and Thru Date is not entered, current MA Exception Type must not be 55, 56, 58, or 59, or

If MA Restriction Type 55, 56, 58 or 59 and Thru Date is not entered, current MA Exception Type must not be 50 or 51.

**012 - RESTRICTION TYPES 06, 08, 11, OR 12 CANNOT BE ACTIVE CONCURRENTLY**

If MA Restriction Type is 06 and Thru Date is not entered, then an existing MA Restriction Type must not be 06, 08, 11, or 12, or

If MA Restriction Type is 08 and Thru Date is not entered, then an existing MA Restriction type must not be 06, 08, 11, or 12, or

If MA Restriction Type is 12 and a Thru Date is not entered, an existing MA Restriction Type must not be 06, 08, 11, or 12.

**013 - CURRENT RESTRICT/EXCALREADY EXISTS FOR THIS INDIVIDUAL**

MA Exception type can not be entered if an active exception record of the same type already exists, or

If MA Exception Type entered is 20 and a Thru Date is not entered, then any existing MA Exception Type must not be 20, 21, or 30, or

If MA Exception Type is 21 and a Thru Date is not entered, then any existing MA Exception Type must not be 20, 21, or 30, or

If MA Exception Type is 22 and a Thru Date is not entered, then any existing MA Exception Type must not be 22, or

If MA Exception Type is 23 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 25, 30, 35, 38, 46, 47, 48, 49, 50, 51, 60, 62-71, 72-74, 78, 81, or 84-86, or

If MA Exception Type entered is 25 and a Thru Date is not entered, then any MA Exception Type must not be 23, 25, 47 or 48, or

If MA Exception Type entered is 30 and a Thru Date is not entered, then any MA Exception Type must not be 20, 21, 23, 30, 38, 46-49, 50-51, 55-59, 60, 62-71, 72-74, 78, 81, or 84-86, or

If MA Exception Type entered is 35 and a Thru date is not entered, then any existing MA Exception Type must not be 23, 35, 50, 51, 62-71, 72-74, or 78, or

If MA Exception Type entered is 38 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 38, 46-49, 50, 51, 60, 62-71, 72-74, or 81, or

If MA Exception Type entered is 46 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 38, 46, 50-51, 60, 62-71, or 81, or

If MA Exception Type entered is 47 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 25, 30, 38, 47-49, 50, 51, 60, 62-71, 72-74, or 81, or

If MA Exception Type entered is 48 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 25, 30, 38, 47-49, 50, 51, 60, 62-71, 72-74, or 81, or

If MA Exception Type entered is 49 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 38, 47-49, 50, 51, 60, 62-71, 72-74, or 81, or

If MA Exception Type entered is 50 or 51 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 35, 38, 46-49, 50-51, 60, 62-71, 72-74, 78, or 81, or

If MA Exception Type entered is 55, 56, 58 or 59 and a Thru Date is not entered, then any existing MA Exception Type must not equal 02-06, 08, 09, 10-13, 30, or 62-71, or

If MA Exception Type entered is 60 and a Thru Date is not entered, then any existing MA Exception Type must not equal 23, 30, 38, 46-49, 50, 51, 60, 62-71, 72-74, 78, 81, 84-86, or

If MA Exception Type entered is 62-71 and a Thru Date is not entered, then any existing MA Exception Type must not equal 02-13, 23, 30, 35, 38, 46-49, 50, 51, 55, 56, 58, 59, 60, 62-71, 72-74, 78, 81, 83, or 84-86, or

If MA Exception Type entered is 72-74 and a Thru Date is not entered, then any existing MA Exception Type must not equal 23, 30, 35, 38, 46-49, 50, 51, 55, 60, 62-71, 72-74, 78, 81, or 83, or

If MA Exception Type entered is 78 and a Thru Date is not entered, then any existing MA Exception Type must not equal 23, 30, 35, 38, 46-49, 50, 51, 60, 62-71, 72-74, 78, or 81, or

If MA Exception Type entered is 81 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 38, 46-49, 50-51, 60, 62-71, 72-74, 78, 81, or 84-86 or

If MA Exception Type entered is 83 and a Thru Date is not entered, then any existing MA Exception Type must not be 62-71, or 83, or

If MA Exception Type entered is 84-85 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 60, 62-71, 81, or 84-85, or

If MA Exception Type entered is 86 and a Thru Date is not entered, then any existing MA Exception Type must not be 23, 30, 60, 62-71, 81, or 86, or

If MA Exception Type entered is 90 and a Thru Date is not entered, then any existing MA Exception Type must not be 91, or

If MA Exception Type entered is 91 and a Thru Date is not entered, any existing MA Exception Type must not be 90.

**014 - DUPLICATE SURS RESTRICTIONS NOT ALLOWED**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Provider ID Number is entered and a current restriction of the same type and Provider ID exists, then the Restriction THRU Date must be entered.

**015 - RSTRCT/EXC BEGIN AND END DATES MAY NOT BOTH BE ENTERED**

If RSTRCT/EXC From Date is entered, then the Restriction Thru date must not be entered.

**016 - RSTRCT/EXC BEGIN DATE NOT A VALID CALENDAR DATE**

If entered, the RSTRCT/EXC From Date must be a valid calendar date.

**017 - RSTRCT/EXC END DATE NOT A VALID CALENDAR DATE**

If entered, the RSTRCT/EXC Thru Date must be a valid calendar date.

**018 - RETRO BEGIN DATE ENTERED DOES NOT EQUAL CURRENT RESTRICTION BEGIN DATE**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction From Date is entered and valid and there is an existing Restriction of the same type, then the entered Restriction From Date must be equal to the existing Restriction From Date.

**019 - RESTRICTION BEGIN DATE MUST EQUAL EFFECTIVE DATE**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction Type From Date is entered and valid and a current MA Restriction of the same type (02-06, 08, 09, 10-13, 55, 56, 58 or 59) does not exist, then the Restriction FROM Date must be equal to the Restriction Effective Date.

**020 - INDIVIDUAL HAS NO CURRENT MA COVERAGE**

If MA Restriction Type is 02, 03, 04, 05, 06, 07, 08, 09, or 10-13 then the current MA Coverage Code must be 01-11, 13-15, or 19-24 if there is current coverage; if coverage lapsed, then SURS restriction is allowed, or

If MA Restriction Type is 20-21 then the current MA Coverage Code must be 01-11, 13-17, 19-24, 30-31 if there is current coverage, or

If MA Restriction Type is 22 then the current MA Coverage Code must be 01-16, 08, 10-15, 19-24, 30-31 if there is current coverage, or

If MA Exception Type is 23 then the current MA Coverage Code must be 01, 10, 11, or 30 if there is current coverage, or

If MA Exception Type is 25 then the current MA Coverage Code must be 01-11, 13-17, 19-24, or 30-31 if there is current coverage, or

If MA Exception Type is 30 then the current MA Coverage Code must be 01-02, 06, 08, 10-11, 19, 21, or 23 if there is current coverage, or

If MA Exception Type entered is 31-32, or 40-44, then the current MA Coverage Code must be 01, 02, 06, 13-16 or 30-33, or

If MA Exception Type entered is 35, then the current MA Coverage Code must be 01, 02, 08, 10, 11, 13-15, 19-24, 30, or 31 or

If MA Exception Type entered is 38, then the current MA Coverage Code must be 01, 07, or 11, or

If MA Exception Type entered is 39, then the current MA Coverage Code must be 01-11, 13-15, 17, 19-24, or 30-31 or

If MA Exception Type entered is 46 or 49, then the current MA Coverage Code must be 01, 02, 05, 06, 11, 13-15, or 30, or

If MA Exception Type entered is 50, then the current MA Coverage Code must be 15, or

If MA Exception Type entered is 51, then the current MA Coverage Code must be 01, 02, 07-11, 13-15, 19-24 or 30-31, or

If MA Exception Type entered is 55, then the current MA Coverage Code must be 01-02, 04-11, 13-15, or 19-24 or

If MA Exception Type entered is 56, 58 or 59, then current MA Coverage Code must be 01-02, 06, 08, 11, or 30, or

If MA Exception Type is 60, then current MA Coverage Code must be 01-02, 06, 08, 11, or 30, or

If MA Exception Type entered is 62-71, then current MA Coverage Code must be 01, 11, or 30-31, or

If MA Exception Type entered is 72-74, then current MA Coverage Code must be 01, 02, 06, 11, 15, or 30-31, or

If MA Exception Type entered is 75-77, then current MA Coverage Code must be 01, 12, 05, 06, 08, 11, 13-15, 17, 18, 19-24, 30, 31, 34, or 36, or

If MA Exception Type entered is 78, then current MA Coverage Code must be 01, 02, 08, 10, 11, 13-15, 19-24, 30, or 31, or

If MA Exception Type entered is 81, then current MA Coverage Code must be 01, 02, 03, 06, 08, 11, or 30, or

If MA Exception Type entered is 83, then current MA Coverage Code must be 01, 02, 04, 05, 06-11, 13-15, 17, 19-24, or 30-31.

**021 - INDIVIDUAL HAS NO VALID MA COVERAGE**

Individual has no MA Coverage record, or MA Coverage Code is invalid.

**022 - NO CURRENT RESTRICT/EXC OF TYPE ENTERED - CLOSE INVALID**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction Thru Date is entered and equal to one day prior to Effective Date, then there must exist a current Restriction of the same Type and Provider ID as that being entered, or

If MA Restriction Type is 20, 21, 22, 23, 25, 30, 35, 38, 39, 46-49, 50, 51, 62-71, 72-74, 75-77, 81, 83, 84-86, 90, 91, or 94-96 and Exception Thru Date is entered but does not equal the Exception From Date of any Exception of the same Type and Provider ID, then there must exist a current Exception of the same Type and Provider ID as that being entered.

**023 - RESTRICT/EXC END DATE PRECEDES BEGIN DATE**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction Thru Date is entered and is equal to one day prior to the Effective Date and a Restriction of the same Type and Provider ID exists, then the Restriction Thru Date must be later than the Restriction From Date of the Restriction of the same Type and Provider ID, or

If MA Restriction Type is 20, 21, 22, 23, 25, 30, 35, 38, 39, 46-49, 50, 51, 60, 62-71, 75-77, 81, 83, 84-86, 90, 91, or 94-96 and Exception Thru date is entered and does not equal the Exception From Date of any exception of that Type and Provider ID and an exception of the same Type and Provider ID exists, then the Exception Thru Date must be later than the Exception From Date of the Exception of the same Type and Provider ID.

**024 - INACTIVATION INVALID - NO CORRESPONDING RECORD PRESENT ON DATABASE**

If MA Restriction Type is 20, 21, 22, 23, 25, 30, 35, 38, 39, 46-49, 50, 51, 62-71, 72-74, 75-77, 78, 81, 83, 84-86, 90, 91, or 94-96 and Exception Thru Date is entered and valid and is equal to the Exception From Date of an existing Exception of the same Type and Provider ID, then the entered Exception Thru Date may not be the same as the Exception Thru Date of the existing Exception, or

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction Thru Date is entered and valid and is not equal to one day prior to Effective Date and is equal to the Restriction From Date of an existing restriction of the same Type and Provider ID, then the entered Restriction Thru Date must not equal the Restriction Thru Date of the existing restriction.



**026 - RETRO NOT ALLOWED ON FUTURE RRESTRICTION**

If MA Restriction Type is 02-06, 08, 09, 10-13, 55, 56, 58 or 59 and Restriction From Date is entered and valid and MA Restriction Type of 02-06, 08, 09, 10-13, 55, 56, 58 or 59 exists and the entered and the entered Restriction From Date is equal to the existing Restriction From Date, then the entered Restriction From Date must not be equal to the Restriction Effective From date.

**035 - INDIVIDUAL HAS PCP COVERAGE**

If MA RSTRCT/EXC Type is 02, 03, 04, 05, 06, 08, 09, 10-13, 30, 38, 50, 56, 58, 59, or 90 then the MA Coverage Code can not be 30 or 31.

**036 - ENTRY OF SURS RESTRICTION NOT ALLOWED AT THIS SITE (NYC ONLY)**

Entry of MA Restriction Type of 02, 03, 04, 05, 06, 08, 09, 10-13, 55, 56, 58 or 59 is limited to specific sites (NYC Only).

**037 - BEGIN DATE MUST BE ENTERED FOR NON-SURS RESTRICTIONS**

If MA Exception Type is 20, 21, 22, 23, 25, 30, 35, 38, 39, 46-49, 50, 51, 60, 62-71, 72-74, 75-77, 78, 81, 83, 84-86, 90, 91, or 94-96 then Exception From Date must be entered.

**038 - CASE CLOSED - INDIVIDUAL HAS ACTIVE PCP ENROLLMENT**

Entry of SURS Restriction is not allowed for individuals in closed cases with active enrollment on PCP Subsystem.

**039 - RESTRICTION TYPES 56 AND 58 CANNOT BE ACTIVE CONCURRENTLY**

If MA Restriction Type is 56 and Thru Date is not entered, then an existing MA Restriction Type must not be 58, or

If MA Restriction Type is 58 and Thru date is not entered, then an existing MA Restriction Type must not be 56.

**040 - CURRENT SURS RESTRICTION ALREADY EXISTS FOR THIS RECIPIENT**

If MA Restriction Type entered is 55, 56, 58 or 59 and THRU Date is not entered, then current MA Restriction Type must not be 02, 03, 04, 05, 06, 08, 09, 10-13.

**041 - EXCEPTION BEGIN DATE MAY NOT BE PRIOR TO 1/1/92 FOR EXCEPTION TYPE 25**

If MA Exception Type is 25, Begin Date must be on or after 1/1/92.

**043 - EXCEPTION BEGIN DATE MAY NOT BE PRIOR TO 09/01/91 FOR EXCEPTION TYPE 39**

If MA Exception Type is 39, Begin Date must be on or after 09/01/91.

**044 - EXCEPTION BEGIN DATE MAY NOT BE PRIOR TO 06/01/95 FOR EXCEPTION TYPE 81**

If MA Exception Type is 81, Begin Date must be on or after 06/01/95.

**045 - (OMR ONLY) EXCEPTION CODE INVALID FOR CROSS DISTRICT ENTRY**

If the Transaction District is 98 (OMRDD) the only codes that may be cross-district entered are 25, 35, 38, 46, 47, 48, 83 or 95.

**049 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 11/01/98 FOR EXCEPTION TYPE 83**

If MA Exception Type is 83, Begin Date must be on or after 11/01/98.

- 050 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 04/01/98 FOR EXCEPTION TYPE 35**  
If MA Exception Type is 35, Begin Date must be on or after 04/01/98.
- 051 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 09/01/96 FOR SPECIAL NEEDS EXCEPTION TYPE 90-92 AND 94-99**  
If MA Exception Type is 90, 91, 92, 94, 95, 96, 97, 98, or 99 the Begin Date must be on or after 09/01/96.
- 052 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 06/01/02 FOR EXCEPTION TYPE 20 OR 21**  
If MA Exception Type is 20 or 21, the Begin Date must be on or after 06/01/02.
- 053 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 07/01/02 FOR EXCEPTION TYPE 49**  
If MA Exception Type is 49, the Begin Date must be on or after 07/02/02.
- 054 - EXCEPTION BEGIN DATE MUST BE LESS THAN 5 MONTHS FROM THE TRANSACTION DATE.**  
If MA Exception Type is entered, it must be less than or equal to 5 months from the transaction date.
- 055 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 07/01/06 FOR THE LTHHCP RESTRICTION EXCEPTION TYPE 30**  
If MA Exception Type is 30, the Exception Begin Date must not be prior to 07/01/06.
- 056 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 07/01/06 FOR THE LONG TERM HEALTH CARE PROGRAM. RESTRICTION EXCEPTION 60**  
If MA Exception Type is 60, the Exception Begin Date must not be prior to 07/01/06.
- 057 - IN ORDER TO PUT UP AN EXCEPTION CODE 47, 48 OR 49, AN EXCEPTION CODE 46 MUST EXIST**  
If the MA Restriction Type Cod e47, 48 or 49 is to be entered, another Restriction Type Code 46 must already exist on the recipient's file.
- 058 - IN ORDER TO CLOSE AN EXCEPTION CODE 46, EXCEPTION CODE(S) 47, 48, AND/OR 49 MUST ALSO BE CLOSED**  
In the MA Restriction Type Code 46 is end dated or deleted, and associated Restriction Type 47, 48, and/or 49 must also be end dated or deleted.
- 059 - ENTRY OF EXCEPTION CODE 23, 84-86 MUST BE DONE BY OMH**  
If the MA Restriction Type Code is 23, 84-86, the entry must be made by OMH.
- 060 - EXCEPTION BEGIN DATE MUST NOT BE PRIOR TO 01/01/07 FOR THE PROS WAIVER RESTRICTION CODES 84-86**  
If MA Exception Type is 84-86, the Exception Begin Date must not be prior to 01/01/07.
- 061 - OMH (DISRICT 97) MAY ONLY ENTER CODES 84-86**  
If the District is 97, the only restriction /exception code that can be entered are exception codes 84-86.
- 063 - EXCEPTION BEGIN DATE MUST NTO BE PRIOR TO 01/01/08 FOR THE B2H EXCEPTION CODES 72 – 74.**  
If the MA restriction type code is 72 – 74, the Exception Begin Date must not be prior to 01/01/08.

## Prepaid Capitation Plan

### Introduction

The Prepaid Capitation Plan (PCP) Subsystem is a term applied to all Health Services paid in advance in return for certain services to be rendered in the future.

The PCP subsystem facilitates a different method of payment from most Medicaid reimbursements. The three main differences are:

- Payment is a monthly fixed fee to a provider entitling an enrollee to a pre-defined benefits package.
- Payment is made regardless of whether the services are actually utilized.
- Enrollees must receive all services which have been included in the benefits package from the provider with whom they are enrolled for the service time period.

PCP provides special controls for recipients who are enrolled in a comprehensive health service plan, such as a Health Maintenance Organization (HMO). Such plans provide a comprehensive benefit package of health services for a pre-paid fixed monthly fee.

The Prepaid Capitation Plan (PCP) is limited to individuals who are active in a PA or MA case with a Coverage Code of 30 (PCP - Full Coverage) or in an MA Only case with Coverage Codes of 31 (PCP - Guarantee), 34 (Family Health Plus (FHP) - Full Coverage) or 36 (Family Health Plus (FHP) - Guarantee).

### Input

PCP data is initially entered, modified and/or deleted on screen **WMPCIN (PCP State Premium Input Screen)**. Access to WMPCIN is obtained by entering C for SUBSYSTEM, I for FUNCTION, CIN, CASE NUMBER, WORKER ID on **WMAMNU - Medical Assistance Subsystem Menu** and transmitting.

If there is no prior stored PCP data, the WMPCIN screen is returned with system generated data (listed below) but no historical data. If prior data was stored, the WMPCIN screen displays the historical data below the input line as well as the following system generated data:

- CIN
- NAME
- CASE NUMBER
- PREPAID CAPITATION PLAN EFFECTIVE FROM DATE
- TRANSACTION INPUT DATE
- DISTRICT
- WORKER ID

The appropriate data from the PCP Data Input Form (DSS 3783) is entered on the input line and transmitted to the Host. A successful input transaction is acknowledged by the message INPUT ACCEPTED and the accepted data is moved below the input line. If there are system detected errors, the fields in error are returned blinking and either an error messages or the error numbers corresponding to the error(s) will be displayed at the bottom of the screen. A maximum of 12 error numbers will be displayed. If changes are necessary, Function key F12 will cancel the transaction and display a clean input screen containing the stored data. Successful input transactions may be stored using Function Keys Ctrl+F3. The message DATA SUCCESSFULLY STORED ON DATABASE acknowledges the stored transaction. The database is updated immediately. Data that is not stored via Function Keys Ctrl+F3 is not retained on the database.

PCP stored data may be deleted or corrected or the individual disenrolled using the following procedures:

### Correction Data

Erroneously entered fields may be corrected by:

- Entering the line number containing the erroneously entered field in the CL field.
- Entering the correct data in the appropriate field.
- Transmit.
- Ctrl+F3 must be used to store the correction on the database.

### Deleting a PCP

Deletion function should be used when:

- An individual line of stored data is totally incorrect, or
- The PCP From Date is incorrect.

To delete a line of data:

- Enter a DL in the CL field.
- Enter the PCP ID and From Date of the line to be deleted.
- Transmit.
- Function key Ctrl+F3 must be used to store the deletion on the database.

### PCP Disenrollment

An individual can be disenrolled from PCP only when the Guarantee Thru Date has (if there is one assigned by the system) not expired. When there is one and it is still effective, it must first be terminated before the disenrollment can be done.

To change the Guarantee Thru Date:

- Enter the line number of the date to be changed in the CL field.

- Enter the last day of the current From Date month under the Guarantee Thru Date.
- Transmit.
- Function key Ctrl+F3 must be used to store this change on the database.

To disenroll the individual:

- Enter the From Date as the last day of the current From Date month.
- Enter a CAP Code of 0 (Disenrollment).
- Transmit.
- Function key Ctrl+F3 must then be used to store the correction on the database.

### PCP One Step

There are two methods for enrolling or disenrolling a client in the Prepaid Capitation Plan. One is to change the MA Coverage Code via an Undercare Maintenance transaction and wait for Batch Update to occur before entering the PCP data. The other method is called the PCP One Step.

The PCP One Step process allows the change of the MA Coverage Code on WMS Screen 5 by updating the PCP screen. The PCP input screen is accessed and appropriate data is entered. This will create a Pending Record on WMS (if there is no existing pending record other than one created by PCP Input). This pending record will modify the MA Coverage code during Batch Update eliminating the Undercare Maintenance Transaction.

### Inquiry

Screen **WMPCIQ (Prepaid Capitation Plan Inquiry Screen)** displays a historical record of PCP information for an individual stored on the database. Since this inquiry is Statewide, the transaction district is displayed on each line of data. The data is displayed in chronological order. Transactions with the most recent From Date will be displayed on top of the stack.

The WMPCAQ screen is accessed by entering C for SUBSYSTEM, A for FUNCTION, CIN on **WMAMNU - Medical Assistance Subsystem Menu** and transmitting or by depressing F5 on the Inquiry screen. Some transactions (deletions/corrections) will not be displayed. SF keys 1, 2 and 3 may be used to page forward and backward if there are multiple pages. Depressing F5 returns **WMPCAQ - Prepaid Capitation Plan Audit** screen.

The inquiry screen displays a maximum of 18 lines of data per screen. The data displayed cannot be changed.

## Audit

Screen **WMPCAQ (Prepaid Capitation Plan Audit Screen)** displays a record of all transactions stored on the database for an individual including those transactions that were deleted and/or corrected. The WMPCAQ screen is accessed by entering C for SUBSYSTEM, A for FUNCTION, CIN on **WMAMNU - Medical Assistance Subsystem Menu** and transmitting or by depressing F5 on the Inquiry screen.

Similar to inquiry, the audit screen lists transactions in chronological order with the most recent From Date are displayed first. SF keys 1, 2, and 3 may be used to page forward and backward if there are multiple pages. Depressing F5 returned **WMPCIQ - PCP State Premium Inquiry** screen.

The audit screen displays a maximum of 18 lines of data per screen. The data displayed cannot be changed.

**NOTE: To perform Prepaid Capitation Plan Inquiry and Audit functions for a different client, enter the individual's CIN in the NEXT CIN field on WMPCIQ and WMPCAQ respectively.**

WMPCIN - PCP State Premium

```
>WMPCIN          PCP STATE PREMIUM INPUT SCREEN          05/25/96
CLIENT ID AB23700P  NAME MARY          MAE          CASE # 05NORTH
PREPAID CAPITATION PLAN EFFECTIVE FROM DATE 06/01/95
                FROM          REAS    FEE    GUARANTEE
CL  DATE DIST WORKR   PCP ID   DATE   BP CAP CODE   FLAG   THRU DATE
^^ 052596 12  PN
                                     XMT ^
```

Figure 7 - PCP State Premium (WMPCIN)

Purpose

This screen is used to input or change or delete data from the Prepaid Capitation Plan (PCP).

Access

- Entering C for SUBSYSTEM, I for FUNCTION, CIN, CASE NUMBER and WORKER ID on **WMAMNU - Medical Assistance Subsystem Menu**.

Screen Response

Positive

- One of the following messages on Line 24:
  - INPUT ACCEPTED if input data was transmitted and accepted, or'
  - DATA SUCCESSFULLY STORED ON DATABASE if accepted and stored using Ctrl+F3
  - CANCEL ACCEPTED if the data was cancelled using Ctrl+F2.

### Negative

- Fields in error return highlighted and one or more messages on Line 24 as shown on the PCP Error Messages Listing pages, or
- The message EXAMINE BKLINKING FIELDS in Line 24 followed by the error numbers as shown on the PCP Error No. Listing pages, or
- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-11, 14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	Displays message CANCEL ACCEPTED
Ctrl+F3	Displays message DATA SUCCESSFULLY STORED ON DATABASE (only if accepted)
Ctrl+F5	WMAMNU wit previously entered CIN, Case Number and Worker ID appearing in appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

### Screen Field Description - WMPCIN

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Comes from input on WMAMNU.
PREPAID CAPITATION PLAN EFFECTIVE FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	System generated.
<b>INPUT TRANSACTION</b>		
CL	NONE	Correction line.
DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
DIST	01010 - TRANSACTION DISTRICT (2)	System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	Comes from input on WMAMNU.
PCP ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	
FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	
BP	21700 - PREPAID CAPITATION PLAN BENEFITS PACKAGE (2)	
CAP	21701 - PREPAID CAPITATION PLAN CAPITATION CODE (1)	
REAS CODE	21003 - PCP ENROLL/DISENROLL REASON FLAG (2)	
FEE FLAG	21004 - PCP ENHANCED FEE FLAG (1)	
GUARANTEE THRU DATE	21704 - PREPAID CAPITATION PLAN GUARANTEE DATE	
<b>HISTORY</b>		
CL	NONE	Protected. 15 occurrences. Correction line.
DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 15 occurrences. System generated.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. 15 occurrences. System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	Protected. 15 occurrences. System generated.
PCP ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	Protected. 15 occurrences.
FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	Protected. 15 occurrences.
BP	21700 - PREPAID CAPITATION PLAN BENEFITS PACKAGE (2)	Protected. 15 occurrences.
CAP	21701 - PREPAID CAPITATION PLAN CAPITATION CODE (1)	Protected. 15 occurrences.
REAS CODE	21003 - PCP ENROLL/DISENROLL REASON FLAG (2)	Protected. 15 occurrences.
FEE FLAG	21004 - PCP ENHANCED FEE FLAG (1)	Protected. 15 occurrences.
GUARANTEE THRU DATE	21704 - PREPAID CAPITATION PLAN GUARANTEE DATE (6)	Protected. 15 occurrences.

WMPCIQ - Prepaid Capitation Plan Inquiry

```
>WMPCIQ      PEP A I D C A P I T A T I O N P L A N I N Q U I R Y      DATE 05/25/96      PAGE 01 OF 01
CLIENT ID AB23700P  NAME MARY MAE      CASE-NO 05NORTH
PREPAID CAPI TATION PLAN EFFECTIVE FROM DATE 06/01/89
CL  DATE  DI ST  CASE-NO      WORKR  PCP ID      FROM      REAS  FEE  GUAR
01 060695 12  05NORTH      PN      00894519  050196      01  3    2255
                                     BP  CAP
                                     CODE FLG  DATE

NEXT CIN ^^^^^^^^
```

Figure 8 - Prepaid Capitation Plan Inquiry (WMPCIQ)

Purpose

The screen displays past and current Prepaid Capitation Plan (PCP) information. All fields are protected.

Access

- Entering C for SUBSYSTEM, Q for FUNCTION, CIN , CASE NUMBER, WORKER ID on **WMAMNU - Medical Assistance Subsystem Menu**, or
- F5 from **WMPCAQ - PCP State Premium Audit** screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPCAQ - PCP State Premium Audit screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field.
Ctrl+F6	WMAMNU Medical Assistance Subsystem Menu

Screen Field Description - WMPCIQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.
CASE #	01050 - CASE NUMBER (10)	Comes from input on WMAMNU.
PREPAID CAPITATION PLAN EFFECTIVE FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	System generated
<b>HISTORY</b>		
CL	NONE	16 occurrences. Correction line
DATE	02020 - TRANSACTION INPUT DATE (6)	16 occurrences. System generated
DIST	01010 - TRANSACTION DISTRICT (2)	16 occurrences. System generated
WORKR	01040 - WORKER IDENTIFIER (5)	16 occurrences. Comes from input on WMAMNU.
PCP ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	16 occurrences.
FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	16 occurrences.
BP	21700 - PREPAID CAPITATION PLAN BENEFITS PACKAGE (2)	16 occurrences.
CAP	21701 - PREPAID CAPITATION PLAN CAPITATION CODE (1)	16 occurrences.
REAS CODE	21003 - PCP ENROLL/DISENROLL REASON FLAG (2)	16 occurrences.
FEE FLAG	21004 - PCP ENHANCED FEE FLAG (1)	16 occurrences.
GUARANTEE THRU DATE	21704 - PREPAID CAPITATION PLAN GUARANTEEDATE (6)	16 occurrences.

WMPCAQ - Prepaid Capitation Plan Audit

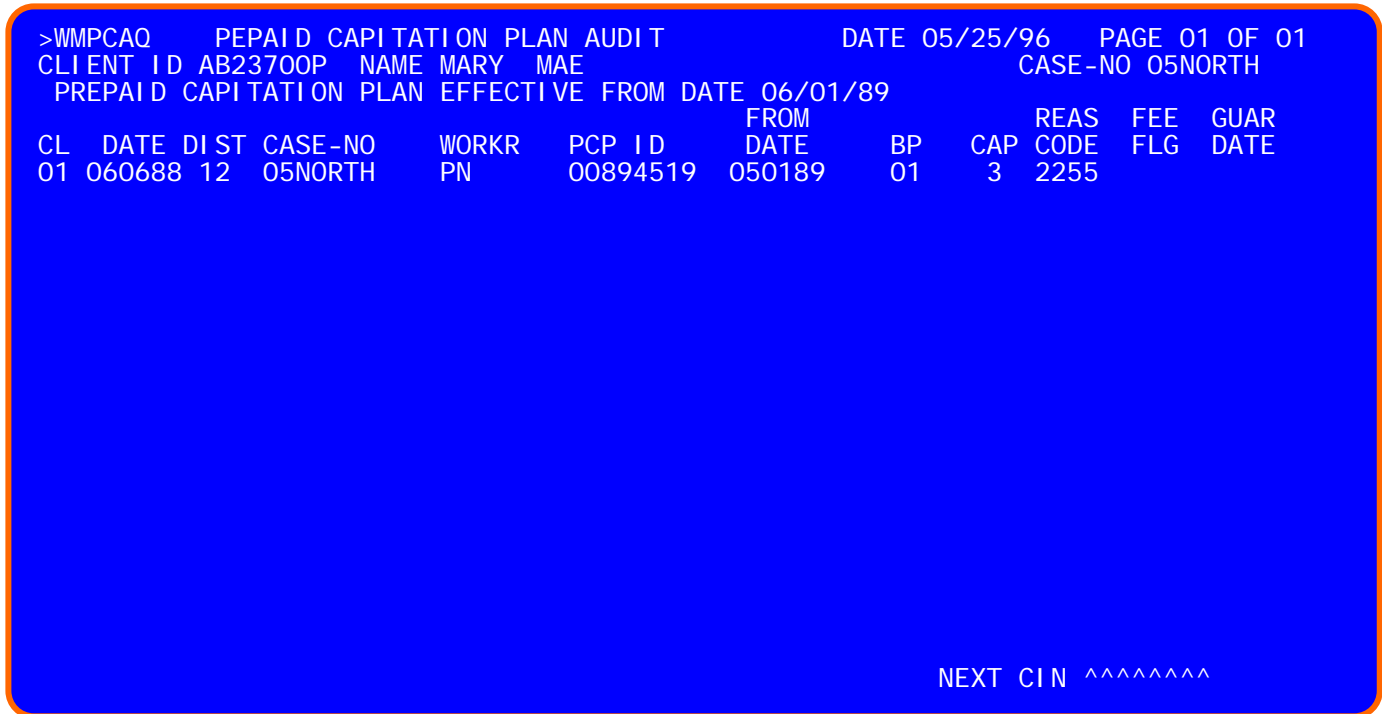


Figure 9 - Prepaid Capitation Plan Audit (WMPCAQ)

Purpose

This screen displays all PCP data entered for an individual including data entered in error and later corrected or deleted. All fields are protected.

Access

- Entering C for SUBSYSTEM, A for FUNCTION, CIN on **WMAMNU - Medical Assistance Subsystem Menu, or**
- F5 from **WMPCIQ - PCP State Premium Inquiry** screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPCIQ - PCP State Premium Inquiry screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field.
Ctrl+F6	WMAMNU - Medical Assistance Subsystem Menu

Screen Field Description - WMPCAO

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.
CASE #	01050 - CASE NUMBER (10)	Comes from input on WMSMNU.
PREPAID CAPITATION PLAN EFFECTIVE FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	System generated.
<b>HISTORY</b>		
CL	NONE	16 occurrences. Correction line.
DATE	02020 - TRANSACTION INPUT DATE (6)	16 occurrences. System generated.
DIST	01010 - TRANSACTION DISTRICT (2)	16 occurrences. System generated.
WORKR	01040 - WORKER IDENTIFIER (5)	16 occurrences. Comes from input on WMAMNU.
PCP ID	21068 - PROVIDER IDENTIFICATION NUMBER (8)	16 occurrences.
FROM DATE	21703 - PREPAID CAPITATION PLAN FROM DATE (6)	16 occurrences.
BP	21700 - PREPAID CAPITATION PLAN BENEFITS PACKAGE (2)	16 occurrences.
CAP	21701 - PREPAID CAPITATION PLAN CAPITATION CODE (1)	16 occurrences.
REAS CODE	21003 - PCP ENROLL/DISENROLL REASON FLAG (2)	16 occurrences.
FEE FLAG	21004 - PCP ENHANCED FEE FLAG (1)	16 occurrences.
GUARANTEE THRU DATE	21704 - PREPAID CAPITATION PLAN GUARANTEE DATE (6)	16 occurrences.

## Error Messages and Edits

### Errors for Which Full Messages are Displayed

(Listing is alphabetical by Message)

#### **CORRECTION LINE NUMBER IS OUT OF RANGE**

The correction line number must be between 01 and 95.

#### **CROSS DISTRICT CORRECTIONS OR DELETIONS NOT ALLOWED**

Corrections or deletions may only be performed on PCP records in the transaction district.

#### **ERROR RETURN FROM MONDAY GENERATION ROUTINE - (99)**

There is an internal system-related problem. Document and contact WMS Operations Hotline.

#### **INSUFFICIENT SYSTEM AREA FOR FURTHER ENTRIES FOR CIN**

All internal storage areas have been filled. System will accept no further transactions for this CIN.

#### **INSUFFICIENT SYSTEM AREA FOR THIS TRANSACTION**

System encountered a storage problem. Document and contact WMS Operations Hotline.

#### **MA COVERAGE NOT FOUND**

MA COVERAGE must be 30 or 31.

#### **NO CORRECTIONS, DELETIONS, OR ADDITIONS ENTERED**

A blank screen was transmitted. Enter a correction, deletion or addition.

#### **NO MATCH ON PCP ID AND/OR FROM DATE FOR DELETEN**

The PCP ID No. and/or FROM data to be deleted not found.

#### **NO UPDATES POSTED FOR ATTEMPTED STORE (Applied to Ctrl+F3)**

Ctrl+F3 was pressed but there was no data to store.

#### **OLD CIN ENTERED - INQUIRY NOT ALLOWED - NEW CIN IS ...**

If Inquiry screen is selected by pressing F5 from the AUDIT screen and the CIN has been unduplicated the new CIN will be displayed.

#### **OLD CIN ENTERED - NEW CIN IS ...**

If a CIN has been unduplicated, the new CIN will be displayed.

#### **PLEASE USE CANCEL (F-12) INSTEAD OF 'DL' TO REMOVE UNSTORED LINES**

Use Cancel (Ctrl+F2) to delete a line that has not been stored.

**SECURITY VIOLATION/F13 NOT ALLOWED**

The USERID/PASSWORD entered is not authorized to store data.

**THIS INDIVIDUAL ACTIVE ON REST/EXC SYSTEM - PCP ENTRY NOT ALLOWED**

The individual accessed is active on the restriction/exception subsystem and therefore cannot be assigned a PCP.

**THIS RECORD WILL HAVE A RESTRICTED END DATE = '999999'**

End Date '999999' means the Restriction will not be terminated until modified.

Errors for Which Only Numbers are Displayed  
(Listing is numerical by system-returned Error Number)

**001 - PROVIDER NUMBER MUST BE NUMERIC**

If Provider ID is entered, it must be numeric.

**002 - PROVIDER NUMBER NOT KNOWN TO SYSTEM**

If a Provider ID is entered, then Provider ID Number must be on Provider List.

**003 - PROVIDER NUMBER NOT VALID FOR THIS DISTRICT**

Provider ID Number must be that of a PCP provider.

**004 - CAP CODE MUST BE '0' WHEN PROVIDER NUMBER NOT ENTERED**

If Provider ID Number is not entered, then Capitation Code must be 0.

**005 - IF PROVIDER NUMBER ENTERED, FROM DATE, BP CODE, CAP CODE, AND REASON CODE MUST ALSO BE ENTERED**

If Provider ID Number is entered, then PCP FROM Data, Benefits Package Code, Capitation Code and Reason Code must all be entered.

**006 - IF PROVIDER NUMBER NOT ENTERED, BP CODE, FEE FLAG AND GUARANTEE THRU DATE MAY NOT BE ENTERED**

If Provider ID Number is not entered, then Benefits Package Code, Fee Flag and Guarantee THRU Date must not be entered.

**007 - PCP FROM DATE IS INVALID**

If PCP FROM Date is entered, it must be a valid calendar date.

**008 - NO MA COVERAGE EXISTS FOR THE DATE ENTERED**

If PCP FROM Date is entered, then an MA-Coverage Record must exist.

**009 - PCP FROM DATE MUST BE FIRST DAY OF THE MONTH**

If PCP FROM Date is entered and the day is not 01, then Capitation Code must be 0.

- 010 - PCP FROM DATE MAY NOT BE EARLIER THAN JANUARY 1985**  
If PCP FROM Date is entered, it must not be earlier than January 1, 1985.
- 011 - PCP FROM DATE MAY NOT EXCEED FOUR MONTHS BEYOND TRANSACTION MONTH**  
If PCP FROM Date is entered, it must not exceed the transaction date month by more than 4 months.
- 013 - ENTERED PCP FROM DATE ALREADY ON FILE**  
If PCP FROM Date is entered, then there must not be an existing PCP record with the same PCP FROM date.
- 014 - RECORD WITH CAP CODE OF '0' ALREADY ON FILE FOR THE ASSOCIATED ENROLLMENT**  
Records with two consecutive Capitation Codes of 0 are not allowed.
- 015 - PCP FROM DATE FALLS WITHIN THE GUARANTEE PERIOD OF THE ASSOCIATED ENROLLMENT**  
If Capitation Code is '0', then the PCP FROM Date must not be later than or equal to the PCP FROM Date of the initial entry and must be earlier than the Guarantee THRU Date of the initial entry of this PCP..
- 016 - BENEFITS PACKAGE CODE IS INVALID**  
The Benefits Package Code must be valid.
- 017 - CAPITATION CODE IS INVALID**  
If Capitation Code is entered, it must be 0 or 3.
- 018 - IF CAP CODE IS '0', PROVIDER NUMBER, BP CODE, FEE FLAG AND GUARANTEE THRU DATE MUST NOT BE ENTERED**  
If Capitation Code is 0, then Provider ID, Benefits Package Code, Fee Flag and Guarantee THRU Date must not be entered.
- 019 - IF CAP CODE IS '0', PCP FROM DATE AND REASON CODE MUST BE ENTERED**  
If Capitation Code is 0, then PCP FROM Date and Reason Code must be entered.
- 020 - PROVIDER INVALID FOR ENROLLMENT PERIOD ENTERED**
- 021 - GUARANTEE THRU DATE IS INVALID**
- 022 - GUARANTEE THRU DATE MUST BE THE LAST DAY OF THE MONTH**  
If Guarantee THRU Date is entered, it must be the last day of the month.
- 023 - GUARANTEE THRU DATE MAY NOT BE EARLIER THAN THE FROM DATE OF THE INITIAL ENROLLMENT IN THAT PCP**  
If Guarantee THRU Date is entered, it must not be earlier than the PCP FROM Date of the initial enrollment record for this PCP.



- 024 - GUARANTEE THRU DATE MAY NOT BE LATER THAN 6 MONTHS FROM THE PCP FROM DATE OF THE INITIAL ENROLLMENT IN THAT PCP**  
If Guarantee THRU Date is entered, it must not be later than 6 months after the PCP FROM Date of the initial enrollment record of this PCP.
- 025 - BP CODE, CAP CODE, REASON CODE, FEE FLAG AND GUARANTEE THRU DATE MUST NOT BE ENTERED FOR DELETE TRANSACTION**  
If Correction Line is DL (DELETE), then Benefits Package Code, Capitation Code, Reason Code, Fee Flag and Guarantee THRU Date must not be entered.
- 026 - CAP CODE '0' MAY NOT BE ENTERED IF NO ACTIVE PCP ENROLLMENT**  
If Capitation Code is 0, then there must be an existing PCP record which is not a deletion or correction record.
- 027 - GUARANTEE THRU DATE MAY NOT BE LATER THAN THE CURRENT GUARANTEE THRU DATE**  
If Guarantee THRU Date is entered, than any existing PCP records which are not deletion or correction records:
- Must not have a PCP FROM Date later than the entered PCP FROM Date and
  - Must not have a Guarantee THRU Date that is earlier than the entered Guarantee THRU Date.
- 028 - GUARANTEE THRU DATE MAY NOT BE EARLIER THAN A GUARANTEE THRU DATE PRIOR TO IT**  
If Guarantee THRU Date is entered and a Correction Line No. is not entered, than any existing PCP records which are not deletion or correction records:
- Must not have a PCP FROM Date earlier than or equal to the entered PCP FROM Date and
  - Must not have a Guarantee THRU Date Provider ID is entered, it must be numeric.
- 030 - ENTRY OF GUARANTEE DATE NOT ALLOWED FOR THIS PROVIDER**  
Guarantee THRU Date must not be entered if Provider ID number is 00477078, 00477087, 00477096, 00477110, 00477129, 00477138 or 00477147.
- 032 - PCP EFFECTIVE DATE EXCEEDS MA COVERAGE TO DATE ON UPDATED MA COVERAGE HISTORY RECORD**  
The PCP Effective Dates must fall within the range of the MA Coverage TO Date on any updated MA Coverage record. Adjust PCP Effective Dates to fall within Coverage.
- 034 - IF CAP CODE EQUALS '0', PCP FROM DATE MUST BE LESS THAN OR EQUAL TO EFFECTIVE FROM DATE**  
If the Capitation Code is 0, then the PCP FROM Date must be less than or equal to the PCP Effective FROM Date. Adjust the PCP FROM Date to be less than/equal to the Effective FROM Date.
- 036 - NO VALID MA COVERAGE FOR CASE NUMBER ENTERED (NYC ONLY)**  
A NYC non-services case must have valid MA Coverage for its Case Number to be accessed.

- 037- PENDING RECORD EXISTS WHICH WAS NOT CREATED BY PCP TRANSACTION. PCP INPUT NOT ALLOWED.**  
A pending record from any non-PCP medical assistance subsystem must be deleted before PCP input can be accepted by the system. Delete the pending record.
- 038 - REASON CODE INVALID FOR THIS TRANSACTION**  
The reason code input was not valid for this transaction type. The user must enter a valid reason code.
- 039 - ENHANCED FEE FLAG MUST EQUAL 'Y', 'N', OR SPACES**  
The valid set of values for the enhanced fee flag is 'Y', 'N', or spaces. All other input will be rejected.
- 040 - PCP EFFECTIVE DATE (+ 6 MONTHS) EXCEEDS MA COVERAGE TO DATE**  
The PCP Effective Date plus 6 months cannot exceed the Medical Assistance Coverage TO Date. The PCP Effective period (PCP Effective Date plus 6 months) goes beyond the MA Coverage TO Date. The user must change the PCP Effective Date or extend the MA Coverage TO Date.
- 041 - BENEFITS PACKAGE CODE = 70 AND CATEGORICAL CD = 56 OR 57 OR 58 OR 59**  
The Benefits Package Code of 70 cannot be assigned when the Categorical Code is 56, 57, 58, or 59.
- 042 - CATEGORICAL CD = 56 OR 57 OR 58 OR 59**  
For PCP transactions, the Categorical Code cannot be equal to 56, 57, 58, or 59. The categorical code must be changed.
- 043 - BENEFITS PACKAGE CODE = 70 AND PCP FROM DATE < 10/01/2001**  
The Benefits Package Code has been set to 70 and the PCP From Date < 10/01/2001. This Benefits Package Code was not effective until 10/01/2001 and cannot be used prior to that date.
- 044 - PCP CAP CODE =3 AND CASE TYPE = 21**  
The PCP Cap Code cannot be 3 when the Case Type is 21 (Medicaid Presumptive Eligibility).
- 045 - MA COVERAGE EXISTS FOR AID CATEGORY 80**  
MA Coverage cannot be established if the individual has an Aid Category of 80. The Aid Category must be changed.
- 046 - DISENROLL ALLOWED ONLY - OLD CIN ENTERED**  
If the individual has a new CIN Number and the user has entered their old CIN number, the only transaction that can be done using the old CIN Number is a disenroll.
- 047 - NO MC ENROLL - DUALY ELIGIBLE < AGE 21**  
No Medical Consultant enrollment has occurred even though the individual is eligible and under the age of 21.

## Pay-In/Excess Income

### Introduction

The Pay-In and Excess Income Program Subsystem provides support for tracking and reconciling the amount of pre-payments made to the district by a recipient to cover the amount by which the recipient's net income exceeds MA income standards.

The Pay-IN/Excess Income plan is an optional plan that can last for periods of one to six months. The payments can be made in full or in monthly installments.

These payments are periodically reconciled with the amount of Medicaid claims paid on behalf of the recipient. Unused pay-in amounts are refunded to the recipient or credited toward a pay-in amount for a subsequent excess income period.

### Input

Pay-In/Excess Income data is entered on WMPXIN - PAY-IN/EXCESS INCOME INPUT screen. Access to WMPXIN is obtained by entering X (PAY-IN/EXCESS INCOME) for SUBSYSTEM, I (INPUT) for FUNCTION, CIN, WORKER ID and PAY-IN START DATE (month/year) on **WMAMNU - Medical Assistance Subsystem Menu** and transmitting. **WMAMNU - Medical Assistance Subsystem Menu** is selection 25 on WMSMNU - WMS MAIN MENU,

If there is no prior stored Pay-In/Excess Income data, the WMPXIN screen is returned with only the system generated data listed below but no historical data. If prior data was stored, the WMPXIN screen displays the historical data below the input line with the Line # displayed as well as the following system generated data:

- CIN
- NAME
- APPLY MTH/YR
- CTY (county code)
- TX DT (Transaction Input Date)
- WORKER ID

The following message is returned after successful (no errors) data entry and transmitting:

- INPUT ACCEPTED. PRESS SF13 TO UPDATE. (SF12 TO START OVER).

If Ctrl+F3 is pressed, the data is stored, and the message **\*\*\*UPDATES HAVE BEEN ACCEPTED\*\*\*** is displayed with the data displayed below the bottom input line. The database is updated immediately. Data that is not stored via Ctrl+F3 is not retained on the database.

If Ctrl+F2 is pressed, the WMAMNU menu is returned to start over.

If there are system detected errors, the fields in error are returned highlighted and the following is displayed:

ERR099: followed by an error message. 99 is the Error Number.

### Inquiry

**WMPXIQ - Pay-In/Excess Income Inquiry** screen displays the current and historical record of data for the data specified. The WMPXIQ screen is accessed by entering X for SUBSYSTEM, Q for FUNCTION, CIN, WIRKER ID and PAY-IN START DATE on WMAMNU and transmitting.

WMPXIN - Pay-In/Excess Income Input

>WMPXIN											PAY - IN/EXCESS INCOME INPUT SCREEN		07/11/96		PAGE 1	
CLIENT ID		AB23700P		NAME MARY		SUTTON		APPLY MTH/YR		0696		CTY 12				
TX DATE	WRKR PN	TX TYPE	ASSOC CIN	F I	EXCESS AMOUNT	PAY-IN AMOUNT	BILLS PAID	BILLS INCURRED	BALANCE							
061996		X			40.00		40.00									
C/D LINE#	TX DATE	CTY CD	WRKR PN	BILL TYPE	BILL AMOUNT	DATE OF SERVICE	PROV TYPE	MTH/YR APPLIED	FA STAT	XMIT						
	071196	12						0696								
01	061996	12	PN	P	40.00	060396	046	0696	H							

Figure 10 - Pay-In/Excess Income Input (WMPXIN)

Purpose

This screen is used to input Pay-In/Excess Income data.

Access

- Entering X for SUBSYSTEM, I for FUNCTION, CIN, WORKER ID and PAY-IN START DATE on **WMAMNU - Medical Assistance Subsystem Menu**.

Screen Response

Positive

- One of the following messages on Line 24:
  - INPUT ACCEPTED. PRESS SF13 TO UPDATE. (SF12 TO START OVER). If error free input data was transmitted.
  - \*\*\*UPDATES HAVE BEEN COMPLETED\*\*\*. If Ctrl+F3 is pressed and data is stored.

Negative

- ERR099 is displayed on Line 24 followed by one of the messages listed on the Pay-In/Excess Income Error No. Listing pages (99 is the error number), or
- One of the following messages on Line 24:
  - NO MORE DATA AVAILABLE, CAN NOT PAGE FORWARD
  - ON FIRST PAGE NOW, CAN NOT PAGE BACKWARD
  - ON FIRST PAGE NOW, NO NEED TO RETURN THESE
  - SECURITY VIOLATION/SF-13 NOT ALLOWED
  - UPDATE NOT ALLOWED - NO EDITS DONE,HIT XMIT
  - SF-99 NOT SUPPORTED BY WMPXIN (99 = 4, 5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU wit previously entered CIN and Worker ID appearing in appropriate fields.
Ctrl+F6	WMAMNU - MEDICAL ASSISTANCE SUBSYSTEM Menu

Screen Field Description - WMPXIN

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.
APPLY MTH/YR	01014 - AUTHORIZATION TO DATE (6)	Month/Year system returned from entry on WMAMNU
CTY	01010 - TRANSACTION DISTRICT (2)	County Code - system returned from entry on WMAMNU - MEDICAL ASSISTENCE SUBSYSTEM MENU
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated
WORKR	01040 - WORKER IDENTIFIER (5)	Comes from input on WMAMNU.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TX TYPE	21018 - PAY-IN/EXCESS INCOME TRANSACTION TYPE CODE (1)	Transaction Types are found in the Data Elements section.
ASSOC CIN	21006 - ASSOCIATED CLIENT IDENTIFICATION NUMBER (8)	Entry of additional family member CIN if appropriate.
FI	21015 - EXCESS INCOME FAMILY FLAG (1)	Family Indicator - Entry of Y if more than 2 members in a case
EXCESS AMOUNT	21013 - EXCESS INCOME AMOUNT (7)	Entry of excess income amount for 1 month
PAY-IN AMOUNT	21016 - PAY-IN AMOUNT (7)	Entry of amount paid in for 1 month
BILLS PAID	21012 - EXCESS INCOME BILLS PAID AMOUNT (7)	System generated total of all paid bills previously entered in the BILL AMOUNT field
BILLS INCURRED	21007 - EXCESS INCOME BILLS INCURRED AMOUNT (7)	System generated total of all incurred bills previously entered in the BILL AMOUNT field
BALANCE	NONE	The balance equals: EXCESS AMOUNT minus BILLS PAID/BILLS INCURRED or EXCESS AMOUNT minus PAY-IN AMOUNT
C/D/LINE#	NONE	System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	County code. System generated from entry of County on WMAMNU menu.
WRKR	01040 - WORKER IDENTIFIER (5)	System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Fiscal Agent Statuses can be found in the Data Elements section.
<b>HISTORY</b>		
C/D/LINE#	NONE	Protected. 8 occurrences. System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 8 occurrences. System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	Protected. 8 occurrences. County code. System generated from entry of County on WMAMNU menu.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected. 8 occurrences. System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Protected. 8 occurrences. Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Protected. 8 occurrences. Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Protected. 8 occurrences. Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Protected. 8 occurrences. Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	Protected. 8 occurrences. System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Protected. 8 occurrences. Fiscal Agent Statuses can be found in the Data Elements section.



WMPXIQ - Pay-In/Excess Income Inquiry

>WMPXIQ										PAY - IN/EXCESS INCOME INPUT SCREEN		07/11/96		PAGE 1	
CLIENT-ID AB23700P			CLIENT NAME JOANNA MORLEY				CTY 12			INQUIRY PERIOD - JUNE 1996					
TX DATE	WRKR	TX TYPE	ASSOC CIN	F I	EXCESS AMOUNT	PAY-IN AMOUNT	BILLS PAID	BILLS INCURRED	BALANCE						
061996	PN	X			40.00		40.00		0.00						
LINE #	TX DATE	CTY CD	WRKR PN	BILL TYPE	BILL AMOUNT	DATE OF SERVICE	PROV TYPE	FA STAT							
01	061996	12	PN	P	40.00	060396	046	H							

Figure 11 - Pay-In/Excess Income Inquiry (WMPXIQ)

Purpose

The screen displays the stored data for the PAY-IN START DATE entered on **WMAMNU - Medical Assistance Subsystem Menu**. All fields are protected.

Access

- Entering X for SUBSYSTEM, Q for FUNCTION, CIN, WORKER ID and PAY-IN START DATE on **WMAMNU - Medical Assistance Subsystem Menu**.

Screen Response

Positive

- See **Function Keys**.

Negative

- ERR09 is displayed on Line 24 followed by one of the messages listed on the Pay-In/Excess Income Error No. Listing pages (99 is the Error Number), or
- If F8 is pressed, the screen is returned without the fields on Line 24 and one of the following messages may be displayed:

- NO MORE DATA AVAILABLE, CA NOT PAGE FORWARD
- ON FIRST PAGE NOW, CANNOT PAGE BACKWARD
- ON FIRST PAGE NOW, NO NEED TO RETURN THERE
- SECURITY VIOLATION/SF-13 NOT ALLOWED
- UPDATE NOT ALLOWED - NO EDITS DONE, HIT XMIT
- SF KEY-99 NOT SUPPORTED BY WMPXIQ (99 = 4, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPCAQ - PCP State Premium Audit screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field.
Ctrl+F6	WMAMNU Medical Assistance Subsystem Menu

Screen Field Description - WMPXIQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.
APPLY MTH/YR	01014 - AUTHORIZATION TO DATE (6)	Month/Year system returned from entry on WMAMNU
CTY	01010 - TRANSACTION DISTRICT (2)	County Code - system returned from entry on WMAMNU - MEDICAL ASSISTENCE SUBSYSTEM MENU
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated
WORKR	01040 - WORKER IDENTIFIER (5)	Comes from input on WMAMNU.
TX TYPE	21018 - PAY-IN/EXCESS INCOME TRANSACTION TYPE CODE (1)	Transaction Types are found in the Data Elements section.
ASSOC CIN	21006 - ASSOCIATED CLIENT IDENTIFICATION NUMBER (8)	Entry of additional family member CIN if appropriate.
FI	21015 - EXCESS INCOME FAMILY FLAG (1)	Family Indicator - Entry of Y if more than 2 members in a case

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
EXCESS AMOUNT	21013 - EXCESS INCOME AMOUNT (7)	Entry of excess income amount for 1 month
PAY-IN AMOUNT	21016 - PAY-IN AMOUNT (7)	Entry of amount paid in for 1 month
BILLS PAID	21012 - EXCESS INCOME BILLS PAID AMOUNT (7)	System generated total of all paid bills previously entered in the BILL AMOUNT field
BILLS INCURRED	21007 - EXCESS INCOME BILLS INCURRED AMOUNT (7)	System generated total of all incurred bills previously entered in the BILL AMOUNT field
BALANCE	NONE	The balance equals: EXCESS AMOUNT minus BILLS PAID/BILLS INCURRED or EXCESS AMOUNT minus PAY-IN AMOUNT
C/D/LINE#	NONE	System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	County code. System generated from entry of County on WMAMNU menu.
WRKR	01040 - WORKER IDENTIFIER (5)	System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Fiscal Agent Statuses can be found in the Data Elements section.
<b>HISTORY</b>		
C/D/LINE#	NONE	Protected. 10 occurrences. System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 10 occurrences. System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	Protected. 10 occurrences. County code. System generated from entry of County on WMAMNU menu.
WRKR	01040 - WORKER IDENTIFIER (5)	Protected. 10 occurrences. System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Protected. 10 occurrences. Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Protected. 10 occurrences. Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Protected. 10 occurrences. Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Protected. 10 occurrences. Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	Protected. 10 occurrences. System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Protected. 10 occurrences. Fiscal Agent Statuses can be found in the Data Elements section.

WMPXAQ - Pay-In/Excess Audit

>WMPXAQ PAY - IN/EXCESS INCOME INPUT SCREEN 07/11/96 PAGE 1									
CLIENT-ID		CLIENT NAME		INQUIRY PERIOD		JOANNA MORLEY		CTY 12	
AB23700P		- JUNE		1996					
TX DATE	WRKR	TX TYPE	ASSOC CIN	F I	EXCESS AMOUNT	PAY-IN AMOUNT	BILLS PAID	BILLS INCURRED	BALANCE
061996	PN	X			40.00		40.00		0.00
LINE #	TX DATE	CTY CD	WRKR PN	BILL TYPE	BILL AMOUNT	DATE OF SERVICE	PROV TYPE	FA STAT	
01	061996	12	PN	P	40.00	060396	046	H	

Figure 12 - Pay-In/Excess Income Audit (WMPXAQ)

Purpose

This screen displays all Pay-In/Excess Income data entered for an individual including data entered in error and later corrected or deleted.

Access

- Entering X for SUBSYSTEM, A for FUNCTION, CIN, WORKER ID and PAY-IN START DATE on **WMAMNU - Medical Assistance Subsystem Menu**, or
- F5 from **WMPXIQ - Pay-In/Excess Income Inquiry** screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- ERR09 is displayed on Line 24 followed by one of the messages listed on the Pay-In/Excess Income Error No. Listing pages (99 is the Error Number), or

- If F8 is pressed, the screen is returned without the fields on Line 24 and one of the following messages may be displayed:
  - NO MORE DATA AVAILABLE, CA NOT PAGE FORWARD
  - ON FIRST PAGE NOW, CANNOT PAGE BACKWARD
  - ON FIRST PAGE NOW, NO NEED TO RETURN THERE
  - SECURITY VIOLATION/SF-13 NOT ALLOWED
  - UPDATE NOT ALLOWED - NO EDITS DONE, HIT XMIT
  - SF KEY-99 NOT SUPPORTED BY WMPXIQ (99 = 4, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WMPXIQ - Pay-In/Excess Income Inquiry screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WMAMNU - With previously entered CIN appearing in appropriate field.
Ctrl+F6	WMAMNU Medical Assistance Subsystem Menu

Screen Field Description - WMPXAQ

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	Comes from input on WMAMNU.
NAME	03030 - NAME (28)	Comes from input on WMAMNU.
APPLY MTH/YR	01014 - AUTHORIZATION TO DATE (6)	Month/Year system returned from entry on WMAMNU
CTY	01010 - TRANSACTION DISTRICT (2)	County Code - system returned from entry on WMAMNU - MEDICAL ASSISTENCE SUBSYSTEM MENU
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated
WORKR	01040 - WORKER IDENTIFIER (5)	Comes from input on WMAMNU.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TX TYPE	21018 - PAY-IN/EXCESS INCOME TRANSACTION TYPE CODE (1)	Transaction Types are found in the Data Elements section.
ASSOC CIN	21006 - ASSOCIATED CLIENT IDENTIFICATION NUMBER (8)	Entry of additional family member CIN if appropriate.
FI	21015 - EXCESS INCOME FAMILY FLAG (1)	Family Indicator - Entry of Y if more than 2 members in a case
EXCESS AMOUNT	21013 - EXCESS INCOME AMOUNT (7)	Entry of excess income amount for 1 month
PAY-IN AMOUNT	21016 - PAY-IN AMOUNT (7)	Entry of amount paid in for 1 month
BILLS PAID	21012 - EXCESS INCOME BILLS PAID AMOUNT (7)	System generated total of all paid bills previously entered in the BILL AMOUNT field
BILLS INCURRED	21007 - EXCESS INCOME BILLS INCURRED AMOUNT (7)	System generated total of all incurred bills previously entered in the BILL AMOUNT field
BALANCE	NONE	The balance equals: EXCESS AMOUNT minus BILLS PAID/BILLS INCURRED or EXCESS AMOUNT minus PAY-IN AMOUNT
C/D/LINE#	NONE	System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	County code. System generated from entry of County on WMAMNU menu.
WRKR	01040 - WORKER IDENTIFIER (5)	System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Fiscal Agent Statuses can be found in the Data Elements section.
<b>HISTORY</b>		
C/D/LINE#	NONE	Protected. 10 occurrences. System generated. Entry for the line number to be Changed or Deleted
TX DATE	02020 - TRANSACTION INPUT DATE (6)	Protected. 10 occurrences. System generated.
CTY CD	01010 - TRANSACTION DISTRICT (2)	Protected. 10 occurrences. County code. System generated from entry of County on WMAMNU menu.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
WRKR	01040 - WORKER IDENTIFIER (5)	Protected. 10 occurrences. System generated from entry on WMSMNU menu.
BILL TYPE	21011 - EXCESS INCOME BILL TYPE CODE (1)	Protected. 10 occurrences. Bill Types Codes can be found in the Data Elements section. Note: Current month entry goes to Fiscal Agent; carryover entries do not.
BILL AMOUNT	21009 - EXCESS INCOME BILL AMOUNT (7)	Protected. 10 occurrences. Entry of the paid amount of any credit or refund applicable to the APPLY MTH/YR
DATE OF SERVICE	21008 - DATE OF SERVICE (6)	Protected. 10 occurrences. Entry of the service date associated with the entry in the BILL AMOUNT field.
PROV TYPE	15049 - PROVIDER TYPE CODE (3)	Protected. 10 occurrences. Entry of one of the provider types that are associated with the BILL AMOUNT and DATE OF SERVICE
MTH/YR APPLIED	21014 - EXCESS INCOME DATE - YEAR/MONTH (6)	Protected. 10 occurrences. System generated from entry on WMAMNU
FA STAT	21017 - PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE (1)	Protected. 10 occurrences. Fiscal Agent Statuses can be found in the Data Elements section.



## Error Messages and Edits

### Errors for Which Only Numbers are Displayed (Listing is numerical by system-returned Error Number)

#### **ERR001 - INVALID MEDICAID COVERAGE FOR MONTH ENTERED**

Client must have one of the following valid active Medicaid Coverage Codes for some portion of the month/year entered. Valid coverage codes are '01', '02', '06', '09' or '10'.

#### **ERR002 - TRANSACTION TYPE INVALID**

If no data exists for the month/year entered, transaction type must be entered and valid. Valid values can be found in the **SRM Data Elements** section.

#### **ERR003 - ASSOCIATED CIN INVALID**

Associated CIN must be a valid alphanumeric client ID or spaces.

#### **ERR004 - ENTRY OF FAMILY INDICATOR NOT ALLOWED WHEN ASSOC. CIN IS BLANK**

Family Indicator may be entered only if Associated CIN is entered.

#### **ERR005 - FAMILY INDICATOR INVALID**

Family Indicator must be equal 'Y' or blank.

#### **ERR006 - ENTRY OF VALID EXCESS AMOUNT REQUIRED**

If Transaction Type entered is 'P' or 'S' or 'X', then an Excess Amount must be entered and be greater than zero.

#### **ERR007 - ENTRY OF PAY-IN AMOUNT NOT ALLOWED WITH TRANSACTION TYPE 'X'**

If Transaction Type entered equals 'X', then the Pay-In amount must be blank.

#### **ERR008 - ENTRY OF PAY-IN AMOUNT REQUIRED FOR TRANSACTION TYPE 'P' OR 'S'**

If Transaction Type entered equals 'P' or 'S', then the Pay-In amount must be entered and greater than zero.

#### **ERR009 - PAY-IN AMOUNT ENTERED MAY NOT EXCEED EXCESS INCOME AMOUNT**

Pay-In Amount must be less than or equal to Excess Amount.

#### **ERR010 - ENTRY OF DATA MORE THAN ELEVEN MONTHS IN THE PAST NOT ALLOWED**

Retroactive entry or changes are not allowed for periods greater than eleven months in the past (current month less eleven months).

#### **ERR011 - ENTRY OF DATA MORE THAN SIX MONTHS IN THE FUTURE NOT ALLOWED**

Prospective entry or changes are not allowed for periods greater than six months in the future (Current month plus six months).

#### **ERR012 - NO RECORD ON FILE FOR MONTH REQUESTED - DELETION NOT ALLOWED**

Transaction Type 'D' may be entered only if a record exists on file for the month/year entered.

**ERR013 - FIELD ENTRY INVALID FOR DELETION**

If Transaction Type entered equals 'D', then the Associated CIN, Family Indicator, Excess Amount and Pay-In Amount may not be changed.

**ERR014 - BILLING RECORDS ON FILE FOR MONTH ENTERED - DELETION NOT ALLOWED**

If Transaction Type entered equals 'D', then existing billing records of the applied month/year must first be deleted.

**ERR015 - DELETION ACCEPTED ONLY FOR FIRST MONTH OF SIX-MONTH PAY-IN**

If Transaction Type entered equals 'D' and the existing Transaction Type for the month/year shown is 'S', the month/year shown must be the first month of the six-month pay-in.

**ERR016 - INVALID BILL TYPE ENTERED**

Bill type entered on billing entry line must be one of the allowed values. See **SRM Data Elements** for allowed values.

**ERR017 - NO EXCESS INCOME DATA ENTERED - BILL ENTRY NOT ALLOWED**

Entry of billing data requires entry or existence of a Pay-In/Excess Income record for the month/year entered on the billing line.

**ERR018 - TRANSACTION TYPE INVALID FOR PAID OR INCURRED BILL ENTRY**

If Bill Type entered is 'P', 'I', 'C' or 'K', then Transaction Type on the Pay-In/Excess Income line (entered or on file) must equal 'X'.

**ERR019 - TRANSACTION TYPE INVALID FOR REFUND ENTRY**

If Bill Type entered is 'R', then the Transaction Type on Pay-In/Excess Income line (entered or on file) must equal 'P' or 'S'.

**ERR020 - ENTRY OF BILL AMOUNT REQUIRED**

If Bill Type entered is 'P' or 'I' or 'C' or 'K' or 'R', and C/D Line # is blank, then the Bill Amount must be entered and be greater than zero.

**ERR021 - NO MONTHLY EXCESS BALANCE - ADDITIONAL BILL ENTRY NOT ALLOWED**

When the total paid or incurred bills entered for a specific month/year reduce the Excess Income Balance to zero, then additional bills may not be entered.

**ERR022 - ENTRY OF VALID DATE OF SERVICE REQUIRED**

If Bill Type entered is 'P' or 'I' or 'C' or 'K' or 'R', and C/D Line # is blank, then the Date of Service must be entered and valid.

**ERR023 - ENTRY OF PROVIDER TYPE REQUIRED**

If Bill Type entered is 'P' or 'I' or 'C' or 'K' or 'R', and C/D Line # is blank, then the Provider Type must be entered.

**ERR024 - NO DATA EXISTS FOR LINE # ENTERED**

Change/Delete Line # must reference an existing line of data listed below billing entry line.

**ERR025 - NO DATA ENTERED FOR REQUESTED LINE CHANGE**

Entry of valid C/D Line # requires entry of at least one other field on billing entry line.

**ERR026 - LINE NUMBER REQUIRED FOR DELETE TRANSACTION**

If Bill Type entered equals 'D' (Delete), then the C/D Line # must be entered.

**ERR027 - FIELD ENTRY INVALID FOR LINE DELETION**

If Bill Type entered equals 'D' (Delete), then the Bill Amount, date of Service, and Provider Type must be blank.

**ERR028 - DATA SENT TO FISCAL AGENT - CHANGE OR DELETION NOT ALLOWED**

If C/D Line # is entered, then the FA Status for the requested line to be changed or deleted may not equal 'S' (Sent to Fiscal Agent).

**ERR029 - C/D LINE # REQUIRED FOR CHANGE IN MONTH/YEAR APPLIED**

Month/Year applied may not be changed on billing entry line if C/D Line # is blank.

**ERR030 - CROSS DISTRICT CHANGES NOT ALLOWED**

Transaction district must equal district of file for Pay-In/Excess or billing record to be changed or deleted.

**ERR031 - INVALID APPLY DATE ENTERED ON BILL ENTRY LINE**

Apply Month/Year entered on billing entry line must be a valid month/year.

**ERR032 - INVALID APPLY DATE ENTERED ON REQUEST FOR NEW MONTH/YEAR**

Apply Month/Year entered for new Pay-In/Excess display or entry must be a valid month/year.

**ERR033 - NO MONTHLY EXCESS OR BILL DATA ENTERED**

Data must be entered on Monthly Pay-In/Excess and/or Billing entry lines before transmitting screen.

**ERR034 TRANSACTION TYPE INVALID (DATA ON FILE WITHIN NEXT 5 MONTHS)**

Transaction Type 'S' may not be entered if data is on file for any month within 5 months in the future.

**ERR035 - PROVIDER TYPE MUST BE NUMERIC**

Provider type entered on billing entry line must be a three digit numeric value.

**ERR036 - NO BILL CHANGES ALLOWED AFTER CHANGE FROM EXCESS TO PAY-IN**

Bill records may not be changed when FA status has been set to 'N' (Do Not Send to FA). FA Status is set to 'N' for any bill records which remain on file when a client is changed from Excess (Transaction Type 'X') to Pay-in (Transaction Type 'P' or 'S').

**ERR037 - PAY-IN AMT ENTERED MUST = EXCESS AMT FOR TRANSACTION TYPE 'S'**

If Transaction Type entered is 'S', then Pay-In Amount entered must equal Excess Amount.

**ERR038 - NO CHANGE TO PAY-IN/EXCESS ALLOWED WHEN MOVING BILL RECORD**

If C/D Line Number and a new Apply Month/Year are entered on billing entry line (attempt to move bill to another month), no fields may be changed on Pay-In /Excess entry line.

**ERR039 - TRANSACTION TYPE 'S' MAY NOT BE CHANGED TO 'P' OR 'X'**

If transaction type of file for entered Month/Year equals 'S' (Six-Month Pay-In), then the transaction type may not be changed.

**ERR040 - DB UPDATE CONFLICT. UPDATE NOT STORED. HIT SF15 TO START OVER**

Data entry of Pay-In/Excess Income data for the same client from two sites at the same time is not allowed.

**ERR041 - TRANSACTION TYPE 'P' WITH BILL RECORDS MAY NOT BE CHANGED TO 'X'**

A client changed from Transaction Type 'X' to Transaction Type 'P' with bill records on file which have been flagged with FA Status 'N' (Do Not Send to Fiscal Agent) may not be subsequently changed back to Transaction Type 'X'. Bill Records must first be deleted.

**ERR042 - BILL RECORDS ON FILE WITHIN NEXT 5 MONTHS. DELETION NOT ALLOWED**

If bill records from refunds exist for any month of a six-month Pay-In (Transaction Type 'S'), then deletion of the six-month Pay-In is not allowed.

**ERR043 - TRANSACTION TYPE MAY NOT BE CHANGED TO SPACE**

Transaction type must be present when revising Pay-In/Excess line.

**ERR044 - ASSOCIATED CIN PRIMARY PAY-IN FOR THIS MONTH**

A CIN that has been previously entered as a Primary CIN for the current Applied Month/Year may not be entered as an Associated CIN for the same Applied Month/Year.

**ERR045 - ASSOCIATED CIN PRIMARY PAY-IN W/IN NEXT 5 MONTHS**

A Client that has previously entered as a Primary CIN within the following five months may not be entered as an Associated CIN on a six month pay-in.

**ERR048 - ASSOCIATED CIN MAY NOT EQUAL PRIMARY CIN**

The Associated CIN may not be the same as the Primary CIN.

**ERR049 - INVALID PROVIDER TYPE ENTERED**

The Provider Type must have a value found in the SRM Data Elements section (D.E. #15049).

**ERR050 - DATE OF SERVICE MAY NOT BE AFTER TRANSACTION DATE**

The Date of Service must be on or before the Transaction Date.

**ERR051 - DATE OF SERVICE MAY NOT BE AFTER APPLY MONTH/YR**

The Date of Service must be on or before the last day of the Applied Month/Year.

**ERR052 - MAY ONLY CHANGE ASSOC CIN IN MONTH ONE FOR 6 MONTH PAY-IN**

Associated Client for a 6-Month Pay-In may only be changed on the first month record of the 6-Month Pay-in.

**ERR053 - MUST DELETE 1 MONTH PAY-IN BEFORE CREATING 6 MONTH PAY-IN**

If Transaction Type 'P' exists for the Month/Year entered, it must be deleted before changing Transaction Type to 'S' for a 6-Month Pay-In.

# MMIS

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## Medicaid Management Information System (MMIS) Inquiry

### Overview

The MMIS Inquiry function available from the WMS Main Menu provides users with a means to view information about clients' Medicaid eligibility. Information available for inquiry is stored on the Interim Recipient Eligibility File (IREF) database. IREF is updated daily via a batch process from both Upstate and New York City WMS. The IREF database is also the source for Managed Care and Nursing Home rosters as well as other Medicaid reports.

Inquiry on the IREF database can be done by any using:

- SSN, or
- CIN, or
- the combination of name, sex, and age or date of birth.

Inquiry results show Medicaid eligibility only to the end of the upcoming month. Results displayed include the recipient's

- Demographic Data (Name, sex, DOB, SSN)
- WMS Case Data (CIN, Case Number, District, Office)
- Medicaid Eligibility Code
- Recipient Aid Category/Payment Type
- Mailing Address
- Recipient Card Indicator (shows if recipient should receive a Medicaid card)
- Principal Provider, Restricted Recipient, and Pre-paid Capitation involvement indicators

None of the MMIS screens have update capability since this subsystem is for inquiry only.

### Navigation

A noticeable difference between MMIS screens and other WMS screens is the navigation method within the MMIS subsystem. MMIS screens have one or more prompts displayed on them for navigation purposes. These prompts are six character screen identifiers usually located at the top of the screen. The user will either place the cursor after the prompt or enter a CIN or SSN as required and transmit to go to the screen identified by the prompt.

### Error Messages

Another difference between MMIS screens and other WMS screens is the location of error messages on the screens. Error messages can appear at the top, in the middle, or at the bottom of MMIS screens.

MMIMNU – Medicaid Management Information System Menu Recipient Inquiry

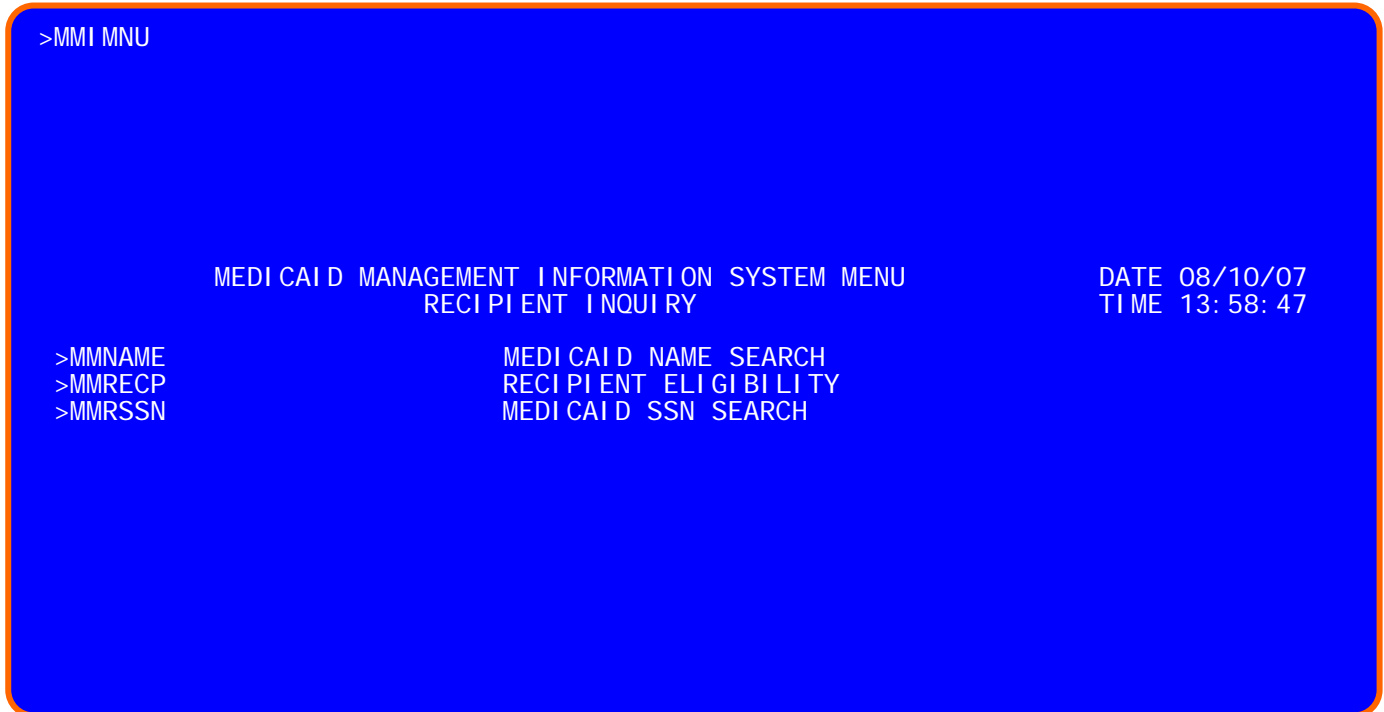


Figure 1 – Medicaid Management Information System Menu Recipient Inquiry (MMIMNU)

Purpose

This screen is used to access the Recipient Name Inquiry, the Recipient History Data Inquiry, and the SSN Inquiry for MMRSSN screens. To access the Recipient Name Inquiry screen, the cursor is placed after the MMNAME prompt and the screen is transmitted. The Recipient History Data Inquiry screen is accessed by entering a CIN after the MMRECP prompt and transmitting. The SSN Inquiry for MMRSSN screen is accessed by entering a Social Security Number, in the format 999999999, after the MMRSSN screen name and transmitting.

Access

- Entering 31 on the WMSMNU – WMS Menu screen

Screen Response

Positive

- Returns MMNAME - Recipient Name Inquiry when cursor is placed after MMNAME and transmitted
- Returns MMRECP - Recipient History Data Inquiry when a CIN is entered after MMRECP and transmitted
- Returns MMRSSN - SSN Inquiry for MMRSSN when an SSN is entered after MMRSSN and transmitted; MMRSSN will display a list of recipients whose SSN match the SSN entered on MMIMNU

### Negative

- One of the following messages at the top of the screen:
  - ERROR IN FETCH OF IREF1 RECORD
  - RECIPIENT NOT FOUND
  - SSN NOT FOUND
  - XXXXXXXXX IS NOT NUMERIC (where XXXXXXXXX is the character string entered after the MMRSSN prompt)
- The following message on Line 24:
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator



Key	Description
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - MMIMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8)	Entered after the MMRECP prompt
(NONE)	15031 - RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER (9)	Entered after the MMRSSN prompt

MMNAME – Recipient Name Inquiry

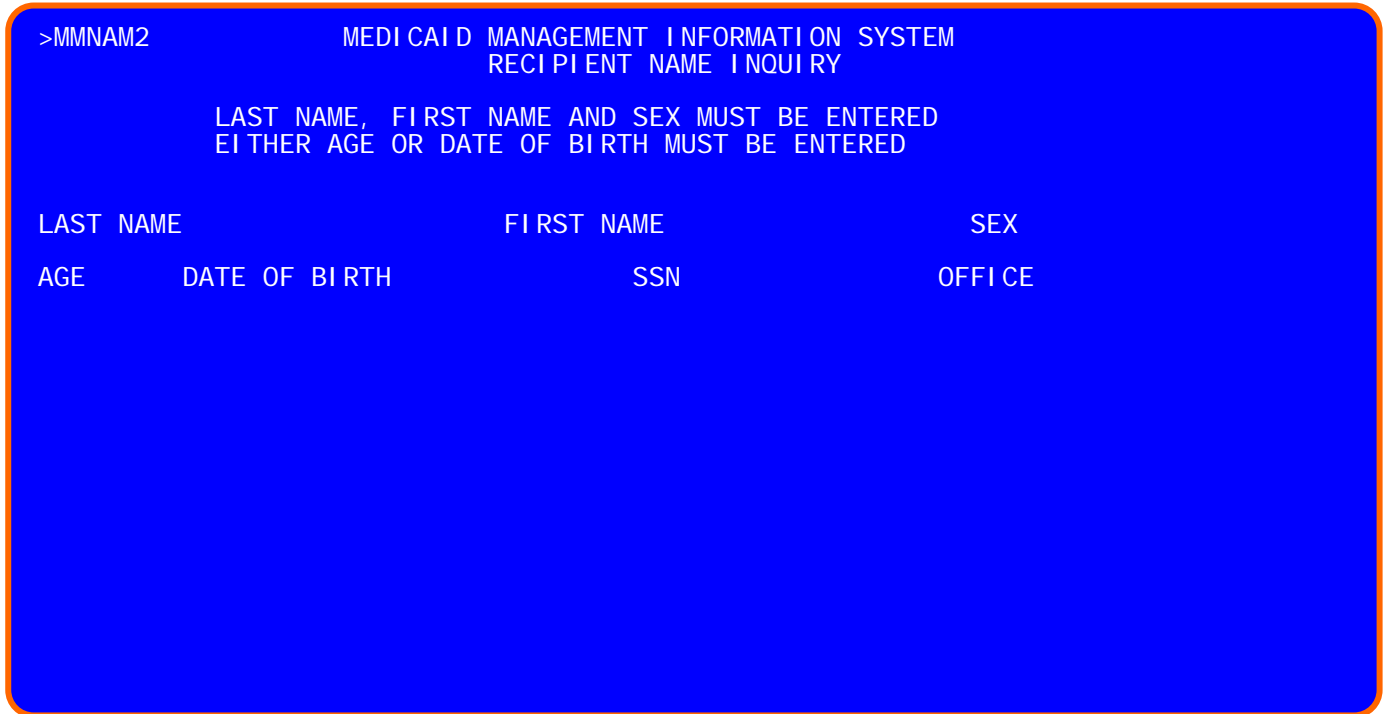


Figure 2 – Recipient Name Inquiry (MMNAME)

Purpose

This screen is used to enter criteria to inquiry the IREF database. Last Name, First Name, Sex, and either Age or Date of Birth are required fields.

Access

- Successful transmission of MMNAME on MMIMNU – Medicaid Management Information System Recipient Inquiry Menu, **or**
- Placing the cursor after the MMNAME prompt on the MMNAM2 - Recipient File Name Inquiry Response Screen and transmitting

Screen Response

Positive

- MMNAM2 – Recipient File Name Inquiry Response Screen displaying the results of the search based on the criteria entered on the MMNAME screen

### Negative

- One of the following messages displayed in the middle of the screen:
  - ENTER AGE OR DOB
  - ENTER DOB CENTURY
  - INCOMPLETE NAME
  - INVALID SEX CODE
  - NO INDIVIDUALS MATCH INPUT
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – MMNAME

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LAST NAME	24110 - SURNAME (17)	
FIRST NAME	24120 - GIVEN NAME (10)	
(NONE)	15005 - RECIPIENT NAME (MI) (1)	
SEX	15012 - RECIPIENT SEX (1)	
AGE	(NONE)	
DATE OF BIRTH	15010 - RECIPIENT DATE OF BIRTH (7)	
SSN	15031 - RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER (9)	
OFFICE	15014 - RECIPIENT LOCAL OFFICE NUMBER (3)	

MMNAM2- Recipient File Name Inquiry Response Screen

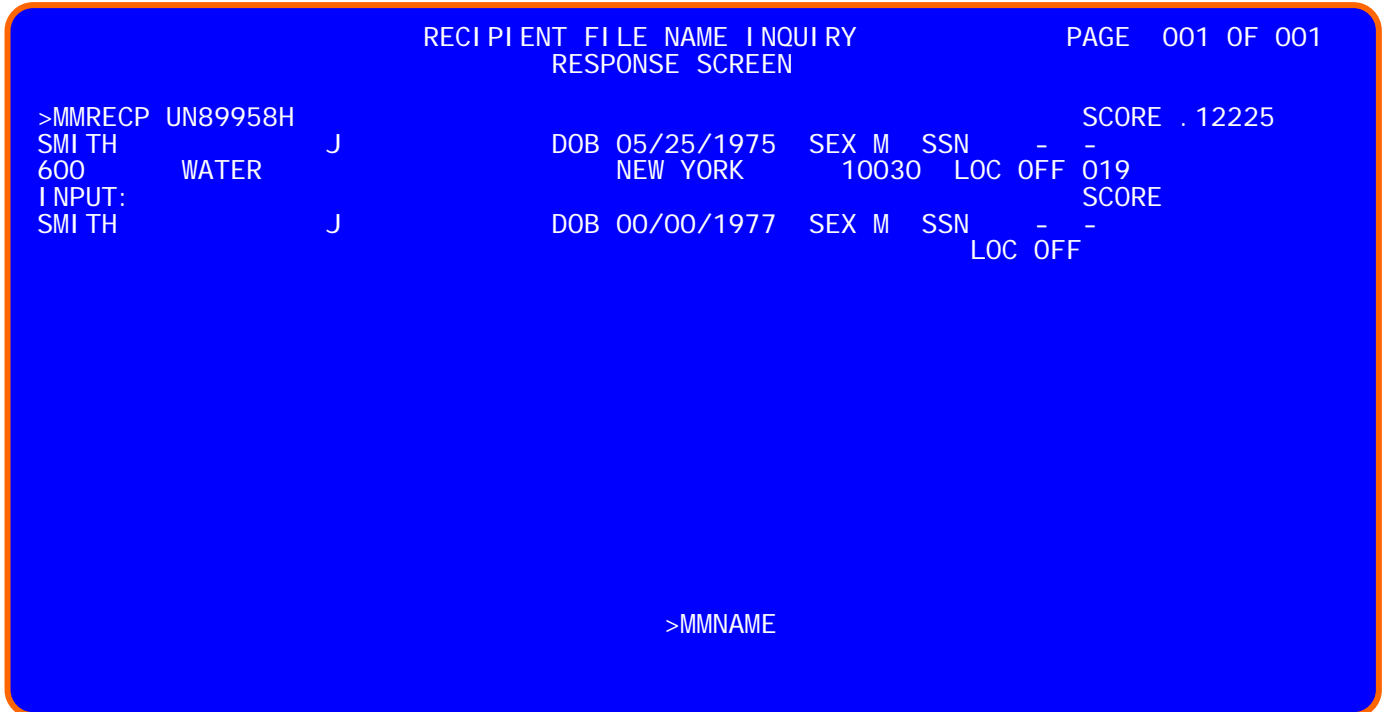


Figure 3 – Recipient File Name Inquiry Response Screen (MMNAM2)

Purpose

This screen displays information on recipients in the IREF database that matched the search criteria entered on the MMNAME - Recipient Name Inquiry Screen. For each recipient listed the probability that the recipient matched the criteria entered is displayed in the SCORE field. Matches are listed in descending order of the score.

At the end of the list of matches the search criteria is displayed under the heading INPUT. If Age was used as one of the criteria, it is not listed; however, the DOB will be displayed in the format 00/00/9999, where 9999 is the calculated year of birth based on the age entered.

Access

- Successfully transmitting the MMNAME - Recipient Name Inquiry Screen

Screen Response

Positive

- Returns the MMRECP - Recipient History Data Inquiry screen if a CIN is entered after the MMRECP prompt and transmitted
- Returns the MMNAME - Recipient Name Inquiry Screen if the cursor is placed after the MMNAME prompt and transmitted

### Negative

- The MMIMNU - Medicaid Management System Menu screen returned with the message, RECIPIENT NOT FOUND, displayed at the top of the screen.
- One of the following messages on Line 24:
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – MMNAM2

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SCORE	(NONE)	The probability the recipient matched the criteria entered
(NONE)	24110 - SURNAME (17)	
(NONE)	24120 - GIVEN NAME (10)	
(NONE)	15005 - RECIPIENT NAME (MI) (1)	
DOB	15010 - RECIPIENT DATE OF BIRTH (7)	
SEX	15012 - RECIPIENT SEX (1)	
SSN	15031 - RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER (9)	
(NONE)	15008 - RECIPIENT MAILING ADDRESS - STREET (35)	
(NONE)	15883 - RECIPIENT MAILING ADDRESS - CITY/TOWN (15)	
(NONE)	15009 - RECIPIENT MAILING ADDRESS - ZIP CODE (5)	
LOC OFF	15014 - RECIPIENT LOCAL OFFICE NUMBER (3)	
<b>INPUT:</b>		
SCORE	(NONE)	Only the label is displayed
(NONE)	24110 - SURNAME (17)	
(NONE)	24120 - GIVEN NAME (10)	
(NONE)	15005 - RECIPIENT NAME (MI) (1)	
DOB	15010 - RECIPIENT DATE OF BIRTH (7)	If age was entered as search criteria, 00/00/9999 will be displayed where 9999 is the calculated year based on the age entered.
SEX	15012 - RECIPIENT SEX (1)	
SSN	15031 - RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER (9)	
LOC OFF	15014 - RECIPIENT LOCAL OFFICE NUMBER (3)	

MMRECP – Recipient History Data Inquiry

```

>MMRECP LA81605J          >MMRSSN 123456789          >WMAMNQ * LA81605J P
>MMNANX                    >MMNAME
-          MEDI CAID MANAGEMENT INFORMATION SYSTEM          DATE 08/13/07
          RECIPIENT HISTORY DATA INQUIRY                    TIME 10:26:18
                                                                UPD ON 04/28/03
NAME ROMAN, CHRISTINA          SEX F   DOB 06/12/1982   SSN 123456789
CLIENT ID LA81605J          DIST 66   CASE # S4749756   OFFICE 071   SYSTEM F
OTHER ID                    CARD R
CASE OPENED THRU 09/30/89          ***** MAILING ADDRESS *****
*
* 177 SANDS STREET APT 100
* BROOKLYN NY 11201
*****
*   PP X   RR   PCP

BEGIN DATE  END DATE  MCD  CAT
NO ELIGIBILITY HISTORY
DURING THE PAST 36 MONTHS

```

Figure 4 – Recipient History Data Inquiry (MMRECP)

Purpose

This screen displays demographic data and Medicaid eligibility history for the last thirty-six months for a recipient.

Access

- Successful transmission of MMRECP on MMIMNU – Medicaid Management Information System Recipient Inquiry Menu after entering an CIN to the right of the MMRECP prompt, **or**
- Entering an CIN after the MMRECP prompt on the MMNAM2 - Recipient File Name Inquiry Response Screen and transmitting, **or**
- Entering an CIN after the MMRECP prompt at the top of the MMRECP - Recipient History Data Inquiry screen and transmitting, **or**
- Entering an CIN after the MMRECP prompt at the top of the MMRSSN - SSN Inquiry for MMRSSN screen and transmitting, **or**
- Placing the cursor after any MMRECP prompt in the list on the MMRSSN - SSN Inquiry for MMRSSN screen and transmitting



## Screen Response

### Positive

- Returns the MMRECP - Recipient History Data Inquiry screen if a CIN is entered after the MMRECP prompt and transmitted
- Returns the MMRSSN - SSN Inquiry for MMRSSN if an SSN is entered after the MMRSSN prompt and transmitted
- Returns the MMNAME - Recipient Name Inquiry Screen if the cursor is placed after the MMNAME prompt and transmitted
- Returns the MMNAME - Recipient Name Inquiry Screen with the search criteria fields populated with the latest data entered if the cursor is placed after the MMNANX prompt and transmitted
- Returns the WMPPIQ - Principal Provider Inquiry screen if there is a 'P' following the CIN displayed after the WMAMNQ prompt and the cursor is placed on or after the 'P' and transmitted
- Returns the WMRIQ - Restriction/Exception Inquiry screen if there is an 'R' following the CIN displayed after the WMAMNQ prompt and the cursor is placed on or after the 'R' and transmitted
- Returns the WMPCIQ - Prepaid Capitation Plan Inquiry screen if there is a 'C' following the CIN displayed after the WMAMNQ prompt and the cursor is placed on or after the 'C' and transmitted

### Negative

- The MMIMNU - Medicaid Management System Menu screen returned with one of the following messages displayed at the top of the screen;
  - ERROR IN FETCH OF IREF1 RECORD
  - NO MA-SUBSYSTEM DATA
  - SSN NOT FOUND
  - XXXXXXXXX IS NOT NUMERIC (where XXXXXXXXX is the character string entered by the MMRSSN prompt)
- One of the following messages on Line 24:
  - CIN NOT FOUND
  - NO MA SUBSYSTEM DATA
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

## Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – MMRECP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	15005 - RECIPIENT NAME (MI) (1)	
SEX	15012 - RECIPIENT SEX (1)	
DOB	15010 - RECIPIENT DATE OF BIRTH (7)	
SSN	15031 - RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER (9)	
CLIENT ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	
DIST	15927 - TRANSACTION DISTRICT (2)	
CASE	15928 - CASE NUMBER (10)	
OFFICE	15014 - RECIPIENT LOCAL OFFICE NUMBER (3)	
SYSTEM	15036 - RECIPIENT SYSTEM ID (1)	For NYC recipients indicates which system was used to determine eligibility

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
OTHER ID	15002 - PRIOR RECIPIENT IDENTIFICATION NUMBER (11)	
CARD	15035 - RECIPIENT CARD INDICATOR (1)	
CASE OPENED THRU	15038 - RECIPIENT OPEN/CLOSE DATE (6)	
MAILING ADDRESS	15007 - MAILING IN CARE OF "NAME"/ADDRESS (16)	
	15008 - RECIPIENT MAILING ADDRESS - STREET (35)	
	15883 - RECIPIENT MAILING ADDRESS - CITY/TOWN (15)	
	15009 - RECIPIENT MAILING ADDRESS - ZIP CODE (5)	
BEGIN DATE	15016 - RECIPIENT ELIGIBILITY BEGIN/END DATES (12)	First 6 characters
END DATE	15016 - RECIPIENT ELIGIBILITY BEGIN/END DATES (12)	Last 6 characters
MCD	15027 - RECIPIENT MEDICAID COVERAGE CODE (1)	
CAT	15015 - RECIPIENT AID CATEGORY/MONEY PAYMENT TYPE (2)	
PP	16099 - PRINCIPLE PROVIDER INDICATOR (1)	An 'X' is displayed in this field if the recipient has Principal Provider information
RR	16100 - RESTRICTED RECIPIENT INDICATOR (1)	An 'X' is displayed in this field if the recipient has Restricted information
PCP	16144 - RECIPIENT PCP INDICATOR FLAG (1)	An 'X' is displayed in this field if the recipient has Prepaid Capitation information

MMRSSH – SSN Inquiry for MMRSSH

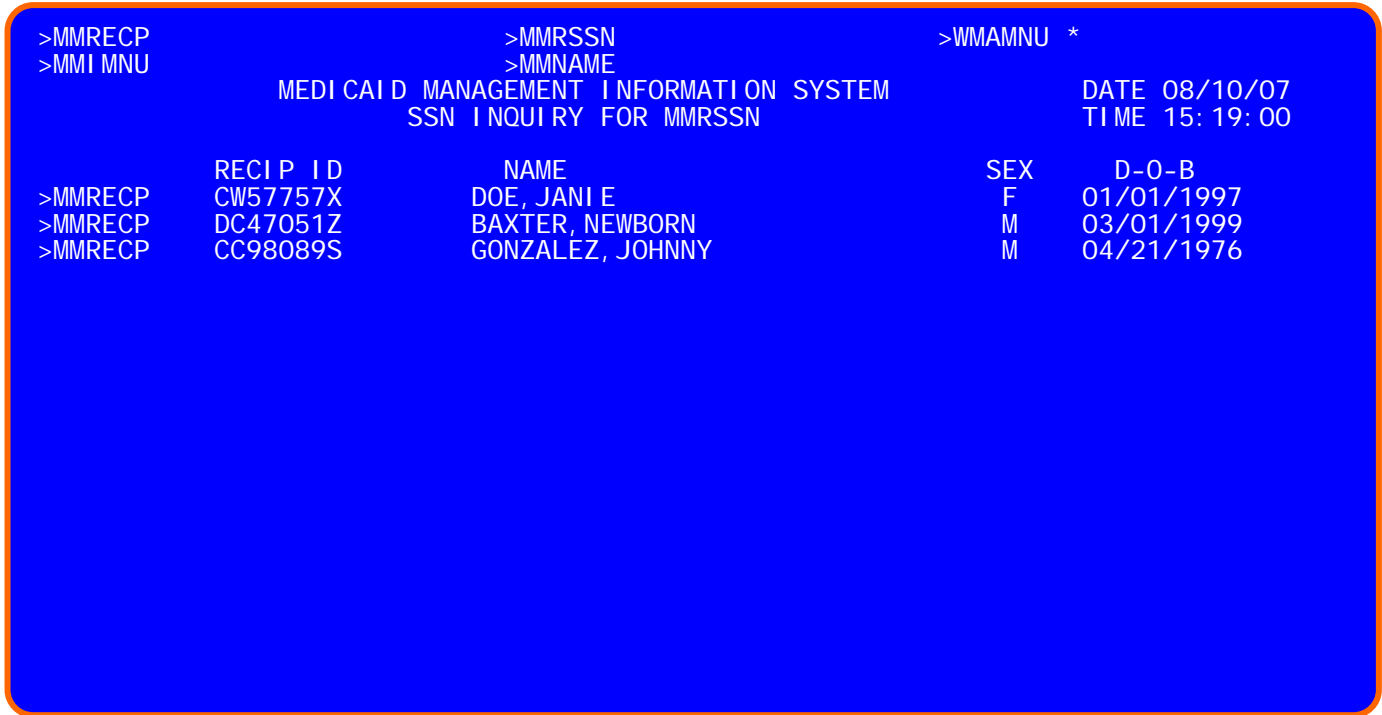


Figure 5 – SSN Inquiry for MMRSSH (MMRSSH)

Purpose

This screen lists all the recipients who's SSN matches the SSN entered when accessing this screen.

Access

- Successful transmission of MMRSSH on MMIMNU – Medicaid Management Information System Recipient Inquiry Menu after entering an SSN to the right of the MMRSSH prompt, **or**
- Entering an SSN after the MMRSSH prompt on the MMRECP - Recipient History Data Inquiry screen and transmitting, **or**
- Entering an SSN after the MMRSSH prompt on the MMRSSH - SSN Inquiry for MMRSSH screen and transmitting

Screen Response

Positive

- Returns the MMRECP - Recipient History Data Inquiry screen if a CIN is entered after the MMRECP prompt at the top of the screen and transmitted
- Returns the MMRSSH - SSN Inquiry for MMRSSH if an SSN is entered after the MMRSSH prompt and transmitted

- Returns the MMNAME - Recipient Name Inquiry Screen if the cursor is placed after the MMNAME prompt and transmitted

#### Negative

- The MMIMNU - Medicaid Management System Menu screen returned with one of the following messages displayed at the top of the screen;
  - ERROR IN FETCH OF IREF1 RECORD
  - SSN NOT FOUND
  - XXXXXXXXX IS NOT NUMERIC (where XXXXXXXXX is the character string entered by the MMRSSN prompt)
- One of the following messages displayed on line 24:
  - TRANSACTION UNKNOWN
  - Any Universal Screen Message – ee **SRM Access and Exit Procedures**

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu

Key	Description
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - MMRSSN

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
RECIP ID	03010 - CLIENT IDENTIFICATION NUMBER (8)	
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	15005 - RECIPIENT NAME (MI) (1)	
SEX	15012 - RECIPIENT SEX (1)	
D-O-B	15010 - RECIPIENT DATE OF BIRTH (7)	

# Periodic Client Contact and Reporting

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## Periodic Client Contacts

### Introduction

Periodically clients are contacted to determine if there are changes in their income or household that may affect their program eligibility and/or their benefit amount. These contacts may be face-to-face meetings or via report forms that are mailed to the client. Clients are required to answer the questions and send the completed forms back to the local district on or after the last day of a report period.

The Periodic Client Contact and Reporting system provides screens to record the date that completed reports are received from clients. For transitional MA cases failure to record a response will prompt WMS to generate and send a second report form. Second mailers are no longer generated for PA and FS cases, and the recording of receipt of completed reports for PA and FS cases is now optional for districts.

Screens are also provided to inquire on reports that have been sent and whether or not responses have been received for them.

### Periodic Reporting Procedures for PA and FS

Each month WMS sends Periodic Report Form LDSS-4310 to PA and FS clients whose cases meet policy based selection criteria. These report forms are generated by WMS in Albany on the fourth weekend of each month and mailed to the selected clients.

Case selection criteria and the number of reports that must be submitted per year vary by program area and is dependant on numerous factors. These include the presence of earned and/or unearned income on stored ABEL budgets, length of authorization periods, the presence of worker-entered Periodic Reporting Codes (both Periodic Required and Periodic Exempt Codes), Shelter Type Codes, Special Program Codes, Aged/Disabled flags on ABEL, Separate Determination Codes, etc.

Currently, the only PA cases that are sent form LDSS-4310 are those PA cases that participate in CAP (Child Assistance Program). For certain FS cases meeting different criteria, a FS Change Report Form (LDSS-3151) is also generated by WMS. Current Periodic reporting criteria can be found on-line in the "Upstate FS Change Reporting Desk-Aid" and in the "Upstate Periodic Reporting Desk-Aid". These publications are available on Centraport under the "Desk Guides/Aids" menu.

Case Number and date of receipt of reports can be entered on the WMRUP1 - Periodic Reporting Mailer Received for <MONTH> screen (<MONTH> is the appropriate month).

### Periodic Reporting Procedures for MA

Periodic Reporting is required for transitional MA cases (TMA) that are the result of a PA closing due to ineligibility because of increase in income either by more earnings or loss of the Earned Income Disregard of the caretaker/relative only. The MA case must contain a child under 21 and have been in receipt of PA in three of the previous six months. The MA is extended initially for six months. The case may be extended up to another six months if the Income, Household and Periodic Reporting requirements are met.



For details on all types of MA extensions, appropriate PA closing codes and MA extension opening codes, see **SRM Denials and Closings**.

### Mailing PA and FS Periodic Client Contact Datamailers

During the last week of each month, WMS searches for PA and FS cases which are due for periodic reporting. The cases which meet the requirements are sent a Periodic Datamailer to be completed by the client and returned to the Local District by the 10th of the month following the month in which they are mailed. The Case Number and date of receipt are entered on WMRUP1 - Periodic Reporting Mailer Received for <MONTH> screen (<MONTH> is the appropriate month).

### Mailing Procedures for MA Periodic Reporting

During the last weekend of each month, WMS searches for MA cases which meet the criteria for periodic reporting. The cases which meet the criteria are sent a Periodic Reporting form to be completed by the client and returned to the Local District. Information from the form is entered on the Periodic Mailer Entry Screen - WRQENT. If the forms are not received and data entered by the due dates, WMS searches for those cases and sends out a second form for completion. If forms are received and clients still meet the requirements for eligibility, the process continues as shown in the following **Timetable for MA Periodic Reporting**.

### Timetable for MA Periodic Reporting

The example shown in the third column is for an extended MA case with an Authorization FROM DATE of January 1. The start of Periodic Reporting six months extension is February 1.

DATE	ACTION	EXAMPLE
20th day of the 3rd month of the initial 6 month extension	Third Month Periodic Report Sent	April 20
7th day of the 4th month of the initial 6 month extension	Due Date for Third Month Periodic Report	May 7
<b>IF NO RESPONSE, then:</b>		
10th day of the 4th month of the initial 6 month extension	Follow-up Third Month Periodic Report Sent	May 10
21st day of the 4th month of the initial 6 month extension	Due Date for Follow-up Third Month Periodic Report	May 21
On or about the 20th day of the 6th month	Sixth Month Periodic Report Sent (If Periodic Reporting, Household and Income Requirements are met)	July 20
7th day of the 7th month	Due Date for Sixth Month Periodic Report	August 7
<b>IF NO RESPONSE, then</b>		
10th day of the 7th month	Follow-up Sixth Month Periodic Report Sent	August 10
21st day of the 7th month	Due Date for Follow-up Sixth Month Periodic Report	August 21

## PAFS and MA Periodic Reporting Menus and Screens

To access the first menu screen, PAFS & MA PERIODIC REPORTING is selected on WMSMNU - WMS Menu. WMRSDDT - PAFS & MA Periodic Reporting Screen is returned which allows selection of either WMRMNU - PAFS Periodic Contact or WRQMNU - MA Periodic Reporting Menu.

### PAFS Periodic Contact Input Screen

The WMRMNU - PAFS Periodic Contact Menu allows input or inquiry for either the current month or the previous month. The WMRMNU screen also allows selection of all the district's cases or cases by office, unit and worker. To record the response to a mailer, PERIODIC CONTACT UPDATE RECEIVED (UP1) is selected on WMRMNU. The screen returned is WMRUP1 - Periodic Contact Datamailer Received for <MONTH>. (<MONTH> = the current or previous month depending on the selection made.) If the Previous Month is selected for input, then the transaction day must be the 12th or earlier of the current month. On WMRUP1, Case Number and the date the report is received are required entries. Up to 15 responses may be entered on WMRUP1. After transmitting, either the acceptance message UPDATED or an error message indicating either an INVALID RETURN DATE or an INVALID CASE NUMBER is returned to the right of each line.

### MA Periodic Reporting Input Screens

Selections on the WRQMNU - MA Periodic Reporting Menu allow for input or inquiry for either the current month or the previous month. The WRQMNU screen also allows for the selection of all the district's cases or for cases by office, unit and worker.

To record an initial response to a Periodic report or to add data, PERIODIC REPORTING MAILER ENTRY is selected on WRQMNU. The screen returned is WRQENT - Periodic Reporting Mailer Entry for <MONTH> (<MONTH> = the current month or previous month depending on the selection made on WRQMNU). On WRQENT, Case Number is the only required entry. The remaining fields, available for entering evaluation data, may be completed during initial entry of the response or they may be left blank and completed later. Up to 15 responses may be entered on WRQENT. After transmitting, the data is edited and either an acceptance message or error message is returned to the right of each line. If a response is entered in WRQENT by the 10th of the 4th month, no follow-up report will be sent. For updating previous month's responses, WRQENT is available until the 12th of the month following the report month.

To record changes, deletions or corrections to data previously entered, PERIODIC REPORTING MAILER UPDATE FOR <MONTH> is selected on WRQMNU. The screen returned is WRQUPD - Periodic Reporting Mailer Update for <MONTH> (<MONTH> = the current month or previous month depending on the selection made on WRQMNU). WRQUPD is returned displaying the case numbers and associated data (if any) previously entered on WRQENT or WRQUPD. Information is updated by locating the Case Number and entering the desired information. The only protected field is Case Number. All other fields may be changed, entered or deleted. After transmitting, the screen is edited and either an acceptance message or an error message is returned to the right of each updated line. For updating the previous month's responses WRQUPD is available until the 12th of the second month following the report month.

### PA Periodic Client Contact Inquiry Screens

There are two inquiry screens which may be selected on the PAFS PERIODIC REPORTING MENU:

- WMRIN1 - PERIODIC CONTACT DATAMAILER SENT FOR <MONTH>. (<MONTH> = the current month or previous month depending on selection made on WMRMNU). This screen displays the latest Case

Number, Case Name, Case Type, Selection Reason and Return Date that has been entered for all cases that were sent Datamailers.

- WMRIN2 - PERIODIC CONTACT NO RESPONSE FOR <MONTH>. (<MONTH> = the current month or previous month depending on selection made on WMRMNU). This screen initially lists all cases which have not had a data entered response. As responses are registered on WMRUP1, the cases are deleted from this screen. Cases which were closed due to NO RESPONSE continue to appear on WMRIN2.

#### MA Periodic Reporting Inquiry Screens

There are three inquiry screens which may be selected on the MA PERIODIC REPORTING MENU:

- WRQIN1 - PERIODIC REPORTS SENT FOR <MONTH> (<MONTH> = the current month or previous month depending on selection made on WRQMNU). This screen displays the latest Periodic Reporting data that has been entered for all cases that were sent Periodic Reports and follow-up reports.
- WRQIN2 - PERIODIC REPORT NO RESPONSE FOR <MONTH> (<MONTH> = the current month or previous month depending on selection made on WRQMNU). This screen initially displays all cases sent a Periodic Report. As responses are registered on WRQENT, the cases are deleted from the screen. Cases which were closed due to NO RESPONSE continue to appear on WRQIN2.
- WRQIN3 - PERIODIC REPORTS - 4 QUARTER HISTORY - This screen is accessed by entering the desired CASE NUMBER on WRQMNU. All Periodic Reporting Information entered during the previous four quarters for the specified Case Number is displayed on WRQIN3.

WMRSDT – PA/FS and MA Periodic Reporting

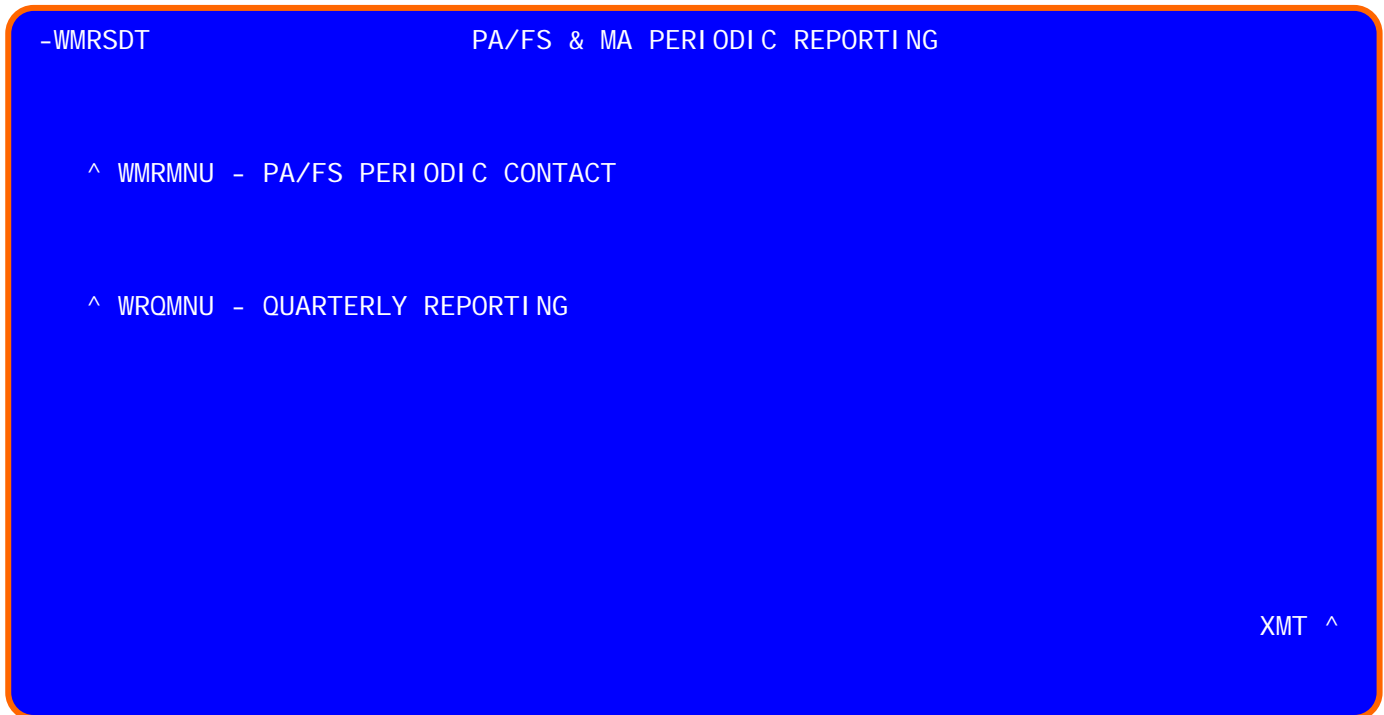


Figure 1 – PA/FS and MA Periodic Reporting (WMRSDT)

Purpose

This screen is used to select the desired Periodic Reporting Menu.

Access

- Entering 24 on WMSMNU – WMS Menu and transmitting

Screen Response

Positive

- WMRMNU – PA/FS Periodic Contact Menu if WMRMNU – PA/FS QUARTERLY CONTACT is selected
- WRQMNU – MA Quarterly Reporting Menu if WRQMNU – QUARTERLY REPORTING is selected

Negative

- One of the following messages on Line 24:
  - CURSOR MUST BE IN XMIT POSITION - REXMT
  - PLEASE MAKE A SELECTION

- SELECT ONLY ONE SELECTION
- Any Universal Screen Message – see **SRM Access and Exit Procedures**

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS – Budget Calculation Menu
F2	WBMAMU – MA Budget Calculation Menu
F3	WST001 – Statistics Menu
F4	WAR001 – Applications Register
F5	WDENIL – Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU – Non-Services Data Entry Menu
F9	WSEMNU – Services Full Date Entry Menu
F10	WSUMNU – Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 – WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 – Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU – RFI Menu
Ctrl+F5	LDMENU – LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 – Time Limit Tracking Inquiry
Ctrl+F8	WASI01 – Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU – Child Care Review Service
Ctrl+F10	WMEEMN – EEDSS Host System Menu
Ctrl+F11	W4139R – Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 – Domestic Violence Data Collection Menu

#### Screen Field Description – WMRDST

Not Applicable

WMRMNU – PA/FS Periodic Contact Menu

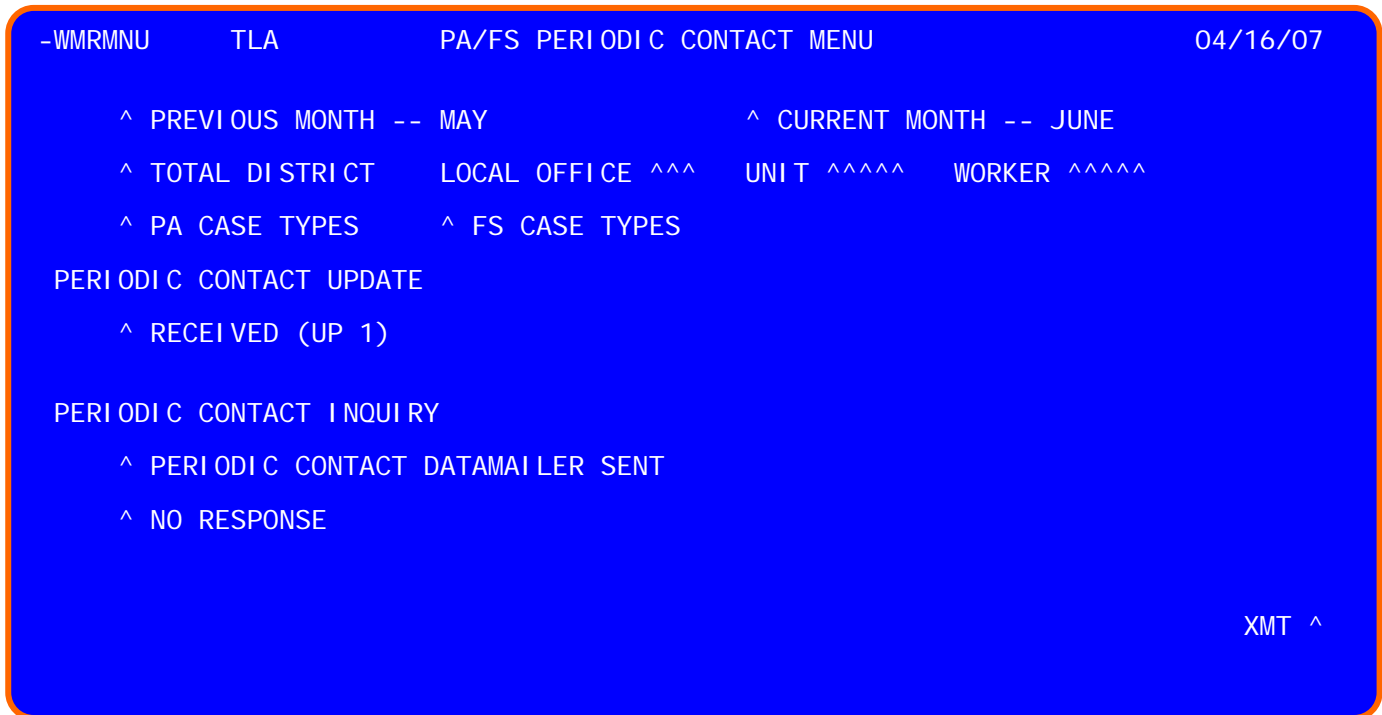


Figure 2 – PA/FS Periodic Contact Menu (WMRMNU)

Purpose

This screen is used to select the desired Periodic Contact or Inquiry screens for the previous or current month for the total District or for Local Office and/or Unit and/or Worker.

Access

- Selecting WMRMNU – PA/FS PERIODIC CONTACT on WMRSDT – PA/FS and MA PERIODIC REPORTING

Screen Response

Positive

- WMRUP1 if QUARTERLY CONTACT UPDATE RECEIVED (UP1) is selected, or
- WMRIN1 if QUARTERLY CONTACT INQUIRY DATAMAILER SENT FOR <MONTH> is selected, or
- WMRIN2 if QUARTERLY CONTACT INQUIRY NO RESPONSE is selected

Negative

- One of the following messages on Line 24:

- ALL CASES HAVE RESPONDED
- CURSOR MUST BE IN XMIT POSITION - REXMT
- DEADLINE FOR PREVIOUS MONTH UPDATE HAS PASSED
- LOCAL OFFICE NOT FOUND
- NO QUARTERLY CONTACT DATAMAILER SENT
- PLEASE MAKE AN UPDATE OR INQUIRY SELECTION
- PLEASE MAKE DISTRICT OR LOCAL OFFICE, UNIT, WORKER SELECTIONS
- PLEASE SELECT EITHER CURRENT MONTH OR PREVIOUS MONTH
- SECOND MAILER LIST NOT AVAILABLE
- SF99 NOT SUPPORTED - REXMT (99 = 3-5, 7-22)
- TRANSACTION CODE INVALID (displayed when F1 is pressed)
- UNIT NOT FOUND
- WORKER NOT FOUND
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F2	WBMAMU – MA Budget Calculation Menu
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMSMNU – WMS Menu

Screen Field Description – WMRMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LOCAL OFFICE	01020 – LOCAL OFFICE NUMBER (3)	
UNIT	01030 – UNIT IDENTIFIER (5)	
WORKER	01040 – WORKER IDENTIFIER (5)	

WMRUP1 – Periodic Contact Datamailer Received for <MONTH>

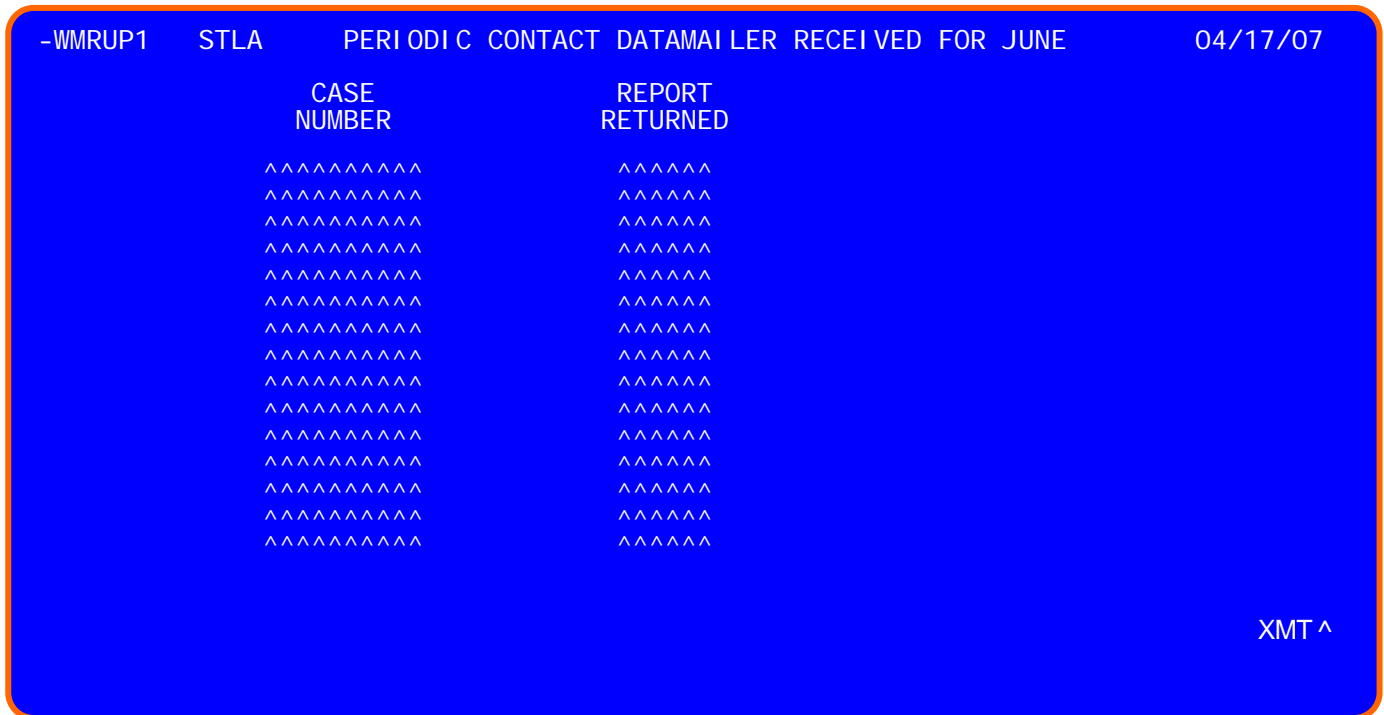


Figure 3 – Periodic Contact Datamailer Received for <MONTH> (WMRUP1)

#### Purpose

This screen is used to record Case Number and Date the report is returned. The screen will be for the current month or previous month depending on selection made on WMRMNU - PA/FS Quarterly Contact Menu. Since second mailers are no longer automatically generated if a Report Returned date is not entered, entry on this screen is optional.

#### Access

- Selecting QUARTERLY CONTACT UPDATE - RECEIVED (UP1) on WMRMNU - PA/FS Quarterly Contact Menu

#### Screen Response

##### Positive

- The following message after each accepted line: UPDATED

##### Negative

- One of the following messages after the appropriate line:
  - INV RET DT (if Return Date entered is before or same as Report Pulldown Date or later than today's Date)



- INV CASE NO (not found on Quarterly Reporting File)
- One of the following messages on Line 24:
  - CURSOR MUST BE IN XMIT POSITION - REXMT
  - PLEASE ENTER DATA OR SF6
  - SF99 NOT SUPPORTED - REXMT (99 = 2-5, 7-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	WMRUP1 with no data
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRMNU – PA/FS Periodic Contact Menu

Screen Field Description – WMRUP1

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
REPORT RETURNED	01500 – REPORT RETURNED DATE (6)	

WMRIN1 – Periodic Contact Datamailer Sent for <MONTH>

>WMRIN1 STLA PERIODIC CONTACT DATAMAILER SENT FOR NOVEMBER 01/26/93 PAGE 001						
CASE NUMBER	LOCAL OFFICE	CASE NAME	UNIT	WORKER	RETURN DATE	
OCC10		CAREY MOORE		12	2	011093
OCC16		ELEANOR NORSE		14	3	011193
OCC28		JEAN CRANE		31	B	011193
OCC29		JUNE DEARBORN		31	C	011193
OCC33		ELLY HART		31	2	011193
OCC34		SHAWN DRUMMOND		31	2	011193
OCC35		TIM STANTON		31	2	011193
OCC192		TOM TRACY		11	2	011193

XMT ^

Figure 4 – Periodic Contact Datamailer Sent for <MONTH> (WMRIN1)

**Purpose**

This screen displays a list of cases that have been sent a Periodic Datamailer. Response information is also displayed as it was input on the Update screen. This screen may be for the current month or previous month depending on selection made on WMRMNU - PA/FS Quarterly Contact Menu.

**Access**

- Selecting QUARTERLY CONTACT INQUIRY - QUARTERLY CONTACT DATAMAILER SENT on WMRMNU - PA/FS Quarterly Contact Menu

**Screen Response**

**Positive**

- See **Function Keys**.

**Negative**

- One of the following messages on Line 24:
  - ALREADY ON LOWEST PAGE
  - INVALID SF-KEY GOT PAST MM0050. REPORT PROBLEM.

- NO MORE DATA
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-22)
- XMT INVALID: MUST HIT SF-KEY
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WDENIL - Application/Services Denial Process

Screen Field Description - WMRIN1

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER(10)	
CASE NAME	01070 – CASE NAME (28)	
CASE TYPE	01060 – CASE TYPE (2)	
SELECT CODE	01580 – QUARTERLY SELECTION REASON (1)	
RETURN DATE	01500 – REPORT RETURNED DATE (6)	

WMRIN2 – Periodic Contact No Response for <MONTH>

WMRI N2	STLA	PERIODIC CONTACT NO RESPONSE FOR	NOVEMBER	08/12/93 PAGE 001	
	LOCAL OFFICE	UNIT 1M	WORKER GZ		
CASE NUMBER	CASE NAME	CASE TYPE	SELECT CODE		
QCC59	JANET MOORE	11	2		
QCC6	PHYLLIS MANN	16	3		
QCC61	JOHN LONG	11	2		
QCC62	JIM BRANDON	17	C		
QCC63	KAREN LOLLY	14	2		
QCC64	CHRIS MANEY	16	2		
QCC65	SILVIA SIMON	17	2		
QCC66	ROBERTO RESTON	11	B		
QCC67	WILMA NORTON	12	2		
QCC68	PHILLIP FARMER	16	2		
QCC69A	JONAS JAMES	16	2		
QCC7	MILTON STONEY	17	3		
QCC70A	PRYOR JENSON	17	2		
QCC71A	BART BENSON	11	2		
QCC72	EDITH MILLER	31	E		

XMT ^

Figure 5 – Periodic Contact No Response for <MONTH> (WMRIN2)

**Purpose**

This screen displays a list of cases sent a Periodic Datamailer which have not had a response entered on the update screen. This screen may be for the current month or previous month depending on the selection made on WMRMNU.

**Access**

- Selecting PERIODIC CONTACT INQUIRY - NO RESPONSE on WMRMNU - PA/FS Quarterly Contact Menu.

**Screen Response**

**Positive**

- See **Function Keys**.

**Negative**

- One of the following messages on Line 24:
  - ALREADY ON LOWEST PAGE
  - INVALID SF-KEY GOT PAST MM0050. REPORT PROBLEM.

- NO MORE DATA
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-22)
- XMT INVALID: MUST HIT SF-KEY
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMRMNU – PA/FS Periodic Contact Menu

Screen Field Description – WMRIN2

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
CASE NAME	01070 – CASE NAME (28)	
CASE TYPE	01060 – CASE TYPE (2)	
SELECT CODE	01580 – QUARTERLY SELECTION REASON (1)	

WRQMNU – MA Quarterly Reporting Menu

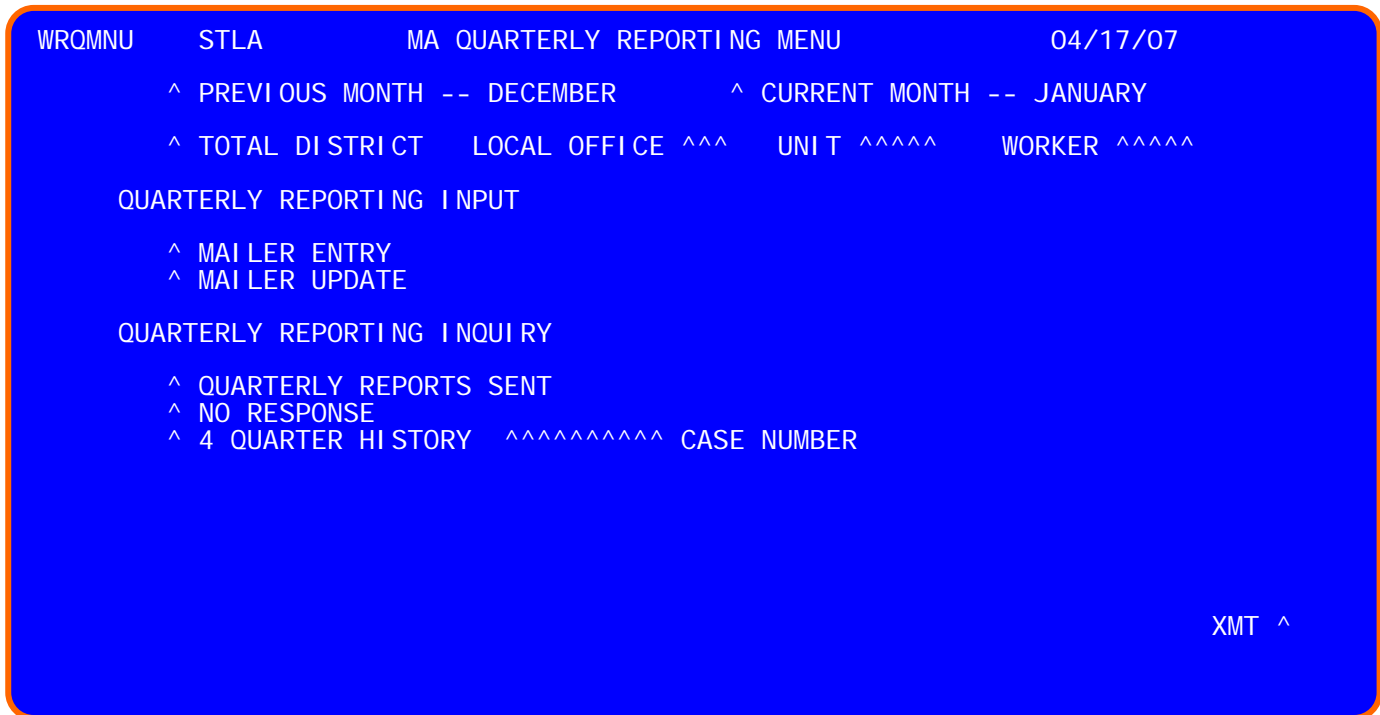


Figure 6 – MA Quarterly Reporting Menu (WRQMNU)

Purpose

This screen is used to select the desired MA Quarterly Reporting Input or Inquiry screens for the previous or current month for the total District or local office and/or unit and/or worker.

Access

- Selecting WRQMNU - QUARTERLY REPORTING on WMRSDDT - PA/FS & MA Quarterly Reporting

Screen Response

Positive

- WRQENT if MAILER ENTRY is selected, or
- WRQUPD if MAILER UPDATE is selected, or
- WRQIN1 if QUARTERLY REPORTS SENT is selected, or
- WRQIN2 if NO RESPONSE is selected, or
- WRQIN3 if 4 QUARTER HISTORY is selected and Case Number entered

### Negative

- One of the following messages on Line 24:
  - ALL CASES HAVE RESPONDED
  - CURSOR MUST BE IN XMIT POSITION - REXMT
  - DEADLINE FOR PREVIOUS MONTH UPDATE HAS PASSED
  - EXAMINE BLINKING FIELDS
  - LOCAL OFFICE NOT FOUND
  - NO DATA FOUND
  - NO QUARTERLY REPORT SENT
  - NO SECOND MAILERS SENT
  - NOT FOUND
  - PLEASE MAKE AN UPDATE OR INQUIRY SELECTION
  - PLEASE MAKE DISTRICT OR LOCAL OFFICE, UNIT, WORKER SELECTIONS
  - PLEASE SELECT EITHER CURRENT MONTH OR PREVIOUS MONTH
  - SECOND MAILER LIST NOT AVAILABLE
  - SF99 NOT SUPPORTED - REXMT (99 = 2-5, 7-22)
  - UNIT NOT FOUND
  - WORKER NOT FOUND
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Response

None

### Function Keys

Key	Screen
F1	WMSMNU – WMS Menu
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WMSMNU – WMS Menu

Screen Field Description – WRQMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LOCAL OFFICE	01020 – LOCAL OFFICE NUMBER (3)	
UNIT	01030 – UNIT IDENTIFIER (5)	
WORKER	01040 – WORKER IDENTIFIER (5)	
CASE NUMBER	01050 – CASE NUMBER (10)	



WRQENT – Quarterly Reporting Mailer Entry for <MONTH>

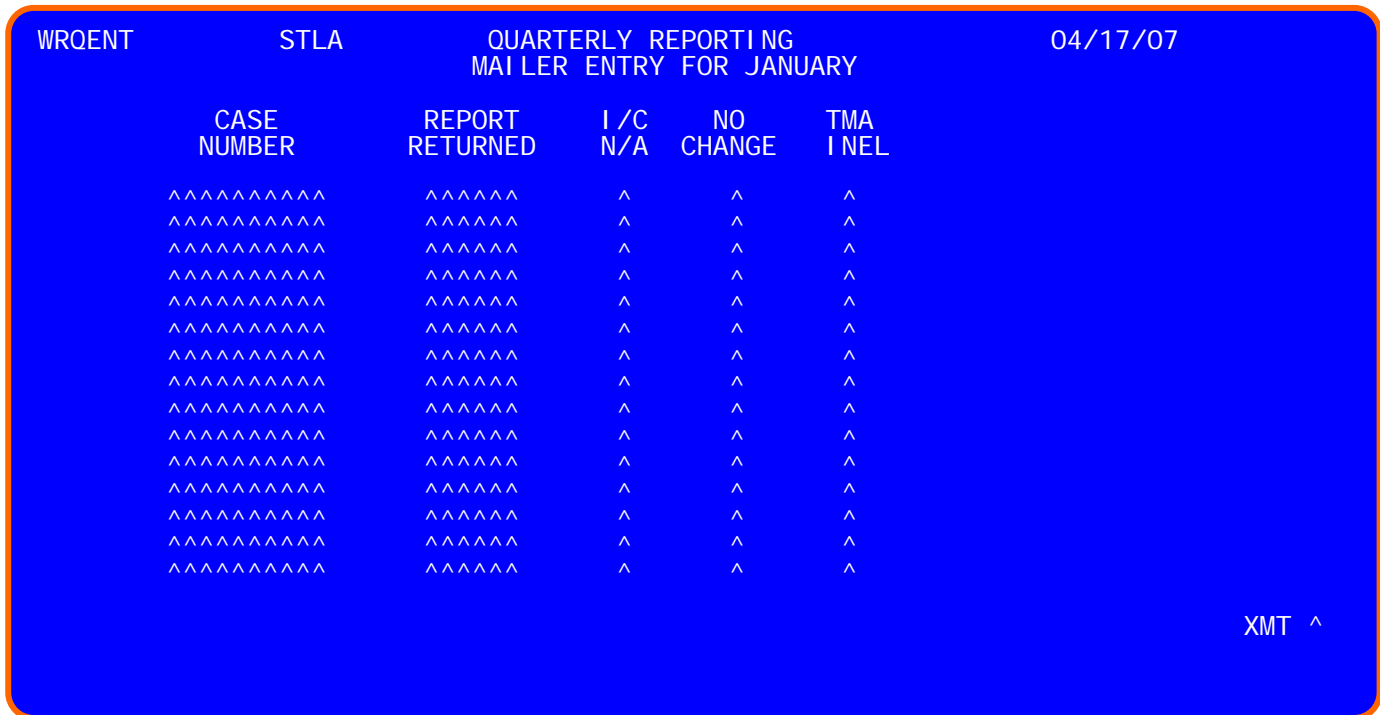


Figure 7 – Quarterly Reporting Mailer Entry for <MONTH> (WRQENT)

Purpose

This screen is used to record initial Quarterly Reporting responses and evaluation data for transitional MA cases for the current month or previous month depending on selection made on WRQMNU - MA Quarterly Reporting Menu. If the Report Returned date is not entered by the due date (see **Timetable for MA Periodic Reporting**), a second follow-up mailer is automatically sent to the client.

Access

- Selecting QUARTERLY REPORTING INPUT - MAILER ENTRY on WRQMNU - MA Quarterly Reporting Menu

Screen Response

Positive

- The following message after each accepted line: UPDATED

Negative

- The following message after each line that matches data already entered: UNCHANGED plus the message SF-1 FOR ADDITIONAL ENTRY on line 24, or

- One of the following messages after each line with an error with the message CORRECT FLASHING FIELDS - TRANSMIT on line 24: (See Edit descriptions at the end of this section.)
  - INPUT-ERR - A data entry field in the entry line has not passed presence or validity edits. Failure of the following edits will cause the INPUT-ERR messages to be displayed:
    - Case Number – must be entered if any other data is entered on the same line
    - Reported Returned – if entered, must be a valid calendar date and be later than the pull down date and earlier than or equal to today's date
    - I/C/NA – if entered must be I (Incorrect), C (Complete) or N (Not Applicable/Wrong Address). If N, then the Report Returned Date and No Change must be blank.
    - No Change – if entered, must be X and I/C/NA must be C. Report returned Data and No Change must be blank
  - CHANGE-ERR - Information newly entered on WRQENT is different from data previously entered. WRQUPD must be used to change data.
  - CONCURRENT - More than one person is attempting to update the same case at the same time.
  - CONFLICT - New information entered on WRQENT is inconsistent with information previously entered. Use WRQUPD to resolve conflict situations.
  - NOT FOUND - Case number entered is not on the Quarterly Reporting File, and therefore no mailer was sent
  - UNCHANGED - Case Number and any associated data entered on WRQENT matches data already entered on WRQENT
- One of the following messages on line 24:
  - CURSOR MUST BE IN XMIT POSITION - REXMT
  - PLEASE ENTER DATA OR SF6
  - SF99 NOT SUPPORTED - REXMT (99 = 2-5, 7-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Screen
F1	WRQENT – with no data

WMS SYSTEM REFERENCE MANUAL  
 PERIODIC CLIENT CONTACT AND  
 REPORTING

Key      Screen  
 F6      *Renders Workstation Inactive*  
 Ctrl+F6      WRQMNU – MA Quarterly Reporting Menu

Screen Field Description – WRQENT

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
REPORT RETURNED	01500 – REPORT RETURNED DATE (6)	
I/C or N/A	01510 – REPORT COMPLETE/INDICATOR (1)	Displays “I” for incomplete, “C” for complete, or “N” for Not Applicable.
NO CHANGE	01520 – MR NO CHANGE FLAG (1)	
TMA INEL	01530 – MR CASE CLOSED CODE (1)	

WRQUPD – Quarterly Report Mailer Update for <MONTH>

>WRQUPD					09/02/93	
STLA					PAGE 1	
QUARTERLY REPORTING						
MAILER UPDATE FOR JULY						
CASE NUMBER	LOCAL OFFICE REPORT RETURNED	UNIT		WORKER TMA I NEL		
		I /C N/A	NO CHANGE			
MA340	080393	^	^	^		
MA358	080793	C	^	^		
MA198	080693	I	^	^		
MA286	080693	C	^	^		
MA219	082393	C	^	^		
MA158	082393	C	^	^		
MA349	082493	I	^	^		
MA340	080993	I	^	^		
MA286	^^^^^^	N	^	^		

XMT ^

Figure 8 – Quarterly Report Mailer Update for <MONTH> (WRQUPD)

**Purpose**

This screen is used to update a case for which a response has been entered on WRQENT. Also used to add, change or delete data previously entered on WRQENT or WRQUPD. Screen is for current or previous month depending on selection made on WRQMNU - MA Quarterly Reporting Menu.

**Access**

- Selecting QUARTERLY REPORTING INPUT - MAILER UPDATE on WRQMNU - MA Quarterly Reporting Menu.

**Screen Response**

**Positive**

- The message CHANGE on each accepted line plus message SF2 FOR ADDITIONAL DATA on line 24

**Negative**

- The following message after each line with an error: INPUT ERR with the message CORRECT FLASHING FIELDS - TRANSMIT on line 24 (See Error Messages and Edit descriptions.)

- INPUT-ERR - A data entry field in the entry line has not passed presence or validity edits. The messages INPUT-ERR is displayed on WRQUPD when the data entered does not pass any of the edits listed below:
  - Case Number – returned by system and cannot be changed.
  - Reported Returned – returned by system and if changed must be a valid calendar date and be later than the pull down date and earlier than or equal to today's date
  - I/C/NA – returned by system and if changed, must be I (Incorrect), C (Complete) or N (Not Applicable/Wrong Address). If N, then the Report Returned Date and No Change must be blank.
  - No Change – if entered, must be X and I/C/NA must be C. TMA Ineligible must be blank.
  - TMA Ineligible - if entered, must be X and I/C/NA must be C, N, or I. If N, then Report Returned Data and No Change must be blank.
- UPDATED - Information newly changed is displayed on WRQUPD when it is different from data previously entered.
- CONCURRENT - More than one person is attempting to update the same case at the same time
- One of the following messages on line 24:
  - ALREADY ON LOWEST PAGE
  - CURSOR MUST BE IN XMIT POSITION - REXMT
  - NO MORE DATA
  - PLEASE ENTER DATA OR SF KEY
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Response

None

#### Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>

Key      Screen  
 Ctrl+F6      WRQMNU – MA Quarterly Reporting Menu

Screen Field Description – WRQUPD

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
REPORT RETURNED	01500 – REPORT RETURNED DATE (6)	
I/C or N/A	01510 – REPORT COMPLETE/INDICATOR (1)	Displays “I” for incomplete, “C” for complete, or “N” for Not Applicable.
NO CHANGE	01520 – MR NO CHANGE FLAG (1)	
TMA INEL	01530 – MR CASE CLOSED CODE (1)	

WRQIN1 - Quarterly Reports Sent for <MONTH>

>WRQIN1		CHEM	QUARTERLY REPORTS SENT FOR JULY						09/02/93						
		LOCAL OFFICE	UNIT	WORKER						PAGE 0001					
CASE NUMBER	CASE NAME			Q	F	RETURN	I	N	N	S	RETURN	I	N	N	T
				C	M	DATE	C	C	R	M	DATE	C	C	R	I
MAQ13	BERRY DEBRA		2	X		080693									
MAQ68	CHRISTMAN JAMES		1	X					X	X					X
MAQ23	DEK MARY		2	X					X	X					X
MAQ52	HOLLEY ANNETTE		2	X					X	X	080393	C			

Figure 9 – Quarterly Reports Sent for <MONTH> (WRQIN1)

Purpose

This screen displays a list of cases that have been sent a Quarterly Report. Response information is also displayed as it is recorded on the Update screens for Quarterly Reports and follow-up reports. This screen may be for the current month or previous month depending on selection made on WRQMNU - MA Quarterly Reporting Menu.

Access

- Selecting QUARTERLY REPORTING INQUIRY - QUARTERLY REPORTS SENT on WRQMNU - MA Quarterly Reporting Menu.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:
  - ALREADY ON LOWEST PAGE

WMS SYSTEM REFERENCE MANUAL  
 PERIODIC CLIENT CONTACT AND  
 REPORTING

- NO MORE DATA
- SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

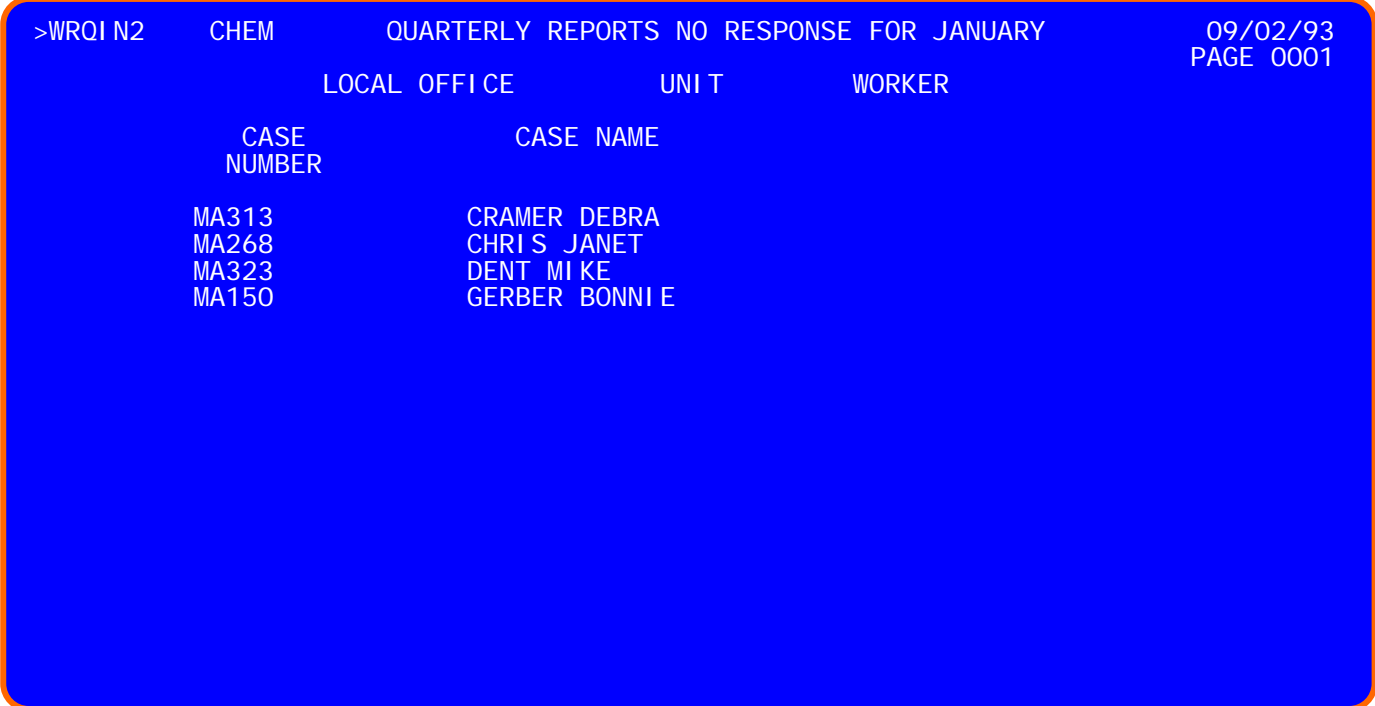
Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WRQMNU – MA Quarterly Reporting Menu

Screen Field Description – WRQIN1

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
CASE NAME	01070 – CASE NAME (28)	
QC	24741 – QUARTERLY INDICATOR (1)	
FM	NONE	System generated. Contains "X" if the first mailer was sent.
RETURN DATE	01500 – REPORT RETURN DATE (6)	
IC	01510 – REPORT COMPLETE/INCOMPLETE (1)	
NC	01520 – MR NO CHANGE FLAG (1)	
NR	NONE	System generated. Contains "X" if the RETURN DATE is blank.
SM	NONE	System generated. Contains "X" if the second mailer was sent.
RETURN DATE	01500 – REPORT RETURN DATE (6)	
IC	01510 – REPORT COMPLETE/INCOMPLETE (1)	
NC	01520 – MR NO CHANGE FLAG (1)	
NR	NONE	System generated. Contains "X" if the RETURN DATE is blank.
TI	01530 – MA CASE CLOSED CODE (1)	



WRQIN2 – Quarterly Report No Response for <MONTH>



>WRQIN2	CHEM	QUARTERLY REPORTS NO RESPONSE FOR JANUARY			09/02/93
		LOCAL OFFICE	UNIT	WORKER	PAGE 0001
	CASE NUMBER	CASE NAME			
	MA313	CRAMER DEBRA			
	MA268	CHRIS JANET			
	MA323	DENT MIKE			
	MA150	GERBER BONNIE			

Figure 10 – Quarterly Report No Response for <MONTH> (WRQIN2)

#### Purpose

This screen displays a list of cases sent a Quarterly Report which have not had a response entered on one of the Update screens. This screen may be for the current month or previous month depending on the selection made on WRQMNU - MA Quarterly Reporting Menu.

#### Access

- Selecting QUARTERLY REPORTING INQUIRY NO RESPONSE on WRQMNU - MA Quarterly Reporting Menu.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on line 24:
  - ALREADY ON LOWEST PAGE

- NO MORE DATA
- SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-22)
- XMIT INVALID: MUST HIT SF-KEY
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WRQMNU – MA Quarterly Reporting Menu

Screen Field Description – WRQIN2

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
CASE NAME	01070 – CASE NAME (28)	

WRQIN3 – Quarterly Reports 4 Quarter History

>WRQIN3 ALBA QUARTERLY REPORTS – 4 QUARTER HISTORY 09/02/93									
CASE NUMBER 011					CASE NAME MARYANNE JONES				
REPORT QUARTER	1ST MLR	RETURN DATE	I/C N/A	NO CHG	2ND MLR	RETURN DATE	I/C N/A	NO CHG	TMA I NL
JAN – MAR	X								
APR – JUN									
JUL – SEP									
OCT – DEC	X				X	111892			

Figure 11 – Quarterly Report 4 Quarter History (WRQIN3)

Purpose

This screen displays all Monthly Reporting information entered during the previous 4 quarters that is associated with the specified case number.

Access

- Selecting QUARTERLY REPORTING INQUIRY – 4 QUARTER HISTORY on WRQMNU - MA Quarterly Reporting Menu

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-22)
  - XMIT INVALID: MUST HIT SF-KEY

- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Screen
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WRQMNU – MA Quarterly Reporting Menu

Screen Field Description – WRQIN3

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NUMBER	01050 – CASE NUMBER (10)	
CASE NAME	01070 – CASE NAME (28)	
REPORT QUARTER	NONE	System generated. JAN – MAR, APR – JUN, JUL – SEP, or OCT - DEC
<b>FIRST MAILER</b>		
1 <sup>ST</sup> MAILER	NONE	System generated. Contains "X" if the first mailer was sent.
RETURN DATE	01500 – REPORT RETURN DATE (6)	
I/C or N/A	01510 – REPORT COMPLETE/INDICATOR (1)	Displays "I" for incomplete, "C" for complete, or "N" for Not Applicable.
NO CHG	01520 – MR NO CHANGE FLAG (1)	
<b>SECOND MAILER</b>		
2 <sup>nd</sup> MAILER	NONE	System generated. Contains "X" if the second mailer was sent.
RETURN DATE	01500 – REPORT RETURN DATE (6)	
I/C or N/A	01510 – REPORT COMPLETE/INDICATOR (1)	Displays "I" for incomplete, "C" for complete, or "N" for Not Applicable.
NO CHG	01520 – MR NO CHANGE FLAG (1)	
TMA INL	01530 – MR CASE CLOSED CODE (1)	

# SSA 40 Quarter Matching

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## Overview

The Federal Welfare Reform Act requires certain aliens to have at least 40 quarters of "creditable coverage" (i.e. quarters of work in the US) to receive benefits. Therefore, when aliens apply for benefits, LDSS workers must verify they have met this requirement through the Social Security Administration (SSA). The SSA 40 Quarter Matching system was developed to provide workers with a means to do this verification.

The system allows workers to:

- enter requests for an individual's quarters of work from the SSA
- view, update, resubmit, and delete requests
- view the results received from the SSA

When a worker enters a request on the WQQINP - SSA Request Entry screen, it is stored in a database. Each night requests are written to a State Data File Exchange (SDX) file which is sent to the New York State Tax Department via the RFI (Resource File Integration) process. The Tax Department sends the file to the SSA. Requests can be updated or deleted until the time responses for the requests are received from the SSA.

### Data Received from the SSA

Responses from the SSA are usually received within five days and are available for view on-line on the WQQDET - SSA Quarter Detail Report screen. Each yearly quarter from 1937 to the present is represented on the screen by a blank, a "Y", or a "?". A blank means the quarter did not qualify for coverage. A "Y" means the quarter did qualify for coverage and a "?" means there is not enough information for the SSA to determine whether the quarter qualifies.

Other information displayed on the WQQDET screen includes:

- date Requested
- date Results Returned
- total number of qualifying quarters from 1937 - 1950
- total number of qualifying, not qualifying, and questionable quarters from 1937 to the present
- the last qualifying quarter (year and quarter)

WQQINP – SSA 40 Quarter Entry

WQQINP                      SSA 40 Quarter Entry                      Dist STLA                      Date 08/17/2007

Case or Reg No. \_\_\_\_\_  
 Ind. C (C/R)

LN	Name First	M	Last	DOB	SSN

xmt ^

Enter a Case/Reg No. Enter individual data if a new request

Figure 1 – SSA 40 Quarter Entry (WQQINP)

**Purpose**

The WQQINP screen is a dual purpose screen that can be used for entry of new requests or for inquiry of previously entered requests. When this screen is accessed, it will always appear as above in entry mode. To inquire on an individual, enter the individual's case or registry number and transmits. If the case is found in the requests table, the screen will change to an inquiry screen. See **SSA 40 Quarter Inquiry** later in this section.

To submit a new request, enter the case or registry number and individual data of each person to be sent to the SSA for employment history data. Individual data consists of either the individual's case line number or all the fields: first name, last name, sex, date of birth, and SSN. When the screen is transmitted, requests will be created for each individual submitted.

**Access**

- Entering 26 on WMSMNU – WMS Menu, **or**
- Entering a case number that has no associated requests on WQQINP - SSA 40 Quarter Inquiry and transmitting.

## Screen Response

### Positive

- Returns the WQQINP - SSA 40 Quarter Entry screen with all fields blank and the message, REQUEST ACCEPTED. ENTER NEXT CASE/REG NO.
- Returns the WQQINP - SSA 40 Quarter Inquiry screen displaying request data for the case/registry number entered on the entry screen and results from SSA if they have been received

### Negative

- The following message on Line 24:
  - ALL THE BLINKING FIELDS ARE REQUIRED ENTRIES
  - BIRTH DATE IS NOT A VALID DATE
  - CASE/REGISTRY NUMBER NOT FOUND
  - ENTER A CASE OR A REGISTRY NUMBER
  - NO INDIVIDUAL DATA FOUND FOR LINE NUMBER
  - NO INDIVIDUAL DATA WAS ENTERED
  - USE A "C" OR "A" TO INDICATE IF CASE OR REG NO ENTERED
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

## Printed Response

None

## Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBAMMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu



Key	Description
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WQQINP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE OR REG NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
IND. (C / R)	NONE	Enter 'C' for case or 'R' for registry; default is 'C'
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	
<b>NAME</b>		
FIRST	24120 - GIVEN NAME (10)	
M	24130 - MIDDLE INITIAL (1)	
LAST	24110 - SURNAME (17)	
DOB	03060 - DATE OF BIRTH (8)	
SSN	09704 - SSA VERIFIED SOCIAL SECURITY NUMBER (9)	

WQQINP – SSA 40 Quarter Inquiry

WQQINP	SSA 40 Quarter Inquiry	Dist NYC	Date 08/17/2007			
Case or Reg No. 000012222D		Date Requested 07/30/2007	Date Results Returned 08/03/2007			
LN	Name First M Last	DOB	SSN	Total QQ	Last QQ	Detail
01	Isabel Ie__ M GONZALEZ_____	10121962	077777779	26	2004 03	_
Resubmit Request? (Y/N) N		Delete Request? (Y/N) N		xmt ^		

Figure 2 – SSA 40 Quarter Inquiry (WQQINP)

Purpose

Besides entry of new requests, the WQQINP screen also functions as a request inquiry screen and displays information about a request. Requests can also be resubmitted or deleted from the WQQINP inquiry screen. If the request has not been sent to the SSA, the message, REQUEST HAS NOT BEEN SENT TO SSA YET, is displayed at the bottom of the screen. If the request has been sent to SSA but no response has been received, the message, NO RESPONSE FROM SSA HAS BEEN RECEIVED YET, is displayed at the bottom of the screen.

In addition to the same fields that appear on the SSA 40 Quarter Entry screen, the SSA 40 Quarter Inquiry screen has two fields, Total QQ and Last QQ, which display data received from the SSA. These fields will be blank if responses haven't been received. If responses have been received, there is a Detail field for each individual. Entering a 'Y' and transmitting will return the WQQDET screen displaying details of the SSA response.

A request can be resubmitted by changing the 'N' to a 'Y' after the "Resubmit Request? (Y/N)" field and transmitting. A request can be deleted by changing the 'N' to a 'Y' after the "Delete Request? (Y/N)" field and transmitting. Request deletion is at the case level. When a request is deleted all individual requests in the case are deleted.

If a response has been received from the SSA, one of the following informational messages may be displayed at the bottom of the screen:

- NO EARNINGS FOUND
- SSA SYSTEM ERROR

- SSN IS NOT ON FILE
- DOB MISMATCH
- SURNAME MISMATCH
- CONTACT SSA

#### Access

- Entering a Case or Registry Number on WQQINP - SSA 40 Quarter Entry and transmitting

#### Screen Response

##### Positive

- If a request is resubmitted successfully, the message, "Resubmission successful. Select detail, resubmit or enter next Case/Reg No", is displayed at the bottom of the screen.
- If a request is deleted successfully, the WQQINP - SSA 40 Quarter Entry screen is returned with the message, "Request deleted. Enter next Case/Reg No" displayed at the bottom of the screen.
- If an 'X' is entered in a Detail field and the screen is transmitted, the WQQDET - SSA 40 Quarter Detail Report screen is returned displaying information for the selected individual.

##### Negative

- The following message on Line 24:
  - ENTER A CASE OR REGISTRY NUMBER
  - NO ACTION WAS SELECTED
  - REQUEST NOT FOUND FOR DISPLAY
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>

Key	Description
F7	WDXMNU - Non-Services Data Entry and Case Disposition Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Case Review Services (CCRS) Menu
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description – WQQINP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE OR REG NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
DATE REQUESTED	12253 - 40 QUARTER REQUEST SUBMISSION DATE (8)	
DATE RESULTS RETURNED	12254 - REQUEST RESULT DATE (8)	
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	
<b>NAME</b>		
FIRST	24120 - GIVEN NAME (10)	
M	24130 - MIDDLE INITIAL (1)	
LAST	24110 - SURNAME (17)	
DOB	03060 - DATE OF BIRTH (8)	
SSN	09704 - SSA VERIFIED SOCIAL SECURITY NUMBER (9)	
TOTAL QQ	NONE	Calculated by WMS
LAST QQ	NONE	Calculated by WMS
DETAIL	NONE	Enter an 'X' in this field and transmit to return WQQDET
RESUBMIT REQUEST? (Y/N)	NONE	
DELETE REQUEST? (Y/N)	NONE	

WQQDET – SSA 40 Quarter Detail Report

```

WQQDET                SSA 40 Quarter Detail Report                Date 08/17/2007
Case/Reg No. 000012222D                Date Requested 07/30/2007
Name: I SABELLE M GONZALEZ                Date Results Returned 08/03/2007
SSN: 077-77-7779 DOB: 10/12/1962
                                                    Individual 1 of 1

Total Quarters of Qualifying Coverage 1937-1950: 0

1937 - 46  ----  ----  ----  ----  ----  ----  ----  ----  ----  ----
1947 - 56  ----  ----  ----  ----  ----  ----  ----  ----  ----  ----
1957 - 66  ----  ----  ----  ----  ----  ----  ----  ----  ----  ----
1967 - 76  ----  ----  ----  ----  ----  ----  ----  ----  ----  ----
1977 - 86  ----  ----  ----  ----  ----  ----  ----  ----  ----  ----
1987 - 96  ----  YYYY  YYYY  Y---  ----  ----  ----  ----  ----  ----
1997 - 06  ----  ----  ----  ----  YY--  YYYY  YYYY  YYY-  ----  ???
2007 - 07  ???

Total Quarters      Qualifying: 26      Questionable: 7      Not Covered: 250
Last Qualifying Quarter: 2004 03

F1/F2/F3-Paging  F6-Signoff  F15-Return to Current Request  F16-Enter New Request
    
```

Figure 3 – SSA 40 Quarter Detail Report (WQQDET)

Purpose

This screen displays details of the results received from the SSA for an individual request.

Access

- Entering an 'X' in one of the Detail fields on the WQQINP - SSA 40 Quarter Inquiry screen and transmitting

Screen Response

Positive

See **Function Keys**.

Negative

- The following message on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-14, 17-22)

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WQQINP - SSA 40 Quarter Inquiry displaying the current request
Ctrl+F6	WQQINP - SSA 40 Quarter Entry

Screen Field Description – WQQINP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE OR REG NO.	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
DATE REQUESTED	12253 - 40 QUARTER REQUEST SUBMISSION DATE (8)	
NAME	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
	24110 - SURNAME (17)	
DATE RESULTS RETURNED	12254 - REQUEST RESULT DATE (8)	
SSN	09704 - SSA VERIFIED SOCIAL SECURITY NUMBER (9)	
TOTAL QUARTERS OF COVERAGE 1937 - 1950:	NONE	
CCYY - YY	NONE	Each row shows quarters for ten years in groups of four; values can be blank, 'Y', or '?'
<b>TOTAL QUARTERS</b>		
QUALIFYING:	NONE	Calculated by WMS
QUESTIONABLE:	NONE	Calculated by WMS
NOT COVERED:	NONE	Calculated by WMS
LAST QUALIFYING QUARTER:	NONE	Calculated by WMS

## Statistics

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## Statistics

### Overview

The Statistics inquiry process displays two types of information:

#### **Cases and Individual Statistics**

This information is available as either:

- The total current active cases and individuals
- The total active cases and individuals as of the end of the prior month.

#### **Transaction Processing Statistics**

This information is available as either:

- The month to date totals
- The totals as of the end of the prior month.

Data displayed on the statistics screens may differ from that on printed reports because the screens will display information based on the date of Batch Update whereas the information on printed reports is based on the Transaction Date.

If the last day of the month falls on a Friday, Saturday or Sunday, the "current" month does not change to the "prior" month until the second business day of the new month.

To access the Statistics screens, enter Selection 03 (STATISTICS) on the WMSMNU - WMS Menu screen. The WST001 - STATISTICS menu screen is returned which allows for the selection of the desired statistics by geographical area: either by a District (first four letters of district), by the whole State (X) or by Region (1-5). For a list of the districts within each region, see DE #01010 in **SRM Data Elements**.

Selection is also made on this screen for the desired type of statistics, either:

- Case and Individual Statistics for the current month (cumulative through yesterday), or for the previous month; or
- Transaction Processing Statistics for the current month to date or for the previous month.

#### **Function 1 and 2 - Case and Individual Statistics**

On the WST001 - Statistics Menu screen, Selections 1 or 2, CASE AND INDIVIDUAL STATISTICS, will return the WST002 - Statistics screen. This screen displays the following statistics:

- The total number of cases with a Case Status of ACTIVE (10) or ACTIVE OVERRIDE (21) by Case Type\* as of close of business the previous work day, or for the previous month.



- The total number of individuals with an Individual Status (DE# 03120) of Active (07, not 08 or 10) as of close of business the previous work day, or for the previous month.

\*The heading PA-FS on WST002 is not a Case Type but rather a count of all active PA cases/individuals authorized to receive Food Stamps. Therefore, PA case types which authorize Food Stamps are counted twice as Case/Individuals, once in the appropriate PA Case Type columns and once in the PA-FS columns.

### Functions 3 and 4 - Transactions Processed

On the WST001 - Statistics Menu screen, Selections 3 and 4 (TRANSACTIONS PROCESSED) will return the first page of two pages of the WST003 - Monthly Transaction Processed screen showing the number and type of transactions for groups of Case Types. F2 returns the second page.

Selection 3 returns statistics for transactions that have been processed through Batch Update so far this month -- cumulative for this month through yesterday.

Selection 4 returns statistics for transactions processed through Batch Update for the previous month.

Sub-totals of pages 1 and 2 for each Case Type in the program areas are available by using the appropriate Function Key as follows:

- F11 - Displays WST003 screen with PA subtotals
- F12 - Displays WST003 screen with MA subtotals
- F13 - Displays WST003 screen with FS subtotals
- F14 - Displays WST003 screen with all totals

The following chart defines how case types are aggregated into Case Type Groups for statistical purposes:

CASE TYPE GROUP DEFINITIONS	
CASE TYPE GROUP	CASE TYPES
PA – Public Assistance	11, 12, 14 (for historical purposes), 16, 17, 18, 19
MA – Medical Assistance	20, 21, 22, 24
FS – Food Stamps	31, 32
HEAP	60
Services	40
ADC-FC	13

### Transaction Types

The WST003 module contains multiple screens that display statistics by Transaction Types. The following matrix defines the Page, Transaction Type/Number, and Remarks/Logic. Please note the following when reviewing Transaction Type Definitions:

- Pending transactions can be cancelled, but they cannot be modified (in general), and
- NYNIP openings and closings are counted in FS statistics.

TRANSACTION TYPE DEFINITIONS			
PAGE	TRANSACTION TYPE NAME	TRAN. TYPE NO.	REMARKS
1	Applications Registered		Applications Registered - Applications with an Application Internal Status (DE# 24020) of 1 - Application Available 2 - Application Undergoing Maintenance 3 - Application Undergoing Clearance 5 - Undergoing Full Data Entry 6 - Full Data Entry Complete and with an Internal Application Registration Date (DE# 01048) that is later than the date of the last Statistics run on WMS. The Application Registration Date is the date the Application was first registered. The use of this date ensures that each application is counted only once for this transaction.
1	Applications Withdrawn		Applications with an internal Application Registration Date (DE# 01048) that is later than the date of the last Statistics run on WMS. The Application Registration Date is the date the Application was first registered. The use of this date ensures that each application is counted only once for this transaction.
1	Applications Denied	01	
1	Denial	03	
1	Opening	02	Includes ASWI, Separate Determination and automated MA Extension openings with Transaction Type 02.
1	Reopening	10	Includes Separate Determination and automated MA Extension openings with Transaction Type 02.
1	Open-Closing	09	Open-Closing is used because that is the verbiage on the screen.
1	Reactivation	11	
1	Change	05	Includes ASWI Changes and Forced Deletions
1	Recertification	06	
1	Closing	07	Includes ASWI Closings and Forced Closings
1	Recertification-Closing	08	
1	Closed Case Maintenance	14	
2	System Withdrawn		Applications flagged for system deletion because they have had no activity for at least 90 days (180 days for applications with Case Type 20, 22, or 24).
2	Forced Closings	12	Also included in <b>Closing</b> on page 1
2	Forced Deletion	13	Also included in <b>Changes</b> on page 1
2	Separate Determination	02 or 10	Also included in <b>FS Openings</b> and <b>Reopenings</b> on page 1.
2	Automated MA	02 or 10	Also included in <b>MA Openings</b> and <b>Reopenings</b> on page 1.
2	ASWI Opening	02 or 10	Case Type 22 (MA-SSI), Reason Code 988. Also included in <b>MA Openings</b> and <b>Reopenings</b> on page 1.
2	ASWI Change	05	Case Type 22 (MA-SSI), Reason Code 988. Also included in <b>MA Changes</b> on page 1.
2	ASWI Closing	07	Case Type 22 (MA-SSI), Reason Code 988. Also included in <b>MA Closings</b> on page 1.
2	CIN Consolidation		New Pending Records with Reason Code 986 created by a CIN Consolidation run. This run is usually done every weekend, with the Pending Record created on the first business day after the weekend run. Batch Update for these Pending Records is done the evening of the first business day and the CIN Consolidation counts are available on this screen the next day.

TRANSACTION TYPE DEFINITIONS			
PAGE	TRANSACTION TYPE NAME	TRAN. TYPE NO.	REMARKS
2	SSN Enumeration		<p><b>NOTE:</b> <b>SSN Enumeration has not been run since 2000. It is reported on screens with zeros in its processing values.</b></p> <p>This transaction type was used to signify new Pending Records with a Reason Code 990 created by an SSN Enumeration Run. This run was usually done one weekend a month, with the Pending Record created on the first business day after the weekend run. Batch Update for Pending Records is done the evening of the first business day. The SSN Enumeration counts were available on this screen the next day.</p>

### Relationships between Statistics and Batch Update

All counts on the Statistics screens depend on Batch Update taking place to add the new counts. Batch Update normally takes place after the close of business and prior to the start of business the next day. Transactions completed on one day show up on the Statistics screen the next business day.

There are two exceptions to this:

- Because of system problems, Batch Update may be delayed or it may not be run for one night. When it is run the next night, it will add two days of transaction counts to the Statistics screens.
- WMS may be available on a Saturday or other non-business day. Any transactions entered on these days do not go through Batch Update until the night of the next regular business day. When Batch Update is run, it will add two days of transaction counts to the Statistics screens.

WST001 – Statistics Menu

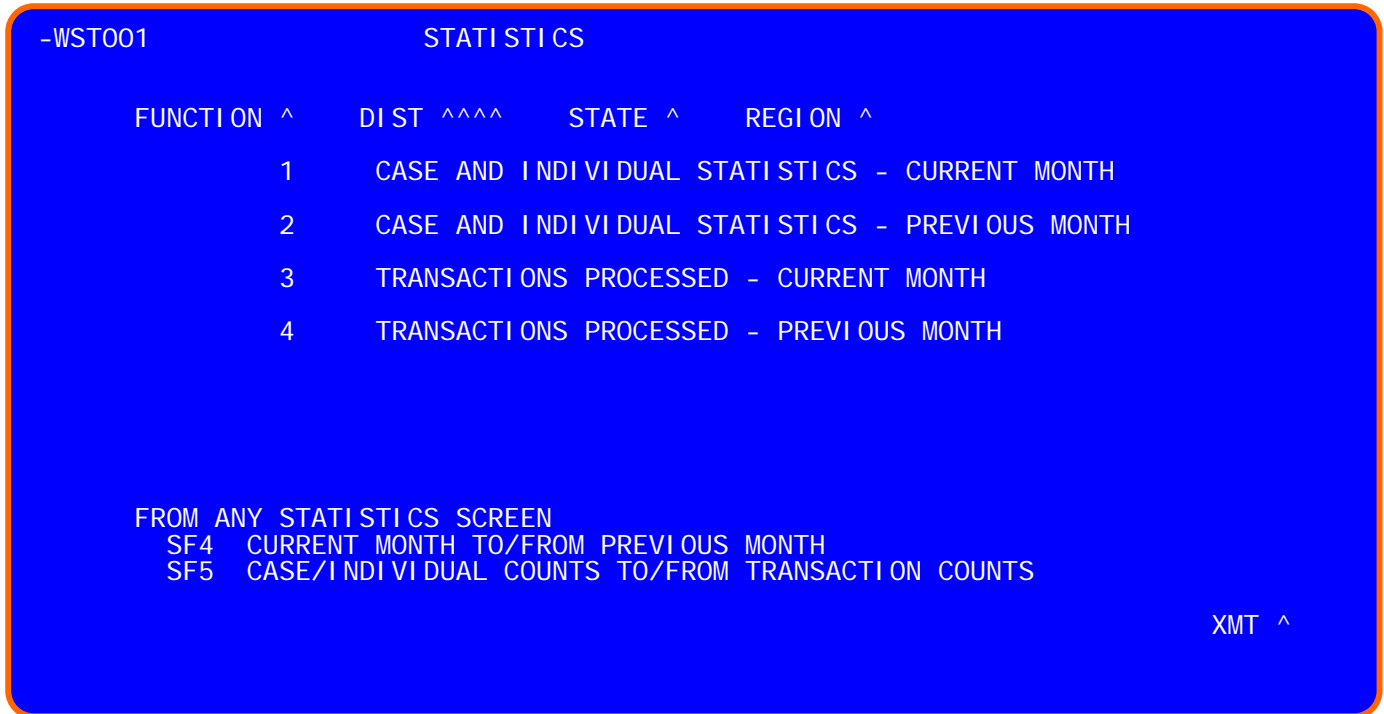


Figure 1 – Statistics Menu (WST001)

Purpose

This screen is used to select the type and geographical areas of statistical information desired.

Access

- Entering 03 on WMSMNU – WMS Menu, or
- F3 from SIGNON COMPLETE; all Menus and certain other screens (see **Function Keys** under each screen for details).

Screen Response

Positive

- WST002 if CASE AND INDIVIDUAL STATISTICS (Selection 1 or 2) is selected.
- WST003 if TRANSACTION PROCESSING STATISTICS (Selection 3 or 4) is selected.

Negative

- Fields in error return highlighted (missing entries display highlighted). One of the following messages will appear on line 24:

- INVALID DISTRICT
- INVALID REGION
- MORE THAN ONE SELECTION – PLEASE TRY AGAIN
- PLEASE MAKE A SELECTION
- PLEASE SELECT DISTRICT REGION OR STATE
- TRANSACTION UNKNOWN (F8 and Ctrl+F3)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU – WMS Menu
Ctrl+F7	WTRK00 – Time Limit Tracking Inquiry
Ctrl+F8	WASI01 – Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU – Child Care Review Service
Ctrl+F10	WMEEMN – EEDSS Host System Menu
Ctrl+F11	W4139R – Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 – Domestic Violence Data Collection Menu

Screen Field Description - WST001

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Functions 1- 4
DIST	95908 – DISTRICT MNEMONIC (4)	First four characters of District Name.
STATE	NONE	Enter an 'X' for a statewide report
REGION	NONE	Enter an 'X' for a region-wide report

WST002 - Active Cases and Individuals

-WST002		STATISTICS				3/25/1999	
ST. LAWRENCE		CASE AND INDIVIDUAL				PAGE 1 OF 1	
		TOTALS AS OF 3/24/1999					
	CASES	INDIVIDUALS		CASES	INDIVIDUALS		
FA	1096	2876	MA	3911	6452		
SN-FP	9	32	MPE	0	0		
TOTAL	1105	2908	MA-SSI	3803	3804		
			FHP	0	0		
			TOTAL	7714	10256		
SN-CSH INDIV	369	369	NPA-FS	2505	4723		
SN-CSH FAMILY	14	32	FS-MIX	373	1248		
SN-FNP INDIV	0	0	TOTAL	2878	5971		
SN-FNP FAMILY	0	0	PA-FS	886	2234		
TOTAL	383	401	TOTAL	3764	8205		
EAA	3	3	HEAP	2834	6985		
EAF	1	1	ADC-FC	109	109		
TOTAL	1492	3313	SERV	783	2324		XMT ^

Figure 2 – Active Cases and Individuals (WST002)

Purpose

This screen displays the total number of active cases and individuals by case type as of the close of business on the previous work day or as of the last day of the previous month depending on the selection made on WST001.

All case types are represented by two counts. The first count is the count of active cases in the case type. The second count is the number of individuals in those cases. Both counts are date dependent and represent the close of business on the previous work day or the last day of the previous month (as selected by the user).

The following matrix defines the totals shown on the screen by case type:

CASE TYPE DESCRIPTION	CASE TYPE
FA – Family Assistance	11
SN-FP – Safety Net Non-Cash Assistance	12
<b>TOTAL</b>	<b>11, 12</b>
SN-CSH INDIV – Safety Net Cash Assistance	16
SN-CSH FAMILY – Safety Net Cash Assistance	16
SN-FNP INDIV – Safety Net Non-Cash Assistance	17
SN-FNP FAMILY – Safety Net Non-Cash Assistance	17
<b>TOTAL</b>	<b>16, 17</b>
EAA – Emergency Assistance for Adults	18
EAF – Emergency Assistance to Families	19

CASE TYPE DESCRIPTION	CASE TYPE
<b>TOTAL</b>	<b>11, 12, 16, 17, 18, 19</b>
MA – Medical Assistance	20
MPE – Medicaid Presumptive Eligibility	21
MA-SSI – Medical Assistance – Supplemental Security Income	22
FHP – Family Health Plus	24
<b>TOTAL</b>	<b>20, 21, 22, 24</b>
NPA-FS – Non-Public Assistance Food Stamps	31
FS-MIX – Public Assistance and Non-Public Assistance Mixed Household	32
<b>TOTAL</b>	<b>31, 32</b>
PA-FS – Public Assistance and Food Stamps	NA
<b>TOTAL</b>	<b>31, 32, and PA-FS</b>
HEAP – Home Energy Assistance Program	60
ADC-FC – Aid to Dependent Children – Foster Care	13
SERV – Service Cases	40

#### Access

- Selection 1 or 2, CASE AND INDIVIDUAL STATISTICS on **WST001 – Statistics Menu**, or
- F5 from WST003.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages displayed on line 24:
  - ALREADY ON LOWEST PAGE
  - NO MORE DATA
  - SF99 NOT SUPPORTED – REXMT (99 = 1-3, 7-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None



### Function Keys

Key	Description
F4	WST002 – Active Case and Individuals - Toggles between Current and Previous month displays.
F5	WST003 – Monthly Transactions - Toggles between WST002 - Active Case and Individuals and WST003 - Monthly Transactions.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WST001 – Statistics Initiator

### Screen Field Description – WST002

See the [Purpose](#) section for information regarding the statistics displayed on the screen and their meaning.

WST003 – Statistics on Transactions Processed Monthly, All Case Type Groups

-WST003		STATISTICS				3/25/1999		
ST. LAWRENCE		MONTHLY TRANSACTIONS PROCESSED AS OF				PAGE 1 OF 2		
		3/24/1999						
		TOTAL	PA	MA	FS	HEAP	SERV	ADC-FC
APPLI CATI ONS	REGI STERED	928	181	288	179	233	36	11
APPLI CATI ONS	WI THDRAWN	0	0	0	0	0	0	0
APPLI CATI ONS	DENI ED	0	0	0	0	0	0	0
DENI AL		271	85	64	57	65	0	0
OPENI NG		554	55	267	39	151	34	8
REOPENI NG		85	8	2	75	0	0	0
OPEN-CLOSI NG		19	19	0	0	0	0	0
REACTI VATI ON		101	32	23	46	0	0	0
CHANGE		4537	1511	1453	856	226	489	2
RECERTI FI CATI ON		708	113	268	197	0	128	2
CLOSI NG		354	58	201	8	30	54	3
RECERTI FI CATI ON-CLOSI NG		30	7	18	5	0	0	0
CLOSED CASE MAI NTENANCE		66	51	10	5	0	0	0
<b>TOTAL</b>		<b>7653</b>	<b>2120</b>	<b>2594</b>	<b>1467</b>	<b>705</b>	<b>741</b>	<b>26</b>
PA = SF11    MA = SF12    FS = SF13    TOTALS = SF14		XMT ^						

Figure 3 – Statistics on Transactions Processed Monthly, All Case Type Groups - Page 1 (WST003)

Purpose

The purpose of this screen is to provide statistics by Case Type Group on the number of transactions processed for a monthly timeframe. The Case Type Group Definition chart illustrates the case type combinations that exist for a case type group and is found in the section entitled **Functions 3 and 4 – Transactions Processed**. Definitions of Transaction Types can be found in the chart entitled Transaction Type Definitions in the **Transaction Types** section.

This screen is the first page of two pages that display the total number of transactions according to transaction type within program areas either for the current month (to date) or for the previous month depending on the selection made on the WST001 screen.

Access

- Selection 3 or 4, TRANSACTION PROCESSING STATISTICS on **WST001 – Statistics Menu, or**
- F5 from WST002

Screen Response

Positive

- See **Function Keys**.

### Negative

- One of the following messages displayed on line 24:
  - ALREADY ON LOWEST PAGE
  - NO MORE DATA
  - SF99 KEY NOT SUPPORTED (99 = 7-10, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WST002 – Active Case and Individuals - Toggles between Current and Previous month displays.
F5	WST003 – Monthly Transactions - Toggles between WST002 - Active Case and Individuals and WST003 - Monthly Transactions.
F6	<i>Renders Workstation Inactive</i>
F11 or Ctrl+F1	WST003 – Monthly Transactions screen with totals for PA Case Types only (Displays the current month if the Function Key is pressed while on a current month screen or displays the previous month if the Function Key is pressed while on a previous month screen)
F12 or Ctrl+F2	WST003 – Monthly Transaction screen with totals for MA Case Types only (Displays the current month if the Function Key is pressed while on a current month screen or displays the previous month if the Function Key is pressed while on a previous month screen)
Ctrl+F3	WST003 – Monthly Transaction screen with totals for FS Case Types only (Displays the current month if the Function Key is pressed while on a current month screen or displays the previous month if the Function Key is pressed while on a previous month screen)
Ctrl+F4	WST003 – Monthly Transaction screen with totals for all Case Types (Displays the current month if the Function Key is pressed while on a current month screen or displays the previous month if the Function Key is pressed while on a previous month screen)
Ctrl+F5	WST001 – Statistics Menu

Key	Description
Ctrl+F6	WST001 – Statistics Initiator

#### Screen Field Description – WST003

See the **Transaction Types** section for information regarding the statistics displayed on the screen and their meaning.

-WST003		STATISTICS			3/25/1999		PAGE 1 OF 2		
ST. LAWRENCE		MONTHLY TRANSACTIONS PROCESSED AS OF			3/24/1999				
		TOTAL	PA	FA	SN-FP	SN-CSH	SN-FNP	EAA	EAF
APPLI CATIONS	REGI STERED	181		95	1	82	1	1	1
APPLI CATIONS	WI THDRAWN	0		0	0	0	0	0	0
APPLI CATIONS	DENI ED	0		0	0	0	0	0	0
DENI AL		85		38	0	47	0	0	0
OPENI NG		55		31	0	24	0	0	0
REOPENI NG		8		4	1	3	0	0	0
OPEN-CLOSI NG		19		7	0	8	0	1	3
REACTI VATI ON		32		21	0	11	0	0	0
CHANGE		1511		1113	9	389	0	0	0
RECERTI FI CATI ON		113		81	1	31	0	0	0
CLOSI NG		58		30	0	28	0	0	0
RECERTI FI CATI ON-CLOSI NG		7		5	0	2	0	0	0
CLOSED CASE MAI NTENANCE		51		36	0	15	0	0	0
<b>TOTAL</b>		<b>2120</b>		<b>1461</b>	<b>12</b>	<b>640</b>	<b>1</b>	<b>2</b>	<b>4</b>
PA = SF11		MA = SF12	FS = SF13	TOTALS = SF14				XMT ^	

Figure 4 - Statistics on Transactions Processed Monthly, PA Case Type Group – Page 1 (WST003)

**Purpose**

The purpose of this screen is to provide statistics for the PA Case Type Group on the number of transactions processed for a monthly timeframe. The Case Type Group Definition chart illustrates the case type combinations that exist for a case type group and is found in the section entitled **Functions 3 and 4 – Transactions Processed**. Definitions of Transaction Types can be found in the chart entitled Transaction Type Definitions in the **Transaction Types** section.

This screen is displayed by pressing F11 or Ctrl+F1. Please refer to **WST003 – Statistics on Transactions Processed Monthly, All Case Type Groups** for a complete description of the screen and its functionality.

-WST003		STATISTICS				5/03/2007	
ST. LAWRENCE		MONTHLY TRANSACTIONS PROCESSED AS OF				PAGE 1 OF 2	
		3/24/1999					
		TOTAL	MA	MPE	MA-SSI	FHP	
APPLI CATIONS	REGI STERED	288	276	0	12	0	
APPLI CATIONS	WI THDRAWN	0	0	0	0	0	
APPLI CATIONS	DENI ED	0	0	0	0	0	
DENI AL		64	64	0	0	0	
OPENI NG		267	234	0	33	0	
REOPENI NG		2	2	0	0	0	
OPEN-CLOSI NG		0	0	0	0	0	
REACTI VATI ON		23	23	0	0	0	
CHANGE		1453	1138	0	315	0	
RECERTI FI CATI ON		268	268	0	0	0	
CLOSI NG		201	172	0	29	0	
RECERTI FI CATI ON-CLOSI NG		18	18	0	0	0	
CLOSED CASE MAI NTENANCE		10	5	0	5	0	
TOTAL		2594	2200	0	394	0	
PA = SF11		MA = SF12	FS = SF13	TOTALS = SF14		XMT ^	

Figure 5 – Statistics on Transactions Processed Monthly, MA Case Type Group – Page 1 (WST003)

**Purpose**

The purpose of this screen is to provide statistics for the MA Case Type Group on the number of transactions processed for a monthly timeframe. The Case Type Group Definition chart illustrates the case type combinations that exist for a case type group and is found in the section entitled **Functions 3 and 4 – Transactions Processed**. Definitions of Transaction Types can be found in the chart entitled Transaction Type Definitions in the **Transaction Types** section.

This screen is displayed by pressing F12 or Ctrl+F2. Please refer to **WST003 – Statistics on Transactions Processed Monthly, All Case Type Groups** for a complete description of the screen and its functionality.

-WST003		STATISTICS			5/03/2007
ST. LAWRENCE		MONTHLY TRANSACTIONS PROCESSED AS OF			PAGE 1 OF 2
		3/24/1999			
		TOTAL	FS	NPA	FS FS MIX
APPLI CATIONS	REGI STERED	179	177		2
APPLI CATIONS	WI THDRAWN	0	0		0
APPLI CATIONS	DENI ED	0	0		0
DENI AL		57	55		2
OPENI NG		39	39		0
REOPENI NG		75	69		6
OPEN-CLOSI NG		0	0		0
REACTI VATI ON		46	36		10
CHANGE		856	692		164
RECERTI FI CATION		197	174		23
CLOSI NG		8	8		0
RECERTI FI CATION-CLOSI NG		5	4		1
CLOSED CASE MAI NTENANCE		5	4		1
<b>TOTAL</b>		<b>1467</b>	<b>1258</b>		<b>209</b>
PA = SF11		MA = SF12	FS = SF13	TOTALS = SF14	
					XMT ^

Figure 5 - Statistics on Transactions Processed Monthly, FS Case Type Group – Page 1 (WST003)

**Purpose**

The purpose of this screen is to provide statistics for the FS Case Type Group on the number of transactions processed for a monthly timeframe. The Case Type Group Definition chart illustrates the case type combinations that exist for a case type group and is found in the section entitled **Functions 3 and 4 – Transactions Processed**. Definitions of Transaction Types can be found in the chart entitled Transaction Type Definitions in the **Transaction Types** section.

This screen is displayed by pressing F13 or Ctrl+F3. Please refer to **WST003 – Statistics on Transactions Processed Monthly, All Case Type Groups** for a complete description of the screen and its functionality.

# Time Limit Tracking Inquiry

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## Time Limit Tracking

### Overview

The Federal Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) specified that an adult may not receive more than sixty (60) months of TANF-funded assistance in his/her lifetime. New York State's Welfare Reform Act of 1997 implemented the Federal requirements and imposed a 24 month lifetime limit on cash Safety Net assistance for adults and 60 month limits for TANF assistance. The WMS Time Limits Tracking function addresses both federal and state requirements for time limits on public assistance. The Time Limits Tracking System permits the local districts to monitor the time limit counts on effected individuals and take appropriate actions when a time limit is reached.

The Time Limits Tracking System collects all relevant data from WMS, BICS (Upstate), and numerous other sources to establish and maintain counts for all effected individuals. For TANF-funded assistance, the count began with December 1996. Safety Net Cash Assistance was instituted with August 1997 data. While months are counted on an individual basis, the individual with the highest count in each case will determine the case count.

The Time Limit Tracking Inquiry system was developed to provide inquiry screen accessibility to the Welfare Reform Tracking System (WRTS) database. The system allows for the viewing of tracking data counters and the overriding/updating of counters by local districts. The Time Limit Tracking system utilizes WMS screens to access the WRTS database for counter information which is maintained in the WRTS database (an Oracle Relational Database Management System (RDBMS)). The SDX database (an Oracle Relational Database Management System (RDBMS) database) is also accessed in the same manner as the WRTS database.

The source of the WRTS data for Upstate is a series of files from various WMS processes. The Screen Field Description acts as a general guide to locate the source of the data in WMS.

This section of the SRM does not describe the reporting use of the WRTS database. More information on this topic can be found on the COGNOS site using the following website: [WRTS Reporting](#)

### Tracking System Updates

The Time Limit Tracking system will be updated by one of three scheduled processes:

- Daily Batch Processing - On a daily basis for both Upstate and NYC cases that meet the time limit tracking criteria, the system will add new individuals, delete individuals, change the tracking status of individuals and adjust the countable months for each individual.
- On-Line Processing - Data entry is allowed through Override Screens. This screen allows the entry of out of state tracking data and adjustments to existing tracking details. The successful transmission of the data entered on this screen will immediately update the Tracking data base.
- Monthly Processing - Monthly updates will also affect the time limit tracking. These updates are automatic and are scheduled after the last day of a month. Included in this process is the incrementing of a count for a sanctioned individual with no issuance to the household.

### Time Limit Tracking Eligibility

In general, the time limit tracking process will only examine cases with a case type of:

- Family Assistance (FA), case type 11
- Safety Net Non-Cash Assistance (SN-FP), case type 12
- Safety Net Cash Assistance (SN-CSH), case type 16

The case status must be:

- AC - Active (10)
- Active-Override (21) (Upstate)
- SI - Single Issue (NYC)

An exception to this is the single individual case closed due to a durational sanction.

In addition, the individual must have an individual status of:

- Active (07)
- Inactive-Sanctioned (10), or SI (Single Issue) and

and an individual tracking status of:

- Adult,
- Minor Head of Household,
- Minor Spouse of Head of Household,
- Minor in a SNA cash case.

Each case may have more than one trackable individual. The case count is determined by the individual with the highest number of countable months.

### Multiple CINs

Individuals that have multiple CINs, (i.e. one issued by NYC WMS and one issued by Upstate WMS) will have their time limit totals consolidated. The time limit tracking system will match individuals with multiple CINs based on an exact match of Sex AND Social Security Number AND Date of Birth. Individuals that have been incorrectly related through a case can be can have those relationships adjusted by a user correcting either the SSN and/or the Date of Birth and/or the Sex of one or both of the individuals through WMS undercare changes to the case.

### Payment Types

Counts for trackable individuals will be incremented when a countable public assistance payment is "issued" - that is, made available to the case. If all payments for the month are not redeemed and expire or are cancelled, the count will be decreased for the appropriate calendar month. However, when a recoupment is taken that eliminates all assistance payments to the case for a month; the month will count as if a countable payment had been made.

Only public assistance payments for regular ongoing needs are countable. Short term, once only needs or emergencies are not countable.

### Impact of Recoveries and Recoupments

There are several situations in which monies paid as countable assistance may subsequently be recovered. These recoveries will affect the time limit tracking counts as described below:

- **Recoveries and refunds** for non-overpayments shall not affect the time limit count.
- **Recoveries of overpayments through recoupment or other means** that fully reduce a prior month's overpayment due to ineligibility will require the time limit count to be adjusted downward through the override function.
- **Support collection:** Monies received through support collection will not affect the time limit tracking count. If a case is not closed for excess support and this is discovered after several months, resulting in an underpayment due to "agency error", the time limit count must be reduced (through the override function) for the calendar months from the point the case should have been closed.
- **Excess Support:** Monies received as excess support will not affect the time limit count, if paid to an active ongoing case (pursuant to 347.13 (b) (4)). However, if the excess support is paid as part of a retroactive correction from a point of actual ineligibility the time limit count must be reduced through the override function.
- **CAP Support Reconciliation:** Monies received as excess support payments to ongoing CAP cases (pursuant to 366.6(c)) will not affect the time limit count. However, if the excess support is paid as part of a retroactive correction from a point of actual ineligibility, the time limit count must be reduced through the override function.
- **Interim Assistance:** When interim assistance is provided as cash Safety Net Assistance then recovered from the initial SSI payment under Part 353 of Regulations, the time limit count will not be reduced.

### Overrides

The override function is used to correct conversion errors, reduce the time limit count when assistance has been fully recouped from an ineligible individual, add out-of-state TANF assistance, correct information due to incorrect WMS coding or a fair hearing decision and link individuals who cannot be linked through normal WMS processing.

### Codes/Mnemonics and Descriptions

The codes/mnemonics and their associated descriptions can be found in the Time Limit Tracking manual. The manual can be accessed via the following link: [Time Limit Tracking Manual](#).

### Selections

A - Individual Tracking Summary

Entry of selection A and either a valid CIN or SSN returns the WTRK11 - Individual Tracking screen. This screen displays various case information for Public Assistance cases in which the individual has been a "countable" individual.

B - Monthly Tracking Summary

Entry of selection B and either a valid CIN or SSN returns the WTRK12 - Monthly Tracking Summary screen. A specific starting month and year may be entered on the menu. This screen displays each countable month for the State, SNA, and TANF counters for the individual. Statewide and out of state trackable activity is reported for an individual.

C - Tracking Payment Detail

Entry of selection C and either a valid CIN or SSN returns the WTRK13 - Tracking Payment Detail. A specific month and year may be entered on the menu. This screen displays all countable payments that affect the counters for an individual.

D - PA Individual Status History

Entry of a valid CIN or SSN for selection D - PA Individual Status History returns WTRK14 - PA Individual Status History screen. WTRK14 displays a detailed history of the PA individual status.

E - FS Individual Status History

Entry of a valid CIN or SSN for selection E - FS Individual Status History returns WTRK15 - FS Individual Status History screen. WTRK15 displays a detailed history of the FS individual status.

F - Tracking Override History

Entry of a valid CIN or SSN returns the WTRK21 - Tracking Override History screen. This screen displays a history of overrides to the tracking detail. The date of the override and the User Id of the person data entering the override are displayed.

G - Tracking Override Input

Entry of a valid CIN or SSN returns the WTRK22 - Tracking Override Input screen. This screen allows for the deletion, modification, or addition to countable months. This screen also allows the entry of out of state data. Override input is allowed only by individuals who have been given permission for this function.

H - Print All Tracking Details

Entry of a valid CIN or SSN will print all tracking and payment records related to the counts. This may be used as documentation for a Fair Hearing. The produced reports are:

- WTRKP1 - Tracking Payment Detail Report
- WTRKP2 - Monthly Tracking Summary
- WTRKP3 - Tracking Override History

I - Produce Out-of-State Report

Entry of a valid CIN or SSN will print the Out of State Tracking Report. This contains only data related to the TANF count. The produced report is WTRKP4 - Out of State report.

J - HEAP Individual History

Entry of selection J and either a valid CIN or SSN returns the WTRK17 - HEAP Individual History screen. This screen displays an individual's statewide HEAP benefit history.

K - SDX-SSI Individual Status

Entry of selection K and a valid SSN returns the WTRK51 - SDX Inquiry screen. This screen displays SSI-related information. Additional information can be found in the **Automated SDX/WMS Interface** section of the SRM as well as the [SDX Manual](#).

WTRK00 - Time Limit / Employment Tracking Menu

```
WTRK00                               Dist                               Date 05/21/2007

                                TIME LIMIT TRACKING INQUIRY

Selecti on _  CIN _____ OR  SSN _____
                                Starting month/year _____ (Selections B and C only) _

A - Individual Tracking Summary      | G - Tracking Override Input
B - Monthly Tracking Summary         | H - Print ALL Tracking Details
C - Tracking Payment Detail          | I - Produce Out-of-State Report
D - PA Individual Status History     | J - Heap Individual History
E - FS Individual Status History     | K - SDX-SSI Individual Status
F - Tracking Override History

                                EMPLOYMENT TRACKING INQUIRY

Selecti on _  CIN _____ Case# _____ Suf ___ Dist _____

P - FS ABAWD Tracking
Q - PA Individual Employment Tracking
R - FS ABAWD Override
S - PA Employment Override
```

Figure 1 - Time Limit / Employment Tracking Menu (WTRK00)

Purpose

The Time Limit Tracking System is accessed from the WMS Menu. The upper portion of the screen is for the Time Limits Tracking System. The lower portion is for Employment Tracking functions.

Selections A through K provide access to Time Limit Tracking Inquiry, the printing of Tracking reports and limited data entry. Entry of either a CIN or SSN will return all time limit tracking data, regardless of district. Upstate and NYC data is combined along with any out of state time that has been entered.

Access

- Entering Selection 17 for Upstate on WMSMNU - WMS Menu.

Screen Response

Positive

- Selection A and CIN/SSN displays **WTRK11 - Individual Tracking Summary**,
- Selection B and CIN/SSN displays **WTRK12 - Monthly Tracking Summary**,
- Selection C and CIN/SSN displays **WTRK13 - Tracking Payment Detail**,

- Selection D and CIN/SSN displays **WTRK14 - PA Individual Status History**,
- Selection E and CIN/SSN displays **WTRK15 - FS Individual Status History**,
- Selection F and CIN/SSN displays **WTRK21 - Tracking Override History**,
- Selection G and CIN/SSN displays **WTRK22 - Tracking Override Input**,
- Selection H and CIN/SSN displays TRACKING REPORT PRINTING on line 24,
- Selection I and CIN/SSN displays OUT OF STATE REPORT PRINTING on line 24,
- Selection J and CIN/SSN displays **WTRK17 - HEAP Individual History**,
- Selection K and SSN displays **WTRK51 - SDX Inquiry**

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN IS A REQUIRED ENTRY
  - CIN OR SSN REQUIRED
  - ENTER EITHER CIN OR SSN
  - ENTER ONLY SSN FOR OPTION K
  - INVALID CIN ENTERED
  - INVALID DATE
  - MUST ENTER SSN FOR OPTION K
  - ONLY ONE SELECTION ALLOWED
  - SELECTION INVALID
  - SELECTION REQUIRED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- Selection H displays the message TRACKING REPORT PRINTING on line 24 and produces the following reports:
  - Tracking Payment Detail report
  - Monthly Summary Tracking report
  - Tracking Override History report
- Selection I displays the message OUT OF STATE REPORT PRINTING on line 24 and produces the Out of State TANF Inquiry report



Negative

None

Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WTRK00

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>TIME LIMIT TRACKING</b>		
SELECTION	NONE	Valid values are A through K
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Either CIN or SSN is entered by the user.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Either CIN or SSN is entered by the user.
STARTING MONTH/YEAR	NONE	Enter starting month/year in the format of MMY.
<b>EMPLOYMENT TRACKING</b>		
SELECTION	NONE	Required. Valid values are P through S.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Either CIN or Case # is entered by the user.
CASE #	01050 - CASE NUMBER (10)	Either CIN or Case # is entered by the user.
SUFF	01904 - SUFFIX IDENTIFIER (2)	The case suffix number. Used for NYC cases. Upstate cases will display 01.
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic. Enter's first four characters of local district name.

WTRK01 - Multiple CIN Selection

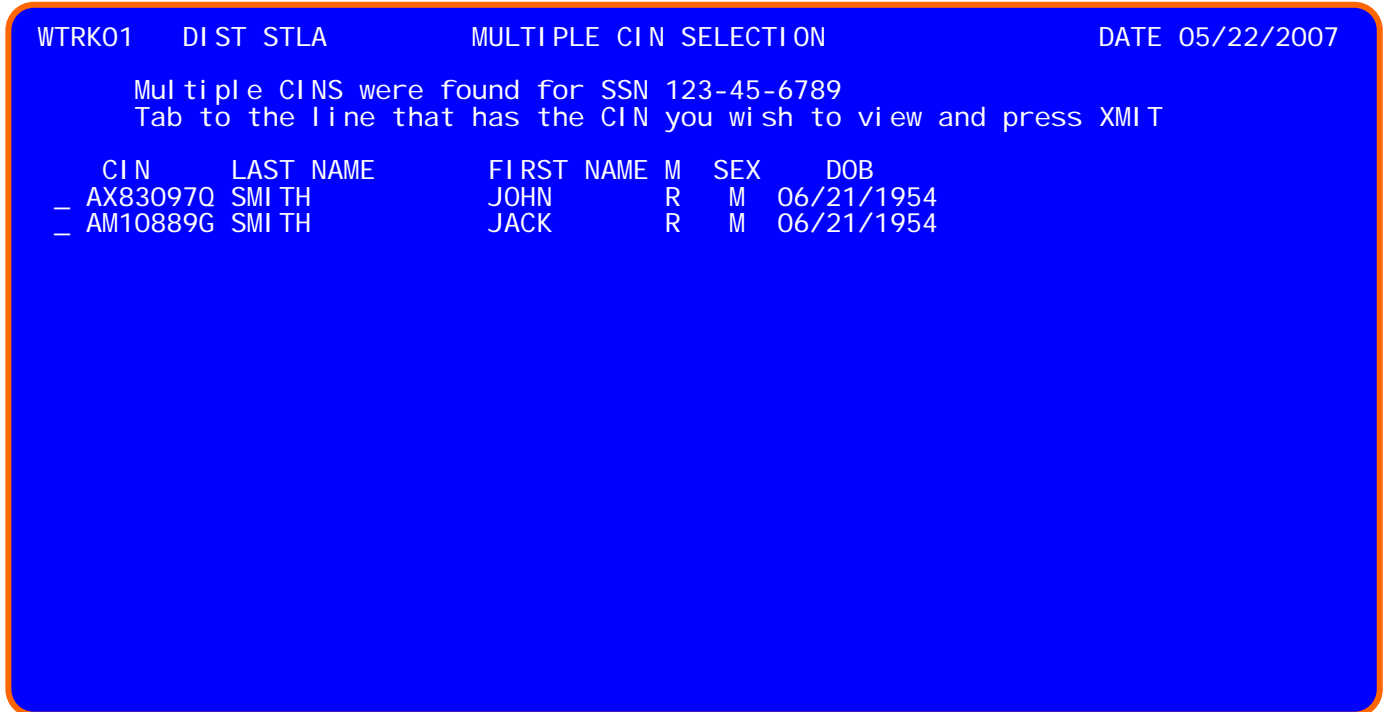


Figure 2 - Multiple CIN Selection (WTRK01)

Purpose

This screen will list up to seventeen CINS found for the SSN entered on WTRK00 - Time Limit Tracking Menu. If the SSN entered on the WTRK00 - Time Limit Tracking Menu is associated with multiple CINS, this screen will list the multiple CINS. The CINS displayed on this screen are listed in ascending order.

The screen allows the user to view the various SSN ID combinations and choose the correct person when the SSN ID they have entered is used by more than one person.

Access

- Entering an SSN in the **WTRK00 - Time Limit Tracking Menu** screen.

Screen Response

Positive

- Move the cursor to the field to the left of the CIN column for that individual and presses transmit.

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:

- NO TRACKING DATA DETAILS FOUND
- SELECTION FIELD MUST BE BLANK, TRY AGAIN
- SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
- SSN NOT FOUND
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK01

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
Multiple CINs were found for SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Comes from WTRK00 input.
<b>CIN INFORMATION</b>		
(NONE)	NONE	Place the cursor next to the CIN to inquire against. 17 occurrences.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. 17 occurrences.
LAST NAME	24110 - SURNAME (17)	Protected. 17 occurrences.
FIRST NAME	24120 - GIVEN NAME (10)	Protected. 17 occurrences.
M	24130 - MIDDLE INITIAL (1)	Protected. 17 occurrences.
SEX	03050 - SEX (1)	Protected. 17 occurrences.
DOB	03060 - DATE OF BIRTH (8)	Protected. 17 occurrences. Formatted as MM/DD/YYYY.

WTRK11 - Individual Tracking Summary

WTRK11 **INDIVIDUAL TRACKING SUMMARY**											
CIN		ST	SN	TF	EX	Di st	STLA	05/21/2007		Page	1 of 1
AX830970		IND: 19	0	19							
		CASE: 19	0	19	N						
Name	St/Di st	CIN	Suf	CD	SSN	Sex	DOB	Ex	Ind	St	
LI SA	A HOWARD	AX830970		1	547874541	F	121255	N	AC	AC	
	STLA	HOWARD0001	01		0305		0906				

F1 - Pg1	F2 - FWD	F3 - Back	F4 - MLY TRACKING SUMRY
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Figure 3 - Individual Tracking Summary (WTRK11)

**Purpose**

This screen displays various case and individual information. The total Time Limit tracking counts are displayed for the individual. All cases in which the individual was countable are displayed. All fields on the screen are protected.

If the individual is currently active, the case counters are displayed. If the individual is not active, only the individual counts are shown.

The cases listed on the screen are sorted with the most recently active cases first. The FROM and TO dates represent the earliest and latest dates for the case, not the beginning and ending dates of a countable time period.

**Access**

- Entering Selection A and a CIN (Individual) on **WTRK00 - Time Limit Tracking Menu, or**
- Entering Selection A and an SSN (with only one CIN associated to it) on **WTRK00 - Time Limit Tracking Menu, or**
- By selecting a CIN (Individual) on **WTRK01 - Multiple CIN Selection** screen.

## Screen Response

### Positive

- See **Function Keys**.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - NO CASES FOUND
  - NO TRACKING DATA DETAIL FOUND
  - SF99 NOT SUPPORTED - REXMT (99 = 5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

## Printed Response

None

## Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WTRK12 - Monthly Tracking Summary
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

## Screen Field Description - WTRK11

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN or SSN	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input.
<b>INDIVIDUAL INFORMATION</b>		
ST	WRTS - STATE CNT (3)	Individual State Count - the number of months that have been applied to the State Count for the individual. Format is 99.
SN	WRTS - SAFETYNET CASH CNT (3)	Individual Safety Net - The number of months that have been applied to the Safety Net Cash count for the individual. Format is 99.
TF	WRTS - FEDERAL TANF CNT	Individual TANF - The total TANF count for the individual. Format is 99.
<b>CASE INFORMATION</b>		
ST	WRTS - CASE STATE CNT (3)	Case State Count - The count that NYS applies to the 60-month time limit for all countable payments, both TANF and SNA. It is the highest count for any active sanctioned or non-applying adult in the case.
SN	WRTS - CASE SNA CNT (3)	Case SNA Count - The number of months of countable benefits that have been applied to a case. It is the highest Safety Net Assistance individual count in the case for any active or sanctioned adult or child in the case. It counts against the 24 month counter. It can change based on individuals being added or deleted from the case.
TF	WRTS - CASE TANF CNT (3)	Case TANF Count - The highest TANF count for any active or sanctioned adult in the case.
EX	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. SNNC OR 60 MO. TANF LIMIT (1)	Exempt Indicator - The case exempt indicator for the individual's case.
NAME	24120 - GIVEN NAME (10)	5 occurrences per page. The first name of the individual associated with the CIN.
	24130 - MIDDLE INITIAL (1)	5 occurrences per page. The middle initial of the individual associated with the CIN.
	24110 - SURNAME (17)	5 occurrences per page. The last name of the individual associated with the CIN.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	5 occurrences per page. The CIN of the individual for whom the search was initiated.
CD	03200 -SOCIAL SECURITY CODE (1)	5 occurrences per page. The SSN code of the individual associate with the CIN.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	5 occurrences per page. The SSN of the individual associated with the CIN
SEX	03050 - SEX (1)	5 occurrences per page. The sex of the individual associated with the CIN.
DOB	03060 - DATE OF BIRTH (8)	5 occurrences per page. The Date of Birth of the individual associated with the CIN.
EX	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. SNNC OR 60 MO. TANF LIMIT (1)	5 occurrences per page. The Limit Exemption code of the individual associated with the CIN.
IND ST	03120 - INDIVIDUAL STATUS (2)	5 occurrences per page. The individual status of the individual associated with the CIN.
ST/DIST	01010 - TRANSACTION DISTRICT (2)	5 occurrences per page. The two character abbreviation of the State of the first 4 letters of the local district name.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO.	01050 - CASE NUMBER (10)	5 occurrences per page. The case number associated with the CIN.
SUF	01904 - SUFFIX IDENTIFIER (2)	5 occurrences per page. The case suffix number. Used for NYC cases. Upstate cases will display 01.
FROM	WRTS - MONTH NBR (8)	5 occurrences per page. The first countable month included in the counter of the individual identified by the CIN. Format is MMY.
TO	WRTS - MONTH NBR (8)	5 occurrences per page. The last countable month included in the counter of the individual identified by the CIN. Format is MMY.
CASE ST	02090 - CASE STATUS (2)	5 occurrences per page. The case status of the case.



WTRK12 - Monthly Tracking Summary

WTRK12 **MONTHLY TRACKING SUMMARY**										Dist	STLA	05/21/2007	Page	1 of MM	
CIN	NAME				ST	SN	TF	OVR							
AX830970	LI SA		A HOWARD		19	0	19	N							
Case Name		Case No.		Suf	Di st	ST	SN	TF	IS						
LI SA A HOWARD		HOWARD0001		01	STLA	19	0	19	AC						
P D O										COUNT	COUNT	CREATED			
R T V	MM/YY	ST/DI ST	CASE NO.	SUF	CIN	ST	SN	TF		TYPE	RSN	BY DATE			
- - -	09/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	08/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	07/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	06/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	05/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	04/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	03/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	02/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
- - -	01/06	STLA	HOWARD0001	01	AX830970	Y	N	Y		ADLT	ISSU	T 02/14/07			
F1 -	Pg1		F2 - FWD					F3 - Back							
F5 -	Payment Detail		F7 - Print Payment Detail					F8 - Print Monthly Summary							
F9 -	Override History		F10 - Tracking Override Input												

Figure 4 - Monthly Tracking Summary (WTRK12)

Purpose

This screen displays the details of the State, SNA, and TANF counters for the individual. Statewide and Out of State Time Limit tracking activity is reported for an individual.

At the top of this screen below "Case Name", case information for up to 2 active cases (most recent month first) in which the individual was countable will be displayed. If the individual is a member of more than 2 active cases a message: "ADD'L CASES" will appear in the message are located at the extreme right side of the second data line.

The months displayed on this screen are sorted with the most recent month listed first.

The three columns labeled PR (print), DT (detail), and OV (override) allow the direct printing or access to detailed tracking data. Entering an "X" in one column for a specific month and transmitting prints the payment details for the month selected, displays the payment details for the month selected, or displays the Override Input screen with tracking data specific to the month selected.

The OV (Override Input) screen is accessible only by staff authorized to perform tracking override.

Access

- Entering Selection B on **WTRK00 - Time Limit Tracking Menu**, or
- F4 from **WTRK11 - Individual Tracking Summary**, or

- F4 from **WTRK21 - Tracking Override History**.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - NO CASES FOUND
  - NO MONTHLY COUNT INFORMATION AVAILABLE
  - SF99 KEY NOT SUPPORTED (99 = 4, 12-14, 17-22)
  - XMIT KEY NOT SUPPORTED WITHOUT INPUT DATA
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

- See **Function Keys**.

#### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WTRK13 - Tracking Payment Detail
F6	<i>Renders Workstation Inactive</i>
F7	WTRKP1 - Monthly Detail report is printed with message "MONTHLY DETAIL REPORT PRINTING"
F8	WTRKP2 - Monthly Summary report is printed with message "MONTHLY SUMMARY REPORT PRINTING"
F9	WTRK21 - Tracking Override History
F10	WTRK22 - Tracking Override Input
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu

Ctrl+F5            WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.  
Ctrl+F6            WTRK00 - Time Limit Tracking

Screen Field Description - WTRK12

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN or SSN	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input.
NAME	24120 - GIVEN NAME (10)	Protected.
	24130 - MIDDLE INITIAL (1)	Protected.
	24110 - SURNAME (17)	Protected.
ST	WRTS - STATE CNT (3)	Protected. Individual State Count - The count that NYS applies to the 60-month time limit for all countable payments, both TANF and SNA. It is the highest count for any active sanctioned or non-applying adult in the case. Formatted as 99.
SN	WRTS - SAFETYNET CASH CNT (3)	Protected. Individual SNA Count - The number of months of countable benefits that have been applied to a case. It is the highest Safety Net Assistance individual count in the case for any active or sanctioned adult or child in the case. It counts against the 24 month counter. It can change based on individuals being added or deleted from the case. Formatted as 99.
TF	WRTS - FEDERAL TANF CNT (3)	Protected. Individual TANF Count - The highest TANF count for any active or sanctioned adult in the case. Formatted as 99.
OVRR	NONE	Protected. Override Indicator - The override indicator is displayed if any month was overridden. This is a condition check set by the system if any months have been overridden. Valid values are 'Y' or space.
CASE NAME	01070 - CASE NAME (28)	Protected. Case Name - The case name of the active cases in which the individual is a member.
CASE NO.	01050 - CASE NUMBER (10)	Protected. Case Number - The case number of the active cases in which the individual is a member.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. Suffix ID - The case suffix number. Used for NYC cases. Upstate cases will display 01.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Transaction District - The first 4 letters of the local district of the active cases in which the individual is a member.
ST	WRTS - CASE STATE CNT (3)	Protected. Case State Count - The count that NYS applies to the 60-month time limit for all countable payments, both TANF and SNA. It is the highest count for any active sanctioned or non-applying adult in the case. Formatted as 99.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SN	WRTS - CASE SNA CNT (3)	Protected. Case SNA Count - The number of months of countable benefits that have been applied to a case. It is the highest Safety Net Assistance individual count in the case for any active or sanctioned adult or child in the case. It counts against the 24 month counter. It can change based on individuals being added or deleted from the case. Formatted as 99.
TF	WRTS - CASE TANF CNT (3)	Protected. TANF Count - The total TANF count for the individual's case. Formatted as 99.
IS	03120 - INDIVIDUAL STATUS (2)	Protected. Individual Status - The 2 character code for the individual status.
(NONE)	NONE	Protected. "ADD'L CASES" displayed by the system as an indication that more than two cases were found that meet the selection criteria.
<b>COUNT INFORMATION</b>		
PR	NONE	9 occurrences per page. Print Payment Detail for Month. An "X" in this field will print the Payment Detail Report for the month selected.
DT	NONE	9 occurrences per page. Display Payment Detail screen. An "X" in this field will display the Payment Detail screen.
OV	NONE	9 occurrences per page. An "X" in this field will display the Override Input screen.
MM/YY	WRTS - MONTH NBR (8)	Protected. 9 occurrences per page. Month/Year - The month/year of the countable month. Format is MM/YY.
ST/DIST	01010 - TRANSACTION DISTRICT (2)	Protected. 9 occurrences per page. State or District - The two character state abbreviation or the first four letters of the local district name.
CASE NO.	01050 - CASE NUMBER (10)	Protected. 9 occurrences per page. Case Number - The case number to which the countable payment was made.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. 9 occurrences per page. Suffix ID - the case suffix number. Used for NYC case. Upstate case s will display 01.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. 9 occurrences per page. Client Identification Number - The CIN for whom the countable month was applied.
ST	WRTS - APPLIED TO STATE IND (1)	Protected. 9 occurrences per page. State Indicator - A Y will be displayed if the month is counted against the State count.
SN	WRTS - APPLIED TO SNA IND (1)	Protected. 9 occurrences per page. Safety Net Assistance Indicator - A Y will be displayed if the month is counted against the SNA count.
TF	WRTS - APPLIED TO TANF IND (1)	Protected. 9 occurrences per page. TANF Indicator - A Y will be displayed if the month is counted against the TANF count.
COUNT TYPE	WRTS - COUNTABLE TYPE CD (1)	Protected. Mnemonic. 9 occurrences per page. The four character mnemonic for the countable type.
COUNT RSN	WRTS - COUNTABLE REASON CD (1)	Protected. Mnemonic. 9 occurrences per page. The four character mnemonic for the countable reason.
<b>CREATED INFORMATION</b>		
BY	WRTS - DATE SOURCE CD (1)	Protected. 9 occurrences per page. Created By - A method of creation for the month.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DATE	WRTS - CREATE DT (8)	Protected. 9 occurrences per page. Created Date - The creation date for each month displayed.

WTRK13 - Tracking Payment Detail

MM/YY	DI ST	CASE NO.	SUF	CT	TYPE	MOP	AMOUNT	PAY PERIOD	ISSUE	RD	T/S
09/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
08/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
07/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
06/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
05/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
04/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
03/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T
02/06	STLA	HOWARD0001	01	SNFP	CASH	01	25.00	10/01/05 - 09/30/06	02/12/07		T

Figure 5 - Tracking Payment Detail (WTRK13)

Purpose

This screen provides the details of payments that have contributed to the Safety Net and TANF counter values for an individual. The Payment details displayed are sorted by month/year, with the most recent month, first and the most recent issuance within that month. All fields on the screen are protected.

Access

- Entering Selection C on **WTRK00 - Time Limit Tracking Menu**, or
- F5 from **WTRK12 - Monthly Tracking Summary**, or
- F5 from **WTRK21 - Tracking Override History**.

Screen Response

Positive

- See **Function Keys**.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - NO PAYMENT DATA FOUND
  - SF99 KEY NOT SUPPORTED (99 = 5, 8, 10, 13-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

See **Function Keys**.

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WTRK12 - Monthly Tracking Summary
F6	<i>Renders Workstation Inactive</i>
F7	WTRKP1 - Payment Detail report with message "PAYMENT DETAIL REPORT PRINTING"
F9	WTRK21 - Tracking Override History
F11 + Ctrl+F1	WTRKP3 - Individual Override History report with message "INDIVIDUAL OVERRIDE HISTORY PRINTING"
F12 + Ctrl+F2	WINQ01/WINQ02 - Application and Case Inquiry/Individual CIN or SSN Inquiry
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK13

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
	24110 - SURNAME (17)	
ST	WRTS - STATE CNT (3)	Individual State Count - The total State count for the individual. Format is 99.
SN	WRTS - SAFETYNET CASH CNT (3)	Individual Safety Net - The total Safety Net count for the individual. Format is 99.
TF	WRTS - FEDERAL TANF CNT (3)	Individual TANF - The total TANF count for the individual. Format is 99.
<b>PAYMENT DETAIL INFORMATION</b>		
MM/YY	WRTS - MONTH NBR (8)	8 occurrences per page. Month/Year - The payment month and year for each countable payment that applies to the individual.
DIST	01010 - TRANSACTION DISTRICT (2)	8 occurrences per page. Payment District - The four letters of the local district name for each countable payment that applies to the individual.
CASE NO.	01050 - CASE NUMBER (10)	8 occurrences per page. Case Number - The case number for each countable payment that applies to the individual.
SUF	01904 - SUFFIX IDENTIFIER (2)	8 occurrences per page. Suffix ID - The case suffix number. Used for NYC cases. Upstate cases will display 01.
CT	01060 - CASE TYPE (2)	8 occurrences per page. Case Type - The two character mnemonic for case type.
TYPE	14010 - PAYMENT TYPE (2)	8 occurrences per page. Payment Type - The four character mnemonic for the payment category.
METH	14020 - METHOD OF PAYMENT INDICATOR (1)	8 occurrences per page. Method of Payment Code - The payment method for each countable payment.
AMOUNT	14011 - PAYMENT AMOUNT (6)	8 occurrences per page. Payment Amount - The payment amount for each countable payment. In cases where the payment amount is zero the recoupment amount for that month from the budget will be displayed.
PAY PERIOD	14012 - PAYMENT PERIOD (12)	8 occurrences per page. Payment Period - The payment FROM and TO dates for each countable payment. Formatted as MM/DD/YY - MM/DD/YY.
ISSUE	WRTS - ISSUANCE DT (8)	8 occurrences per page. Payment Issuance - The payment issue date for each countable payment.
RD	WRTS - PAYMENT STATUS CD (2)	8 occurrences per page. PA Benefit Reconciliation Code - The redemption status for each countable payment that applies to an individual. Statuses of I (issued) and A (Authorized - Town Payments) will be displayed as a blank since they are not redemption statuses. Redemption statuses of P (Partial Redemption) and F (Full Redemption) will be displayed.



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
T/S	WRTS - TANF SNA CD (1)	8 occurrences per page. A code indicating how a payment should be counted for tracking purposes.



- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- NO HISTORY FOUND
- SF99 KEY NOT SUPPORTED (99 = 4, 7-12, 14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

Positive

- Clearance Report and App TAD for new Application Registration.

Negative

- None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WTRK16 - Individual Sanction History
F6	<i>Renders Workstation Inactive</i>
Ctrl+F3	WTRK15 - FS Individual Status History
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK14

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
	24110 - SURNAME (17)	
ST	WRTS - STATE CNT (3)	Individual State Count - The total State count for the individual. Format is 99.
SN	WRTS - SAFETYNET CASH CNT (3)	Individual Safety Net - The total Safety Net count for the individual. Format is 99.
TF	WRTS - FEDERAL TANF CNT (3)	Individual TANF - The total TANF count for

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
		the individual. Format is 99.
<b>PA INDIVIDUAL INFORMATION</b>		
DIST	01010 - TRANSACTION DISTRICT (2)	7 occurrences per page. Transaction District - The first four letters of the local district name.
CASE NUMBER	01050 - CASE NUMBER (10)	7 occurrences per page. Case Number - The case number of the cases in which the individual is or was a member.
SUF	01904 - SUFFIX IDENTIFIER (2)	7 occurrences per page. Suffix ID - The case number suffix. Used for NYC cases. Upstate cases will display 01.
CT	01060 - CASE TYPE (2)	7 occurrences per page. Case Type - The 4 character mnemonic for the case type.
CASE STAT	02090 - CASE STATUS (2)	7 occurrences per page. PA Case Stat - The four character mnemonic for the PA case status.
CASE REASON	02006 - PA/FS REASON CODE (3)	7 occurrences per page. PA Case Reason - The three character code and 9 character mnemonic for the PA case reason.
DATE	02020 - TRANSACTION INPUT DATE (6)	7 occurrences per page. PA Case Status Date - The PA case status date. Format as MM/DD/YY
IND STAT	03120 - INDIVIDUAL STATUS (2)	7 occurrences per page. Individual Status - The two character mnemonic for the PA individual status.
IND REASON	03121 - PA/MA INDIVIDUAL REASON CODE (3)	7 occurrences per page. Individual Reason Code - The three character code and the 9 character mnemonic for the PA individual reason code.
DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	7 occurrences per page. Individual Status Date - The PA individual status date. Format as MM/DD/YY.

WTRK15 - FS Individual Status History

WTRK15 **FS INDIVIDUAL STATUS HISTORY**									
Di st		STLA		05/21/2007		Page 1 of 1			
CIN		Name		A HOWARD					
AX830970		LI SA							
ST 19		SN 0		TF 19					
DI ST	CASE NUMBER	SUF CT	FS STAT	CASE REASON	DATE	IND STAT	IND REASON	DATE	
STLA	HOWARD0001	01	SNFP AC			AC		04/01/05	

F1 - Pg1	F2 - FWD	F3 - Back
F5 - Individual Sanction History	F13 - PA IND Status History	-

Figure 7 - FS Individual Status History (WTRK15)

Purpose

This screen provides a history of FS case and individual history. If the Tracking Main Menu selection was E - FS Individual Status History, then this screen name will be WTRK15 - FS Individual Status History and the STAT column will be labeled "FS STAT". All fields on the screen are protected.

Access

- Entering Selection E on **WTRK00 - Time Limit Tracking Menu, or**
- Ctrl+F3 on **WTRK14 - PA Individual Status History**

Screen Response

Positive

- See **Function Keys.**

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND

- CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- NO HISTORY FOUND
- SF99 KEY NOT SUPPORTED (99 = 4, 7-12, 14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WTRK11- Individual Tracking Summary
F6	<i>Renders Workstation Inactive</i>
Ctrl+F3	WTRK14 - PA Individual Status History
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK15

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
	24110 - SURNAME (17)	
ST	WRTS - STATE CNT (3)	Individual State Count - The total State count for the individual. Format is 99.
SN	WRTS - SAFETYNET CASH CNT (3)	Individual Safety Net - The total Safety Net count for the individual. Format is 99.
TF	WRTS - FEDERAL TANF CNT (3)	Individual TANF - The total TANF count for the individual. Format is 99.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>FS INDIVIDUAL INFORMATION</b>		
DIST	01010 - TRANSACTION DISTRICT (2)	7 occurrences per page. Transaction District - The first four letters of the local district name.
CASE NUMBER	01050 - CASE NUMBER (10)	7 occurrences per page. Case Number - The case number of the cases in which the individual is or was a member.
SUF	01904 - SUFFIX IDENTIFIER (2)	7 occurrences per page. Suffix ID - The case number suffix. Used for NYC cases. Upstate cases will display 01.
CT	01060 - CASE TYPE (2)	7 occurrences per page. Case Type - The 4 character mnemonic for the case type.
CASE STAT	02090 - CASE STATUS (2)	7 occurrences per page. FS Case Stat - The four character mnemonic for the FS case status.
CASE REASON	02006 - PA/FS REASON CODE (3)	7 occurrences per page. FS Case Reason - The three character code and 9 character mnemonic for the FS case reason.
DATE	02020 - TRANSACTION INPUT DATE (6)	7 occurrences per page. FS Case Status Date - The PA case status date. Format as MM/DD/YY
IND STAT	03120 - INDIVIDUAL STATUS (2)	7 occurrences per page. Individual Status - The two character mnemonic for the FS individual status.
IND REASON	WRTS - REASON CD (3)	7 occurrences per page. Individual Reason Code - The three character code and the 9 character mnemonic for the FS individual reason code.
DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	7 occurrences per page. Individual Status Date - The FS individual status date. Format as MM/DD/YY.

WTRK16 - Individual Sanction History

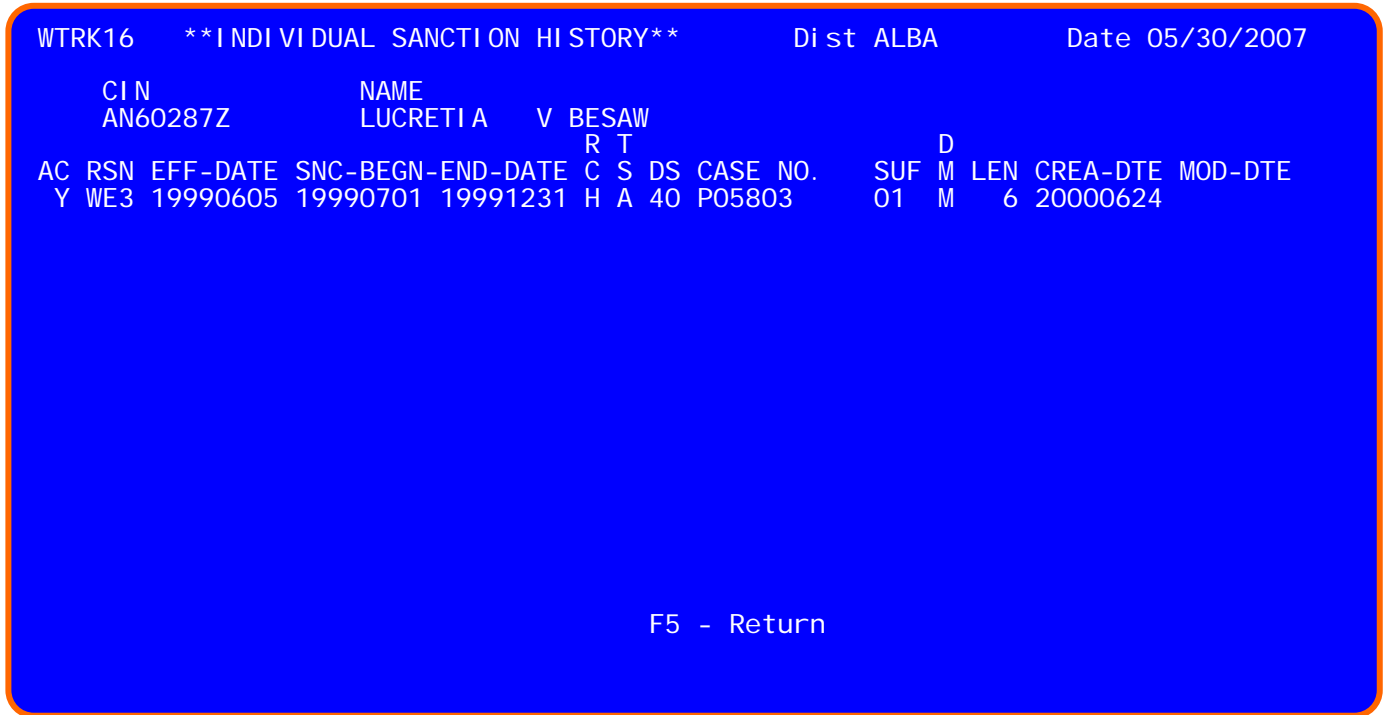


Figure 8 - Individual Sanction History (WTRK16)

Purpose

This screen provides a history of sanctions for PA/FS individuals. Its purpose is to provide details helpful in the system debugging process. All fields on the screen are protected.

Access

- Entering F5 on **WTRK14 - PA Individual Status History**, or
- Entering F5 on **WTRK15 - FS Individual Status History**.

Screen Response

Positive

- See **Function Keys**.

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND
  - NO DATA FOUND



- SF99 KEY NOT SUPPORTED (99 = 1-4, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F5	WTRK14 - PA Individual Status History or WTRK15 - FS Individual Status History
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK16

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
	24110 - SURNAME (17)	
<b>SANCTION INFORMATION</b>		
AC	WRTS - ACTIV IND (1)	17 occurrences per page.
RSN	02050 - REASON CODE (3)	17 occurrences per page.
EFF-DATE	WRTS - REASON EFF DT (8)	17 occurrences per page.
SNC-BEGN-END-DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	17 occurrences per page.
	03118 - CLIENT STATUS EFFECTIVE DATE (6)	17 occurrences per page.
RC	WRTS - SANCTION END MONTH DT (8)	17 occurrences per page.
TS	WRTS - TANF SNA CD (1)	17 occurrences per page.
DS	01010 - TRANSACTION DISTRICT (2)	17 occurrences per page.
CASE NO.	01050 - CASE NUMBER (10)	17 occurrences per page.
SUF	01904 - SUFFIX IDENTIFIER (2)	17 occurrences per page.
DM	WRTS - DAY MONTH CD (1)	17 occurrences per page.
LEN	WRTS - LENGTH NBR (3)	17 occurrences per page.
CREA-DTE	WRTS - CREATE DT (8)	17 occurrences per page.
MOD-DTE	WRTS - MODIFY DT (8)	17 occurrences per page.

WTRK21 - Tracking Override History

WTRK21    **TRACKING OVERRIDE HISTORY**    Dist STLA    05/23/2007    Page 1 of 1															
CIN		Name			ST	SN	TF								
AX830970		LISA			A	HOWARD	18	0	18						
MM/YY	ST/DS	CASE NO.	SUF	CIN	ST	SN	TF	CNT TYPE	CNT RSN	CR	OVERRI DATE	USER ID	OVR RSN		
09/06	STLA	HOWARD0001	01	AX830970	N	N	N	ADLT	ISSU	0	05/23/07	AX7799	S		
09/06	STLA	HOWARD0001	01	AX830970	Y	N	Y	ADLT	ISSU	T	02/14/07				

F1 - Pg1	F2 - FWD	F3 - Back
F4 - Monthly Tracking Summary	F5 - Payment Detail	F11 - Print Override History

Figure 9 - Transaction Override History (WTRK21)

Purpose

This screen provides a history of override activity for an individual. The timestamp and userid of the person making the overrides are displayed for each overridden record.

The months displayed are sorted with the most recent month first, then the most current entry for that month/year. The months displayed must have a Creation Indicator of "O" (Override). All fields on the screen are protected.

Access

- Selection F on **WTRK00 - Time Limit Tracking Menu**, or
- F9 from **WTRK12 - Monthly Tracking Summary**, or
- F9 from **WTRK13 - Tracking Payment Detail**.

Screen Response

Positive

- See **Function Keys**.

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CIN NOT FOUND
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - NO MONTHS HAVE BEEN FOUND OVERRIDDEN FOR INDIVIDUAL
  - SF99 KEY NOT SUPPORTED (99 = 1-4, 7-10, 12-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

See **Function Keys**.

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WTRK12 - Monthly Tracking Summary
F5	WTRKP1 - Tracking Payment Detail
F6	<i>Renders Workstation Inactive</i>
F11	WTRKP3 - Tracking Override History report with message "INDIVIDUAL OVERRIDE HISTORY PRINTING"
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK21

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24120 - GIVEN NAME (10)	First name of the individual.
	24130 - MIDDLE INITIAL (1)	Middle initial of the individual.
	24110 - SURNAME (17)	Last name of the individual.
ST	WRTS - STATE CNT (3)	
SN	WRTS - SAFETYNET CASH CNT (3)	
TF	WRTS - FEDERAL TANF CNT (3)	
<b> OVERRIDE INFORMATION </b>		
MM/YY	WRTS - MONTH NBR (8)	13 occurrences per page. Month/Year - The month/year of the month that was overridden. Format of MM/YY.
ST/DS	01010 - TRANSACTION DISTRICT (2)	13 occurrences per page. Case State or Case District - the 2 character abbreviation for the State of the first 4 letter on the local district name.
CASE NO.	01050 - CASE NUMBER (10)	13 occurrences per page. Case Number - The case number of the cases in which the individual is/was a member.
SUF	01904 - SUFFIX IDENTIFIER (2)	13 occurrences per page. Suffix ID - The case number suffix. Used for NYC cases. Upstate cases will display 01.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	13 occurrences per page. Client Identification Number (CIN) - The CIN of the individual that had the month overridden.
ST	WRTS - APPLIED TO STATE IND (1)	13 occurrences per page. State Indicator - The applied to State indicator for each month displayed.
SN	WRTS - APPLIED TO SNA IND (1)	13 occurrences per page. SNA Indicator - The applied to SNA indicator for each month displayed.
TF	WRTS - APPLIED TO TANF IND (1)	13 occurrences per page. TANF Indicator - The applied to TANF indicator for each month displayed.
CNT TYPE	WRTS - COUNTABLE TYPE CD (1)	13 occurrences per page. Countable Type - The 4 character mnemonic for countable type.
CNT RSN	WRTS - COUNTABLE REASON CD (1)	13 occurrences per page. Countable Reason - The 4 character mnemonic for the countable reason.
CR	WRTS - DATA SOURCE CD (1)	13 occurrences per page. Created By Indicator - The method of the creation code.
OVERRIDE DATE	WRTS - CREATE DT (8)	13 occurrences per page. Override Date - The date the override was data entered.
USER ID	WRTS - OVERRIDE USER ID (6)	13 occurrences per page. Changed by ID - The User ID of the user who performed the override.
OVR RSN	WRTS - OVERRIDE REASON CD (1)	13 occurrences per page. Override Reason - the override reason code.

WTRK22 - Tracking Override Input

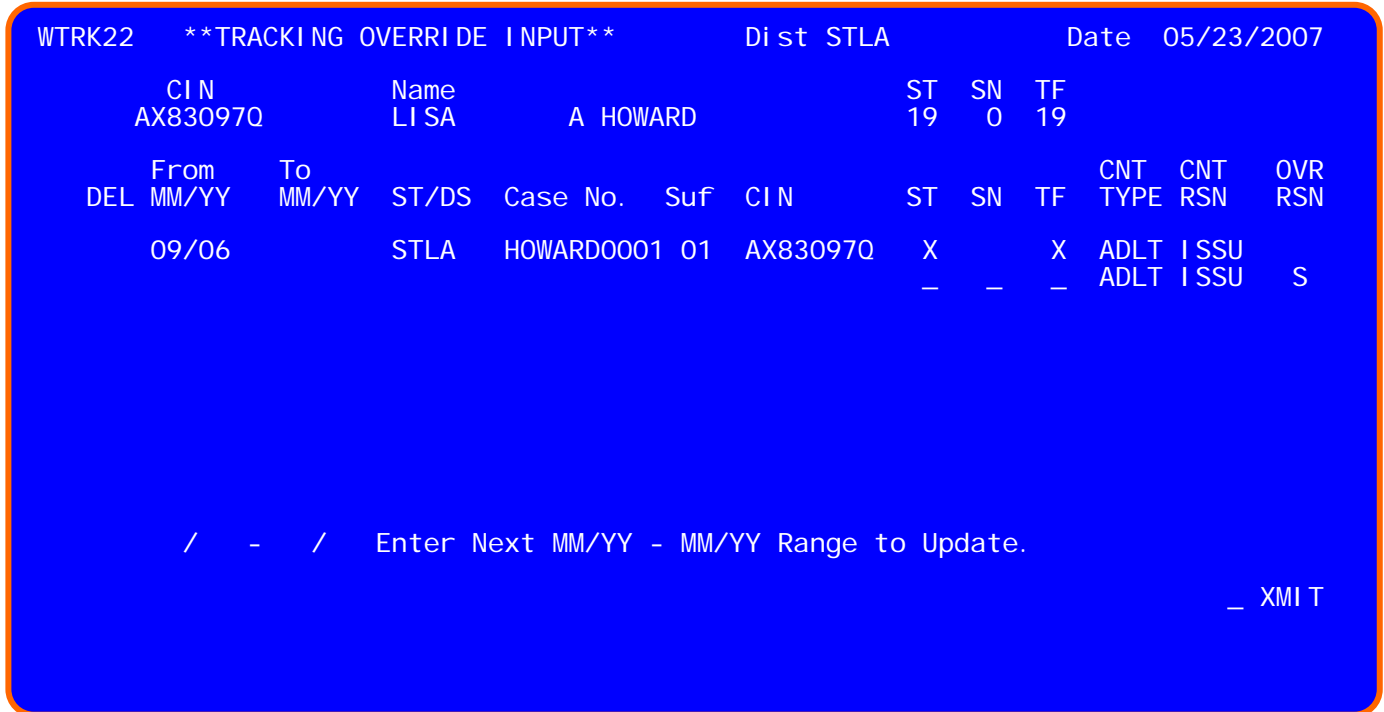


Figure 10 - Transaction Override History (WTRK22)

Purpose

This screen provides an area where overrides can be added, modified or deleted. Up to 4 overrides (per screen) to the tracking detail can be made when a counter adjustment is necessary. The screen also provides for the entry of out-of-state information.

A monthly range may be added or changed. Note that the Override Input screens have messages and prompts in the lower portion.

Override inputs of any kind (adds, changes, or deletes) must be accepted. This is done using special function keys which bring the user to **WTRK23 - Transaction Override Acceptance** where transactions are accepted by pressing the ENTER key.

Access

- Selection G on **WTRK00 - Time Limit Tracking Menu**, or
- F10 on **WTRK12 - Monthly Tracking Summary**, or
- Ctrl+F5 on **WTRK23 - Tracking Override Acceptance**.

## Screen Response

### Positive

- Entering a date range (in “MM/YY” format) and then pressing the ENTER key. This user action provides a list of issuance month/years that fall with the entered date range. For each record in the list, the user may do one of the following:
  - Keying an “X” in the DEL column to delete an override and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the ST column to override the record for State counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the SN column to override the record for SNA counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the TF column to override the record for TANF counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Removing an “X” in any of the columns described previously and then moving to the XMIT column and pressing the ENTER key.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - BAD STATE CODE
  - CASE NUMBER NOT FOUND
  - CASE NUMBER REQUIRED FOR IN-STATE ENTRY
  - CIN HAS MULTIPLE DISTRICT ACTIVITY
  - CIN NOT FOUND
  - EARLIEST DATE FOR STATES IS SEP 96
  - EARLIEST DATE W/60 ST CHECKED IS SEP 96
  - EARLIEST VALID FROM DATE IS 8/97 IF SN INDICATOR IS CHECKED
  - FROM DATE MISSING
  - FROM DATE MM/DD/YY > TO DATE
  - FROM DATE PRIOR TO AUG '96
  - FUTURE DATE NOT ALLOWED
  - INVALID DATE NON-NUMERIC
  - INVALID DISTRICT
  - INVALID ENTRY
  - INVALID FROM DATE
  - INVALID TO DATE

- NO INVOLVEMENT IN DISTRICT
- NO PENDING RECORDS HAVE BEEN STORED
- NOT ACTIVE IN DISTRICT
- OVERRIDE DATA CAN'T BE THE SAME AS HISTORY
- OVERRIDE REASON CANNOT BE BLANK
- OVERRIDE REASON INVALID
- OVERRIDE REASON IS REQUIRED
- SF99 NOT SUPPORTED - REXMT (99 = 1-3, 5, 7-14, 17-22)
- SNA ENTRY IS ONLY ALLOWED FOR DISTRICTS
- STATE OR DISTRICT IS A REQUIRED ENTRY
- SUFFIX IS INVALID
- SUFFIX IS REQUIRED
- SUFFIX MUST BE NUMERIC
- SUFFIX ONLY ALLOWED FOR NYC CASES
- TANF INDICATOR IS A X, STATE INDICATOR MUST ALSO BE A X
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F4	WTRK23 - Tracking Override Acceptance
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK22

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	Protected. First name of the individual.
	24130 - MIDDLE INITIAL (1)	Protected. Middle initial of the individual.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	24110 - SURNAME (17)	Protected. Last name of the individual.
<b>OVERRIDE INFORMATION</b>		
DEL	NONE	"X" to delete (undo) this override.
FROM MM/YY	WRTS - MONTH NBR (8)	Protected. 4 occurrences. Month/Year - The starting month/year of the series of months that were overridden. Format of MM/YY.
TO MM/YY	WRTS - MONTH NBR (8)	Protected. 4 occurrences. Month/Year - The ending month/year of the series of months that were overridden. Format of MM/YY.
ST/DS	01010 - TRANSACTION DISTRICT (2)	Protected. 4 occurrences. Case State or Case District - the 2 character abbreviation for the State or the first 4 letter of the local district name.
CASE NO.	01050 - CASE NUMBER (10)	Protected. 4 occurrences.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. 4 occurrences.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. 4 occurrences.
ST	WRTS - APPLIED TO STATE IND (1)	Protected. 4 occurrences.
SN	WRTS - APPLIED TO SNA IND (1)	Protected. 4 occurrences.
TF	WRTS - APPLIED TO TANF IND (1)	Protected. 4 occurrences.
CNT TYPE	WRTS - COUNTABLE TYPE CD (1)	Protected. 4 occurrences. Countable Type - The 4 character mnemonic for countable type.
CNT RSN	WRTS - COUNTABLE REASON CD (1)	Protected. 4 occurrences. Countable Reason Code
OVR RSN	WRTS - OVERRIDE REASON CD (1)	Protected. 4 occurrences.



WTRK22 - Tracking Override Input (Showing Input Area)

```

WTRK22  **TRACKING OVERRIDE INPUT**          Dist STLA          Date 07/10/2007
      CIN          Name          ST  SN  TF
      AX830970     LISA          18  0  18
      A HOWARD
      From      To
      DEL MM/YY MM/YY  ST/DS  Case No.  Suf  CIN          ST  SN  TF  CNT  CNT  OVR
                                     TYPE  RSN  RSN
      _ 01/05          _          _  AX830970  _  _  _          _
      /  -  /          Enter Next MM/YY - MM/YY Range to Update.
      F4 - Tracking Override Acceptance          _ XMIT
    
```

Figure 11 - Transaction Override Input - Showing Input Area (WTRK22)

**Purpose**

This screen provides an area where overrides can be added, modified or deleted. Up to 4 overrides (per screen) to the tracking detail can be made when a counter adjustment is necessary. The screen also provides for the entry of out-of-state information.

A monthly range may be added or changed. Note that the Override Input screens have messages and prompts in the lower portion.

Override inputs of any kind (adds, changes, or deletes) must be accepted. This is done using special function keys which bring the user to **WTRK23 - Transaction Override Acceptance** where transactions are accepted by pressing the ENTER key.

**Access**

- Selection G on **WTRK00 - Time Limit Tracking Menu**, or
- F10 on **WTRK12 - Monthly Tracking Summary**, or
- Ctrl+F5 on **WTRK23 - Tracking Override Acceptance**.

## Screen Response

### Positive

- Entering a date range (in “MM/YY” format) and then pressing the ENTER key. This user action provides a list of issuance month/years that fall with the entered date range. For each record in the list, the user may do one of the following:
  - Keying an “X” in the DEL column to delete an override and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the ST column to override the record for State counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the SN column to override the record for SNA counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Keying an “X” in the TF column to override the record for TANF counting, entering an override reason, and then moving to the XMIT column and pressing the ENTER key.
  - Removing an “X” in any of the columns described previously and then moving to the XMIT column and pressing the ENTER key.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - BAD STATE CODE
  - CASE NUMBER NOT FOUND
  - CASE NUMBER REQUIRED FOR IN-STATE ENTRY
  - CIN HAS MULTIPLE DISTRICT ACTIVITY
  - CIN NOT FOUND
  - EARLIEST DATE FOR STATES IS SEP 96
  - EARLIEST DATE W/60 ST CHECKED IS SEP 96
  - EARLIEST VALID FROM DATE IS 8/97 IF SN INDICATOR IS CHECKED
  - FROM DATE MISSING
  - FROM DATE MM/DD/YY > TO DATE
  - FROM DATE PRIOR TO AUG '96
  - FUTURE DATE NOT ALLOWED
  - INVALID DATE NON-NUMERIC
  - INVALID DISTRICT
  - INVALID ENTRY
  - INVALID FROM DATE
  - INVALID TO DATE

- NO INVOLVEMENT IN DISTRICT
- NO PENDING RECORDS HAVE BEEN STORED
- NOT ACTIVE IN DISTRICT
- OVERRIDE DATA CAN'T BE THE SAME AS HISTORY
- OVERRIDE REASON CANNOT BE BLANK
- OVERRIDE REASON INVALID
- OVERRIDE REASON IS REQUIRED
- SF99 NOT SUPPORTED - REXMT (99 = 1-3, 5, 7-14, 17-22)
- SNA ENTRY IS ONLY ALLOWED FOR DISTRICTS
- STATE OR DISTRICT IS A REQUIRED ENTRY
- SUFFIX IS INVALID
- SUFFIX IS REQUIRED
- SUFFIX MUST BE NUMERIC
- SUFFIX ONLY ALLOWED FOR NYC CASES
- TANF INDICATOR IS A X, STATE INDICATOR MUST ALSO BE A X
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F4	WTRK23 - Tracking Override Acceptance
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK22

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	Protected. First name of the individual.
	24130 - MIDDLE INITIAL (1)	Protected. Middle initial of the individual.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	24110 - SURNAME (17)	Protected. Last name of the individual.
<b>OVERRIDE INFORMATION</b>		
DEL	NONE	"X" to delete (undo) this override.
FROM MM/YY	WRTS - MONTH NBR (8)	Protected. 4 occurrences. Month/Year - The starting month/year of the series of months that were overridden. Format of MM/YY.
TO MM/YY	WRTS - MONTH NBR (8)	Protected. 4 occurrences. Month/Year - The ending month/year of the series of months that were overridden. Format of MM/YY.
ST/DS	01010 - TRANSACTION DISTRICT (2)	Protected. 4 occurrences. Case State or Case District - the 2 character abbreviation for the State or the first 4 letter of the local district name.
CASE NO.	01050 - CASE NUMBER (10)	Protected. 4 occurrences.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. 4 occurrences.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. 4 occurrences.
ST	WRTS - APPLIED TO STATE IND (1)	Protected. 4 occurrences.
SN	WRTS - APPLIED TO SNA IND (1)	Protected. 4 occurrences.
TF	WRTS - APPLIED TO TANF IND (1)	Protected. 4 occurrences.
CNT TYPE	WRTS - COUNTABLE TYPE CD (1)	Protected. 4 occurrences. Countable Type - The 4 character mnemonic for countable type.
CNT RSN	WRTS - COUNTABLE REASON CD (1)	Protected. 4 occurrences. Countable Reason Code
OVR RSN	WRTS - OVERRIDE REASON CD (1)	Protected. 4 occurrences.
<b>NEW/UPDATE INFORMATION AREA</b>		
MONTH YEAR	NONE	Required. 4 occurrences. Enter MM/YY.
ST/DS	NONE	Required. 4 occurrences. Enter a two character state code or a four character district code.
CASE NO.	NONE	Required. 4 occurrences. Enter a valid case number.
SUF	NONE	Required. 4 occurrences. Enter a suffix id. For Upstate cases this is always 01
CIN	NONE	Required. 4 occurrences. Enter a valid CIN.
ST	NONE	4 occurrences. Updateable. State Indicator. Enter an 'X' to set this indicator, or a space to clear this indicator.
SN	NONE	4 occurrences. Updateable. Enter an 'X' to set this indicator, or a space to clear this indicator.
TF	NONE	4 occurrences. Updateable. Enter an 'X' to set this indicator, or a space to clear this indicator.
CNT TYPE	NONE	4 occurrences. System generated.
CNT RSN	NONE	4 occurrences. System generated.
OVR RSN	NONE	Required. 4 occurrences. Enter a valid override reason code.



### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMIT (99 = 4-5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK22 - Tracking Override Input
Ctrl+F6	WTRK00 - Time Limit Tracking

### Screen Field Description - WTRK23

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	First name of the individual.
	24130 - MIDDLE INITIAL (1)	Middle initial of the individual.
	24110 - SURNAME (17)	Last name of the individual.
<b>OVERWRITE INFORMATION</b>		
MM/YY	WRTS - MONTH NBR (8)	14 occurrences. Month/Year - The month/year of the month that was overridden. Format of MM/YY.
ST/DS	01010 - TRANSACTION DISTRICT (2)	14 occurrences. Case State or case District - the 2 character abbreviation for the State of the first 4 letter on the local district name.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO.	01050 - CASE NUMBER (10)	14 occurrences.
SUF	01904 - SUFFIX IDENTIFIER (2)	14 occurrences.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	14 occurrences.
ST	WRTS - APPLIED TO STATE IND (1)	14 occurrences.
SN	WRTS - APPLIED TO SNA IND (1)	14 occurrences.
TF	WRTS - APPLIED TO TANF IND (1)	14 occurrences.
CNT TYPE	WRTS - COUNTABLE TYPE CD (1)	14 occurrences.
CNT RSN	WRTS - COUNTABLE REASON CD (1)	14 occurrences.
CR	WRTS - DATA SOURCE CD (1)	14 occurrences.
OVERRIDE DATE	WRTS - CREATE DT (8)	14 occurrences.
USER ID	WRTS - OVERRIDE USER ID (6)	14 occurrences.
OVR RSN	WRTS - OVERRIDE REASON CD (1)	14 occurrences.

WTRK17 - HEAP Individual History

```
WTRK17      ** HEAP I N D I V I D U A L H I S T O R Y **      D I S T S T L A   0 5 / 3 1 / 2 0 0 7   P A G E 0 1 O F 0 1
C I N / S S N      N A M E
A X 8 3 0 9 7 0      L I S A           A H O W A R D

              S
              U   C A S E   C A S E           P A Y
D I S T   C A S E   F   T Y P E   S T A T   R E L   T Y P E           A M O U N T   P A Y   P E R I O D           A U T H           F   V
S T L A   N U M B E R   F   T Y P E   S T A T   R E L   T Y P E           A M O U N T   P A Y   P E R I O D           A U T H           T   /
S T L A   A X 8 3 0 9 7 0   0 1   S N F P   A C   A P Y   1 1           2 5 . 0 0   0 9 / 0 1 / 0 6 - 0 9 / 3 0 / 0 6   0 9 / 0 1 / 0 6           Y   C
                                                                                                     6   A

F 1  -  P G 1                                F 2  -  F W D                                F 3  -  B A C K
```

Figure 13 - HEAP Individual History (WTRK17)

Purpose

This screen provides a history of an individual's statewide HEAP benefits. It displays those individuals that were active at the time HEAP benefits were authorized. All fields on the screen are protected.

If an SSN was entered, this screen will display that SSN under the screen caption SSN. If a CIN was entered, this screen will display that CIN under the screen caption CIN.

The Payment details displayed are stored by month/day/year, with the most recent payment displayed first.

Access

- Selection J on **WTRK00 - Time Limit Tracking Menu.**

Screen Response

Positive

- See **Function Keys.**

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:



- Cin Not Found.
- CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- No Case Member Data Found.
- No Payment Data Found.
- SF99 NOT SUPPORTED - REXMIT (99 = 4, 5, 7-14, 17-22)
- XMIT KEY NOT SUPPORTED WITHOUT INPUT DATA
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK17

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	03010 - CLIENT IDENTIFICATION NUMBER (8) OR 03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Display SSN or CIN from WTRK00. Screen Caption varies based on WTRK00 input. Screen Caption will be CIN or SSN.
NAME	24120 - GIVEN NAME (10)	First name of the individual.
	24130 - MIDDLE INITIAL (1)	Middle initial of the individual.
	24110 - SURNAME (17)	Last name of the individual.
<b>CASE INFORMATION</b>		
DIST	01010 - TRANSACTION DISTRICT (2)	14 occurrences.
CASE NUMBER	01050 - CASE NUMBER (10)	14 occurrences.
SUF	01904 - SUFFIX IDENTIFIER (2)	14 occurrences.
CASE TYPE	01060 - CASE TYPE (2)	14 occurrences.
CASE STAT	02090 - CASE STATUS (2)	14 occurrences.
REL	03090 - RELATIONSHIP CD (2)	14 occurrences.

WMS SYSTEM REFERENCE MANUAL  
 TIME LIMIT TRACKING INQUIRY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PAY TYPE	14010 - PAYMENT TYPE (2)	14 occurrences.
AMOUNT	14011- PAYMENT AMOUNT (6)	14 occurrences.
PAY PERIOD	14012 - PAYMENT PERIOD (12)	14 occurrences.
AUTH DATE	02020 - TRANSACTION INPUT DATE (6)	14 occurrences. Authorization Date - for Upstate districts, this is the date that the HEAP payment line was written on Screen 6 of WMS (i.e. transaction date). For NYC, this is the date that the HEAP benefit was made available (i.e. issuance date).
FTY	11130 - FUEL FOR HEATING TYPE (1)	14 occurrences.
V/C	WRTS - PAYMENT STATUS CD (1)	14 occurrences.

WTRK51 - SDX Inquiry

```

WTRK51          SDX I NQUIRY          DI ST STLA          DATE 06/14/2007
SSN 093-67-8901 DOB 06/21/1954 SEX M          F I S C A L  DI ST STLA          UPDATED 05/11/2007

JAMES          M VAN NOSTRAND          C I N AX830780
197 WOODS WAY          PAYMENT STATUS XXX XXXXXXXXXXXXXXXX          ALI EN I ND XX
OGDENSBURG          NY 11290          APPLI CATION XXXXXXXXXXXX          I A R STATUS X XXXXXXXXXXXXXXXXXXXX
DENIAL CODE XXX XXXXXXXXXXXXXXXXXXXX          DENI AL DT XXXXXXXXXXXX

SSI ELI GIB I L I T Y MM/DD/CCYY          APPEAL CODE X XXXXXXXXXXXXXXXXXXXX          TYPE OF PAYEE XXX
FED LIVING X          APPEAL DATE MM/DD/CCYY
STATE LIVING X XXXXXXXXXXXXXXXXXXXX          APPEAL DEC I S I O N XX XXXXXXXXXXXXXXXXXXXX

NET PAY          XXXXXXXX          SSI XXXXXXXXXX          STATE SUPP XXXXXXXXXX          TOTAL XXXXXXXXXX
XXXXXXXXXX          XXXXXXXXXXXX
XXXXXXXXXX          XXXXXXXXXXXX          XXXXXXXXXXXX          XXXXXXXXXXXX
XXXXXXXXXX          XXXXXXXXXXXX

GROSS PAY XXXXXXXX          XXXXXXXXXX          XXXXXXXXXX          XXXXXXXXXX

                                U N E A R N E D I N C O M E T Y P E A N D A M O U N T
X XXXXXXXXXX          X XXXXXXXXXX          X XXXXXXXXXX          X XXXXXXXXXX          X XXXXXXXXXX          X XXXXXXXXXX

                                F 2 = P g 2 ( M A / N Y S N I P D A T A )          F 3 = P g 3 ( A D D R E S S D A T A )
    
```

Figure 14 - SDX Inquiry (WTRK51)

Purpose

This screen displays the individual data received from SSA via the SDX/WMS Data Exchange. All fields on the screen are protected. More information on the SDX/SSI Individual Status subsystem can be found at [SDX/SSI](#).

Access

- Entering Selection K and an SSN on **WTRK00 - Time Limit Tracking Menu**, or
- Pressing F1 on **WTRK52 - MA/NYSNIP Inquiry**, or
- Pressing F1 on **WTRK53 - SDX Addresses**.

Screen Response

Positive

- See **Function Keys**.

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:

- CURRENT SCREEN IS MA/NYSHIP DATA SCREEN
- CURRENT SCREEN IS SDX ADDRESS SCREEN
- CURRENT SCREEN IS SDX DATA SCREEN
- SF99 NOT SUPPORTED - REXMIT (99 = 1, 4, 5, 7-14, 17-22)
- SSN Not Found
- XMIT KEY NOT SUPPORTED WITHOUT INPUT DATA
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F2	WTRK52 - MA/NYSNIP Inquiry
F3	WTRK53 - SDX Addresses
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK51

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SSN	SDX - SSN (9)	This reflects the SSN of the recipient.
DOB	SDX - DATE OF BIRTH WITH CENTURY (8)	This is the date of birth of the recipient in the format of MM/DD/CCYY.
SEX	SDX - SEX CODE (1)	This indicates the sex of the recipient.
FISCAL DIST	SDX - FISCAL DIST	Mnemonic.
UPDATED	SDX - UPDATED	The date WRTS posted the information to the WRTS database.
(NONE)	SDX - INDIVIDUAL'S NAME (54)	Individual's first, MI, and last name.
CIN	SDX - CIN	Client Identification Number from WMS.
(NONE)	SDX - RESIDENCE ADDRESS (175)	Street portion.
PAYMENT STATUS	SDX - PAYMENT STATUS CODE (3)	Payment Status Code
	SDX - PAYMENT STATUS CODE DESCRIPTION (15)	Payment Status Code Description
ALIEN IND	SDX - ALIEN INDICATOR CODE (1)	Alien Indicator Code

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	SDX - RESIDENCE ADDRESS (175)	Second line of address.
APPLICATION	SDX - APPLICATION DATE (8)	Application Date. Formatted as MM/DD/YY.
IAR STATUS	SDX - IAR STATUS CODE (1)	Interim Assistance Reimbursement Status Code.
(NONE)	SDX - IAR STATUS CODE DESCRIPTION (15)	
(NONE)	SDX - RESIDENCE ADDRESS (175)	City and State portion.
(NONE)	SDX - RESIDENCE ZIP CODE (5)	Residence zip code.
DENIAL CODE	SDX - DENIAL CODE (3)	Code describing why application was initially denied
(NONE)	SDX - DENIAL CODE DESCRIPTION (15)	
DENIAL DATE	SDX - DENIAL DATE (8)	Denial date. Formatted as MM/DD/YY.
SSI ELIGIBILITY	SDX - SSI/OPTIONAL SSP ELIGIBILITY DATE (8)	Date of eligibility for SSI and/or State Supplementation
APPEAL CODE	SDX - APPEALS CODE (1)	Appeals Code
(NONE)	SDX - APPEALS CODE DESCRIPTION	Appeals Code Description
TYPE OF PAYEE	SDX - TYPE OF PAYEE CODE (3)	Type of payee code. This identifies the individual who receives the check.
FED LIVING	SDX - FDREAL LIVING ARRANGEMENT CODE (1)	Federal Living Arrangement Code
APPEAL DATE	SDX - APPEALS DECISION CODE DATE (8)	The date of the most recent appeals decision. Formatted as MM/DD/CCYY.
STATE LIVING	07496 - STATE LIVING ARRANGEMENT (1)	State Living Arrangement Code - not found on SDX  A - Living alone means living alone in the community or living in the community with others but customarily preparing food separately from all other household members.  B - Living with others means living in the community with at least one other person (other than a foster child or a spouse also on SSI) or a child (unless in certain Congregate Care facilities)
APPEAL DECISION	SDX - APPEALS DECISION CODE (2)	Appeals decision code
(NONE)	SDX - APPEALS DECISION CODE DESCRIPTION	Appeals decision code definition
<b>NET PAY/SSI/STATE SUPP/TOTAL - From four latest payment records sorted by descending to date.</b>		
NET PAY	SDX - PAYMENT DATE (8)	4 occurrences. Dollar amounts appear as blanks if zero. The date payment occurred. Formatted as MM/DD/YY.
SSI	SDX - SSI MONTHLY ASSISTANCE PAYMENT (7)	4 occurrences. Dollar amounts appear as blanks if zero. Actual amount of Federal SSI payment.
STATE SUPP	SDX - STATE SUPPLEMENT AMOUNT (7)	4 occurrences. Dollar amounts appear as blanks if zero. Actual amount of State Supplementation payment.
TOTAL	NONE	4 occurrences. Dollar amounts appear as blanks if zero. The actual total amount of federal and/or State Supplementation payments. Sum of SSI and STATE SUPP.
<b>GROSS PAY INFORMATION - Data is from the most current payment record.</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
GROSS PAY		The date payment occurred.
(NONE)	SDX - SSI GROSS PAYABLE AMOUNT (7)	The gross amount (before any adjustment) of Federal, SSI, State Supplementation, and total payments.
(NONE)	SDX - SUPPLEMENT GROSS PAYABLE AMOUNT (7)	
(NONE)	NONE	The total gross amounts for SSI and State Supplement
<b>UNEARNED INCOME TYPE AND AMOUNT Unearned income types and amounts. Six most recent distinct unearned income type codes.</b>		
(NONE)	SDX - UNEARNED INCOME TYPE CODE (1)	6 occurrences. The current Unearned Income Type code.
(NONE)	SDX - UNEARNED INCOME AMOUNT (7)	6 occurrences. The current Unearned Income gross amount

WTRK52 - MA/NYSNIP Inquiry

```

WTRK52                MA/NYSNIP I NQUIRY                DIST STLA                DATE 06/14/2007
SSN 093-67-8901 DOB 06/21/1954 SEX M                FISCAL DIST STLA
JAMES                M VA NOSTRAND                SSA OFFICE XXX XXXXXXXXXXXXXXXXXXXX

CLAIM NBR XXXXXXXXXXXXX                FOOD STAMP INFORMATION:
HI PART A BEGIN: 02/11/2007 END: 06/30/2007        FS RECIPIENT STATUS XXXXXXXXXXXXXXXX
SMI PART B BEGIN: 02/11/2007 END: 06/30/2007        FS APPLICATION XXX
MEDICARE ENTITLEMENT CD X XXXXXXXXXXXXXXXXXXXX        FS INPUT DATE XXXXXXXXXXXXXXXX
                                                        FS HEAT XXXXXXXXXXXXXXXXXXXXXXXX
                                                        FS SHELTER XXXXXXXXXXXXXXXXXXXXXXXX

MEDICAID EFFECTIVE DATE                XXXXXXXXXXXXX
MEDICAID ELIGIBILITY CD X XXXXXXXXXXXXXXXXXXXX
MULTICATEGORY IND                X XXXXXXXXXXXXXXXXXXXX
MEDICAID TEST IND                X XXXXXXXXXXXXXXXXXXXX
MA UNPAID MEDICAL EXPENSES CD X
ONSET OF DISABILITY/BLINDNESS MM/DD/CCYY

ALIEN INFORMATION:
INDICATOR                X XXXXXXXXXXXXXXXXXXXX
ELIGIBILITY                X XXXXXXXXXXXXXXXXXXXX
DT OF RESIDENCY                MM/DD/CCYY

SPONSOR                X XXXXXXXXXXXXXXXXXXXX                LAST TRANSACTION DATE MM/DD/CCYY
                                                        TYPE XX CODE XXX

F1 = Pg1 (SDX DATA)                F3 = Pg3 (ADDRESS DATA)
    
```

Figure 15 - SDX Inquiry (WTRK52)

Purpose

The purpose of this screen is to display information on Medicaid and Food Stamp eligibility as received from the Social Security Administration via the SDX interface. All fields on the screen are protected. More information on the SDX/SSI Individual Status subsystem can be found at [SDX/SSI](#).

Four fields of information on the screen are received from the BDX file which comes from the Social Security Administration. The BDX file contains information regarding an individual's Social Security Title II benefits (Retirement, Survivor or Disability Insurance - RSDI). The fields are:

- HI Part A Begin Date
- HI Part A End Date
- SMI Part B Begin Date
- SMI Part B End Date

More information on the BDX file and how it is processed and matched can be found at **SRM Resource File Integration**.

Access

- Pressing F2 on **WTRK51 - SDX Inquiry, or**
- Pressing F2 on **WTRK53 - SDX Addresses.**

Screen Response

Positive

- See **Function Keys.**

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CURRENT SCREEN IS MA/NYSHIP DATA SCREEN
  - CURRENT SCREEN IS SDX ADDRESS SCREEN
  - CURRENT SCREEN IS SDX DATA SCREEN
  - SF99 NOT SUPPORTED - REXMIT (99 = 2, 4, 5, 7-14, 17-22)
  - SSN Not Found
  - XMIT KEY NOT SUPPORTED WITHOUT INPUT DATA
  - Any Universal Screen Message - See **SRM Access and Exit Procedures.**

Printed Response

None

Function Keys

Key	Description
F1	WTRK51 - SDX Inquiry Page 1
F3	WTRK53 - SDX Addresses
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK52

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SSN	SDX - SSN (9)	This reflects the SSN of the recipient.
DOB	SDX - DATE OF BIRTH WITH CENTURY (8)	This is the date of birth of the recipient in month, day, century and year format.



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SEX	SDX - SEX CODE (1)	This indicates the sex of the recipient.
FISCAL DIST	SDX - FISCAL DIST	Mnemonic. The district which is fiscally responsible for the local share of Medicaid displayed in the WMS mnemonic code.
(NONE)	SDX - INDIVIDUALS'S NAME (54)	Concatenation of individual's first, MI and last name.
SSA OFFICE	SDX - SSA OFFICE	(DO Code). The servicing SSA district office from SDX.
CLAIM NBR	SDX - CLAIM IDENTIFICATION NUMBER (12)	The title II record for the individual (if present).
HI PART A BEGIN	SDX - HI PART A BEGIN	The start date of Medicare Part A (from BENDEX)
END	SDX - HI PART A END	The end date of Medicare Part A (from BENDEX)
SMI PART B BEGIN	SDX - SMI PART B BEGIN	The start date of Medicare Part B (from BENDEX)
END	SDX - SMI PART B END	The end date of Medicare Part B (from BENDEX)
MEDICARE ENTITLEMENT CD	SDX - MEDICARE ENTITLEMENT CODE (1)	The individual's current Medicare status : A = A only B = B only C = A & B N = not eligible for A or B
<b>FOOD STAMP INFORMATION</b>		
FS RECIPIENT STATUS	SDX - FOOD STAMP RECIPIENT STATUS (1)	Mnemonic. Indicates whether the individual receives Food Stamps or has filed an application in the past 60 days. Y = Yes, N = No, or Blank = no input
FS APPLICATION	SDX - FS APPLICATION	This indicates whether or not SSA took an application for Food Stamps. Y = Yes, N = No, or Blank = no input
FS INPUT DATE	SDX - FS INPUT DATE	
FS HEAT	SDX - FS HEAT	Indicates a Combined Application State (CAP) where heat is not included in the rent. Y = Yes, N = No
FS SHELTER	SDX - FS SHELTER	CAP state where shelter costs are at or above the standard. Y = Yes, N = No, Blank = no input
MEDICAID EFFECTIVE DATE	SDX - MEDICAID EFFECTIVE DATE (8)	
MEDICAID ELIGIBILITY CD	SDX - MEDICAID ELIGIBILITY CODE (1)	
	SDX - MEDICAID ELIGIBILITY CODE DEFINITION (15)	Medicaid Eligibility Code definition.
MULTICATEGORY IND	SDX - MULTICATEGORY INDICATOR (1)	
	SDX - MULTICATEGORY INDICATOR CODE DEFINITION (15)	Multi-category Indicator Code definition.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
MEDICAID TEST IND	SDX - MEDICAID TEST INDICATOR (1)	
	SDX - MEDICAID TEST INDICATOR DEFINITION (15)	MEDICAID test indicator definition.
MA UNPAID MEDICAL EXPENSES CD	SDX - MEDICAID UNPAID MEDICAL EXPENSES (1)	
ONSET OF DISABILITY/BLINDNESS	SDX - ONSET OF DISABILITY/BLINDNESS (1)	Formatted as MM/DD/CCYY.
COMPETENCY CD	SDX - COMPETENCY CODE (1)	
	SDX - COMPETENCY CODE DEFINITION (15)	Competency Code definition.
CUSTODY CD	SDX - CUSTODY CODE (3)	
	SDX - CUSTODY CODE DEFINITION (15)	Custody Code definition.
DATE RESIDENCY BEGAN	SDX - DATE RESIDENCY BEGAN (8)	Formatted as MM/DD/CCYY
DEATH DATE	SDX - DEATH DATE (8)	Formatted as MM/DD/CCYY
<b>ALIEN INFORMATION</b>		
INDICATOR	SDX - ALIEN INDICATOR CODE (1)	
	SDX - ALIEN INDICATOR CODE DEFINITION (15)	Alien Indicator Code definition
ELIGIBILITY	SDX - ALIEN ELIGIBILITY CODE (1)	
	SDX - ALIEN ELIGIBILITY CODE DEFINITION (15)	Alien Eligibility Code definition
DT OF RESIDENCY	SDX - ALIEN DATE OF RESIDENCY (8)	Formatted as MM/DD/CCYY
SPONSOR	SDX - ALIEN SPONSOR STATUS CODE (1)	
	SDX - ALIEN SPONSOR STATUS CODE DEFINITION (15)	Alien Sponsor Status Code definition.
<b>LAST TRANSACTION INFORMATION</b>		
LAST TRANSACTION DATE	SDX - LAST TRANSACTION DATE (8)	
TYPE	SDX - LAST TRANSACTION TYPE (2)	
CODE	SDX - LAST TRANSACTION CODE (3)	

WTRK53 - SDX Addresses

```
WTRK53                                SDX ADDRESSES                                DI ST STLA                                DATE 06/14/2007
      SSN 093-67-8901  DOB 06/21/1954  SEX M
JONATHAN  A VON NOSTRAND

RESI DENCE                                MAI LI NG
197 WOODS WAY                                197 WOODS WAY
OGDENSBURG      NY 11290                    OGDENSBURG      NY 11290

REPRESENTATI VE/PAYEE
JONATHAN  A VON NOSTRAND                                TYPE OF PAYEE FTH
197 WOODS WAY
OGDENSBURG      NY 11290

      F1 = Pg1 (SDX DATA)                    F2 = Pg2 (MA/NYSNIP DATA)
```

Figure 16 - SDX Addresses (WTRK53)

Purpose

The purpose of this screen is to display individual address information as received from the Social Security Administration via the SDX interface. All fields on the screen are protected. More information on the SDX/SSI Individual Status subsystem can be found at [SDX/SSI](#).

Access

- Pressing F3 on **WTRK51 - SDX Inquiry**, or
- Pressing F3 on **WTRK52 - MA/NYSNIP Inquiry**.

Screen Response

Positive

- See **Function Keys**.

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CURRENT SCREEN IS MA/NYSHIP DATA SCREEN

- CURRENT SCREEN IS SDX ADDRESS SCREEN
- CURRENT SCREEN IS SDX DATA SCREEN
- SF99 NOT SUPPORTED - REXMIT (99 = 2, 4, 5, 7-14, 17-22)
- SSN Not Found
- XMIT KEY NOT SUPPORTED WITHOUT INPUT DATA
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WTRK51 - SDX Inquiry
F3	WTRK53 - SDX Addresses
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking with previously entered SSN/CIN retained.
Ctrl+F6	WTRK00 - Time Limit Tracking

Screen Field Description - WTRK53

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SSN	SDX - SSN (9)	
DOB	SDX - DATE OF BIRTH WITH CENTURY (8)	
SEX	SDX - SEX CODE (1)	
(NONE)	SDX - INDIVIDUAL'S NAME (54)	
<b>RESIDENCE INFORMATION</b>		
(NONE)	SDX - RESIDENCE ADDRESS (175)	Street portion line 1.
(NONE)	SDX - RESIDENCE ADDRESS (175)	Street portion line 2.
(NONE)	SDX - RESIDENCE ADDRESS (175)	City, State, and Zip Code
<b>MAILING INFORMATION</b>		
(NONE)	SDX - RECIPIENT'S MAILING ADDRESS (210)	Street portion line 1.
(NONE)	SDX - RECIPIENT'S MAILING ADDRESS (210)	Street portion line 2.
(NONE)	SDX - RECIPIENT'S MAILING ADDRESS (210)	City, State and Zip Code
<b>REPRESENTATIVE/PAYEE</b>		
(NONE)	SDX - REPRESENTATIVE PAYEE NAME (54)	
(NONE)	SDX - REPRESENTATIVE PAYEE NAME (54)	
TYPE OF PAYEE	SDX - TYPE OF PAYEE CODE (3)	
(NONE)	SDX - REPRESENTATIVE PAYEE ADDRESS (140)	Street portion line 1.
(NONE)	SDX - REPRESENTATIVE PAYEE ADDRESS (140)	Street portion line 2.
(NONE)	SDX - REPRESENTATIVE PAYEE CITY (22)	City
(NONE)	SDX - REPRESENTATIVE PAYEE STATE NAME (2)	State Abbreviation.
(NONE)	SDX - REPRESENTATIVE PAYEE ZIP (5)	Zip Code

## Employment Tracking

### Overview

The Employment Tracking system was designed to aid local districts in tracking mandated employment requirements for PA and Food Stamp recipients. The information displayed on the screens is derived from the Welfare to Work Caseload Management System (WTWCMS), and other sources such as the WMS case record and the ABEL budget.

There are four screens available from the main menu selection (WTRK00). Screen WTRK31 supports Food Stamp ABAWD (Able Bodied Adults Without Dependents) tracking requirements. Screen WTRK32 and WTRK42 support PA employment tracking WTRK42 also has a limited override function for PA employment. Screen WTRK43 allow for overriding various PA and ABAWD tracking functions.

Users can view recent participation in which the individual was countable and override/extend the provision of benefits. This is done by maintaining the countable months that have been charged to the individual.

### Selections

#### P - FS ABAWD Tracking

Entry of selection P and either a valid CIN or Case # returns the **WTRK31 - FS ABAWD Tracking** screen. The case number must be entered if the client is in multiple cases. This screen displays various case information for Food Stamps cases in which the individual has been a "countable", able-bodied adult without dependents (ABAWD).

#### Q - PA Individual Employment Tracking

Entry of selection Q and either a valid CIN or Case # returns the **WTRK32 - PA Individual Employment Tracking Inquiry**. This screen provides an overview of employment related data for an individual in a Public Assistance case.

#### R - FS ABAWD Override

Entry of selection R and either a valid CIN or Case # returns the **WTRK43 - FS ABAWD / PA Employment Override** Input screen. The screen allows users to override time limit tracking limits on Food Stamp participation by removing/adding countable months of participation in the present 36-month period.

#### S - PA Employment Override

Entry of selection S and either a valid CIN or Case # returns the **WTRK42 - PA Employment Override** screen. The screen allows users to override participation, sanctions, or education requirements established to receive Public Assistance benefits. Overrides can be performed on any of the four employment tracking categories.

If the case being accessed through the four selections is in New York City, a suffix is required. District is a required entry when the case being accessed is a district other than the district access is being performed from.

WTRK31 - FS ABAWD Tracking

```

WTRK31  ** FS ABAWD TRACKING **                Dist STLA                05/21/2007
CIN      SSN      Name                          A HOWARD                DOB
AX830970 547874541 LISA                          12/12/55
Case Name Case No.  Suf  CT  CS  FS-IS  Emp  36 Mon Start
LISA A HOWARD HOWARD0001 01  SNFP AC  AC  45  05/01/04

Total Mon N-P    Mon Non-Part:
Removed Due To ABAWD:    Reestablished Date:  /  /    ABAWD Exempt Status
as of 04/30/07 : E

*** CURRENT ENROLLMENTS ***
Activity  Hours Per Week  Effective Date
1.
2.
3.

*** EARNINGS ***
Type      Hours Per Month  Effective Date  Gross Amount
1.
2.

F17 - FS ABAWD Override Input
    
```

Figure 17 - FS ABAWD Tracking (WTRK31)

Purpose

This screen provides a summary of ABAWD participation, enrollment, and earnings information on the individual. All fields on the screen are protected. Portions of the data displayed on the screen reflect the last run of the WRTS monthly job.

Access

- Selection P on **WTRK00 - Time Limit / Employment Tracking Menu.**

Screen Response

Positive

- See **Function Keys.**

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - ABAWD DATA NOT YET AVAILABLE FOR CURRENT MONTH
  - CASE NOT FOUND

- CIN HAS MULTIPLE CASE INVOLVEMENT
- CIN ISN'T A MEMBER OF THIS CASE
- CIN NOT FOUND
- SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 18-22)
- UNKNOWN APPL-RETURN-CODE RECEIVED

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking Menu with CIN, Case Number, Suffix, and District filled in.
Ctrl+F6	WTRK00 - Time Limit Tracking Menu
Ctrl+F7	WTRK43 - FS ABAWD / PA Employment Override Input

Screen Field Description - WTRK31

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	The CIN of the individual.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	The Social Security Account Number of the individual associated with the CIN.
NAME	03030 - NAME (FIRST) (10)	The name of the individual associated with the CIN.
	03030 - NAME (MI) (1)	
	03030 - NAME (LAST) (17)	
DOB	03060 - DATE OF BIRTH (8)	The Date of Birth of the individuals associated with the CIN.
CASE NAME	01070 - CASE NAME (28)	The case name of the case through which the screen was accessed.
CASE NO.	01050 - CASE NUMBER (10)	The case number through which the screen was accessed.
SUF	01904 - SUFFIX IDENTIFIER (2)	The case suffix number. Used for NYC cases, for Upstate cases "01" will be displayed.
CT	01060 - CASE TYPE (2)	The four character mnemonic indicating the case type.
CS	02090 - CASE STATUS (2)	The two character mnemonic indicating the case status of the case.
FS-IS	03120 - INDIVIDUAL STATUS (2)	The two character mnemonic indicating the individual status of the individual.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
EMP	03190 - EMPLOYABILITY CODE (2)	The two character code for the current employability code as stored on WMS.
36 MON START	NONE	The beginning date of the 36 month look-back for ABAWD tracking. This date is a 36 month look back from the current month and increments monthly. System generated.
TOTAL MON N-P	WRTS - ABAWD NON PRT CNT (3)	The total number of months within the past 36 months that the individual was receiving Food Stamps but not participating in an appropriate work activity.
MON NON-PART	WRTS - MONTH NBR (8)	6 occurrences. Formatted as MM/YY. Month Nbr is the calendar month that a record is recorded for. In this situation it displays up to six months of non-participation.
REMOVED DUE TO ABAWD	03014 - FS INDIVIDUAL REASON CODE (3)	The one character code ("X") indicating that the FS Individual Reason for the individual is F94 - ABAWD Ineligible.
REESTABLISHED DATE	WRTS - ABAWD REESTABLISHED DT (8)	The date on which the client's Food Stamp eligibility was re-established. This date is set when an individual who was previously identified as Removed Due to ABAWD becomes active for Food Stamps again and the months non-participating counter shows the individual was non-participating for at least three of the past 36 months.
ABAWD EXEMPT STATUS	WRTS - ABAWD EXEMPT REQUIRED CD (1)	The ABAWD exempt required code. This one character code indicates an individual's ABAWD status as of the end of the previous month. The codes R, E, or N will be displayed in the field (R-Required, E-Exempt, and N-Not presently in receipt of Food Stamps).
AS OF MM/DD/YY	WRTS - MONTHLY LAST RUN DT (8)	
<b>CURRENT ENROLLMENTS</b>		
ACTIVITY	09308 - EMPLOYMENT ACTIVITY CODE (2)	3 occurrences. The activity mnemonic indicating what employment activities an individual is currently enrolled in. The three most recent activities will be displayed from the current Welfare to Work Caseload management System record.
HOURS PER WEEK	09322 - COUNT OF EMPLOYMENT HOURS PER WEEK (3)	3 occurrences. The hours per week associated with each activity line. From the current Welfare to Work Caseload Management System record.
EFFECTIVE DATE	09310 - EMPLOYMENT EFFECTIVE DATE (6)	3 occurrences. The effective date associated with each activity line. From the current Welfare to Work Caseload Management System record.
<b>EARNINGS</b>		
TYPE	07010 - EARNED INCOME SOURCES (2)	2 occurrences. The individual's source of earned income from the current Food Stamp budget.



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	07017 - FS EARNED INCOME SOURCE (2)	2 occurrences.
	23126 - SERVICES INCOME SOURCE (2)	2 occurrences.
HOURS PER MONTH	07044 - HOURS WORKED PER MONTH (3)	2 occurrences. The hours per month of the earned income from the current Food Stamp budget.
EFFECTIVE DATE	01310 - FS BUDGET EFFECTIVE DATES (12)	2 occurrences. First date in effective date (characters 1-6). This acts as the "From" date. The Effective FROM Date of earnings will reflect the date on which earnings were first applied to the individual's Food Stamp case.
	01310 - FS BUDGET EFFECTIVE DATES (12)	2 occurrences. Last date in effective date (characters 7-12). This acts as the "To" date.
GROSS AMOUNT	07011 - EARNED INCOME GROSS AMOUNT (7)	2 occurrences. The gross amount of earned income for the individual from the current Food Stamp budget.
	07027 - MONTHLY GROSS EARNED INCOME AMOUNT (7)	2 occurrences.
	07145 - FS EARNED INCOME GROSS AMOUNT (7)	2 occurrences.
	07805 - INCOME AMOUNT (7)	2 occurrences.
	23127 - SERVICES INCOME AMOUNT (7)	2 occurrences.
	98338 - PAY STUB AMOUNT (7)	2 occurrences.

WTRK32 - PA Individual Employment Tracking Inquiry

```

WTRK32 **PA INDIVIDUAL EMPLOYMENT TRACKING INQUIRY**      Dist STLA  05/21/2007
CIN      SSN      Name      A HOWARD      DOB
AX83097Q 547874541 LISA      A HOWARD      12/12/55
Case Name Case No.  Suf CT  CS  IS  Emp Par  ST  SN
LISA A HOWARD HOWARD0001 01 SNFP AC AC 45 1 19 0

- Assessment Req'd End Date 06/01/05 Assessment Date / /
- Sanction Months 0 3-Month Exclusion Applied N
- Child Caretaker Months Exempted 0
- Job Search/Job Readiness Weeks Used In FFY 0 Countable N
- Vocational Education Months Used 0 Countable N

*** CURRENT ENROLLMENTS ***
  Activity  Hours Per Week  Effective Date
1.
2.
3.
*** EARNINGS ***
  Type  Hours Per Month  Effective Date  Gross Amount
1.
2.

Transmit From Detail/Override Selection
    
```

Figure 18 - PA Individual Employment Tracking Inquiry (WTRK32)

Purpose

This screen provides an overview of employment related data for an individual in a Public Assistance case.

Access

- Selection Q from **WTRK00 - Time Limit / Employment Tracking Menu, or**
- Ctrl+F7 from **WTRK42 - PA Employment Override.**

Screen Response

Positive

- Transmitting from in front of each employment tracking element:
  - Assessment Req'd End Date returns **WTRK42 - PA Employment Override**
  - Sanction Months will return **WTRK42 - PA Employment Override** with the heading "SANCTIONED MONTHS COUNTED:"
  - Child Caretaker Months Exempted will return **WTRK42 - PA Employment Override** with the heading "EXEMPTED CARETAKER OF A CHILD UNDER 12 MONTHS - TOTAL MONTHS COUNTED:"

- Job Search/Job Readiness Weeks Used in FFY returns **WTRK42 - PA Employment Override** with the heading "JOB SEARCH/READINESS WEEKS USED DURING PRESENT FFY:"
- VOCATIONAL EDUCATION MONTHS USED returns **WTRK42 - PA Employment Override** with the heading "VOCATIONAL EDUCATION MONTHS COUNTED:"

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CASE NO REQUIRED
  - CASE NOT FOUND
  - CIN HAS MULTIPLE CASE INVOLVEMENT
  - CIN ISN'T A MEMBER OF THIS CASE
  - CIN NOT FOUND
  - CIN NOT ON THIS CASE
  - COUNTABLE WEEK/MONTH ALREADY EXISTS
  - CURRENT OR FUTURE DATE NOT ALLOWED
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - DATE EARLIER THAN 12/96 NOT ALLOWED
  - DATE EARLIER THAN 07/97 NOT ALLOWED
  - DATA REQUIRED
  - DISTRICT/CASE/SUFFIX NOT FOUND
  - INVALID DATE
  - INVALID DISTRICT
  - INVALID SUFFIX
  - NOTHING TO PROCESS
  - OVERRIDE REASON INVALID
  - REASON REQUIRED
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 17-22)
  - SUFFIX IS INVALID
  - SUFFIX MUST BE NUMERIC
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking Menu with CIN, Case Number, Suffix, and District filled in.
Ctrl+F6	WTRK00 - Time Limit Tracking Menu

Screen Field Description - WTRK32

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. The CIN of the individual.
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Protected. The Social Security Account Number of the individual.
NAME	03030 - NAME (FIRST) (10)	Protected. The name of the individual.
	03030 - NAME (MI) (1)	Protected.
	03030 - NAME (LAST) (17)	Protected.
DOB	03060 - DATE OF BIRTH (8)	Protected. The date of birth of the individual.
CASE NAME	01070 - CASE NAME (28)	Protected. The case name of the case through which the screen was accessed.
CASE NO.	01050 - CASE NUMBER (10)	Protected. The case number of the case through which the screen was accessed.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. The case number suffix. Used for NYC cases. For Upstate cases "01" will be displayed.
CT	01060 - CASE TYPE (2)	Protected. The four character mnemonic indicating the case type.
CS	02090 - CASE STATUS (2)	Protected. The two character mnemonic indicating the case status.
IS	03120 - INDIVIDUAL STATUS (2)	Protected. The two character mnemonic indicating the individual status.
EMP	03190 - EMPLOYABILITY CODE (2)	Protected. The two character employability code as stored on WMS.
PAR	01024 - NUMBER OF PARENTS IN HOUSEHOLD (1)	Protected. The number of parents in the household for federal reporting purposes. 0-No parents, 1-One parent, 2-Two parents.
ST	WRTS - STATE CNT (3)	Protected. The total number of months applied to the individual's State 60 Month time limit, as reported on the PA Time Limit Tracking screens.
SN	WRTS - SAFETYNET CASH CNT (3)	Protected. The totals number of months applied to the individual's Safety Net time limit, as reported on the PA Time Limit Tracking screens.
ASSESSMENT REQ'D END	WRTS - ASSESSMENT REQUIRED DT (8)	Protected. The date by which a TANF,

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DATE		Safety Net MOE Families (State/Federal Charge Code 60, 63, or 64) or SN non-MOE individual must be assessed for Welfare to Work programs.
ASSESSMENT DATE	WRTS - ASSESSED DT (8)	The date the client was actually assessed based on the Effective date of a completed assessment as entered in the Welfare to Work Caseload Management System.
SANCTION MONTHS	WRTS - SANCTION MONTHS CNT (3)	The number of months that the TANF or Safety Net MOE Families (State/Federal Charge Code 60, 63, or 64) individual is in an employment sanction or sanction process during the last twelve months.
3-MONTH EXCLUSION APPLIED	WRTS - SANCTIONS EXCLUSION IND (1)	A code of "Y" indicates that the TANF or SN MOE case (due to the sanction status of the individual) is currently excludable from the Federal and State participation rate calculation. A code of "N" indicates that the case is not currently excludable since the case has been previously excluded for more than three months in the preceding 12 months based on an individual in the case being sanctioned or in the sanction process.
CHILD CARETAKER MONTHS EXEMPTED	WRTS - EMPLOY CARETAKER CNT (3)	The number of months that the TANF individual or Safety Net MOE Families individual (State/Federal Charge Code 60, 63, or 64) has been coded with an Employability Code (31 or 34) indicating that the individual is the exempted caretaker of a child under 12 months of age.
JOB SEARCH/JOB READINESS WEEKS USED IN FFY	WRTS - JOB SEARCH READINESS CNT (3)	The total number of weeks with a FFY that a TANF or a Safety Net individual was enrolled in Job Search and/or Job Readiness activities or a TANF or SN MOE (State/Federal Charge Code 60, 63, or 64) individual was enrolled in Substance Abuse Treatment and/or Treatment Plan Other Than Substance Abuse activities, as entered on the Welfare to Work Caseload Management system.
COUNTABLE	WRTS - JOB SEARCH READINESS IND (1)	Protected. A code of "Y" indicates that the TANF, SN MOE or Safety Net individual's time in any of the activities (or combination) can be counted for the federal and state participation rate.
VOCATIONAL EDUCATION MONTHS USED	WRTS - VOCATION EDUCATION MONTHS CNT (3)	The total number of months a TANF, SN MOE or Safety Net individual has been enrolled in vocational education activity during the individual's lifetime as reported on the Welfare to Work Caseload Management system. This counter is never reset.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
COUNTABLE	WRTS - VOCATION EDUC COUNTABLE IND (1)	Protected. A code of "Y" indicates that an individual has been enrolled on the Welfare to Work Caseload Management system in vocational education and has not completed 12 months as a TANF, SN MOE or Safety Net case member while enrolled in that activity. After a total of 12 months have been reached, this indicator will change to "N".
<b>*** CURRENT ENROLLMENTS ***</b>		
ACTIVITY	09308 - EMPLOYMENT ACTIVITY CODE (2)	Protected. 3 occurrences. The mnemonic for the Employment Activities in which an individual is currently enrolled. From the current Welfare to Work Caseload Management system.
HOURS PER WEEK	09322 - COUNT OF EMPLOYMENT HOURS PER WEEK (3)	Protected. 3 occurrences. The house per week associated with each activity line. From the current Welfare to Work Caseload Management system record.
EFFECTIVE DATE	09310 - EMPLOYMENT EFFECTIVE DATE (6)	Protected. 3 occurrences. The effective date associated with each activity line. From the current Welfare to Work Caseload Management system record.
<b>*** EARNINGS ***</b>		
TYPE	07010 - EARNED INCOME SOURCES (2)	Protected. 2 occurrences. The source of earned income for the individual from the current PA budget.
	07016 - PA EARNED INCOME SOURCE (2)	Protected. 2 occurrences.
	23126 - SERVICES INCOME SOURCE (2)	Protected. 2 occurrences.
HOURS PER MONTH	07044 - HOURS WORKED PER MONTH (3)	Protected. 2 occurrences. The hours per month of earned income from the current PA budget.
EFFECTIVE DATE	01310 - FS BUDGET EFFECTIVE DATES (12)	Protected. 2 occurrences. First date in effective date (characters 1-6). This field acts as a "From" date. The Effective FROM Date of earnings will reflect the date on which earnings were first applied to the individual's PA case.
	01310 - FS BUDGET EFFECTIVE DATES (12)	Protected. 2 occurrences. Last date in effective date (characters 7-12). This field acts as a "To" date. The Effective TO Date will reflect the current effective TO date of the PA budget stored with earnings.
GROSS AMOUNT	07011 - EARNED INCOME GROSS AMOUNT (7)	Protected. 2 occurrences. The earnings gross amount for income associated with this individual is displayed.
	07027 - MONTHLY GROSS EARNED INCOME AMOUNT (7)	Protected. 2 occurrences.
	07145 - FS EARNED INCOME GROSS AMOUNT (7)	Protected. 2 occurrences.
	07805 - INCOME AMOUNT (7)	Protected. 2 occurrences.
	23127 - SERVICES INCOME AMOUNT (7)	Protected. 2 occurrences.
	98338 - PAY STUB AMOUNT (7)	Protected. 2 occurrences.

WTRK43 - FS ABAWD / PA Employment Override Input

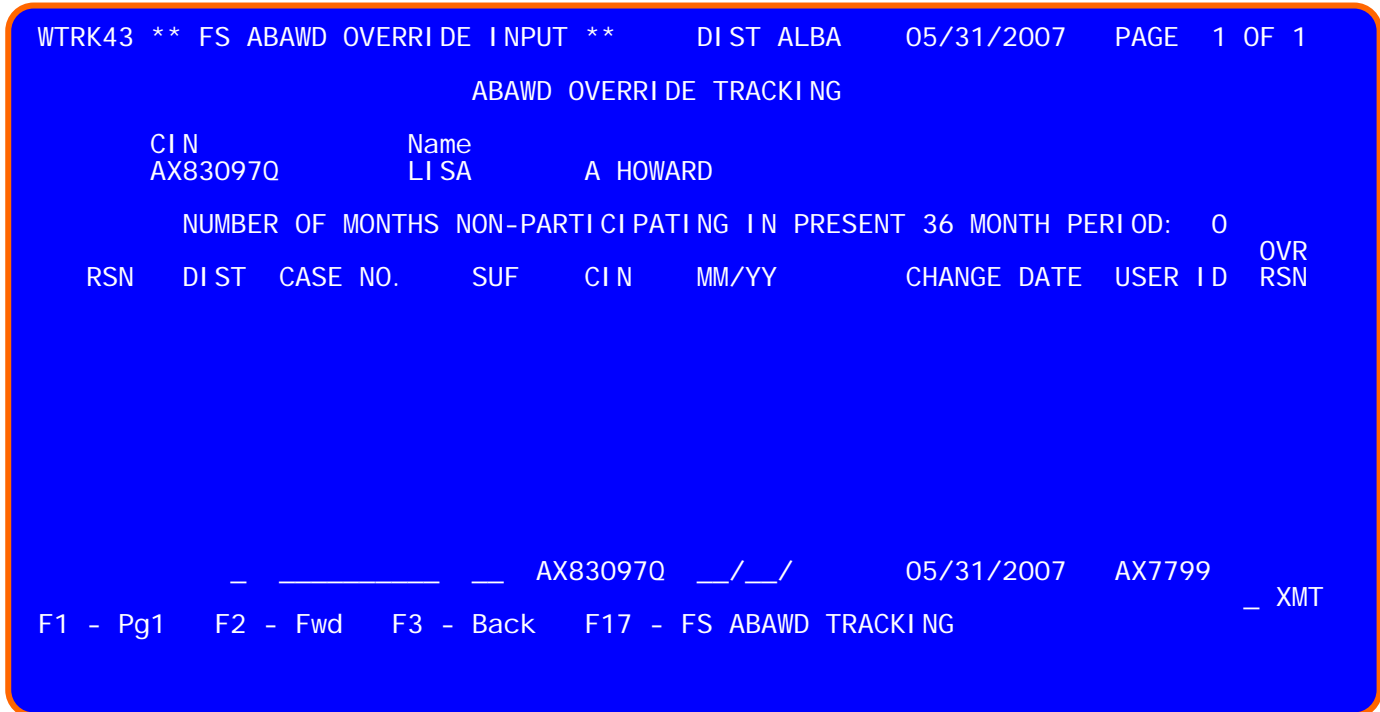


Figure 19 - FS ABAWD / PA Employment Override Input (WTRK43)

Purpose

This screen displays a history of ABAWD non-participation for an individual. Up to ten lines in descending order will be displayed on a screen. Multiple screens are available by use of the special function keys listed on the bottom of the screen. Paging capability (using F1, F2, and F3) is provided to scroll through the override history. Tracking data may be deleted on this screen.

This screen determines which function to perform based on the Counter Code. Counter codes can have values of:

- EC - Exempted Caretaker
- MS - Sanctioned Months
- VE - Vocational Education
- AB - Number of Month Non-Participating
- JB - Job Search Readiness

Data is retrieved using the Tuxedo service WTRK43GET which accesses the WRTS database for data displayed in the screen. The retrieved data displays the counts of the months or weeks present for the CIN.

The screen is divided into two sections. The first section contains up to ten lines that represent months that have been applied/deleted to the ABAWD non-participation count. When blank, the column labeled RSN (Override Reason Code) is the only enterable field on any line displayed.

Overrides can be added or deleted. This is accomplished by transmitting the screen with a valid reason code. Only one Add is processed at a time while multiple Deletes can be handled simultaneously. Transmit and paging are mutually exclusive functions. Overrides are applied when the transmit key is depressed.

### Correction to a Deleted Month

If a month was deleted (RSN = D) erroneously and that month needs to be reapplied to the counter, the month must be entered as a transaction in Section 2 of the screen. Successful correction will result in an additional (line) being displayed in Section 1 of the screen, listed immediately above the original month.

### Access

- Placing the cursor next to an entry on **WTRK32 - PA Individual Employment Tracking Inquiry** and transmitting.

### Screen Response

#### Positive

- Successful deletion of a month will result in:
  - Entry in the RSN field will change to D,
  - The OVR RSN field will display the original code entered in the RSN field,
  - Line 24 will contain "Update Complete", and
  - The number of months non-participating in the present 36 month period will change to reflect the new number of months.
- Corrections to a deleted month
  - If a month was deleted (RSN = D) erroneously and that month needs to be reapplied to the counter, the month must be entered as a transaction in Section 2 of the screen. Successful correction will result in an additional (line) being displayed in Section 1 of the screen, listed immediately above the original month., and
  - Line 24 will contain "Update Complete"
- Addition of a Month
  - Upon successful Completion of the addition of a month, the added month will be displayed chronologically on the screen and the Number of Month Non-Participating will be incremented by 1.
  - Line 24 will contain "Update Complete"

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:



- CASE NO REQUIRED
- CASE NOT FOUND
- CIN HAS MULTIPLE CASE INVOLVEMENT
- CIN ISN'T A MEMBER OF THIS CASE
- CIN NOT FOUND
- CIN NOT ON THIS CASE
- CURRENT OR FUTURE DATE NOT ALLOWED
- CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- DATE EARLIER THAN 12/96 NOT ALLOWED
- DATE EARLIER THAN 07/97 NOT ALLOWE
- DATE REQUIRED
- DISTRICT/CASE/SUFFIX NOT FOUND
- INVALID DATE
- INVALID DISTRICT
- INVALID SUFFIX
- NOTHING TO PROCESS
- REASON REQUIRED
- SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-14, 19-22)
- SUFFIX IS INVALID
- SUFFIX MUST BE NUMERIC
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking Menu with retained SSN/CIN filled in.

Key	Description
Ctrl+F6	WTRK00 - Time Limit Tracking Menu
Ctrl+F7	WTRK31 - FS ABAWD Tracking
Ctrl+F8	WTRK32 - PA Individual Tracking Inquiry

Screen Field Description - WTRK43

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	The individual's CIN.
NAME	03030 - NAME (FIRST) (10)	Protected. First name of the individual.
	03030 - NAME (MI) (1)	Protected. Middle initial of the individual.
	03030 - NAME (LAST) (17)	Protected. Last name of the individual.
(NONE)	NONE	Protected. If Counter Code = "EC" then field displays: "EXEMPTED CARETAKER OF CHILD UNDER 12 MONTHS - TOTAL MONTHS COUNTED"  If Counter Code = "VE" then field displays: "VOCATIONAL EDUCATION MONTHS COUNTED"  If Counter Code = "MS" then field displays: "SANCTIONED MONTHS COUNTED"  If Counter Code = "AB" then field displays: "NUMBER OF MONTHS NON_PARTICIPATING IN PRESENT 36 MONTH PERIOD"
(NONE)	WRTS - EMPLOY CARETAKER CNT (3) Or WRTS - SANCTION MONTHS CNT (3) Or WRTS - JOB SEARCH READINESS CNT (3) Or WRTS - ABAWD NON PART CNT (3)	Protected. If Counter Code = "EC" then EMPLOY CARETAKER CNT is displayed. If Counter Code = "MS" then SANCTION MONTHS CNT is displayed. "EXEMPTED CARETAKER OF CHILD UNDER 12 MONTHS - TOTAL MONTHS COUNTED" If Counter Code = "VE" then JOB SEARCH READINESS CNT is displayed. If Counter Code = "AB" then ABAWD NON PART CNT is displayed.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
RSN	NONE	10 occurrences. User entered override reason code. Allowable entries are: C - Conversion Error F - Fair Hearing Decision I - Incorrect Coding O - Overridden in Error S - Out of State (Section 2 only)  Once successful, the RSN code will contain A - Addition or D - Deletion. The user entered RSN field will be placed in the OVR RSN field.
DIST	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic. 10 occurrences. New York City is coded "NYC".
CASE NO.	01050 - CASE NUMBER (10)	Protected. 10 occurrences. The case number of the active case in which the individual was a member at the time the line was generated.
SUF	01904 - SUFFIX IDENTIFIER (2)	Protected. 10 occurrences.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Protected. 10 occurrences.
MM/DD/YY Or MM/YY	09310 - EMPLOYMENT EFFECTIVE DATE (6)	Protected. "MM/DD/YY" shown when Counter Code = "JB" "MM/YY" shown when Counter Code = ("AB", "EC", "MS" or "VE")
WK CNT	WRTS - WEEK COUNTED IND (1)	Protected. Optional field only shown when Counter Code = "JB". A code of "Y" indicates that the TANF or Safety Net individual's time in a Job Search and/or Job Readiness activity or a TANF or Safety MOE (State /Federal Charge Code of 60, 63, or 64) individual's time in a Substance Abuse Treatment and/or Treatment Plan Other Than Substance Abuse activity can be counted, for a corresponding week, for the federal and state participation rate. A code of "N" indicates that a corresponding week cannot be counted.
CHANGE DATE	WRTS - CREATE DT (8) Or WRTS - MODIFY DT (8)	Protected. 10 occurrences. The system date when the record was created/modified
USER ID	WRTS - OVERRIDE USER ID (6)	Protected. 10 occurrences. The User Id of the individual who performed the Override.
OVR RSN	WRTS - OVERRIDE REASON CD (1)	Protected. 10 occurrences. The Override Reason code values are: C - Conversion Error F - Fair Hearing Decision I - Incorrect Coding O - Overridden in Error S - Out of State (Section 2 only)
<b>DATA ENTRY AREA FOR NEW OVERRIDE</b>		
RSN	NONE	Enterable. Enter action code ("D" for delete).
DIST	01010 - TRANSACTION DISTRICT (2)	Enterable. District in which counter is applied.
CASE NO.	01050 - CASE NUMBER (10)	Enterable. Case Number of individual to which count applied.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SUF	01904 - SUFFIX IDENTIFIER (2)	Enterable. Suffix to which count applied. Only applicable to NYC cases.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Enterable. CIN ID to whom count applied
MM/DD/YY Or MM/YY	09310 - EMPLOYMENT EFFECTIVE DATE (6)	Enterable as MM/YY when Counter Code = "AB", "EC", "MS" or "VE" Enterable as MM/DD/YY when Counter Code = "JB"
CHANGE DATE	WRTS - CREATE DT (8) Or WRTS - MODIFY DT (8)	Today's date (MM/DD/CCYY)
USER ID	WRTS - OVERRIDE USER ID (6)	User ID of user that entered the data.

WTRK42 - PA Employment Override

```
WTRK42 **PA EMPLOYMENT OVERRIDE ENTRY**      Dist STLA  05/21/2007

CIN      Name
AX830970  LISA      A HOWARD

Assessment Date:  /  /  Change To:  __/__/__

Override Code:  __

          EC - Exempted Caretaker
          MS - Months Sanctioned
          JB - Job Search/Job Readiness
          VE - Vocational Education

F17 - PA Employment Tracking Inquiry  F18 - FS ABAWD Tracking Screen  _ XMT
```

Figure 20 - PA Employment Override (WTRK42)

Purpose

This screen provides for access to the override capability for the various counters related to PA Employment. It also allows for override of the Assessment Date recorded for an individual within a case.

Access

- Selection S from **WTRK00 - Time Limit Tracking, or**
- Ctrl+F7 from **WTRK43 - FS ABAWD / PA Tracking Override Input, or**
- Ctrl+F7 from **WTRK32 - PA Individual Employment Tracking Inquiry.**

Screen Response

Positive

- The field labeled OVERRIDE CODE allows for the entry of one of the four employment activity codes listed. The entry of these codes will return:
  - EC - Exempted Caretaker returns **WTRK43 - FS ABAWD / PA Employment Override Input** screen with the heading "EXEMPTED CARETAKER OF CHILD UNDER 12 MONTHS - TOTAL MONTHS COUNTED: \_\_\_"

- MS - Months Sanctioned returns **WTRK43 - FS ABAWD / PA Employment Override Input** screen with the heading "SANCTIONED MONTHS COUNTED: \_\_\_\_"
- JB - Job Search/Job Readiness returns **WTRK43 - FS ABAWD / PA Employment Override Input** with the heading "JOB SEARCH/READINESS WEEKS USED DURING PRESENT FFY: \_\_\_\_"
- VE - Vocational Education returns **WTRK43 - FS ABAWD / PA Employment Override Input** with the heading "VOCATIONAL EDUCATION MONTHS COUNTED: \_\_\_\_"

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:
  - CASE NOT FOUND
  - CASE TYPE INAPPROPRIATE FOR PA EMPLOYMENT TRACKING
  - CIN HAS MULTIPLE CASE INVOLVEMENT
  - CIN ISN'T A MEMBER OF THIS CASE
  - CIN NOT FOUND
  - ENTRY MUST BE BLANK - ENTER TRANSMIT
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 19-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WTRK00 - Time Limit Tracking Menu with CIN, Case Number, Suffix, and District filled in.
Ctrl+F6	WTRK00 - Time Limit Tracking Menu
Ctrl+F7	WTRK32 - PA Individual Employment Tracking
Ctrl+F8	WTRK31 - FS ABAWD Tracking

Screen Field Description - WTRK42

Note: WRTS receives some of its data from the WMS system, but often that data has been passed through several other processes before it is loaded onto WRTS. Data meaning and/or content may have changed through these processes.)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CIN	03010 - CLIENT IDENTIFICATION (8)	Protected.
NAME	03030 - NAME (FIRST) (10)	Protected. First name of the individual.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	03030 - NAME (MI) (1)	Protected. Middle initial of the individual.
	03030 - NAME (LAST) (17)	Protected. Last name of the individual.
ASSESSMENT DATE	WRTS - ASSESSED DT (8)	Protected. The current Welfare to Work Assessment date as generated by the entry of a complete assessment on the Welfare to Work Caseload Management system.
CHANGE TO	WRTS - ASSESSED DT (8)	Enterable field. Format is MM/DD/CCYY). Entering a valid date in this field will update the Welfare to Work Assessment Date
OVERRIDE CODE	NONE	Enterable field (EC, MS, JB, VE)

## Subsystem Processing

### Error Messages and Edits

#### Time Limit Tracking / Employment Tracking Errors

(Listing is alphabetical by Message)

**CASE NO REQUIRED**

Case Number is a required entry.

**CASE NOT FOUND**

The case number entered was not found on the tracking database.

**CASE TYPE INAPPROPRIATE FOR PA EMPLOYMENT TRACKING**

Case Type is not consistent with case types used in PA Employment.

**CIN HAS MULTIPLE CASE INVOLVEMENT**

The CIN entered is involved in more than one case. A case number must be entered.

**CIN ISN'T A MEMBER OF THIS CASE**

On the tracking database, the CIN entered is not associated with the case number entered.

**CIN NOT FOUND**

The CIN entered was not found on the tracking database.

**CASE NO REQUIRED**

Case Number is a required entry.

**CIN NOT ON THIS CASE**

The CIN entered was not found on the tracking database with the case number entered.

**CIN NOT RECEIVING FS ON THIS CASE**

The CIN entered is receiving Food Stamps on another case.

**COUNTABLE WEEK/MONTH ALREADY EXISTS**

When adding a countable week/month, the same week/month already exists.

**CURRENT OR FUTURE DATE NOT ALLOWED**

The date entered must be prior to the current month and not in the future.

**DATE EARLIER THAN 12/96 NOT ALLOWED**

For this transaction, a date earlier than December 1996 is not allowed.



**DATE EARLIER THAN 07/97 NOT ALLOWED**

For this transaction, a date earlier than July 1997 is not allowed.

**DATE REQUIRED**

Date field is a required entry.

**DISTRICT/CASE/SUFFIX NOT FOUND**

The District Name and Case Number when required must be valid. A valid Suffix is required for NYC cases.

**ENTRY MUST BE BLANK - ENTER TRANSMIT**

On the WTRK32 - PA Individual Employment Tracking Inquiry screen, the Transmit position (in front of each Employment Activity) must be blank.

**INVALID CHANGE DATE ENTERED**

If an Assessment Change date was entered, it must be a valid date and not prior to 12/96.

**INVALID DATE**

The date entered is not a valid date.

**INVALID DISTRICT**

If entered, district must be the first four letters of a valid district name. For New York City cases district should be "NYC".

**INVALID OVERRIDE CODE ENTERED**

If entered, the override code must be EC or MS or JB or VE or AB.

**INVALID SUFFIX**

For Upstate cases, suffix must be "01" or blank.

**NOTHING TO PROCESS**

During the override data entry, an add or delete must be done.

**OVERRIDE REASON INVALID**

The override reason code entered must be one of the following:

<u>Code</u>	<u>Definition</u>
C	Conversion Error
F	Fair Hearing Decision
I	Incorrect Coding
O	Overridden in Error
S	Out of State (To add a line)

**REASON REQUIRED**

Reason Code is required entry.

**SUFFIX IS INVALID**

Suffix must be greater than 09.

**SUFFIX MUST BE NUMERIC**

When entered, Suffix must be numeric.

Internal Processing

Application Reports

There are several on-request and monthly reports that are used by local districts to manage client and time limits

Number	Title	Freq	Description/Processing
N/A	Print All Tracking Details	On Request	The Print Tracking Details selection on the menu and the various inquiry screens are designed for use in the Fair Haring process. This request will produce several printed reports of the countable assistance history of the individual report. Reports include: <ul style="list-style-type: none"> <li>■ Tracking Payment Detail</li> <li>■ Monthly Tracking Summary</li> <li>■ Tracking Override History</li> </ul>
N/A	Out of State TANF Inquiry	On Request	The Out of State Report selection on the menu will print a report of the months of TANF-funded assistance for an individual. This report may be used to respond directly to inquiries from other states on TANF assistance in New York state for individuals now applying in another state.
WINR8112	Milestone Report	Monthly	On a monthly basis, a "milestone" report will be produced, reporting cases that have been reached significant milestones toward the case safety Net Assistance or the State 60-month limit.
WNR8113	Case Details	Monthly	This monthly report provides specific case-related details for all active cases.
WINR8116	Cases Reaching Time Limits	Monthly	This monthly report lists details on cases that have reached the time limit and were converted to case type 16 or 17.

Time Limit Tracking Notices

The Time Limit Tracking system will generate and mail to each client a notice (letter) informing them of the current status of their individual time limit tracking counts. Each member that is being tracked will receive their own notice. The notice will be mailed to either the resident address or mailing address for the WMS case. Each notice will state the number of months that have been counted.

Safety Net Assistance recipients will receive a letter when the Safety Net (SN) count is 22.

Family Assistance cases will be sent a letter when the state count (ST) is at 48 months, 54 months and 58 months.

Cases that remain closed for 14 days are sent a letter informing them of transitional benefits such as child care and food stamps.

## External Processing

### HEAP Web Application

The application for HEAP (LDSS - 3421) is available to the public on the OTDA Internet website. It can be printed from the website, filled in, and submitted to the applicant's county Social Services office or other HEAP Certifier. The HEAP application can be submitted electronically if the applicant meets all of the following conditions:

1. Lives in a participating county as listed on the OTDA website
2. Received a HEAP benefit for the previous year
3. Resides in the same county as in the previous year

**If this is a client's initial application, an LDSS worker must enter the application in WMS through the Application Registration process.**

The electronically submitted data can be retrieved by LDSS workers via the eHeap Workbook, a web application that workers can access from CentraPort. The eHEAP Workbook allows workers to update demographic data, create and store HEAP ABEL budgets, create payment lines, and invoke Client Notice Subsystem (CNS) transactions. Data entered or modified in the eHEAP Workbook updates the WMS database. The eHEAP Workbook does not retrieve data directly from the WMS database but instead retrieves it from the WRTS database. More information on the eHEAP Workbook can be found in **SRM Budget Calculation**.

### WMS Application Data To Welfare Reform Tracking System (WRTS) and Sidney on SQL (SOS)

Each workday night Upstate WMS creates one file of application data that is sent to both WRTS and SOS. This file contains three records: Application, Applicant, and Application Disposition. Additional information about the interfaces between WMS and WRTS may be found in the **SRM Application Registration/Denial**.

# Undercare Changes and Recertifications for Non-Service Cases

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## Undercare Maintenance/Error Correction/Change Pending

### Overview

Undercare/Maintenance of an Active or Closed Non-Services case is the process used to change, add, delete and/or correct case and individual data. This process includes Undercare/Maintenance Error Correction and Pending Data Change.

For some Case Type, Transaction Type and Reason Code combinations, data can be entered to the Client Notices System (CNS) at the same time the Undercare Maintenance transaction is entered on WMS. This section includes a description of how to access the CNS from the WMS Non-Services Data Entry Menu. For a detailed description of CNS, see **SRM Client Notices System**.

Additional information on Closings is contained in **SRM Denials and Closings**.

### Undercare/Maintenance

An Undercare/Maintenance (U/M) activity on an Active case is begun by entering Function C, Undercare Maintenance/Error Correction/Change Pend, and the Case Number on the entry line of the Non-Services Data Entry Menu screen. An Authorization Number is required if the district has selected Authorization Print Option 1 (**SRM Standards, Conventions, and General Information**). The screens on which changes, additions or deletions are to be made are selected by placing an X in front of the appropriate screen(s) and transmitting. If the Case is available for U/M, no pending Record exists for that case, and an "X" was not entered for CNS, screen WKUM01 is automatically returned. The user may be taken to particular Undercare Maintenance screens automatically depending on edits and entries that were made in error.

If Closed Case Maintenance is being performed (**SRM Closed Case Activity**), the screens on which data is to be entered are selected directly on the WCLOCM - Closed Case Maintenance screen. WKUM01 is returned as the first screen only if selected.

If a CNS Limited Fill Input Form accompanies the Authorization Change Form, an "X" is entered in front of CNS to request the WMS/Client Notice Subsystem - Reason Code Entry Screen, WCN011. This screen is displayed before any WMS Undercare screens. After successful completion of WCN011, other CNS screens may be displayed if the Reason Code or Codes entered on WCN011 require additional information. Data is entered on the CNS screens as it appears on the CNS Limited Fill Input Form. See **SRM Client Notices System** for further information on CNS.

After successful completion of all appropriate CNS screens, a Pending Notice Record is created, and a Notice Number is generated. WKUM01 is automatically displayed after error free transmission of the final CNS entry screen. For a case closing, the *first* Case Reason Code entered on WCN011, the Transaction Type and the Notice Number are carried forward from the CNS entry screens to WKUM01.

If an error cannot be corrected during CNS entry, the screen with the error message is printed, and any highlighted fields are circled. All CNS errors are "Fatal". No information is saved on CNS if any error occurs and is not corrected. The transaction cannot be canceled while in CNS. The user must return to a WMS screen to cancel the transaction. Pressing the Ctrl+F6 keys displays WKUM01.

After WKUM01 is displayed, the transaction can then be canceled by pressing Ctrl+F5, or Undercare Maintenance can continue. To continue, some of the data which would normally be carried forward from CNS must be entered on WKUM01 to avoid a "Fatal" error. These fields are Case Reason Code and Transaction Type. Because a Notice Number is not available from CNS, the pending record will be placed in an error status until CNS entry is completed, and a Notice Number is entered by the user.

On WKUM01, the transaction type is entered, if it was not carried forward from CNS. Other data on this screen is changed, added or deleted as required. The screen is transmitted and edited. Any errors or missing required fields are returned highlighted. If the user is not able to correct the errors, a "Y" is entered after ACCEPT BLINKING FIELDS.

If the errors are "Fatal", a System Acknowledgment screen with the message TRANSACTION REJECTED is returned and no data that was changed, added or deleted on WKUM01 is retained by the system and the transaction is terminated. If the errors are "Non-Fatal", processing continues and the next screen is returned.

This next screen may be the one selected on either the WDXMNU - Non Services Data Entry Menu screen or the WCLOCM - Closed Case Maintenance screen, or it may be a screen that is automatically scheduled (i.e. forced) because certain data on screen WKUM01 was changed.

The next screens (WKUM02, WKUM03, WKUM04, WKUM05, WKUM06, WKUM07, WKUM08, WKUM09) selected or automatically scheduled are returned in sequence. "Fatal" or "Non-Fatal" Errors can occur on these screens. The errors can be accepted by entering "Y" after ACCEPT BLINKING FIELDS. Screen WKUM08 is available to enter local non-WMS data and is unedited by WMS.

When data entry on all appropriate screens is completed, a System Acknowledgment screen with the message TRANSACTION ACCEPTED is returned. If any screens had "Non-Fatal" errors that were accepted, the error numbers are listed on this System Acknowledgment screen (See **Standards, Conventions, and General Information**). See **SRM Full Data Entry and Undercare Error Messages** for a complete list of all fatal and non-fatal error messages for Undercare/Maintenance

Completion of U/M establishes a Pending Record. The Pending Data Status is UM/ERR or UM/CLERR if it has non-fatal errors. If the Pending Record is error free, the Pending Data Status is UM/BUP, UM/CL, UM/RFI, or AT/UM.

A new Authorization Number is assigned to this Pending Record. If the Pending Record is error free an Authorization may be printed depending on the local district option (See **SRM Section Standards, Conventions, and General Information**). If the Pending Record contains fatal or non-fatal errors, an Authorization is not available. If the Pending Data status is UM/RFI indicating that one or more individuals have unresolved RFI data, the availability of an Authorization depends on the transaction type (See **SRM Resource File Integration**). However, either or both a Case Comprehensive Report and a Case Comprehensive Error Report may be selected on the System Acknowledgment screen and may be printed. A list of the fatal and non-fatal errors may be seen on the WKERQY error inquiry screen by pressing F1 or F2 from the System Acknowledgment screen. Both F1 and F2 bring the user to the first page of the error inquiry screen (WKERQY). A Pending Record containing fatal errors is not retained by the system after the System Acknowledgment screen is removed by pressing MENU or F6. (See **Standards, Conventions, and General Information** for additional information).

If an individual was added to the case and the Client Identification Number (CIN) field left blank, a Clearance Match Record is established and a Clearance Report is printed for that individual only. The Pending Data Status is UM/CL or UM/CLERR if there are non-fatal errors. An Authorization is not available but a Case Comprehensive Report, and

a Case Comprehensive Error Report if the Pending Data Status is UM/CLERR, may be selected on the System Acknowledgment screen.

### Creation of MA Extension Pending Record

The closing of certain PA cases may include the automatic creation of a MA case Pending Record via the MA Extension process. See **SRM Denials and Closings** for a full description of the MA Extension process. The Pending Data Status of this MA Pending Record will be AT/FDE. A new Authorization Number is assigned to this Pending Record and an Authorization may be printed depending on the local district option (See **SRM Standards, Conventions, and General Information**). The MA Extension Case Number is also printed on the PA Case Authorization.

Only Screen 8 of the MA Extension Pending Record can be accessed for changes.

### FS Separate Determination

The FS Separate Determination process provides the opportunity to open a FS case when the associated PA case is closed. This may be done either at the time of the PA case closing or after the PA case completes Batch Update after the closing. This process allows the opening of a new FS case without the need for data entry of a new application and with entry of minimal new case data due to the automatic transfer of most data elements from the PA closing case to the new FS case. See **SRM Denials and Closings** for a full description of the FS Separate Determination process.

### FS Transitional Benefit Allowance (TBA)

The FS Transitional Benefit Allowance process automatically creates an FS case when the associated PA case (case types 11 and 12) is closed with specific reason codes. This process allows for the opening of a new FS case without the need for data entry of a new application by the automatic transfer of data elements from the closed PA case. TBA is the Federal provision that permits NYS to provide transitional food stamp benefits to households leaving TANF to further support welfare reform goals and transitional supports for working families.

### Error Correction & Pending Data Change

The Pending Record created by the U/M activity (Pending Data Status is XXX/ERR or by the BICS/LDF process (Pending Data Status is XXX/ALEC) can be accessed for Error Correction and Pending Data Change. This allows clearance resolution, error correction, further changes, additions, or deletions to the Pending Record subject to the limits of the appropriate edits (See **SRM Full Data Entry and Undercare Error Messages**). The Pending Data Status must be an appropriate one for an Error Correction or a Pending Data Change (See **SRM Standards, Conventions, and General Information**).

Function C, Undercare Maintenance/Error Correction/Change Pend, the Case Number, and Authorization Number of the Pending Record if district has selected Authorization Print Option 1, are entered on the entry line of the Non-Services Data Entry Menu screen. An "X" is entered in front of the screens on which changes, additions or deletions are to be made. Screens containing errors are returned automatically. Certain other screens are automatically scheduled.

If a CNS Limited Fill Input Form accompanies the Authorization Change Form, an "X" is entered in front of CNS to request the Client Notice System Reason Code Entry screen, WCN011. This screen is displayed before any WMS Data Entry screens. If a Pending Notice Record was previously created, that record cannot be accessed from WDXMNU. However, a new notice record can be created.

After successful completion of WCN011, other CNS screens may be displayed if the Reason Code or Codes entered on WCN011 require additional information. Data is entered on the CNS screens as it appears on the CNS Limited Fill Input Form.

After successful completion of all appropriate CNS screens, a Pending Notice Record is created, and a Notice Number is generated. WKUM01 is automatically displayed after error free transmission of the final CNS entry screen. For a case closing, the *first* Case Reason Code entered on WCN011, the Transaction Type and the Notice Number are carried forward from CNS to WKUM01.

If an error cannot be corrected during CNS entry, the screen with the error message is printed, and any highlighted fields are circled. All CNS errors are "Fatal". No information is saved on CNS if any error occurs and is not corrected. The transaction cannot be canceled while in CNS. The user must return to a WMS screen to cancel the transaction. By pressing the Ctrl+F6 key, the system displays WKUM01.

After WKUM01 is displayed, the transaction can then be canceled by pressing Ctrl+F5, or Undercare Maintenance can continue. To continue, some of the data which would normally be carried forward from CNS must be entered on WKUM01 to avoid a "Fatal" error. These fields are Case Reason Code and Transaction Type. Because a Notice Number is not available from CNS, the pending record will be placed in an error status until CNS entry is completed, and a Notice Number is entered.

The changes, additions, deletions or corrections are entered by the user on the appropriate screens and transmitted. All the data on each screen transmitted is edited even if it was not changed. Any errors or missing required elements are returned highlighted. If these errors cannot be corrected by the user, a "Y" is entered after ACCEPT BLINKING FIELDS. Errors can be Fatal or Non-fatal. Fatal Errors will result in a System Acknowledgment screen with the message TRANSACTION REJECTED FATAL ERROR DETECTED displayed along with up to 20 error numbers and the transaction is terminated. Non-fatal errors allow processing to continue.

When data entry on all appropriate screens is completed, a System Acknowledgment screen with the message TRANSACTION ACCEPTED is returned. A new Authorization Number is assigned to the Pending Record if its last Pending Data Status was not UM/ERR, UM/CLERR, REAC/UM or REAC/ERR. See **SRM Standards, Conventions, and General Information** for a complete explanation of Authorization Number assignment. The new Pending Data Status of the corrected or changed Pending Record is UM/ERR, UM/CLERR or REAC/ERR if it has Non-fatal errors. If the Pending Record is error free, the Pending Data Status is UM/CL, UM/RFI, AT/UM, or AT/REA.

## Authorization Report Request

Additional copies of the current Authorization can be obtained by entering Function E, the Case Number, and the Authorization Number if district has selected Authorization Print Option 1, on the entry line of the WDXMNU - Non-Services Data Entry screen. See **SRM Establishing a Non-Services Case** for a complete explanation of this selection. Also, see **SRM Standards, Conventions, and General Information** for a full explanation of conditions that may restrict the use of this transaction.



## Data Elements Not Returned on First Undercare Transaction

**WKUM01** - Registry/Version, Transaction Type and Reason Code.

The AFA Data (LN, Code, and Date (optional depending on AFA - e.g. Z95)) is not pulled down if date is earlier than TRANSACTION DATE

**WKUM02** - Application Register/Line Number and Other Name (LN, Code, Name).

Individual Data (Name, SSN Code, SSN, Marital Status, CIN, App Reg/Ln No, Sex, DOB, SSI Status) is not pulled down if Individual Status on Screen 05 is not 07, 08 or 10.

**WKUM06** - Payment lines are *not* pulled down for the following conditions:

**Expired Recurring Payment** - Payment Issue Code (DE #14045) is 1-RECUR and Payment TO Date is earlier than today's date.

**Single Issue Payments** - Payment Issue Code (DE #14045) is 2-ONCE.

**Release, Cancel or Void** - Local Action Code (DE #14009) 5-CANCEL or 9-VOID.

**WKUM07** - All elements of Associated Name and Address are not pulled down if Associated Name and Address Code is 14 or 15.

WDXMNU - Non-Services Data Entry Menu (Function C)

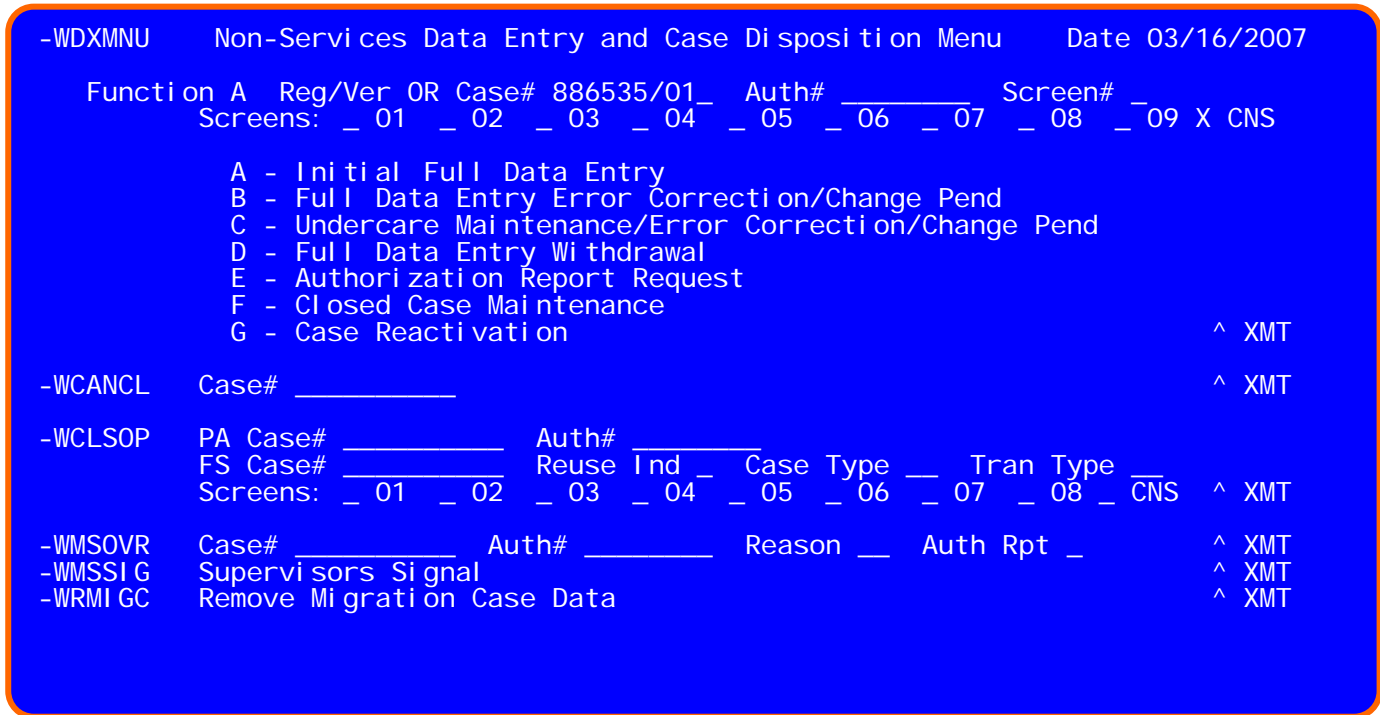


Figure 1 - Non-Services Data Entry and Case Disposition Menu (WDXMNU)

Purpose

Function C on this menu is used to obtain the data entry screens needed to initiate an undercare transaction by creating a pending record or to change, add, delete and/or correct data in a pending record.

Access

- Entering 07 (or F7 from) the WMSMNU - WMS Menu, or
- F7 from Sign-on Acknowledgement screen (**SRM Access and Exit Procedures**), most menus and sub-menus and certain other screens. See **Function Keys** for each screen details.

Screen Response

Positive

- WKUM01

Negative

- Field(s) in error return highlighted (missing entries display highlighted). One of the following messages on Line 24:

- APPLICATION NOT FOUND
- AUTH NUMBER MISSING
- AUTH NUMBER MISSINGO
- AUTH NUMBER/ACCEPT NO INVALID
- AUTO SDX CASES CANNOT BE WITHDRAWN
- A SLASH IS REQUIRED BETWEEN REG NUMBER AND VERSION
- CASE NOT FOUND
- CASE NUMBER INVALID
- CASE NUMBER MISSING
- CASE PENDING DATA STATUS INVALID
- CASE STATUS INVALID
- CLOCKDOWN CLSING IN PROGRESS-PENDING REC ACCESS NOT ALLOWED
- CNS SELECTION NOT ALLOWED FOR THIS DISTRICT
- CNS SELECTION NOT ALLOWED FOR THIS FUNCTION
- CNS SELECTION NOT ALLOWED FOR MA CASE TYPES
- ENTRY NOT A VALID SCREEN NUMBER
- FUNCTION MUST BE ENTERED
- INDIVIDUAL AUX MARKED FOR DATA MIGRATION
- INVALID CALL TO INDIV PULLDOWN
- INVALID CALL TO MED-CASE PULLDOWN
- INVALID CASE TYPE FOR THIS PROCESS
- INVALID FUNCTION CODE ENTERED
- MA EXT/SEP DET CASES CANNOT BE WITHDRAWN
- MA RECERT IN PROGRESS PENDING REC ACCESS NOT ALLOWED
- MUST ACCESS PA CASE THAT CREATED MA CASE
- NO MATCH ON AUTH NUMBER
- NO SCREEN ENTRIES ALLOWED FOR THIS FUNCTION
- ONLY SCREEN 8 ALLOWED FOR MA EXTENSION
- ONLY SCREEN 8 ALLOWED FOR TRANSACTION TYPE
- ONLY SCREENS 1 AND 4 ALLOWED FOR RC Y35
- PLEASE SELECT SCREENS
- REGISTRY NUMBER MISSING/INVALID

- REGISTRY NUMBER/VERSION NUMBER MISSING
- REPLACEMENT FOOD STAMPS TRANS IN PROGRESS NO ACCESS
- REQUEST INVALID-CASE FLAGGED FOR DATA MIGRATION
- SCREEN 8 NOT ALLOWED
- SCREEN 9 INVALID FOR CASE TYPE
- SCREEN 9 NOT PERMITTED FOR CASE TYPE
- SCREEN SELECTION MUST BE MADE
- SELECT ONLY SCREEN 8
- SEP CASE NOT FOUND
- SERVICES CASE TYPE NOT ALLOWED
- SSN ENUMERATION IN PROGRESS-PENDING REC ACCESS NOT ALLOWED
- TRANSACTION NOT ALLOWED
- UPDATE NOT ALLOWED-PCP PENDING RECORD EXISTS
- VA CERTIFICATION PENDING REC ACCESS NOT ALLOWED
- VERSION NUMBER INCORRECT
- VERSION NUMBER MISSING/INVALID
- WITHDRAWAL NOT ALLOWED USE INITIAL LOAD CANCEL
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu

Key	Description
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WDXMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Valid values are A through G.
REG/VER or CASE #	01046 - REGISTRY NUBER (6) and 01047 - VERSION NUMBER (2) Or 01050 - CASE NUMBER (10)	Required
AUTH #	02040 - AUTHORIZATION NUMBER (8)	Required
SCREEN #	NONE	User entered to move to a specific data entry screen; Valid values are 1-9
<b>SCREENS:</b>		
01	NONE	Enters an 'X' to return WKUM01.
02	NONE	Enters an 'X' to return WKUM02.
03	NONE	Enters an 'X' to return to WKUM03.
04	NONE	Enters an 'X' to return WKUM04.
05	NONE	Enters an 'X' to return WKUM05.
06	NONE	Enters an 'X' to return WKUM06.
07	NONE	Enters an 'X' to return WKUM07.

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SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
08	NONE	Enters an 'X' to return WKUM08.
09	NONE	Enters an 'X' to return WKUM09.
CNS	NONE	Enters an 'X' to return WCN011

WKUM01 - Undercare Maintenance/Error Correction/Change Pend 1

```

WKUM01      Case#                               03/23/2007
Trans Type 05 Case Reason Y99 PA/FS RC ____ PA/MA RC SafeNet APP
Client Notice: Ind _ Number _____ Language S HII _ RVT _ SRC _
Auth Period 092893 to 083194 Recert Date _____ FS Intw _ TI _
FS Period 092893 to 083194 PA/FS Code 01 TOP Ofc Unit Worker
Reuse Case Number Type Emergency Fiscal Trans:
Ind N871433 16 40 Resp: 1_ 8____ 1118_
FS Rep Cd _ IV-D Ind _ Sp-Code _ HEAP Income _
Case Name FRANK_____ LFLN _
Residence Address _____ Ci ty _ St Zip Phone
137_11TH_AVE_____ MT_VERNON_____ NY 11111 _____
Care Of Name _____
Mailing Address _____ Ci ty _ St Zip
_____

Co-op Case Nos: _____
Local Data: _____
FS Extension: Case No _____ Ofc Unit Worker
MA Extension: Case No _____ Ofc Unit Worker Reason ____

ACCEPT BLINKING FIELDS _ NEXT SCREEN 06 XMT _
    
```

Figure 2 - Undercare Maintenance/Error Correction/Change Pend 1 (WKUM01)

**Purpose**

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record. If one or more individuals have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will appear on line 23 (See **SRM Resource File Integration**).

**Access**

- Entering Function C and a valid Case No. and Authorization No. (both required) on the WDXMNU - Non-Services Data Entry Menu screen, **or**
- Entering Function C and a valid Case No. and Authorization No. (both required) on the WDXMNU - Non-Services Data Entry Menu screen along with placing an "X" for Screen 01, **or**
- Directly from the last CNS screen if CNS data is transmitted error-free, **or**
- Pressing the Ctrl+F6 if errors on CNS

## Screen Response

### Positive

- If one or more individuals have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will appear on line 23. (See **SRM Resource File Integration**).
- WKUM02, WKUM03, WKUM04, WKUM05, WKUM06, WKUM07, WKUM08, or WKUM09 as selected or as required by the system.
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error returns highlighted (missing entries display highlighted). The message EXAMINE BLINKING FIELDS on Line 24, or
- One of the following messages on Line 24:
  - F99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.



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Screen Field Description - WKUM01

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Unprotected but changes are not accepted
REGISTRY VERSION	01046 - REGISTRY NUMBER (6)	Protected; Blank.
	01047 - VERSION NUMBER (2)	Protected; Blank.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Required; System-generated on WKUM01 if entered on CNS screen - WCN011 - if CNS was previously accessed through WDXMNU.
CASE REASON	02050 - REASON CODE (3)	Required
PA/FS RC	02006 - PA/FA REASON CODE (3)	
PA/MA RC	02005 - PA/MA REASON CODE (3)	
SAFENET	01026 - FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (1)	
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
RVI	01043 - RESOURCE VERIFY (1)	
APP SRC	01066 – APPLICATION SOURCE CODE (1)	
<b>CLIENT NOTICE</b>		
IND	04001-TIMELY OR ADEQUATE NOTICE INDICATOR CODE (1)	
NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	System is implemented in your district; System-generated on WKUM01 if entered on CNS screen - WCN011- if CNS was previously accessed through WDXMNU
LANGUAGE	04002 - LANGUAGE OF NOTICE FLAG (1)	Required
<b>AUTHORIZATION PERIOD</b>		
AUTH PERIOD	01100 - AUTHORIZATION PERIOD (12)	Characters 1-6.; Formatted as MMDDYY; Required
TO	01100 - AUTHORIZATION PERIOD (12)	Characters 7-12.; Formatted as MMDDYY; Required
RECERT DATE	01910 - CERTIFICATION DATE (6)	Formatted as MM/DD/YY
FS Intw	02022 - FOOD STAMP INTERVIEW (1)	
TI	01067 – TRUST INDICATOR (1)	Must be Y or N. The default value is N.
<b>FOOD STAMP PERIOD</b>		
FS PERIOD	17051 - FS AUTHORIZATION PERIOD (12)	Characters 1-6.; Formatted as MMDDYY
TO	17051 - FS AUTHORIZATION PERIOD (12)	Characters 7-12.; Formatted as MM/DD/YY
PA/FS CODE	01130 - PA FOOD STAMP CODE (2)	
TOP	01041 - TOP INDICATOR (1)	
<b>TRANS:</b>		
OFC	02014 - TRANSACTION OFFICE NUMBER (3)	
UNIT	02015 - TRANSACTION UNIT NUMBER (5)	Either unit or worker is required
WORKER	02016 - TRANSACTION WORKER NUMBER (5)	Either unit or worker is required
<b>RESP:</b>		
OFC	01020 - LOCAL OFFICE NUMBER (3)	

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SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
UNIT	01030 - UNIT IDENTIFIER (5)	Required Either unit or worker required
WORKER	01040 - WORKER IDENTIFIER (5)	Required Either unit or worker required
REUSE IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	Protected
CASE NUMBER	01050 - CASE NUMBER (10)	Required
TYPE	01060 - CASE TYPE (2)	Required
EMERGENCY	01061- EMERGENCY INDICATOR (1)	
FISCAL	01011- FISCAL DISTRICT (2)	
FS REP CD	01350 - MONTHLY REPORTING CODE (1)	
IV-D IND	01440 - IV-D INDICATOR (1)	
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	
CASE NAME	01070 - CASE NAME (FIRST) (10)	Required
	01070 - CASE NAME (MI) (1)	
	01070 - CASE NAME (LAST) (17)	
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
RESIDENCE ADDRESS	01080 - RESIDENCE STREET (35)	Required
CITY	01082 - RESIDENCE CITY/TOWN (15)	Required
ST	01083 - RESIDENCE STATE (2)	Required
ZIP	01084 - RESIDENCE ZIP (5)	Required
PHONE	01085 - TELEPHONE NUMBER (10)	
CARE OF NAME	05110 - IN CARE OF NAME (FIRST) (10)	
	05110 - IN CARE OF NAME (MI) (1)	
	05110 - IN CARE OF NAME (LAST) (17)	
MAILING ADDRESS	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
ST	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
CO-OP CASE NOS	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
LOCAL DATA	24760 - CASE LOCAL DATA (57)	4 occurrences
<b>FS EXTENSION</b>		
CASE NO	01050 - CASE NUMBER (10)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>MA EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	
OFC	01002 - MA EXTENSION LOCAL OFFICE NUMBER (3)	
UNIT	01003 - MA EXTENSION UNIT ID NUMBER (5)	
WORKER	01004 - MA EXTENSION WORKER ID NUMBER (5)	
REASON	01605 - SEPARATE DETERMN. REASON CODE (3)	

WKUM02 - Undercare Maintenance/Error Correction/Change Pend 2

```

WKUM02      Case # N871433      Type SN-CSH      Trans Type CHNG      03/23/2007
C Individual Name      C SS/RR      M Client      Ap S      Date
d First      M Last      d Number      S Number      Rg e      of SSI
01 FRANK      M SMITH      1 244415544      AX26394B      LN x      Birth Stat
02
03
04
05
06
07
08
09
10
C Other Name      C Other Name
LN d First      M Last      LN d First      M Last

ACCEPT BLINKING FIELDS _      NEXT SCREEN 06      XMT ^
    
```

Figure 3 - Undercare Maintenance/Error Correction/Change Pend 2 (WKUM02)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting WKUM01 with no errors or with accepted non-fatal errors, **or**
- Entering 02 in NEXT SCREEN on first page of WKUM02 Undercare Maintenance/Error Correction/Change Pend 2 (Second page will have Line Numbers 11-20)., **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 02 is selected or has errors.

Screen Response

Positive

- WKUM02 (Page 2) if 02 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKUM02 will have Line Numbers 11-20)

- WKUM03, WKUM04, WKUM05, WKUM06, WKUM07, WKUM08, or WKUM09 as selected or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

#### Negative

- Field(s) in error returned highlighted (missing entries display highlighted). The message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - NO APPLICANT ENTERED (if no individual data was entered on WKUM02)
  - ADDITIONAL PAGE NOT ALLOWED (if on Page 2 and Page 2 is requested again)
  - INVALID NEXT SCREEN ENTRY
  - NEXT SCREEN SELECTION INVALID FOR THIS CASE TYPE (05 may be entered only if Case Type is 60)
  - DUPLICATE CINS EXIST LINE NOS: 99,99 (99 = 01-20)
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

#### Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKUM02

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>INDIVIDUAL NAME</b>		
CD	03514 - PREGNANCY/PARENTING INDICATOR (1)	10 occurrences
FIRST	03030 - NAME (FIRST) (10)	10 occurrences; Characters 1-10
M	03030 - NAME (MI) (1)	10 occurrences; Character 11
LAST	03030 - NAME (LAST) (17)	10 occurrences; Characters 12-28
CD	03200 - SOCIAL SECURITY CODE (1)	10 occurrences
SS/RR NUMBER	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences
MS	03070 - CURRENT MARITAL STATUS (1)	10 occurrences
CLIENT ID NUMBER	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
AP RG LN	01045 - APPLICATION REGISTER LINE NO. (2)	10 occurrences
SEX	03050 - SEX (1)	10 occurrences
DATE OF BIRTH	03060 - DATE OF BIRTH (8)	10 occurrences; Formatted as MMDDCCYY
SSI STAT	03145 - SSI STATUS (1)	10 occurrences
<b>OTHER NAME</b>		
LN	03045 - LINE NO. OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	03040 - OTHER NAME CODE (1) 00183 - PRISON CODE (1)	6 occurrences For Prisoner case processing
FIRST	03041 - OTHER NAME (FIRST) (10) 00184 - DEPARTMENT IDENTIFICATION NUMBER (10)	6 occurrences; Characters 1-10 For Prisoner case processing
M	03041 - OTHER NAME (MI) (1)	6 occurrences; Character 11
LAST	03041 - OTHER NAME (LAST) (17)	6 occurrences; Character 12-28

WKUM03 - Undercare Maintenance/Error Correction/Change Pend 3

```

WKUM03   Case # N871433   Type SN-CSH   Trans Type CHNG   03/23/2007
Ln  Rel  De  Cat  Fap  Emp  PA/MA FS  MA St/Fd T  Mom Vet  Race  Ed  MS
No  Cd  gr  Cd  Cd  Cd  Indv Indv Indv Chgs Lm Ln  Stat H IABPW Stat Cit PI
01  01   09  _  41  _  _  _  _  _  _  _  _  _  _
02
03
04
05
06
07
08
09
10

          DV Wai vers
Ln  IVD Ti mLmt Drug/Al c Other

          ACCEPT BLI NKI NG FI ELDS _  NEXT SCREEN 04  XMT ^
    
```

Figure 4 - Undercare Maintenance/Error Correction/Change Pend 3 (WKUM03)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting **WKUM02 - Undercare Maintenance/Error Correction/Change Pend 2** with no errors or with accepted non-fatal errors, **or**
- Entering 03 in NEXT SCREEN on first page of **WKUM02 Undercare Maintenance/Error Correction/Change Pend 2** (Second page will have Line Numbers 11-20), **or**
- Entering a valid Case No. and Authorization No. on **WDXMNU - Non-Services Data Entry Menu** - Function C - and Screen 03 is selected or has errors.

## Screen Response

### Positive

- WKUM03 (Page 2) if 03 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKUM03 will have Line Numbers 11-20)
- WKUM04, WKUM05, WKUM06, WKUM07, WKUM08, or WKUM09 as selected or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

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 RECERTIFICATION

Screen Field Description - WKUM03

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
REL CD	03090 - RELATIONSHIP CODE (2)	10 occurrences
DEGR	03029 - HIGHEST EDUCATION DEGREE ATTAINED CODE (1)	10 occurrences
CAT CD	03110 - INDIVIDUAL CATEGORICAL CODE (2)	10 occurrences
FAP CD	03028 - FOOD ASSISTANCE PROGRAM CODE (1)	10 occurrences
EMP CD	03190 - EMPLOYABILITY CODE (2)	10 occurrences
PA/MA INDV	03121 - PA/MA INDIVIDUAL REASON CODE (3)	10 occurrences
FS INDV	03014 - FS INDIVIDUAL REASON CODE (3)	10 occurrences
MA INDV	03015 - MA INDIVIDUAL REASON CODE (3)	10 occurrences
ST/FD CHGS	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	10 occurrences
T LM	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. OR 60 MO. TANF LIMIT (1)	10 occurrences
MOM LN	03044 - MOTHERS LINE NUMBER (2)	10 occurrences
VET STAT	09302 - VETERAN STATUS (1)	10 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	10 occurrences
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	10 occurrences
A	03055 - ASIAN (1)	10 occurrences
B	03056 - BLACK OR AFRICAN AMERICAN (1)	10 occurrences
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences
W	03058 - WHITE OR CAUCASIAN (1)	10 occurrences
ED STAT	09304 - EDUCATION LEVEL (2)	10 occurrences
CIT	03180 - CITIZENSHIP INDICATOR (1)	10 occurrences
MS PI	15021 - RECIPIENT BUY-IN ELIGIBILITY STATUS CODE (1)	10 occurrences
<b>DV WAIVERS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
IVD	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; The program places a "Y" in this field if the individual has a domestic violence waiver. 3 occurrences
TIMLMT	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	3 occurrences
DRUG/ALC	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	3 occurrences
OTHER	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	3 occurrences



WKUM04 - Undercare Maintenance/Error Correction/Change Pend 4

```

WKUM04   Case # N871433   Type SN-CSH   Trans Type CHNG   03/23/2007

Future Action Information:
LN      AFA Cd   Date              LN      AFA Cd   Date
  _      _      _              _      _      _
  _      _      _              _      _      _
  _      _      _              _      _      _

Resident Alien Program Information:
Ln      Individual
No      First      M Last      Alien No   DEC       DOS       EPI       SP
01      FRANK      M SMITH
02
03
04
05
06
07
08
09
10

ACCEPT BLINKING FIELDS _   NEXT SCREEN 05   XMT ^
    
```

Figure 5 - Undercare Maintenance/Error Correction/Change Pend 4 (WKUM04)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting WKUM03 - Undercare Maintenance/Error Correction/Change Pend 3 with no errors or with accepted non-fatal errors, **or**
- Entering 04 in NEXT SCREEN on first page of WKUM03 - Undercare Maintenance/Error Correction/Change Pend 3 (Second page will have Line Numbers 11-20), **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 04 is selected or has errors.

## Screen Response

### Positive

- WKUM04 (Page 2) if 04 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKUM04 will have Line Numbers 11-20)
- WKUM05, WKUM06, WKUM07, WKUM08, or WKUM09 as selected or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKUM04

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>FUTURE ACTION INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
AFA CD	01140 - ANTICIPATED FUTURE ACTION CODE (3)	6 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	6 occurrences
<b>RESIDENT ALIEN PROGRAM INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
INDIVIDUAL FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
ALIEN NO	03171 - ALIEN NUMBER (9)	10 occurrences
DEC	03072 - DATE OF ENTRY INTO THIS COUNTRY (8)	10 occurrences
DOS	03172 - DATE OF STATUS (6)	10 occurrences
EPI	03073 - EPI INDICATOR (1)	10 occurrences
SP	03076 - CHAFEE INDICATOR (1)	10 occurrences

WKUM05 - Undercare Maintenance/Error Correction/Change Pend 5

WKUM05	Case # N871433	Type SN-CSH	Trans Type CHNG	03/23/2007	
Ln Individual No First M Last		PA/MA Ind Eff Stat Date	FS Eff Date	Cv MA Coverage Cd From To	PP C E A rr a B F io r C I nv d d S
01 FRANK SMITH		07 092893	092893	16 090193 083194	00 P _
02					
03					
04					
05					
06					
07					
08					
09					
10					
ACCEPT BLINKING FIELDS _			NEXT SCREEN 06		XMT ^

Figure 6 - Undercare Maintenance/Error Correction/Change Pend 5 (WKUM05)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting the WKUM04 - Undercare Maintenance/Error Correction/Change Pend 4 screen with no errors or with accepted non-fatal errors, **or**
- Entering 05 in NEXT SCREEN on first page of WKUM04 - Undercare Maintenance/Error Correction/Change Pend 4 (Second page will have Line Numbers 11-20), **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 05 is selected or has errors

## Screen Response

### Positive

- WKUM05 (Page 2) if 05 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKUM05 will have Line Numbers 11-20)
- WKUM06, WKUM07, WKUM08, or WKUM09 as selected or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive.</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKUM05

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Protected; 10 occurrences
FIRST	24120 - GIVEN NAME (10)	Protected; 10 occurrences
M	24130 - MIDDLE INITIAL (1)	Protected; 10 occurrences
LAST	24140 - SURNAME (17)	Protected; 10 occurrences
IND STAT	03120 - INDIVIDUAL STATUS (2)	10 occurrences
PA/MA EFF DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	10 occurrences; Formatted as MMDDYY
FS EFF DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (6)	10 occurrences; Formatted as MMDDYY
CV CD	21090 - RECIPIENT MEDICAID COVERAGE (2)	10 occurrences
<b>MA COVERAGE</b>		
FROM	21110 - RECEIPT MEDICAID COVERAGE DATES	10 occurrences; Characters 1-6.; Formatted as MMDDYY.
TO	21110 - RECEIPT MEDICAID COVERAGE DATES	10 occurrences; Characters 7-12.; Formatted as MMDDYY
PRIN PROV	21550 - PRINCIPAL PROVIDER CODE (2)	10 occurrences
CARD	21620 - CARD CODE (2)	10 occurrences
EBCD	01001- FOOD STAMPS CARD HOLDER FLAG (1)	10 occurrences
AFIS	03047 - AFIS EXEMPTION INDICATOR (1)	10 occurrences

WKUM06 - Undercare Maintenance/Error Correction/Change Pend 6

```

WKUM06      Case # N871433      Type SN-CSH      Trans Type CHNG      03/23/2007
LN Act  Pay Meth      Pay P-U  --Effective--  Ind  Cl m  Vend  Manual Issue
01  Typ  Pay Amount  Iss  Sch Cd  From  To  Ln  Cd  Id  Check No
02
03
04
05
06
07
08
09
10
11
12

LN Amount  LN Amount  LN Amount  LN Amount  LN Amount  LN Amount
Recoument  _  _  _  _  _  _  _  _  _  _  _
Energy Rst  _  _  _  _  _  _  _  _  _  _  _
HVnd/Acct
Repl ace LN      CHK/FSB      LN      Vnd/Acct
                        CHK/FSB

ACCEPT BLI NKI NG FI ELDS _      NEXT SCREEN 07      XMT ^
    
```

Figure 7 - Undercare Maintenance/Error Correction/Change Pend 6 (WKUM06)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting the WKUM05 - Undercare Maintenance/Error Correction/Change Pend 5 screen with no errors or with accepted non-fatal errors, **or**
- Entering 06 in NEXT SCREEN on first page of WKUM05 - Undercare Maintenance/Error Correction/Change Pend 5, **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 06 is selected or has errors.

Screen Response

Positive

- WKUM07, WKUM08, or WKUM09 as selected or as required by the system

- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

#### Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

#### Screen Field Description - WKUM06

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic



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SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>LINE INFORMATION</b>		
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6; Formatted as MMDDYY
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12; Formatted as MMDDYY
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	Protected; 12 occurrences; No longer supported
CLM CD	14035 - SPECIAL CLAIMING CATEGORY	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	7 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	7 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
VND/ACCT	14024 - HEAP VENDOR (8)	
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	

WKUM07 - Undercare Maintenance/Error Correction/Change Pend 7

```

WKUM07      Case # N871433      Type SN-CSH      Trans Type CHNG      03/23/2007
Associated Names And Addresses
LN 01 Code 03 Notice Cpy _      Name X _____
                                Addr X _____
                                Ci ty X _____ St NY Zip 11111
LN _ Code _ Notice Cpy _      Name _____
                                Addr _____
                                Ci ty _____ St _ Zip _____
The following 2 addresses may be used ONLY for additional Notice copies
LN _ Code _ Notice Cpy _      Name _____
                                Addr _____
                                Ci ty _____ St _ Zip _____ CPC _____
LN _ Code _ Notice Cpy _      Name _____
                                Addr _____
                                Ci ty _____ St _ Zip _____ CPC _____
                                ACCEPT BLINKING FIELDS _      NEXT SCREEN 99      XMT ^
    
```

Figure 8 - Undercare Maintenance/Error Correction/Change Pend 7 (WKUM07)

Purpose

This screen is used to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting WKUM06 - Undercare Maintenance/Error Correction/Change Pend 6 with no errors or with accepted non-fatal errors, **or**
- Entering 07 in NEXT SCREEN on first page of WKUM06 - Undercare Maintenance/Error Correction/Change Pend 6, **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 07 is selected or has errors.

## Screen Response

### Positive

- WKUM08 as selected or as required by the system
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

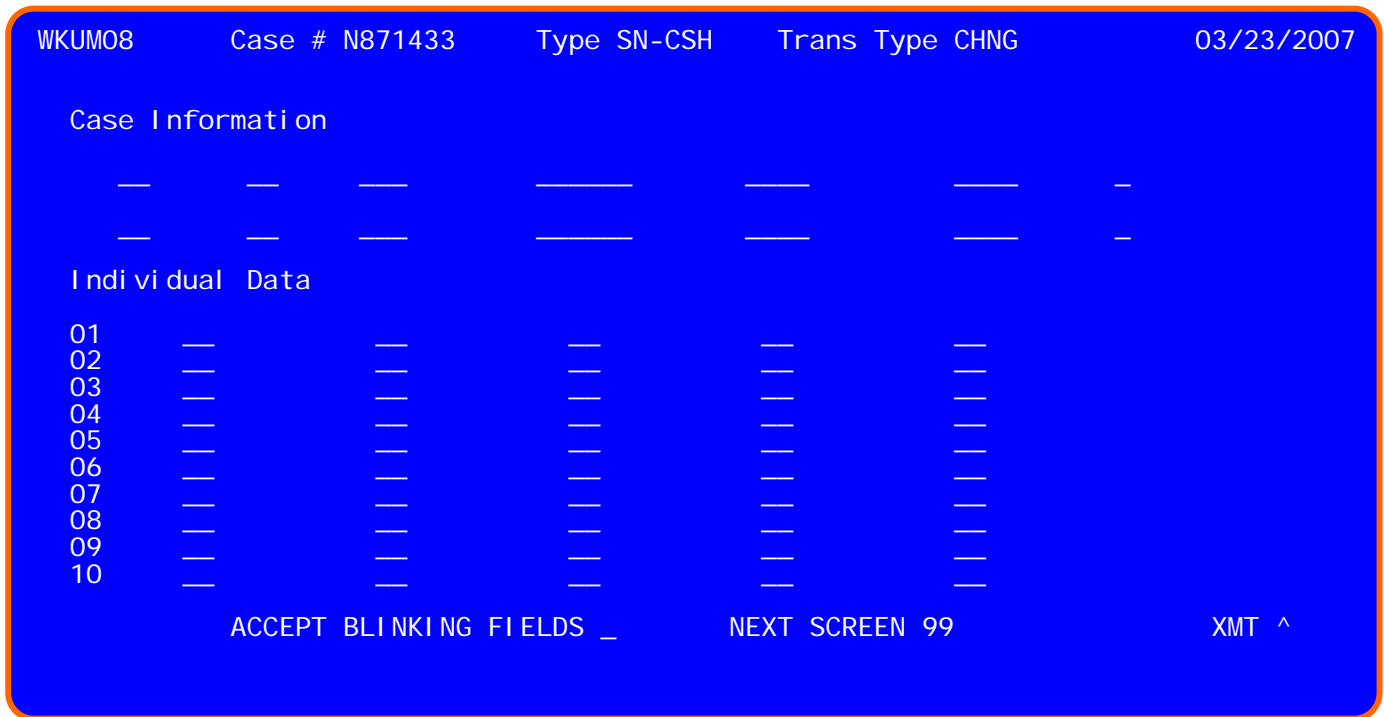
## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKUM07

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>ASSOCIATED NAMES AND ADDRESSES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	
	05011 - ASSOCIATED NAME (LAST) (17)	
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
<b>THE FOLLOWING 2 ADDRESSES MAY BE USED ONLY FOR ADDITIONAL NOTICE COPIES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (FIRST) (10)	2 occurrences
	05011 - ASSOCIATED NAME (MI) (1)	
	05011 - ASSOCIATED NAME (LAST) (17)	
ADDRESS	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
CPC	05004 - CANADIAN POSTAL CODE (6)	2 occurrences

WKUM08 - Undercare Maintenance/Error Correction/Change Pend 8



The screenshot shows a blue background with white text. At the top, it displays 'WKUM08', 'Case # N871433', 'Type SN-CSH', 'Trans Type CHNG', and the date '03/23/2007'. Below this is a section titled 'Case Information' with two rows of dashes representing data fields. The next section is 'Individual Data', which lists line numbers 01 through 10, each followed by several dashes representing data fields. At the bottom, there are three options: 'ACCEPT BLINKING FIELDS \_', 'NEXT SCREEN 99', and 'XMT ^'.

Figure 9 - Undercare Maintenance/Error Correction/Change Pend 8 (WKUM08)

Purpose

This screen is used to input data from the Authorization (DSS3209 - on the back side of the form) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting WKUM07 - Undercare Maintenance/Error Correction/Change Pend 7 with no errors or with accepted non-fatal errors, **or**
- Entering 08 in NEXT SCREEN on first page of WKUM07 - Undercare Maintenance/Error Correction/Change Pend 7 (Second page will have Line Numbers 11-20)., **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 08 is selected or has errors.

## Screen Response

### Positive

- WKUM08 (Page 2) if 08 is entered after NEXT SCREEN when case has more than 10 members. (Page 2 of WKUM08 will have Line Numbers 11-20)
- WSYSAK System Acknowledgement Screen TRANSACTION ACCEPTED with any System Acknowledgement Messages and/or Error Numbers listed - See **SRM Full Data Entry and Undercare Error Messages**.
- WKUM08 (p.2) - If 08 is entered after NEXT SCREEN
- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - INVALID NEXT SCREEN ENTRY
  - ADDITIONAL PAGE NOT ALLOWED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

## Printed Response

None, unless this is the last screen, and transaction is error-free, then AUTHORIZATION depending on District option. See **SRM Standards, Conventions, and General Information**.

## Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>

Key	Description
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

Screen Field Description - WKUM08

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic
<b>CASE INFORMATION</b>		
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 1-2
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 3-4
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 5-7
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 8-13
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 14-17
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 18-21
(NONE)	24760 - CASE LOCAL DATA (57)	2 occurrences; Character position 22
<b>INDIVIDUAL DATA</b>		
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	2 occurrences; Character position 1-2
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	2 occurrences; Character position 3-4
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	2 occurrences; Character position 5-6
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	2 occurrences; Character position 7-8
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	2 occurrences; Character position 9-10

WKUM09 - Undercare Maintenance/Error Correction/Change Pend 9

```

WKUM09          Case # N871433          Type SN-CSH          Trans Type CHNG          03/23/2007
LN Act  Pay Meth      Pay P-U  --Effective--  Ind  Cl m  Vend  Manual Issue
01  Typ  Pay Amount  Iss  Sch Cd  From  To  Ln  Cd  Id  Check No
02
03
04
05
06
07
08
09
10
11
12

LN Amount  LN Amount  LN Amount  LN Amount  LN Amount  LN Amount
Recoument  _  _  _  _  _  _  _  _  _  _  _
Energy Rst  _  _  _  _  _  _  _  _  _  _  _
HVnd/Acct
Repl ace LN      CHK/FSB          LN      Vnd/Acct
                           CHK/FSB

ACCEPT BLI NKI NG FI ELDS _      NEXT SCREEN          XMT ^
    
```

Figure 10 - Undercare Maintenance/Error Correction/Change Pend 9 (WKUM09)

Purpose

This screen is used to support Child Care payments. The screen is utilized to input data from the Authorization (DSS3209) for an undercare transaction (create a pending record) or to correct, change, add, or delete data in a pending record.

Access

- Transmitting WKUM08 - Undercare Maintenance/Error Correction/Change Pend 8 with no errors or with accepted non-fatal errors, **or**
- Entering 09 in NEXT SCREEN on first page of WKUM08 - Undercare Maintenance/Error Correction/Change Pend 8, **or**
- Entering a valid Case No. and Authorization No. on WDXMNU - Non-Services Data Entry Menu - Function C - and Screen 09 is selected or has errors.

Screen Response

Positive



- System Acknowledgement Screen - WSYSAK - TRANSACTION ACCEPTED with any System Acknowledgement Messages. See **SRM Standards, Conventions, and General Information** for further information on WSYSAK screens.

#### Negative

- Field(s) in error return highlighted (missing entries display highlighted) with the message EXAMINE BLINKING FIELDS on Line 24
- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-14, 16-22)
  - UNKNOWN TRANS ID - UNABLE TO PROCESS
  - INVALID NEXT SCREEN ENTRY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.
- WSYSAK - System Acknowledgement Screen - TRANSACTION REJECTED FATAL ERROR DETECTED - with any System Acknowledgement Message listed or TRANSACTION ACCEPTED - with any System Acknowledgement Messages and/or Error Numbers listed.
  - See **SRM Full Data Entry and Undercare Error Messages** for error messages and meanings.
  - See **SRM Standards, Conventions, and General Information** for further information on the WSYSAK screens.

#### Printed Response

If the transaction is error-free, then AUTHORIZATION depending on District options. See **SRM Standards, Conventions, and General Information**.

#### Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	Presents WSYSAK System Acknowledgement screen with message TRANSACTION CANCELLED BY OPERATOR. See <b>SRM Standards, Conventions, and General Information</b> for further information on the WSYSAK screens.

#### Screen Field Description - WKUM09

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	Protected
TYPE	01060 - CASE TYPE (2)	Protected; Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected; Mnemonic

WMS SYSTEM REFERENCE MANUAL  
 UNDERCARE CHANGES AND  
 RECERTIFICATION

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>LINE INFORMATION</b>		
LN	NONE	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH TYP	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE	12 occurrences
<b>EFFECTIVE</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6.;Formatted as MMDDYY
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12.;Formatted as MMDDYY
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences; This is the line number for the child. No longer supported
CLM CD	14035 - SPECIAL CLAIMING CATEGORY	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
RECOUPMENT LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	7 occurrences
RECOUPMENT AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	7 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	3 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	3 occurrences
<b>HEAP INFORMATION</b>		
HVND/ACCT	14024 - HEAP VENDOR (8)	Protected
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	Protected
VND/ACCT	14024 - HEAP VENDOR (8)	Protected
	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	Protected
REPLACE LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	Protected
CHK/FSB	14001 - REPLACED CHECK/ATP NUMBER (12)	Protected
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	Protected
CHK/FFB	14001 - REPLACED CHECK/ATP NUMBER (12)	Protected

## Subsystem Processing

### Internal Processing

#### Batch Processing

In WMS, data processing can be considered to be done either “on-line” or by “batch processing”.

“On-line” data processing means that a transaction by the user results in an immediate update of the database. Examples of on-line data processing are Application Registration, Budget Calculation and Storage, and Full Data Entry. Each on-line transaction results in the updating of the database for a single application or case.

“Batch processing” refers to the practice of running one or more programs against the complete WMS database to make one transaction against all appropriate records. A batch processing activity searches the WMS database for all records that have to be processed for that activity and then makes the appropriate changes. Batch processing is usually done after close of business, either overnight or over a weekend.

The following table illustrates the WMS Batch processing activities:

ACTIVITY	WHEN SCHEDULED	ADDITIONAL INFORMATION FOUND IN
Common Benefit Identification Card	Daily (Multiple Times)	<b>SRM Common Benefit Identification Card</b>
Local Data Feedback	Nightly	<b>SRM Batch Processing</b>
BICS LDF/File Maintenance	Nightly	<b>SRM Batch Processing</b>
Batch Update	Nightly	<b>SRM Batch Processing</b>
Automatic Closings/Case Conflicts	Nightly	<b>SRM Batch Processing</b>
CIN Consolidation	Weekly	<b>SRM CIN Assignment and Verification</b>
SSN Validation	Quarterly	<b>SRM Batch Processing</b>
Data Migration	Annually	<b>SRM Batch Processing</b>

### External Processing

#### Benefit Issuance and Control System (BICS)

There is a nightly batch processing activity (known as BICS Local Data Feedback/File Maintenance) that is the means by which data entered into WMS is made available to the BICS database. This activity is described in the [BICS Service Payment Processing Manual](#).

#### Local Data Feedback (LDF)

This is a batch processing activity that is performed nightly and is the means by which data entered into WMS is made available to local districts that have their own data processing systems which require WMS data.

## Reporting

NUMBER	TITLE	FREQ	DESCRIPTION/PROCESSING
W3209P	Authorization Report	On Request	An on-request report that details the information associated with the authorization of a case.
WKCCPR	Case Comprehensive Report	On Request	A comprehensive listing of the data that has been captured on the case up to the point in time the report is generated. Used to create a paper copy of case information and to assist in error detection correction.
WKERPR	Case Comprehensive Error Report	On Request	An on-request report that details all error numbers and messages associated with the case. The report enumerates the detected errors for the current transaction that has been entered into WMS.

# Inquiry

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## Inquiry

### Introduction

This section describes the WMS Inquiry screens that are available to authorized WMS users to view Upstate WMS data for Non-Services and Services Application Records, Case Records, Pending Records and Individual Records, and NYC WMS data for individuals.

### Function Keys

In the WMS Inquiry process, Function Keys, the top row of keys on the keyboard, can be used to easily access screens.

#### Paging Keys

These are F1, F2 and F3. They are used when either a screen has multiple pages indicated by the words PAGE 01 OF MM in the upper right hand corner of the first screen, or a screen is one of several different screens in a fixed sequence such as the nine screens in the Non-Services Inquiry Case Comprehensive series.

In the above situations, these keys work as follows:

- F1 - Displays the first page of a multi-page screen, or, in the Case Comprehensive series, displays Screen 1 of the series.
- F2 - Displays the next page of a multi-page screen, or, in the Case Comprehensive series, displays the next screen of the series.
- F3 - Displays the previous page of a multi-page screen, or in the Case Comprehensive series, displays the previous screen.

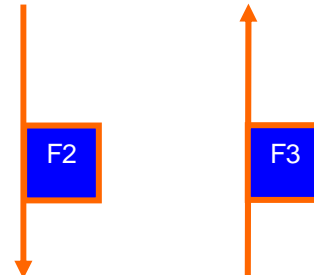
If a case has more than 10 Individuals, then three of the Case Comprehensive screens will have a second page. These screens are:

- Screen 2 - WINQ20 or WINQ50
- Screen 3 - WINQ21 or WINQ51
- Screen 4 - WINQ22 or WINQ52
- Screen 5 - WINQ23 or WINQ53
- Screen 8 - WINQ29 or WINQ59

The first page will display Line Numbers 1-10 and the second page Line Numbers 11-20. In this situation F2 and F3 will page forward and backward through all the Case Comprehensive screens and their pages. The following example shows how a user would page forward and backward through the Case Comprehensive screen. The example assumes that the case contains more than 10 individuals.



WINQ19 or WINQ49, screen 1  
WINQ20 or WINQ50, screen 2, page 1  
WINQ20 or WINQ50, screen 2, page 2  
WINQ21 or WINQ51, screen 3, page 1  
WINQ21 or WINQ51, screen 3, page 2



### Other Function Keys

While on the Case Make-up or Case Comprehensive screens and if a Pending Record exists, F4 allows movement between the Case Record screen and the equivalent Pending Record screen.

While on the Individual Inquiry screens, F4 returns the ILIST screen if the ILIST screen was used to obtain the current screen.

- F8 - (In Case Inquiry Only) Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu**.
- F9 - Displays the **WINQ35 - Pending Case - Errors/Warnings** Screen from the Case Comprehensive screens. Also used to return from WINQ35 to the Case Comprehensive screens.
- F11 or Ctrl+F1 - (In Case Inquiry Only) Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu**.
- F12 or Ctrl+F2 - Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu**.
- F13 or Ctrl+F3 - (In Case Inquiry Only) Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu**.
- Ctrl+F5 - Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu** from all screens. Case Number or Registry Number or Individual data is displayed in appropriate fields depending on which was used to obtain the current screen.
- Ctrl+F6 - Displays **WINQ01/WINQ02 - Case/Individual Inquiry Menu** from all screens.

### Inquiry Menu

The single WMS inquiry menu screen is obtained by entering 12 (or F12 or Ctrl+F2) on the WMSMNU - Welfare Management System Menu screen. The WMS inquiry menu screen that is returned consists of two transactions, one for application and case inquiry and the second for individual inquiry. The two transactions are:

- 1) WINQ01 - Application and Case Inquiry, and
- 2) WINQ02 - Individual, CIN or SSN Inquiry.

## Application and Case Inquiry

### Overview

The upper portion of the inquiry menu, WINQ01, is used for Application inquiry and for Case inquiry. Eleven types of inquiry are possible. These are designated as Selections A through F, and J through N. Entry of a Registry Number is required for Selection A. Entry of a Case Number is required for Selections B through F and J through N. The SCREEN field is used with Selection D to request a particular screen (1 through 9) in the Case Comprehensive series of inquiry screens.

The PENDING field is used with Selections B, D, and J through N. If a Y is entered in this field, the Pending Record version of the selected screen will be returned.

An Application inquiry search is restricted to the district in which the request is initiated. To search another district's case records (cross-district inquiry) the workstation and User ID must be authorized for this function. The first four letters of the district to be searched are entered in the DIST field.

The screen may be transmitted from any point on the SELECTION line as long as the cursor is 1) on or 2) after the last character of the desired entry.

### Selections for Application and Case Inquiry

The following is a brief description of how to obtain each screen and of the contents of each screen:

#### Selections A, B and C are for Non-Services and Services

##### A - Application

Entry of Selection A and a valid Registry number returns the **WINQ70 - Application Inquiry** screen.

This screen displays information about an Application and all its applicants. This information is available until Batch Update has been completed after Full Data Entry, Application Denial, or Application Withdrawal.

##### B - Case Make-Up/Indivs

Entry of Selection B and a valid Case Number returns the **WINQ07 - WMS Case Inquiry** screen for Non-Services cases or the **WINS07 - WMS Case Inquiry** screen for Services cases. If Y is entered in PENDING, the **WINQ37 - Pending Case Inquiry (Non-Services)** or **WINS37 - Pending Case Inquiry (Services)** is returned.

This screen displays a summary of basic case data and basic individual data for all individuals who have ever been associated with the case.

##### C - Transaction History

Entry of selection C and a valid Case Number returns the **WINQ08 - Transaction Disposition History** screen.

This screen displays all transactions for the case that have passed through Batch Update and other system processes that generate transactions, with the most recent transaction listed first.

Selections D through F are for Non-Services only

#### D - Case Comprehensive

Entry of Selection D and a valid Case Number returns the **WINQ19 - Case Comprehensive - Screen 1**. If Y is entered in PENDING, the **WINQ49 - Pending Case Comprehensive - Screen 1** is returned, if available.

This is a series of nine screens which display all the data for a case and for the individuals currently associated with that case.

The field labeled SCREEN on the menu is used only for Selection D. Entering a number from 1 to 9 in the SCREEN field will return that screen number. If no entry is made in this field, the first screen is returned. The next eight screens can be viewed by using the Function keys F1, F2, and F3.

#### E - Auth Payment History

Entry of Selection E and a valid Case Number returns the **WINQ25 - Authorization Payment History** screen.

This screen or series of screens displays all payments that have been authorized for this case with the most recent payments listed first.

#### F - Pending Errors/Warnings

Entry of Selection F and a valid Case Number returns the **WINQ35 - Pending Case - Errors/Warnings** screen, if available.

This screen or series of screens displays all non-fatal errors and warnings for a Pending Record that is in error status.

#### G - Case Address History

Entry of Selection G and a valid Case Number returns the **WINQ05 - Case Address History** screen. This screen or series of screens displays all address changes (both residential and mailing) that have been applied to the case.

Selections J - N are for services only

#### J - SFED - Client Info

Entry of selection J and a valid Case Number returns the **WINQ15 - SFED - Client Information** screen. If Y is entered in PENDING, the **WINQ45 - Pending SFED - Client Information** screen is returned, if available.

This screen displays direct service information for each individual in the case.

#### K - SFED - POS Info

Entry of Selection K and a valid Case Number returns the **WINQ16 - SFED - Purchase of Service** screen. If Y is entered in PENDING, the **WINQ46 - Pending SFED - Purchase of Service** screen is returned, if available.

This screen displays the purchase of service information for each individual in the case.

#### L - Case Information

Entry of Selection L and a valid Case Number returns the **WINQ17 - Services Case Information** screen. If Y is entered in PENDING, the **WINQ47 - Pending Services Case Information** screen is returned, if available.

This screen displays all case information.

#### M - Workbook 2 - Indivs

Entry of Selection M and a valid Case Number returns the **WINQ18 - Services Workbook 2 - Individual** screen. If Y is entered in PENDING, the **WINQ48 - Pending Services Workbook 2 - Individual** screen is returned, if available.

This screen displays services eligibility information for each individual in the case.

#### N - Services Local Data

Entry of Selection N and a valid Case Number returns the **WINQ27 - Services Local Data Feedback** screen. If Y is entered in PENDING, the **WINQ57 - Pending Services Local Data Feedback** screen is returned, if available.

This screen displays local data for the case and its individuals.

WINQ01 - Application and Case Inquiry Menu

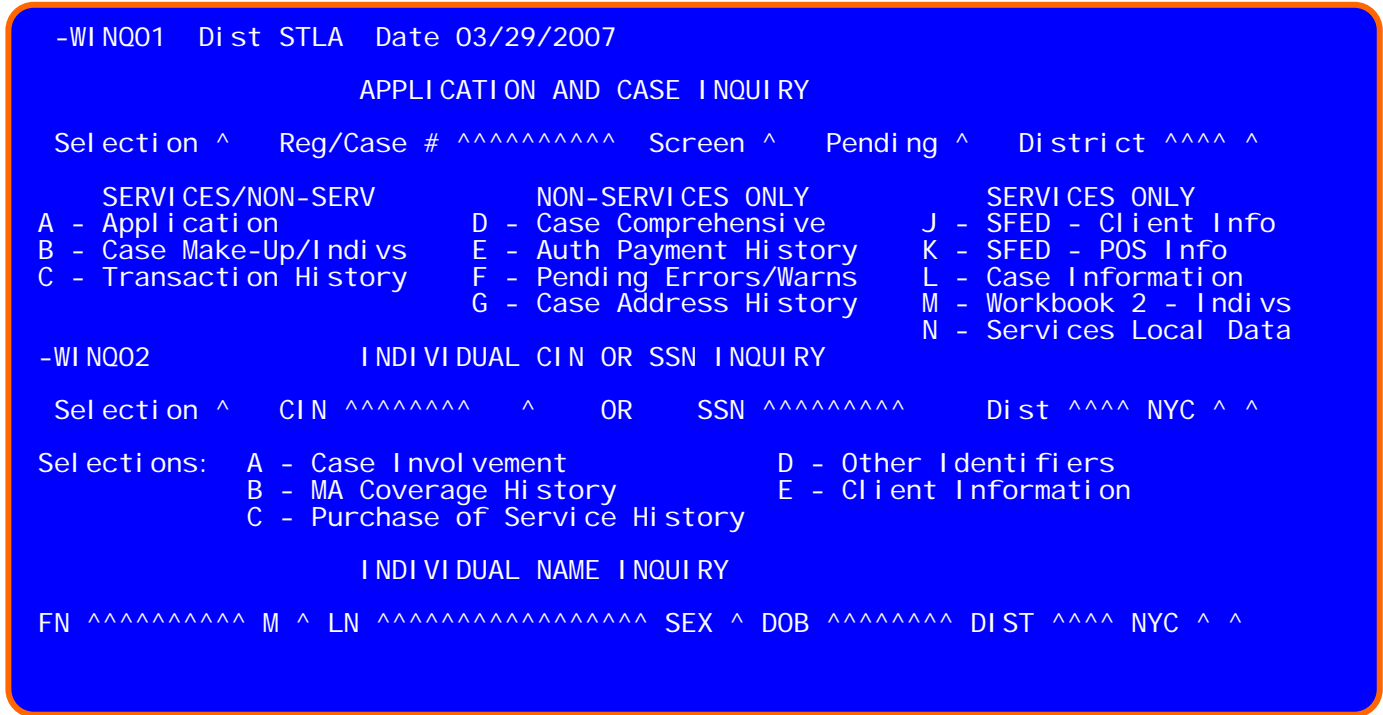


Figure 1 - Application and Case Inquiry (WINQ01)

Purpose

The WINQ01 portion of this screen is used to select Application Inquiry, Non-Services Case Inquiry and Services Case Inquiry.

Access

- Entering 12 on WMSMNU - WMS Menu, **or**
- F12 from SIGN-ON COMPLETE, WMSMNU, most Non-Services menus, and from all inquiry screens except W4139R Auto Closings/Case Conflicts Initiator (See **Function Keys** under each screen for detail.), **or**
- F4 from WINQ12 - Case Involvement and WINQ70 - Application Inquiry, if WINQ14 - ILIST was not the previous screen

Screen Response

Positive

- Selection A displays **WINQ70 - Application Inquiry**

- Selection B displays **WINQ07/WINS07 - WMS Case Makeup**, or **WINQ37/WINS37 - WMS Pending Case Inquiry** if Y was entered after PENDING
- Selection C displays **WINQ08 - Transaction Disposition History**
- Selection D displays WINQ19-24, 28-30 - Case Comprehensive Screens 1-9, or WINQ49-54, 58-60 Pending Case Comprehensive screens 1-9 if Y was entered after PENDING. A specific screen can be requested if the screen number (1-9) is entered after SCREEN. If this field is left blank, WINQ19 is returned, or, if left blank and Y entered in PENDING, WINQ49 is returned
- Selection E displays **WINQ25 - Authorization Payment History**
- Selection F displays **WINQ35 - Pending Case - Errors/Warnings**
- Selection G displays **WINQ05 - Case Address History**
- Selection J displays **WINQ15 - SFED - Client Information**, or **WINQ45 - Pending SFED - Client Information** if Y was entered after PENDING
- Selection K displays **WINQ16 - SFED - Purchase of Service**, or **WINQ46 - Pending SFED - Purchase of Service** if Y was entered after PENDING
- Selection L displays **WINQ17 - Services Case Information**, or **WINQ47 - Pending Services Case Information** if Y was entered after PENDING
- Selection M displays **WINQ18 - Services Workbook 2 - Individual**, or **WINQ48 - Pending Services Workbook 2 - Individual** if Y was entered after Pending
- Selection N displays **WINQ27 - Services Local Data Feedback**, or **WINQ57 - Pending Services Local Data Feedback** if Y was entered after PENDING

#### Negative

- Field in error is returned highlighted with one of the following message:
  - ACCESS DENIED - NON-SERVICES INQUIRY NOT AVAILABLE ON SERVICES CASE
  - ACCESS DENIED - SERVICES INQUIRY NOT AVAILABLE ON NON-SERVICES CASE
  - CASE NUMBER NOT FOUND (IN DISTRICT)
  - CASE NUMBER REQUIRED
  - CIN UNDUP PENDING - NO PEND INQ PERMITTED
  - CROSS DISTRICT APPLICATION INQUIRY PROHIBITED FOR SERVICES

- CROSS DISTRICT INQUIRY PROHIBITED FOR SERVICES CASE
- CROSS DISTRICT INQUIRY PROHIBITED (The user may access Non-Services Application and Case Records from another district if the workstation and User ID are authorized to do cross-district inquiry.)
- CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- F4 NOT SUPPORTED - REXMT
- F5 NOT SUPPORTED - REXMT
- F9 NOT SUPPORTED - REXMT
- INVALID DISTRICT
- INVALID PEND INDICATOR (Y OR SPACE)
- INVALID SCREEN NUMBER (1-9)
- NO ACTIVE INDIVIDUAL FOUND FOR SUPPLIED SSN
- NO ERRORS OR WARNINGS FOR THIS CASE
- NO LOCAL DATA FOR THIS CASE
- NO PENDING RECORD - F4 INVALID
- PAYMENT HISTORY NOT FOUND
- PENDING DATA NOT FOUND
- REGISTRY NUMBER NOT FOUND (IN DISTRICT)
- REGISTRY RECORD - CASE # IS: 999999
- TRANSACTION HISTORY NOT FOUND
- VALID REG NUMBER REQUIRED
- VALID SELECTION REQUIRED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED (for F8 or F13)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Applications Register
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WINQ01

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SELECTION		Valid values are A, B, C, D, E, F, G, J, K, L, M, N
REG/CASE #	01046 - REGISTRY NUMBER (6) OR 01050 - CASE NUMBER (10)	
SCREEN	NONE	Valid values are 1 through 9 for SELECTION D
PENDING	NONE	A flag that indicates whether pending case data is to be displayed. Valid values are "Y" or blank.
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic First four characters of district name.



WINQ70 - Application Inquiry

WI N070	APPLI CATI ON I NQUI RY	Di st	STLA	Date	04/03/2007	Page	1 of 1
Registry/Ver #	575577/01	APP		App-Date:	04/03/07	Trans-Date:	04/03/07
Language:	SPA X ENG H I I	SRC		App-Stat:	AVAIL	Concur:	CONX:
Case Name		LFLN		Case Type	Case Number	Office	Unit Worker
JOHN VAN NOSTRAND				SN-FP	JOTEST1	10	CARRJ
	Street Address			City	St	Zip	Phone
R:	188 PEAK AVENUE			OGDENSBURG	NY	13669	518 438-9849
M:	188 PEAK AVENUE			OGDENSBURG	NY	13669	
LN	First	MI	Last Name	DOB	Sex	SSN	H I ABPW CIN
01	EMILY	R	VANNOSTRAND	01/31/1987	F	938-66-4878	Y
02	SERAH	S	VANNOSTRAND	02/01/2006	F	938-66-4879	Y

Figure 2 - Application Inquiry (WINQ70)

Purpose

This screen displays Application Register data. All fields are protected on this screen. If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on line 23. See **SRM Resource File Integration**.

Access

- Enter A and a valid Registry Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- Enter a valid line number for an individual with APP in APP/CSE field in the ENTER DESIRED NO field and entering selection A (or no selection) on WINQ14 - ILIST Individual List Response Screen. The WINQ70 screen will display a marker (>) next to the name that was selected on the ILIST (WINQ14) screen. If a name on the ILIST (WINQ14) screen has an O in the OTH NAM (Other Name) column, then that name is an individual's Other Name (maiden name or alias) and not the Prime Name. If the Other Name is selected, then the WINQ70 screen will display the marker (>) next to that individual's Prime Name, **or**
- Enter 8 in FUNCTION and a valid Registry No. on WIDMNU - WMS ID Card Menu, **or**
- Enter 13 in FUNCTION and either a Registry Number and Application Line Number or a Card Number on the WIDMNU - WMS ID Card Menu; District entry is optional

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - APPLICATION WITHDRAWN
  - CROSS DISTRICT APPLICATION INQUIRY PROHIBITED FOR SERVICES
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - REGISTRY NUMBER NOT FOUND (IN DISTRICT)
  - REGISTRY RECORD - CASE # IS : XXXXXXXXXXXX
  - F99 NOT SUPPORTED - REXMT (99 = 7-11, 13, 14, 17-22)
  - UNRESOLVED CINTRAK DATA EXISTS
  - VALID REG NUMBER REQUIRED
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - \*\*\* NO APPLICANTS FOUND \*\*\*
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01. A second page of WINQ70 is available if there are more than 10 individuals on the application. See <b>Function Keys</b> in the Overview to this Section.
F2	Next Page if there are multiple pages. A second page of WINQ70 is available if there are more than 10 individuals in the application. See <b>Function Keys</b> in the Overview to this Section.

Key	Description
F3	Previous Page. A second page of WINQ70 is available if there are more than 10 individuals in the application. See <b>Function Keys</b> in the Overview to this Section.
F4	WINQ14 - ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F5	WIDMNU - WMS ID Card Menu
F6	<i>Renders Workstation Inactive</i>
Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu screen with the Application Registry Number previously entered appearing in the Registry No. field.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ70

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
REGISTRY/VER #	01046 - REGISTRY NUMBER (6) and 01047 - VERSION NUMBER (2)	Registry Number and Version Number are separated by “/”.
APP-DATE	01090 - APPLICATION DATE (6)	
TRANS-DATE	02010 - TRANSACTION INPUT DATE (6)	
LANGUAGE: SPA	04002 - LANGUAGE OF NOTICE FLAG (1)	
ENG	04002 - LANGUAGE OF NOTICE FLAG (1)	
HII	01044 - HII (1)	Health Insurance Indicator - a code to denote why a case does not have third party insurance. Can only be entered for case types 20 and 24
APP SRC	01066 - APPLICATION SOURCE CODE (1)	
APP-STAT	24020 - APPLICATION RECORD INTERNAL STATUS (1)	Mnemonic
CONCUR	24095 - CONCURRENT APPLICATION (1)	
CONX	23490 - CCRS INDICATOR	
CASE NAME	01070 - CASE NAME (28)	
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
CASE TYPE	01060 - CASE TYPE (2)	Mnemonic
CASE NUMBER	01050 - CASE NUMBER (10)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>R: (RESIDENTIAL ADDRESS)</b>		
STREET ADDRESS	01080 - RESIDENCE STREET (35)	
CITY	01082 - RESIDENCE CITY/TOWN (15)	
ST	01083 - RESIDENCE STATE (2)	
ZIP	01084 - RESIDENCE ZIP (5)	
PHONE	01085 - TELEPHONE NUMBER (10)	
<b>M: (MAILING ADDRESS)</b>		
STREET ADDRESS	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
ST	05140 - MAILING STATE (2)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ZIP	05150 - MAILING ZIP (5)	
<b>INDIVIDUAL INFORMATION</b>		
LN	01045 - APPLICATION REGISTER LINE NUMBER (2)	10 occurrences; 01-10 on Page 1 and 11-20 on Page 2.
FIRST	24120 - GIVEN NAME (10)	10 occurrences
MI	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST NAME	24110 - SURNAME (17)	10 occurrences
DOB	03060 - DATE OF BIRTH (8)	10 occurrences; Formatted as MM/DD/CCYY.
SEX	03050 - SEX (1)	10 occurrences
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences; Formatted as 999-99-9999.
<b>RACE</b>		
H	03059 - INDIVIDUAL CODE TO DENOTE HISPANIC OR LATIN ETHNICITY (1)	10 occurrences
I	03054 - INDIVIDUAL RACE CODE FOR AMERICAN INDIAN OR ALASKAN NATIVE (1)	10 occurrences
A	03055 - INTIVIDUAL RACE CODE FOR ASIAN (1)	10 occurrences
B	03056 - INDIVIDUAL RACE CODE FOR BLACK OR AFRICAN AMERICAN (1)	10 occurrences
P	03057 - INDIVIDUAL RACE CODE FOR HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences
W	03058 -INDIVIDUAL RACE CODE FOR WHITE OR CAUCASIAN (1)	10 occurrences
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
<b>Captions for the following Data Element Fields do not appear on the screen, but are positions below Application Line Number 10 on Page 1 and 20 on Page 2.</b>		
<b>(Other Name Information)</b>		
(NONE)	01045 - APPLICATION REGISTER LINE NUMBER (2)	4 occurrences
(NONE)	03040 - OTHER NAME CODE (1)	4 occurrences
(NONE)	03041 - OTHER NAME (FIRST) (10)	4 occurrences; Characters 1-10
(NONE)	03041 - OTHER NAME (MI) (1)	4 occurrences; Character 11
(NONE)	03041 - OTHER NAME (LAST) (17)	4 occurrences; Characters 12-28.

WINQ07/WINS07 - WMS Case Inquiry

```

WINQ07          CASE MAKE-UP          Date 02/22/2007          Page 1 of 1
Case HOWARD0001 Type SN-FP          Stat ACTIVE          Pend NO PEND          Auth 05028383
Dist          L-Off 010 Unit WRTS Worker JJK          Auth-Period 10/01/05-09/30/06
Fiscal STLA SP-Code CCRS          SCN          MA Ext/Sep Det
Name LISA A HOWARD
Address 1 AVE A
PORT          NY          12203          App-Date 03/01/05
Phone 518-402-3729

INDIVIDUAL INFORMATION
Last Name      First      M DOB      Sex  SSN          Cin      Status  Relat  SC
HOWARD        JAMES    R 12/06/1985 M 1-262300142 AX83099K ACT     SN
HOWARD        MARY     K 01/15/1985 F 1-521320011 AX83098N ACT     DTR
HOWARD        LISA     A 12/12/1955 F 1-547874541 AX83097Q ACT     APP-PY
    
```

Figure 3 - WMS Case Inquiry (WINQ07/WINS07)

Purpose

Each page of this screen displays Non-Services or Services case data plus individual data for up to 11 persons who are now or have been associated with this case. It also shows the Case Type and Case Number of an MA Extension and or Food Stamp Separate Determination Case. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on Line 24. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed in Line 23. MM/DD/YY is the Authorization To Date of the closing transaction.

Access

- Function 14 with Case Number and District (optional) entered on the WIDMNU - WMS ID Card Menu, **or**
- Selection B with Case Number and District (optional) entered on the WINQ01 - Application and Case Inquiry Menu

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages displayed on line 24:
  - ACCESS DENIED - NON-SERVICES INQUIRY NOT AVAILABLE ON SERVICES CASE
  - CASE NUMBER NOT FOUND (IN DISTRICT)
  - CIN UNDUP PENDING - NO PEND INQ PERMITTED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - F99 - NOT SUPPORTED - REXMT (99 = 7, 9, 10, 14, 16-22)
  - NO PENDING RECORD - F4 INVALID
  - PENDING DATA NOT FOUND
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ37/WINS37 - Pending Case Makeup (if there is pending data)
F5	WIDMNU - WMS ID Card Menu
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the Case Number previously entered appearing in the appropriate field.

Screen Field Description - WINQ07/WINS07

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; WINQ07 only; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
L-OFF	01020 - LOCAL OFFICE NUMBER (3)	WINQ07 only
LOCAL-OFF	01020 - LOCAL OFFICE NUMBER (3)	WINS07 only
CONX	23490 - CCRS INDICATOR (1)	WINS07 only, For Services cases, indicates the status of the companion CONNECTIONS case.
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
AUTH-PERIOD	01100 - AUTHORIZATION PERIOD (12)	Displayed as from date-to date; MM/DD/YY-MM/DD/YY
FISCAL	01011 - FISCAL DISTRICT (2)	Mnemonic
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	WINQ07 only
CCRS	23490 - CCRS INDICATOR (1)	Mnemonic; WINQ07 only
SCN	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	WINQ07 only
NAME	01070 - CASE NAME (28)	
MA EXT/SEP DET	01615 - SEPARATE DETERMINATION CASE TYPE (2)	Mnemonic; 2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	2 occurrences; WINQ07 only; If a PA closing has created an MA Extension case and/or a Food Stamp case was opened by Separate Determination or automatically by Transitional Benefit Allowance, then after Batch Update, the Case Type and Case Number will be displayed under the MA EXT/SEP DET section heading. The Food Stamp Case Type and Case Number will always appear on the second line. If inquiry is made on an MA or Food Stamp case that was created from a closed PA case, the PA Case Type and Case Number will be displayed in the MA EXT/SEP DET section.
ADDRESS	01080 - RESIDENCE STREET (35)	
	01082 - RESIDENCE CITY/TOWN (15)	
	01083 - RESIDENCE STATE (2)	
	01084 - RESIDENCE ZIP (5)	
APP-DATE	01090 - APPLICATION DATE (6)	
PHONE	01085 - TELEPHONE NUMBER (10)	
<b>INDIVIDUAL INFORMATION</b>		
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28.; Multiple occurrences up to 11 per screen
FIRST	03030 - NAME (FIRST) (10)	Characters 1-10; Multiple occurrences up to 11 per screen
M	03030 - NAME (MI) (1)	Character 12; Multiple occurrences up to 11 per screen
DOB	03060 - DATE OF BIRTH (8)	Multiple occurrences up to 11 per screen
SEX	03050 - SEX (1)	Multiple occurrences up to 11 per screen
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Multiple occurrences up to 11 per screen
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Multiple occurrences up to 11 per screen
STATUS	03120 - INDIVIDUAL STATUS (2)	Mnemonic; Multiple occurrences up to 11 per screen
RELAT	03090 - RELATIONSHIP CODE (2)	Mnemonic; Multiple occurrences up to 11 per screen. WINQ07 only
RELATION	03090 - RELATIONSHIP CODE (2)	WINS07 only
SC	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	Mnemonic; Multiple occurrences up to 11 per screen. WINQ07 only



WINQ37/WINS37 - WMS Pending Case Inquiry

```

WINQ37          PENDING CASE MAKE-UP          Date 02/22/2007  Page 1 of 1
Case BICS091014 Type ADC          Stat ACTIVE  Pend AT-UM          Auth 05028383
Dist STLA  L-Off 010 Unit WRTS  Worker JJK    Auth-Period 10/01/05-09/30/06
Fiscal STLA  SP-Code  CCRS          SCN          MA Ext/Sep Det
Name  BRUCE MAYWEATHER
Address 20 PINE STREET
        PLATTSBURGH          NY          12203          App-Date 03/01/05
Phone  518-402-3729

                                I N D I V I D U A L  I N F O R M A T I O N
Last Name      First      M  DOB      Sex  SSN          Cin      Status Relat  SC
MAYWEATHER    BRUCE          12/06/1985 M  1-262300142 AX83099K CAS-CL APP-PY
MAYWEATHER    BARBARA       01/15/1985 F  1-521320011 AX83098N CAS-CL DTR
    
```

Figure 4 - WMS Pending Case Inquiry (WINQ37/WINS37)

Purpose

Each page of this screen displays Non-Services or Services case data plus individual data for up to 11 persons who are now or have been associated with this case. It also shows the Case Type and Case Number of an MA Extension and/or Food Stamp Separate Determination Case. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- If an inquiry is made on a Services case, the WINS37 - Case Make-up screen is displayed. See Data Element list for this screen for differences. Entering Selection B and a valid Case Number and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ07/WINS07 - WMS Case Inquiry, **or**
- Function 14 with Case Number and District (optional) entered on the WIDMNU - WMS ID Card Menu

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages displayed on line 24:
  - ACCESS DENIED - NON-SERVICES INQUIRY NOT AVAILABLE ON SERVICES CASE
  - CASE NUMBER NOT FOUND (IN DISTRICT)
  - CIN UNDUP PENDING - NO PEND INQ PERMITTED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - F99 - NOT SUPPORTED - REXMT (99 = 7, 9, 10, 14, 17-22)
  - NO PENDING RECORD - F4 INVALID
  - PENDING DATA NOT FOUND
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ07/WINS07 - Case Makeup
F5	WEMMNU - Employment Menu with Case Number appearing in appropriate field if WINQ07 was obtained from WEMMNU or WIDMNU - WMS ID Card Menu
F6	<i>Renders Workstation Inactive</i>

Key	Description
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the Case Number previously entered appearing in the appropriate field.
Ctrl+F6	WINQ01/WINQ02 - Case Individual Inquiry Menu

Screen Field Description - WINQ37/WINS37

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; WINQ37 only; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
L-OFF	01020 - LOCAL OFFICE NUMBER (3)	WINQ37 only
LOCAL-OFF	01020 - LOCAL OFFICE NUMBER (3)	WINS07 only
CONX	23490 - CCRS INDICATOR (1)	WINS07 only, For Services cases, indicates the status of the companion CONNECTIONS case.
UNIT	01030 - UNIT IDENTIFIER (5)	WINQ37 only
WORKER	01040 - WORKER IDENTIFIER (5)	WINQ37 only
AUTH-PERIOD	01100 - AUTHORIZATION PERIOD (12)	Displayed as From date-To date. MM/DD/YY-MM/DD/YY
FISCAL	01011 - FISCAL DISTRICT (2)	Mnemonic
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	WINQ37 only
CCRS	23490 - CCRS INDICATOR (1)	Mnemonic; WINQ37 only
SCN	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	WINQ37 only
NAME	01070 - CASE NAME (28)	
MA EXT/SEP DET	01615 - SEPARATE DETERMINATION CASE TYPE (2)	Mnemonic; 2 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	WINQ37 only; If a PA closing has created an MA Extension case and/or a Food Stamp case was opened by Separate Determination, then after Batch Update, the Case Type and Case Number will be displayed under the MA EXT/SEP DET section heading. The Food Stamp Case Type and Case Number will always appear on the second line. If inquiry is made on an MA or Food Stamp case that was created from a closed PA case, the PA Case Type and Case Number will be displayed in the MA EXT/SEP DET section.
ADDRESS	01080 - RESIDENCE STREET (35)	
	01082 - RESIDENCE CITY/TOWN (15)	
	01083 - RESIDENCE STATE (2)	
	01084 - RESIDENCE ZIP (5)	
APP-DATE	01090 - APPLICATION DATE (6)	
PHONE	01085 - TELEPHONE NUMBER (10)	
REGISTRY	01046 - REGISTRY NUMBER (6)	Shown only when pending status is FDE/XXX.
VERSION	01047 - VERSION NUMBER (2)	Shown only when pending status is FDE/XXX.
<b>INDIVIDUAL INFORMATION</b>		
LAST NAME	03030 - NAME (LAST) (17)	Characters 12-28; Multiple occurrences up to 11
FIRST	03030 - NAME (FIRST) (10)	Characters 1-10; Multiple occurrences up to 11
M	03030 - NAME (MI) (1)	Character 12; Multiple occurrences up to 11
DOB	03060 - DATE OF BIRTH (8)	Multiple occurrences up to 11
SEX	03050 - SEX (1)	Multiple occurrences up to 11
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Multiple occurrences up to 11
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	Multiple occurrences up to 11
STATUS	03120 - INDIVIDUAL STATUS (2)	Mnemonic; Multiple occurrences up to 11
RELAT	03090 - RELATIONSHIP CODE (2)	Mnemonic; Multiple occurrences up to 11. WINQ37 only
RELATION	03090 - RELATIONSHIP CODE (2)	WINS37 only
SC	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	Mnemonic; Multiple occurrences up to 11. WINQ37 only

WINQ08 - Transaction Disposition History

Case A	Type	SN-CSH	Stat	ACTIVE	Pend	NO PENDING	Date	04/03/2007	Page	1 of 1
Name	AONE		Dist	STLA	Loc-Off	Unit			Auth	05013610
Case-Type	SP	Auth-No	Auth-Period	TX-Type	Disp-Typ	Sep-Det	Reason			
Off Unit	Wrkr	FS-Ind	FS-Period	TX-Date	Audit-Dt	Over-Reas	Notice			
Reason Cd		PA/MA	Reason Cd	PA/FS	Reason Cd	Heap	Income			
SN-CSH		05013610	03/01/05-12/31/05	OPEN	SUP-SIG					
	W	AU-PA-FS	03/01/05-12/31/05	03/28/05	03/28/05					
038/LAYOFF/DI SCH										

Figure 5 - Transaction Disposition History (WINQ08)

Purpose

Each page of this screen displays up to four transaction dispositions for a Non-Services or Services case. The most current transaction is listed first. The transactions displayed on the screen must have completed the Batch Update process. All fields on the screen are protected.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering C and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- Entering C on WINQ12 - Case Involvement.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:

- ACCESS DENIED - NON-SERVICES INQUIRY NOT AVAILABLE ON SERVICES CASE
- CASE NUMBER NOT FOUND (IN DISTRICT)
- CIN UNDUP PENDING - NO PEND INQ PERMITTED
- CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
- F99 NOT SUPPORTED - REXMIT (99 = 4, 5, 7, 9, 10, 14, 17-22)
- PAGE NO 999 OF BLOCK 999 IS AN INVALID PAGE REQUEST
- TRANSACTION HISTORY NOT FOUND
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Menu with the case number previously entered appearing in appropriate field.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ08

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
LOC-OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WKR	01040 - WORKER IDENTIFIER (5)	
<b>TRANSACTION DISPOSITION</b>		
CASE-TYPE	01060 - CASE TYPE (10)	Mnemonic; 4 occurrences per page
SP	01420 - SPECIAL PROGRAM CODE (2)	4 occurrences per page
AUTH-NO	02040 - AUTHORIZATION NUMBER (8)	4 occurrences per page
AUTH-PERIOD	01100 - AUTHORIZATION PERIOD (12)	4 occurrences per page; Displayed as MM/DD/YY-MM/DD/YY
TX-TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic; 4 occurrences per page
DISP-TYP	02110 - DISPOSITION TYPE (1)	Mnemonic; 4 occurrences per page
SEP-DET	01600 - SEPARATE DETERMINATION INDICATOR (1)	4 occurrences per page
REASON	02050 - REASON CODE (3)	Mnemonic; 4 occurrences per page
OFF	01020 - LOCAL OFFICE NUMBER (3)	4 occurrences per page
UNIT	01030 - UNIT IDENTIFIER (5)	4 occurrences per page
WRKR	01040 - WORKER IDENTIFIER (5)	4 occurrences per page
FS-IND	01130 - PA FOOD STAMP CODE (2)	4 occurrences per page
FS-PERIOD	17051 - FOOD STAMP AUTH. PERIOD	4 occurrences per page; Displayed as MM/DD/YY-MM/DD/YY
TX-DATE	02020 - TRANSACTION INPUT DATE (6)	4 occurrences per page; Displayed as MM/DD/YY
AUDIT-DT	24070 - AUDIT DATE (6)	4 occurrences per page; Date of batch update
OVER-REAS	02060 - OVERRIDE REASON CODE (2)	4 occurrences per page
NOTICE	04001 - TIMELY OR ADEQUATE NOTICE FLAG (1)	4 occurrences per page
REASON CD	02050 - REASON CODE (3)	Mnemonic; 4 occurrences per page
PA/MA REASON CD	02005 - PA/MA REASON CODE (3)	Mnemonic; 4 occurrences per page
PA/FS REASON CD	02006 - PA/FS REASON CODE (3)	Mnemonic; 4 occurrences per page
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	4 occurrences per page

WINQ19 - Case Comprehensive - Screen 1

WIN019	CASE COMPREHENSIVE - SCREEN 1	Date 04/09/2007	Page 1 of 9
Case P61176	Type EAF	Stat	Auth
Dist STLA		App Date	SafeNet
Trans Type 00	Case Reason	PA/FS RC	PA/MA RC
Client Notice: Ind	Number	Language	Trans Date
Auth Period	to	Recert Date	HII RVI
FS Period	to	PA/FS Code	APP SRC
Reuse Case Number Type	Emergency	Fi scal	Trans: Resp:
Ind P61176	19		
FS Rep Cd	IV-D Ind	Sp-Code	HEAP Income
Case Name EMILY VANNOSTRAND		LFLN	SCN
Residence Address		City	St Zip Phone
208 PEAK AVENUE		OGDENSBURG	NY 13669
Care Of Name		60ct 0	24ct 0
Mailing Address		City	St Zip
Co-op Case Nos:			
Local Data:			
FS Extension: Case No	Ofc	Unit	Worker
MA Extension: Case No	Ofc	Unit	Worker Reason
PENDING DATA (USE F4)			

Figure 6 - Case Comprehensive - Screen 1

Purpose

The Case Comprehensive series of screen provides information on all Non-Services cases and individuals in the case. The case and individual information is divided into a series of nine (there may be fewer screens for a case depending on case type and local information) screens. The screens can be accessed sequentially or directly as needed. All fields on the screen are protected.

WINQ19 is the first screen in the Case Comprehensive series and displays case-related data. If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

After Batch Update when an MA Extension case is created by the closing of a PA case, only the MA Case Number and Reason Code will be shown.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 24. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering D and a valid Case Number and 1 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu (The WINQ19 screen will be returned if SCREEN field is left blank.), **or**
- F3 from WINQ20 - Case Comprehensive - Screen 2, **or**



- F1 from WINQ20-24, 28-30 - Case Comprehensive screens, **or**
- F4 from WINQ49 - Pending Case Comprehensive Screen 1, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if this screen was displayed just before WINQ35, **or**
- Entering D on WINQ12 - Case Involvement

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - ACCESS DENIED - NON-SERVICES INQUIRY NOT AVAILABLE on SERVICES CASE
  - CASE NUMBER NOT FOUND (IN DISTRICT)
  - CIN UNDUP PENDING - NO PEND INQ PERMITTED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - F1 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - F4 INVALID
  - F99 NOT SUPPORTED - REXMT (99 = 1, 3, 5, 7, 10, 14, 17-22)
  - PENDING DATA NOT FOUND
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

Function Keys

Key	Description
F2	WINQ20 - Case Comprehensive - Screen 2
F4	WINQ49 - Pending Case Comprehensive - Screen 1 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ19

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
REG/VER	01046 - APPLICATION REGISTRY NUMBER (6) and 01047 - APPLICATION REGISTRY VERSION NUMBER (2)	
APP DATE	01090 - APPLICATION DATE (6)	
PA HEAP	24890 - PA HEAP INDICATOR (1)	Labeled if present
	24890 - PA HEAP INDICATOR (1)	Labeled if present
SAFENET	01026 - FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (1)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
CASE REASON	02050 - REASON CODE (3)	Mnemonic
PA/FS RC	02006 - PA/FS REASON CODE (3)	Mnemonic
PA/MA RC	02005 - PA/MA REASON CODE (3)	Mnemonic
TRANS DATE	02020 - TRANSACTION INPUT DATE (6)	
<b>CLIENT NOTICE</b>		
IND	04001 - TIMELY OR ADEQUATE NOTICE FLAG (1)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	
LANGUAGE	04002 - LANGUAGE OF NOTICE FLAG (1)	
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
RVI	01043 - RESOURCE VERIFY (1)	
APP SRC	01066 - APPLICATION SOURCE CODE (1)	
AUTH PERIOD	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY.; Characters 1-6
TO		Formatted as MM/DD/YY; Characters 7-12
RECERT DATE	01910 - CERTIFICATION DATE (6)	
FS Intw	02022 - FOOD STAMP INTERVIEW (1)	
TI	01067 - TRUST INDICATOR (1)	Must be Y or N. The default value is N.
FS PERIOD	17051 - FS AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY; Characters 1-6
TO		Formatted as MM/DD/YY; Characters 7-12
PA/FS CODE	01130 - PA FOOD STAMP CODE (2)	
TOP	01041- TOP INDICATOR (1)	
<b>TRANS</b>		
OFC	02014 - TRANSACTION OFFICE NUMBER (3)	
UNIT	02015 - TRANSACTION UNIT NUMBER (5)	
WORKER	02016 - TRANSACTION WORKER NUMBER (5)	
<b>RESP</b>		
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
REUSE IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	
CASE NUMBER	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	
EMERGENCY	01061 - EMERGENCY INDICATOR (1)	
FISCAL	01011 - FISCAL DISTRICT (2)	
FS REP CD	01350 - MONTHLY REPORTING CODE (1)	
IV-D IND	01440 - IV-D INDICATOR (1)	
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	
PARENT IND	01024 - NUMBER OF PARENTS IN HOUSEHOLD (1)	
CASE NAME	01070 - CASE NAME (28)	
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
SCN	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	
<b>RESIDENCE ADDRESS</b>		
RESIDENCE ADDRESS	01080 - RESIDENCE STREET (35)	
CITY	01082 - RESIDENCE CITY/TOWN (15)	
ST	01083 - RESIDENCE STATE (2)	
ZIP	01084 - RESIDENCE ZIP (5)	
PHONE	01085 - TELEPHONE NUMBER (10)	
CARE OF NAME	05110 - IN CARE OF NAME (28)	
60CT	WRTS - CASE STATE CNT (3)	The count that NYS applies to the 60-month time limit for all countable payments, both TANF and SNA. It is the highest count for any active sanctioned or non-applying adult in the case.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
24CT	WRTS - CASE SNA CNT (3)	It is the highest Safety Net Assistance individual count in the case for any active or sanctioned adult or child in the case. It counts against the 24 month counter. It can change based on individuals being added or deleted from the case.
<b>MAILING ADDRESS</b>		
MAILING ADDRESS	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
ST	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	
COOP CASE NOS	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
LOCAL DATA	24760 - CASE LOCAL DATA (57)	4 occurrences
<b>FS EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>MA EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	
OFC	01002 - MA EXTENSION LOCAL OFFICE NUMBER (3)	
UNIT	01003 - MA EXTENSION UNIT ID NUMBER (5)	
WORKER	01004 - MA EXTENSION WORKER ID NUMBER (5)	
REASON	01605 - SEPARATE DETERMINATION REASON CODE (3)	Mnemonic

WINQ20 - Case Comprehensive - Screen 2

WI NQ20 Case	CASE P61176	COMPREHENSIVE Type	SCREEN 2 EAF	Stat	NEW-CASE	Pend	Date	04/09/2007	Page	2 of 9
							FDE/ERR	Auth	05030179	
LN	C Individual	Name	C SS/RR	M Id	Rg	S	Client	Ap	S	Date
	d First	M Last	d Number	S Number	LN	x	Number	LN	F	Birth Stat
01	EMILY	A VANNOSTRAND	1	939664878	AY07037E	01	F	01311987		
02	SARAH	V VANNOSTRAND	1	939664879	AY07038C	02	F	03012006		
03										
04										
05										
06										
07										
08										
09										
10										
	C Other Name		C Other Name							
LN	d First	M Last	LN	d First	M Last					

PENDING DATA (USE F4)

Figure 7 - Case Comprehensive - Screen 2 (WINQ20)

Purpose

WINQ20 is the second screen in the Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. Each page of WINQ20 displays individual data for up to 10 individuals. A second page of this screen is available if there are more than 10 individuals in the case. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA - RFI FLAG ON will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

The screen allows for up to six other names to be displayed for individuals in the case. If there are more than six other names, only the first six retrieved from the database will be shown.

Access

- Entering Selection D, a valid Case Number, and 2 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ19 - Case Comprehensive - Screen 1, **or**

- F3 from WINQ21 - Case Comprehensive - Screen 3, **or**
- F4 from WINQ50 - Pending Case Comprehensive - Screen 2, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if this screen was displayed just before WINQ35.

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ21 - Case Comprehensive - Screen 3 - A second page of WINQ20 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ19 - Case Comprehensive - Screen 1. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ50 - Pending Case Comprehensive - Screen 2 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ20

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
<b>INDIVIDUAL INFORMATION</b>		
(NONE)	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences; 1-10 on Page 1 and 11-20 on Page 2
CD	03514 - PREGNANCY/PARENTING INDICATOR (1)	10 occurrences
<b>INDIVIDUAL NAME</b>		
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
CD	03200 - SOCIAL SECURITY NUMBER CODE (1)	10 occurrences
SS/RR NUMBER	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences
MS	03070 - CURRENT MARITAL STATUS (1)	10 occurrences
CLIENT ID NUMBER	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
AP RG LN	01045 - APPLICATION REGISTER LIN NO (2)	10 occurrences
SEX	03050 - SEX (1)	10 occurrences
DATE OF BIRTH	03060 - DATE OF BIRTH (8)	10 occurrences
SSI STAT	03145 - SSI STATUS (1)	10 occurrences
<b>OTHER NAME INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	03040 - OTHER NAME CODE (1) 00183 - PRISON CODE (1)	6 occurrences For Prisoner case processing
<b>OTHER NAME</b>		
FIRST	03041 - OTHER NAME (FIRST) (10) 00184 - DEPARTMENT IDENTIFICATION NUMBER (10)	6 occurrences; Characters 1-10 For Prisoner case processing
M	03041 - OTHER NAME (MI) (1)	6 occurrences; Character 11
LAST	03041 - OTHER NAME (LAST) (17)	6 occurrences; Characters 12-28

WINQ21 - Case Comprehensive - Screen 3

Ln	Rel Cd	De gr	Cat Cd	Fap Cd	Emp Cd	PA/MA Indv	FS Indv	MA Indv	St/Fd Chgs	T LM	Mom Ln	Vet Stat	Race H I ABPW	Ed Stat	Cit	MS PI
01	01	0	13			F45						9	N NNNNY	10	C	
02	04	0	06								01	9	N NNNNY		C	
03																
04																
05																
06																
07																
08																
09																
10																

DV Wai vers  
I VD Ti mLmt Drug/Al c Other

PENDING DATA (USE F4)

Figure 8 - Case Comprehensive - Screen 3 (WINQ21)

Purpose

WINQ21 is the third screen in the Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. A second page of this screen is available if there are more than 10 individuals in a case. Each page of WINQ21 displays individual data elements for up to 10 individuals. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 3 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ20 - Case Comprehensive - Screen 2, **or**
- F3 from WINQ22 - Case Comprehensive - Screen 4, **or**
- F4 from WINQ51 - Pending Case Comprehensive - Screen 3, **or**



- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 - 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ22 - Case Comprehensive - Screen 4 - A second page of WINQ21 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ20 - Case Comprehensive - Screen 2 - A second page of WINQ20 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ51 - Pending Case Comprehensive - Screen 3 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field

Key	Description
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ21

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	1-10 on Page 1 and 11-20 on Page 2; 10 occurrences
REL CD	03090 - RELATIONSHIP CODE (2)	10 occurrences
DEGR	03029 - HIGHEST EDUCATION DEGREE ATTAINED CODE (1)	10 occurrences
CAT CD	03110 - INDIVIDUAL CATEGORICAL CODE (2)	10 occurrences
FAP CD	03028 - FOOD ASSISTANCE PROGRAM CODE (1)	10 occurrences
EMP CD	03190 - EMPLOYABILITY CODE (2)	10 occurrences
PA/MA INDV	03121 - PA/MA INDIVIDUAL REASON CODE (3)	10 occurrences
FS INDV	03014 - FS INDIVIDUAL REASON CODE (3)	10 occurrences
MA INDV	03015 - MA INDIVIDUAL REASON CODE (3)	10 occurrences
ST/FD CHGS	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	10 occurrences
T LM	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. OR 60 MO. TANF LIMIT (1)	10 occurrences
MOM LN	03044 - MOTHERS LINE NUMBER (2)	10 occurrences
VET STAT	09302 - VETERAN STATUS (1)	10 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	10 occurrences
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	10 occurrences
A	03055 - ASIAN (1)	10 occurrences
B	03056 - BLACK OR AFRICAN AMERICAN (1)	10 occurrences
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences
W	03058 - WHITE OR CAUCASIAN (1)	10 occurrences
ED STAT	09304 - EDUCATION LEVEL (2)	10 occurrences
CIT	03180 - CITIZENSHIP INDICATOR (1)	10 occurrences
MS PI	15021 - RECIPIENT BUY-IN ELIGIBILITY STATUS CODE (1)	10 occurrences
<b>DV WAIVERS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
IVD	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver; 3 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TIMLMT	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver; 3 occurrences
DRUG/ALC	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver; 3 occurrences
OTHER	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver; 3 occurrences

WINQ22 - Case Comprehensive - Screen 4

```

WINQ22 CASE COMPREHENSIVE - SCREEN 4 Date 04/09/2007 Page 4 of 9
Case P61176 Type EAF Stat NEW-CASE Pend FDE/ERR Auth 05030179

Future Action Information:
LN AFA Cd Date LN AFA Cd Date

Resident Alien Program Information:
Ln Individual
No First M Last Alien No DEC DOS EPI TPhi SC MCR
01 EMILY A VANNOSTRAND
02 SARAH V VANNOSTRAND
03
04
05
06
07
08
09
10

PENDING DATA (USE F4)
    
```

Figure 9 - Case Comprehensive - Screen 4 (WINQ22)

Purpose

WINQ22 is the fourth screen in the Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. A second page of this screen is available if there are more than 10 individuals in the case. WINQ22 displays individual residency, citizenship and alien status information for up to 10 individuals. All fields on the screen are protected.

Additionally, future actions that are to be performed on behalf of the individuals in the case are displayed by line number and the date on which the future action is to occur and what (by code) future action will occur.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 4 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ21 - Case Comprehensive - Screen 3, **or**

- F3 from WINQ23 - Case Comprehensive - Screen 5, **or**
- F4 from WINQ52 - Pending Case Comprehensive - Screen 4, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ23 - Case Comprehensive - Screen 5 - A second page of WINQ22 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ21 - Case Comprehensive - Screen 3 - A second page of WINQ21 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ52 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ22

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>FUTURE ACTION INFORMATION</b>		
LN	01142 - LINE NUMBER OF INDIVIDUAL WITH AN ANTICIPATED FUTURE ACTION CODE/DATE (2)	6 occurrences
AFA CD	01140 - ANTICIPATED FUTURE ACTION CODE (3)	6 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	6 occurrences
<b>RESIDENT ALIEN PROGRAM INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences; Protected; 01-10 on Page 1 and 11-20 on Page 2
INDIVIDUAL FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
ALIEN NO	03171 - ALIEN NUMBER (9)	10 occurrences
DEC	03072 - DATE OF ENTRY INTO THIS COUNTRY (8)	10 occurrences
DOS	03172 - DATE OF STATUS (6)	10 occurrences
EPI	03073 - EPI INDICATOR (1)	10 occurrences
TPHI	03067 - THIRD PARTY HEALTH INSURANCE CODE (1)	10 occurrences
SC	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	10 occurrences
MCR	03064 - MEDICARE FLAG SET BY RFI SUBSYSTEM (1)	10 occurrences

WINQ23 - Case Comprehensive - Screen 5

Ln	Individual	PA/MA	FS	MA Coverage	PP C E A
No	First M Last	Ind Eff Stat	Eff Date	Cv Cd From To	rr a B F io r C I nv d d S
01	EMILY	A	040907	040907	P X
02	SARAH	V	040907	040907	N
03					
04					
05					
06					
07					
08					
09					
10					

PENDING DATA (USE F4)

Figure 10 - Case Comprehensive - Screen 5 (WINQ23)

Purpose

WINQ23 is the fifth screen in the Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. A second page of this screen is available if there are more than 10 individuals in the case. WINQ23 displays individual effective dates, CBIC information and MA information for up to 10 individuals. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 5 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ22 - Case Comprehensive - Screen 4, **or**
- F3 from WINQ24 - Case Comprehensive - Screen 6, **or**
- F4 from WINQ53 - Pending Case Comprehensive - Screen 5, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ24 - Case Comprehensive - Screen 6 - A second page of WINQ23 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ22 - Case Comprehensive - Screen 3 - A second page of WINQ22 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ53 - Pending Case Comprehensive - Screen 5 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field



Key	Description
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ23

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences; 01-10 on Page 1 and 11-20 on Page 2
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24140 - SURNAME (17)	10 occurrences
IND STAT	03120 - INDIVIDUAL STATUS (2)	10 occurrences
PA/MA EFF DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	10 occurrences
FS EFF DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (6)	10 occurrences
CV CD	21090 - RECIPIENT MEDICAID COVERAGE (2)	10 occurrences
<b>MA COVERAGE</b>		
FROM	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 1-6
TO	21110 - RECEIPT MEDICAID COVERAGE DATES (12)	10 occurrences; Characters 7-12
PRIN PROV	21550 - PRINCIPAL PROVIDER CODE (2)	10 occurrences
CARD	21620 - CARD CODE (2)	10 occurrences
EBCD	01001 - FOOD STAMPS CARD HOLDER FLAG (1)	10 occurrences
AFIS	03047 - AFIS EXEMPTION INDICATOR (1)	10 occurrences

WINQ24 - Case Comprehensive - Screen 6

LN	Act	Typ	Pay	Amount	Iss	Sch	Cd	From	To	Ln	Cd	Vnd	Id
01	2	10	09	320.00	1	M	1	040907	043007			10700	
02	2	10	09	20.00	1	M	1	040907	043007			10700	
03	2	10	09	245.00	1	M	4	040907	093007			10700	
04													
05													
06													
07													
08													
09													
10													
11													
12													

LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount
Recoupment											
Energy Rst											
HVnd/Acct											
Repl ace LN	Chk/FSB			LN	Vnd/Acct						
					Chk/FSB						

PENDING DATA (USE F4)

Figure 11 - Case Comprehensive - Screen 6 (WINQ24)

Purpose

WINQ24 is the sixth screen in the Case Comprehensive series and displays authorized payments, other payment actions and HEAP data. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 24. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 24. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 6 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ23 - Case Comprehensive - Screen 5, **or**
- F3 from WINQ28 - Case Comprehensive - Screen 7, **or**
- F4 from WINQ54 - Pending Case Comprehensive - Screen 6, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

## Screen Response

### Positive

- See **Function Keys**.

### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 9, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

## Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ28 - Case Comprehensive - Screen 7 See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ23 - Case Comprehensive - Screen 5 - A second page of WINQ23 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ54 - Pending Case Comprehensive - Screen 6 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ24

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>AUTHORIZATION INFORMATION</b>		
LN	95210 - PAYMENT LINE NUMBER (2)	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>--EFFECTIVE--</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6
TO		12 occurrences; Characters 7-12
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences; No longer supported
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	6 occurrences
AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	6 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	6 occurrences
<b>HVND/ACCT</b>		
(NONE)	14024 - HEAP VENDOR IDENTIFICATION (8)	
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
<b>VND/ACCT</b>		
(NONE)	14024 - HEAP VENDOR IDENTIFICATION (8)	
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
<b>REPLACE</b>		
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	2 occurrences
CHK/FSB	14001 - REPLACED CHK/FSB NUMBER (12)	2 occurrences

WINQ28 - Case Comprehensive - Screen 7

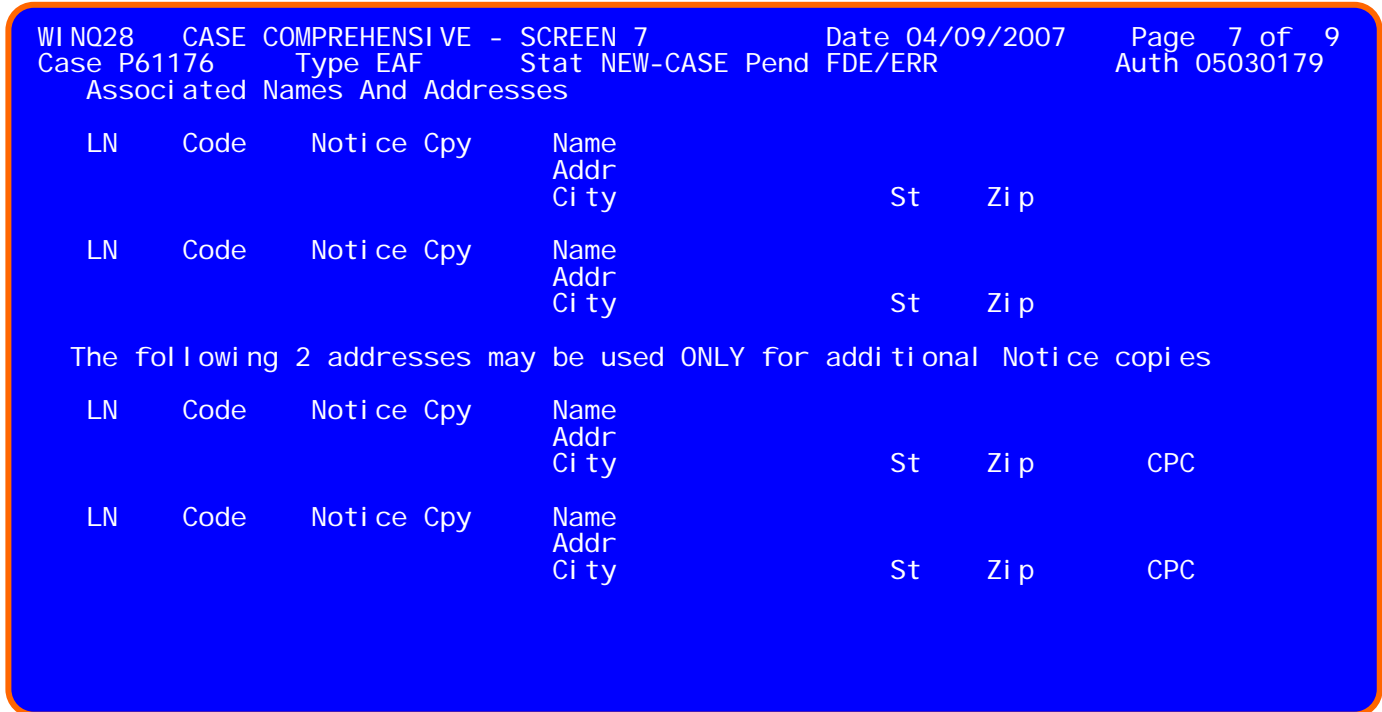


Figure 12 - Case Comprehensive - Screen 7 (WINQ28)

Purpose

WINQ28 is the seventh screen in the Case Comprehensive series which provides information on a Non-Services pending record. WINQ28 displays associated names and addresses. The screen can accommodate up to four addresses associated with the case. All fields are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D and a valid Case Number, and 7 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ24 - Case Comprehensive - Screen 6, **or**
- F3 from WINQ29 - Case Comprehensive - Screen 8, **or**
- F4 from WINQ58 - Pending Case Comprehensive - Screen 7, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ29 - Case Comprehensive - Screen 8 - A second page of WINQ28 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ24 - Case Comprehensive - Screen 6. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ58 - Pending Case Comprehensive - Screen 7 - if pending data exists
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ28

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>ASSOCIATED NAMES AND ADDRESSES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (28)	2 occurrences
ADDR	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
<b>THE FOLLOWING 2 ADDRESSES MAY BE USED ONLY FOR ADDITIONAL NOTICE COPIES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (28)	2 occurrences
ADDR	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences

WINQ29 - Case Comprehensive - Screen 8

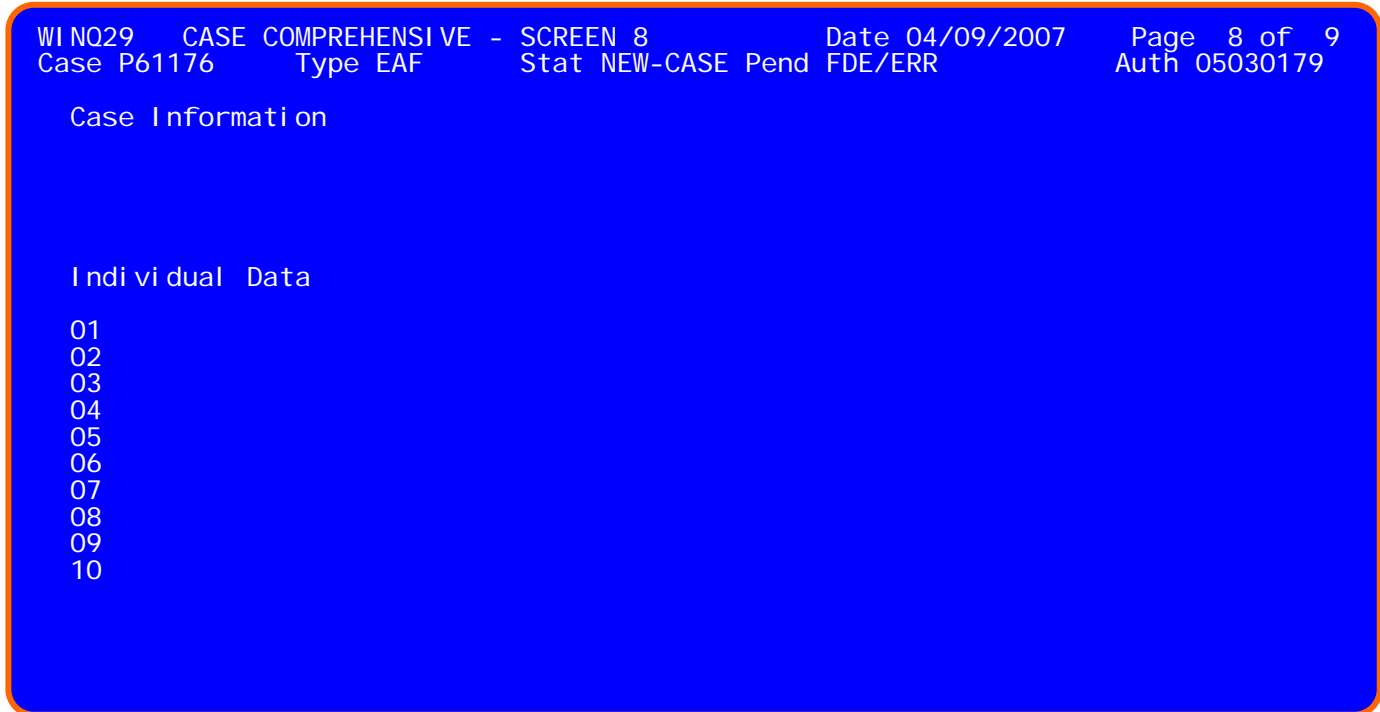


Figure 13 - Case Comprehensive - Screen 8 (WINQ29)

#### Purpose

WINQ29 is the eighth screen in the Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. A second page of this screen is available if there are more than ten individuals in the case. WINQ29 displays LDSS-entered/LDSS-specific information for the case and for up to twenty individuals. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will appear on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will appear on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

#### Access

- Entering Selection D, a valid Case Number, and 8 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ28 - Case Comprehensive - Screen 7, **or**
- F3 from WINQ30 - Case Comprehensive - Screen 9, **or**
- F4 from WINQ59 - Pending Case Comprehensive - Screen 8, **or**



- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F2	WINQ30 - Case Comprehensive - Screen 9 - A second page of WINQ29 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ28 - Case Comprehensive - Screen 7. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ59 - Pending Case Comprehensive - Screen 8 - if pending data exists
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.

Key	Description
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ29

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>CASE INFORMATION</b>		
(NONE)	24760 - CASE DATA (57)	
<b>INDIVIDUAL DATA</b>		
01-10 or 11-20	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (2)	Five occurrences for each line number

WINQ30 - Case Comprehensive - Screen 9

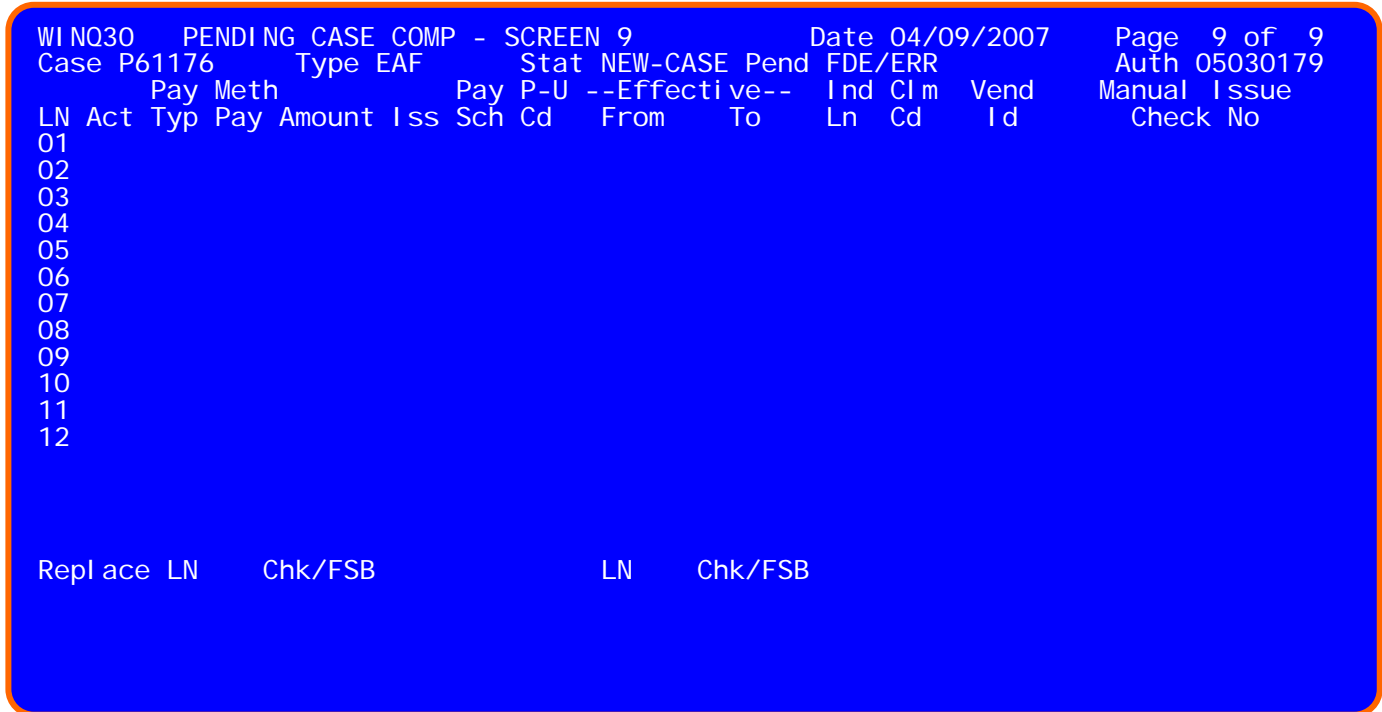


Figure 14 - Case Comprehensive - Screen 9 (WINQ30)

Purpose

WINQ30 is the ninth screen in the Case Comprehensive series and displays child care payment line data. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 24. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 24. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 9 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ29 - Case Comprehensive - Screen 8, **or**
- F4 from WINQ60 - Pending Case Comprehensive - Screen 9, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 2, 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Function Keys

Key	Description
F1	WINQ19 - Case Comprehensive - Screen 1
F3	WINQ29 - A second page of WINQ29 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ60 - Pending Case Comprehensive - Screen 9 - if there is pending data
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if there are errors or warnings
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in appropriate field
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ30

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>AUTHORIZATION INFORMATION</b>		
LN	95210 - PAYMENT LINE NUMBER (2)	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>--EFFECTIVE--</b>		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6; Formatted MMDDYY.
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12.; Formatted MMDDYY.
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>REPLACE</b>		
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	2 occurrences
CHK/FSB	14001 - REPLACED CHK/FSB NUMBER (12)	2 occurrences

WINQ49 - Pending Case Comprehensive - Screen 1

WINQ49	PENDING CASE COMP - SCREEN 1	Date 04/09/2007	Page 1 of 9
Case P61176	Type EAF	Stat	Auth
Dist STLA		App Date	SafeNet
Trans Type 00	Case Reason	PA/FS RC	PA/MA RC
Client Notice: Ind	Number	Language	Trans Date
Auth Period	to	Recert Date	HII RVI
FS Period	to	PA/FS Code	APP SRC
Reuse Case Number Type	Emergency	Fi scal	Trans: Resp:
Ind P61176	19		
FS Rep Cd	IV-D Ind	Sp-Code	HEAP Income
Case Name EMILY VANNOSTRAND		LFLN	SCN
Residence Address		City	St Zip Phone
208 PEAK AVENUE		OGDENSBURG	NY 13669
Care Of Name		60ct 0	24ct 0
Mailing Address		City	St Zip
Co-op Case Nos:			
Local Data:			
FS Extension: Case No		Ofc	Unit Worker
MA Extension: Case No		Ofc	Unit Worker Reason

Figure 15 - Pending Case Comprehensive - Screen 1 (WINQ49)

Purpose

The Pending Case Comprehensive series of screens provides information on all Non-Services cases and individuals in the case. Case and individual information is divided into a series of nine (there may be fewer screens for a case depending on case type and local information) screens. The screens can be accessed sequentially or directly as needed. All fields on the screen are protected.

WINQ49 is the first screen in the Pending Case Comprehensive series and displays Pending Record case data.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will appear on Line 23. See **SRM Resource File Integration**.

Before Batch Update when an MA Extension case is created by the closing of a PA case, all MA Extension data will be shown.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will appear on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering D, a valid Case Number, 1 or blank in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, or

- F1 from WINQ50-54, 58-60 - Pending Case Comprehensive screens, **or**
- F3 from WINQ50 - Pending Case Comprehensive - Screen 2, **or**
- F4 from WINQ19 - Case Comprehensive - Screen 1, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 1, 3, 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORT - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F2	WINQ50 - Pending Case Comprehensive - Screen 2
F4	WINQ19 - Case Comprehensive - Screen 1
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ49

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name.-
REG/VER	01046 - APPLICATION REGISTRY NUMBER (6) 01047 - APPLICATION REGISTRY VERSION NUMBER (2)	Registry and Version Number only show when Case Status is NEW-CASE
APP DATE	01090 - APPLICATION DATE (6)	Formatted as MMDDYY
PA HEAP	24890 - PA HEAP INDICATOR	Labeled if present
	24890 - PA HEAP INDICATOR	Labeled if present
SAFENET	01026 - FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (1)	
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
CASE REASON	02050 - REASON CODE (3)	Mnemonic
PA/FS RC	02006 - PA/FS REASON CODE (3)	Mnemonic
PA/MA RC	02005 - PA/MA REASON CODE (3)	Mnemonic
TRANS DATE	02020 - TRANSACTION INPUT DATE (6)	
<b>CLIENT NOTICE:</b>		
IND	04001 - TIMELY OR ADEQUATE NOTICE FLAG (1)	
NUMBER	04097 - NOTICE IDENTIFIER NUMBER (10)	
LANGUAGE	04002 - LANGUAGE OF NOTICE FLAG (1)	
HII	01044 - HEALTH INSURANCE INDICATOR CODE (1)	
RVI	01043 - RESOURCE VERIFY (1)	
APP SRC	01066 - APPLICATION SOURCE CODE (1)	
AUTH PERIOD	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY
TO		Formatted as MM/DD/YY
RECERT DATE	01910 - CERTIFICATION DATE (6)	
FS Intw	02022 - FOOD STAMP INTERVIEW (1)	
TI	01067 - TRUST INDICATOR (1)	Must be Y or N. The default value is N.
FS PERIOD	17051 - FS AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY
TO		Formatted as MM/DD/YY
PA/FS CODE	01130 - PA FOOD STAMP CODE (2)	



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TOP	01041- TOP INDICATOR (1)	
<b>TRANS:</b>		
OFC	02014 - TRANSACTION OFFICE NUMBER (3)	
UNIT	02015 - TRANSACTION UNIT NUMBER (5)	
WORKER	02016 - TRANSACTION WORKER NUMBER (5)	
<b>RESP:</b>		
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
REUSE IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	
CASE NUMBER	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	
EMERGENCY	01061 - EMERGENCY INDICATOR (1)	
FISCAL	01011 - FISCAL DISTRICT (2)	
FS REP CD	01350 - MONTHLY REPORTING CODE (1)	
IV-D IND	01440 - IV-D INDICATOR (1)	
SP-CODE	01420 - SPECIAL PROGRAM CODE (1)	
HEAP INCOME	01018 - HEAP INCOME LEVEL CODE (1)	
PARENT IND	01024 - NUMBER OF PARENTS IN HOUSEHOLD (1)	
CASE NAME	01070 - CASE NAME (28)	
LFLN	01063 - LIFE LINE PARTICIPATION (1)	
SCN	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	
<b>RESIDENCE ADDRESS</b>		
RESIDENCE ADDRESS	01080 - RESIDENCE STREET (35)	
CITY	01082 - RESIDENCE CITY/TOWN (15)	
ST	01083 - RESIDENCE STATE (2)	
ZIP	01084 - RESIDENCE ZIP (5)	
PHONE	01085 - TELEPHONE NUMBER (10)	
CARE OF NAME	05110 - IN CARE OF NAME (28)	
60CT	WRTS - CASE STATE CNT (3)	The count that NYS applies to the 60-month time limit for all countable payments, both TANF and SNA. It is the highest count for any active sanctioned or non-applying adult in the case.
24CT	WRTS - CASE SNA CNT (3)	It is the highest Safety Net Assistance individual count in the case for any active or sanctioned adult or child in the case. It counts against the 24 month counter. It can change based on individuals being added or deleted from the case or when additional countable payments are issued.
<b>MAILING ADDRESS</b>		
MAILING ADDRESS	05120 - MAILING STREET (35)	
CITY	05130 - MAILING CITY/TOWN (15)	
ST	05140 - MAILING STATE (2)	
ZIP	05150 - MAILING ZIP (5)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
COOP CASE NOS	01110 - COOPERATIVE CASE NUMBER	3 occurrences
LOCAL DATA	24760 - CASE LOCAL DATA (57)	4 occurrences
<b>FS EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	
OFC	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
<b>MA EXTENSION</b>		
CASE NO	01610 - SEPARATE DETERMINATION CASE NUMBER (10)	
OFC	01002 - MA EXTENSION LOCAL OFFICE NUMBER (3)	
UNIT	01003 - MA EXTENSION UNIT ID NUMBER (5)	
WORKER	01004 - MA EXTENSION WORKER ID NUMBER (5)	
REASON	01605 - SEPARATE DETERMINATION REASON CODE (3)	Mnemonic

WINQ50 - Pending Case Comprehensive - Screen 2

WINQ50 PENDING CASE COMP - SCREEN 2				Date 04/09/2007			Page 2 of 9	
Case	Type	Stat	NEW-CASE	Pend	FDE/ERR	Auth 05030179		
LN	C Individual	Name	C SS/RR	M	Client	Ap	S	Date
	d First	M Last	d Number	S	Number	Rg	e	of SSI
						LN	x	Birth Stat
01	EMILY	A VANNOSTRAND	1 939664878		AY07037E	01	F	01311987
02	SARAH	V VANNOSTRAND	1 939664879		AY07038C	02	F	03012006
03								
04								
05								
06								
07								
08								
09								
10								
	C Other Name				C Other Name			
LN	d First	M Last			d First	M Last		

Figure 16 - Pending Case Comprehensive - Screen 2 (WINQ50)

Purpose

WINQ50 is the second screen in the Pending Case Comprehensive series which provides information on a Non-Services pending record. Each page of WINQ50 displays data for up to 10 individuals in the Pending Record. A second page of this screen is available if there are more than 10 individuals in the case. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

The screen allows for up to six other names to be displayed for individuals in the case. If there are more than six other names, only the first six retrieved from the database will be shown.

Access

- Entering Selection D, a valid Case Number, 2 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ49 - Pending Case Comprehensive - Screen 1, **or**

- F3 from WINQ51 - Pending Case Comprehensive - Screen 3, **or**
- F4 from WINQ20 - Case Comprehensive - Screen 2, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ51 - Pending Case Comprehensive - Screen 3 - A second page of WINQ50 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview to this Section.
F3	WINQ49 - Pending Case Comprehensive - Screen 1. See <b>Function Keys</b> in the Overview to this Section.
F4	WINQ20 - Case Comprehensive - Screen 2
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ50

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
<b>INDIVIDUAL INFORMATION</b>		
(NONE)	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences; 1-10 on Page 1 and 11-20 on Page 2
CD	03514 - PREGNANCY/PARENTING INDICATOR (1)	10 occurrences
<b>INDIVIDUAL NAME</b>		
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
CD	03200 - SOCIAL SECURITY NUMBER CODE (1)	10 occurrences
SS/RR NUMBER	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	10 occurrences; Formatted as 999999999
MS	03070 - CURRENT MARITAL STATUS (1)	10 occurrences
CLIENT ID NUMBER	03010 - CLIENT IDENTIFICATION NUMBER (8)	10 occurrences
AP RG LN	01045 - APPLICATION REGISTER LIN NO (2)	10 occurrences
SEX	03050 - SEX (1)	10 occurrences
DATE OF BIRTH	03060 - DATE OF BIRTH (8)	10 occurrences; Formatted as MMDDCCYY
SSI STAT	03145 - SSI STATUS (1)	10 occurrences
<b>OTHER NAME INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences
CD	03040 - OTHER NAME CODE (1) 00183 - PRISON CODE (1)	6 occurrences For Prisoner case processing
<b>OTHER NAME</b>		
FIRST	03041 - OTHER NAME (FIRST) (10) 00184 - DEPARTMENT IDENTIFICATION NUMBER (10)	6 occurrences; Characters 1-10 For Prisoner case processing
M	03041 - OTHER NAME (MI) (1)	6 occurrences; Character 11
LAST	03041 - OTHER NAME (LAST) (17)	6 occurrences; Character 12-28

WINQ51 - Pending Case Comprehensive - Screen 3

Ln	Rel Cd	De gr	Cat Cd	Fap Cd	Emp Cd	PA/MA Indv	FS Indv	MA St/Fd Indv	T Chgs	Mom LM	Vet Ln	Race Stat	H I ABPW	Ed Stat	Cit	MS PI
01	01	0	13			F45						9	N NNNNY	10	C	
02	04	0	06							01		9	N NNNNY		C	
03																
04																
05																
06																
07																
08																
09																
10																

Ln	I V D	T i m L m t	D V W a i v e r s	D r u g / A l c	O t h e r

Figure 17 - Pending Case Comprehensive - Screen 3 (WINQ51)

Purpose

WINQ51 is the third screen in the Pending Case Comprehensive series which provides individual information on a Non-Services pending record. Each page of WINQ51 displays data for up to 10 individuals in the Pending Record. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, 3 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ50 - Pending Case Comprehensive - Screen 2, **or**
- F3 from WINQ53 - Pending Case Comprehensive - Screen 4, **or**
- F4 from WINQ21 - Case Comprehensive - Screen 3, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ52 - Pending Case Comprehensive - Screen 4 - A second page of WINQ51 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ50 - Pending Case Comprehensive - Screen 2 - A second page of WINQ50 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ21 - Case Comprehensive - Screen 3
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ51

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
REL CD	03090 - RELATIONSHIP CODE (2)	10 occurrences
DEGR	03029 - HIGHEST EDUCATION DEGREE ATTAINED CODE (1)	10 occurrences
CAT CD	03110 - INDIVIDUAL CATEGORICAL CODE (2)	10 occurrences
FAP CD	03028 - FOOD ASSISTANCE PROGRAM CODE (1)	10 occurrences
EMP CD	03190 - EMPLOYABILITY CODE (2)	10 occurrences
PA/MA INDV	03121 - PA/MA INDIVIDUAL REASON CODE (3)	10 occurrences
FS INDV	03014 - FS INDIVIDUAL REASON CODE (3)	10 occurrences
MA INDV	03015 - MA INDIVIDUAL REASON CODE (3)	10 occurrences
ST/FD CHGS	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	10 occurrences
T LM	03048 - FLAG TO INDICATE EXEMPTION FROM 24 MO. OR 60 MO. TANF LIMIT (1)	10 occurrences
MOM LN	03044 - MOTHERS LINE NUMBER (2)	10 occurrences
VET STAT	09302 - VETERAN STATUS (1)	10 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	10 occurrences
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	10 occurrences
A	03055 - ASIAN (1)	10 occurrences
B	03056 - BLACK OR AFRICAN AMERICAN (1)	10 occurrences
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	10 occurrences
W	03058 - WHITE OR CAUCASIAN (1)	10 occurrences
ED STAT	09304 - EDUCATION LEVEL (2)	10 occurrences
CIT	03180 - CITIZENSHIP INDICATOR (1)	10 occurrences
MS PI	15021 - RECIPIENT BUY-IN ELIGIBILITY STATUS CODE (1)	10 occurrences
<b>DV WAIVERS</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	3 occurrences
IVD	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver. 3 occurrences
TIMLMT	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver. 3 occurrences
DRUG/ALC	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver. 3 occurrences



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
OTHER	12296 - DOMESTIC VIOLENCE WAIVER TYPE CODE (1)	Mnemonic; A "Y" in this field indicates that the individual has a domestic violence waiver. 3 occurrences

WINQ52 - Pending Case Comprehensive - Screen 4

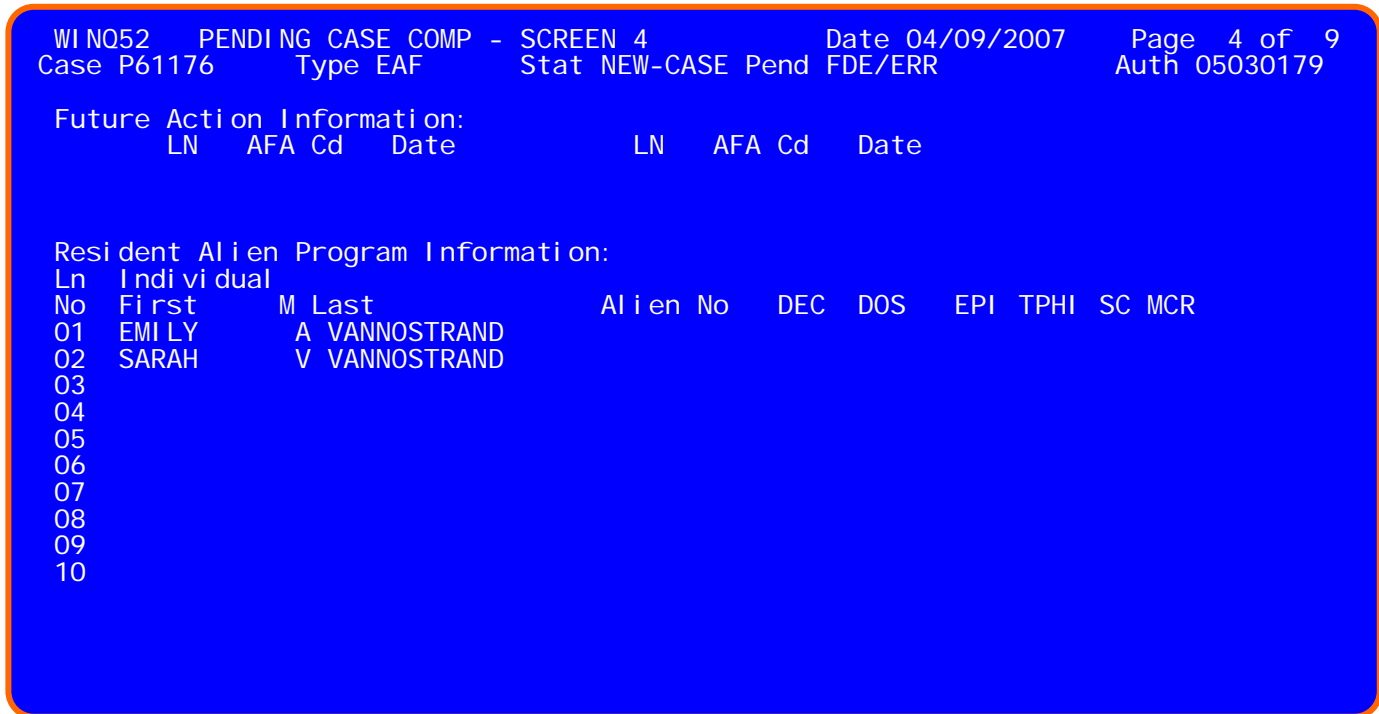


Figure 18 - Pending Case Comprehensive - Screen 4 (WINQ52)

Purpose

WINQ52 is the fourth screen in the Pending Case Comprehensive series which provides information on a Non-Services case and the individuals in that case. A second page of this screen is available if there are more than 10 individuals in the case. WINQ52 displays individual residency, citizenship and alien status information for up to 10 individuals. All fields on the screen are protected.

Additionally, future actions that are to be performed on behalf of the individuals in the case are displayed by line number and the date on which the future action is to occur and what (by code) future action will occur.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, and 4 in the SCREEN field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ51 - Pending Case Comprehensive - Screen 3, **or**

- F3 from WINQ53 - Pending Case Comprehensive - Screen 5, **or**
- F4 from WINQ22 - Case Comprehensive - Screen 4, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ53 - Pending Case Comprehensive - Screen 5 - A second page of WINQ52 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ51 - Pending Case Comprehensive - Screen 3 - A second page of WINQ51 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ22 - Case Comprehensive - Screen 4
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Key	Description
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ52

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>FUTURE ACTION INFORMATION</b>		
LN	01142 - LINE NUMBER OF INDIVIDUAL WITH AN ANTICIPATED FUTURE ACTION CODE/DATE (2)	6 occurrences
AFA CD	01140 - ANTICIPATED FUTURE ACTION CODE (3)	6 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	6 occurrences
<b>RESIDENT ALIEN PROGRAM INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences; 01-10 on Page 1 and 11-20 on Page 2
INDIVIDUAL FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24110 - SURNAME (17)	10 occurrences
ALIEN NO	03171 - ALIEN NUMBER (9)	10 occurrences
DEC	03072 - DATE OF ENTRY INTO THIS COUNTRY (8)	10 occurrences
DOS	03172 - DATE OF STATUS (6)	10 occurrences
EPI	03073 - EPI INDICATOR (1)	10 occurrences
TPHI	03067 - THIRD PARTY HEALTH INSURANCE CODE (1)	10 occurrences
SC	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	10 occurrences
MCR	03064 - MEDICARE FLAG SET BY RFI SUBSYSTEM (1)	10 occurrences

WINQ53 - Pending Case Comprehensive - Screen 5

Ln	Individual	PA/MA	FS	PP	C	E	A
No	First M Last	Ind Stat	Eff Date	Eff Date	Cv Cd	MA Coverage From To	rr a B F i o r C I n v d d S
01	EMILY A VANNOSTRAND	07	040907	040907			P X
02	SARAH V VANNOSTRAND	07	040907	040907			N
03							
04							
05							
06							
07							
08							
09							
10							

Figure 19 - Pending Case Comprehensive - Screen 5 (WINQ53)

Purpose

WINQ53 is the fifth screen in the Pending Case Comprehensive series which provides information on a Non-Services pending case and the individuals in that case. A second page of this screen is available if there are more than 10 individuals in the case. WINQ53 displays individual effective dates, CBIC information and MA information for up to 10 individuals in the Pending Record. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, 5 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ52 - Pending Case Comprehensive - Screen 4, **or**
- F3 from WINQ54 - Pending Case Comprehensive - Screen 6, **or**
- F4 from WINQ23 - Case Comprehensive - Screen 5, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ54 - A second page of WINQ53 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ52 - A second page of WINQ52 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ23 - Case Comprehensive - Screen 5
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ53

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
FIRST	24120 - GIVEN NAME (10)	10 occurrences
M	24130 - MIDDLE INITIAL (1)	10 occurrences
LAST	24140 - SURNAME (17)	10 occurrences
IND STAT	03120 - INDIVIDUAL STATUS (2)	10 occurrences
PA/MA EFF DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	10 occurrences
FS EFF DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (6)	10 occurrences
CV CD	21090 - RECIPIENT MEDICAID COVERAGE (2)	10 occurrences
<b>MA COVERAGE</b>		
FROM	21110 - RECEIPT MEDICAID COVERAGE DATES	10 occurrences; Characters 1-6
TO	21110 - RECEIPT MEDICAID COVERAGE DATES	10 occurrences; Characters 7-12
PRIN PROV	21550 - PRINCIPAL PROVIDER CODE (2)	10 occurrences
CARD	21620 - CARD CODE (2)	10 occurrences
EBCD	01001 - FOOD STAMPS CARD HOLDER FLAG (1)	10 occurrences
AFIS	03047 - AFIS EXEMPTION INDICATOR (1)	10 occurrences

WINQ54 - Pending Case Comprehensive - Screen 6

LN	Act	Typ	Pay	Amount	Iss	Sch	Cd	From	To	Ln	Cd	Id	LN	Amount
01	2	10	09	320.00	1	M	1	040907	043007			10700		
02	2	10	09	20.00	1	M	1	040907	043007			10700		
03	2	10	09	245.00	1	M	4	040907	093007			10700		
04														
05														
06														
07														
08														
09														
10														
11														
12														

LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount	LN	Amount
Recoupment											
Energy Rst											
HVnd/Acct											
Repl ace LN	Chk/FSB			LN	Vnd/Acct						
					Chk/FSB						

Figure 20 - Pending Case Comprehensive - Screen 6 (WINQ54)

Purpose

WINQ54 is the sixth screen in the Case Comprehensive series and displays authorized payments, other payment actions and HEAP data. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, 6 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ53 - Pending Case Comprehensive - Screen 5, **or**
- F3 from WINQ58 - Pending Case Comprehensive - Screen 7, **or**
- F4 from WINQ24 - Case Comprehensive - Screen 6, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.



### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ58 - Pending Case Comprehensive - Screen 7. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ53 - Pending Case Comprehensive - Screen 5 - A second page of WINQ53 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ24 - Case Comprehensive - Screen 6
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ54

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>AUTHORIZATION INFORMATION</b>		
LN	95210 - PAYMENT LINE NUMBER (2)	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>--EFFECTIVE--</b> 12 occurrences		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6; Formatted as MMDDYY
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12.; Formatted as MMDDYY
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>RECOUPMENT</b>		
LN	14003 - RECOUPMENT PAYMENT LINE NUMBER (2)	6 occurrences
AMOUNT	14004 - RECOUPMENT PAY LINE AMOUNT (6)	6 occurrences
<b>ENERGY RST</b>		
LN	14005 - ENERGY RESTRICTION PAYMENT LINE NUMBER (2)	6 occurrences
AMOUNT	14006 - ENERGY RESTRICTION PAYMENT AMOUNT (6)	6 occurrences
<b>HVND/ACCT</b>		
(NONE)	14024 - HEAP VENDOR IDENTIFICATION (8)	
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
<b>VND/ACCT</b>		
(NONE)	14024 - HEAP VENDOR IDENTIFICATION (8)	
(NONE)	14025 - HEAP CUSTOMER ACCOUNT NUMBER (20)	
<b>REPLACE</b>		
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	2 occurrences
CHK/FSB	14001 - REPLACED CHK/FSB NUMBER (12)	2 occurrences

WINQ58 - Pending Case Comprehensive - Screen 7

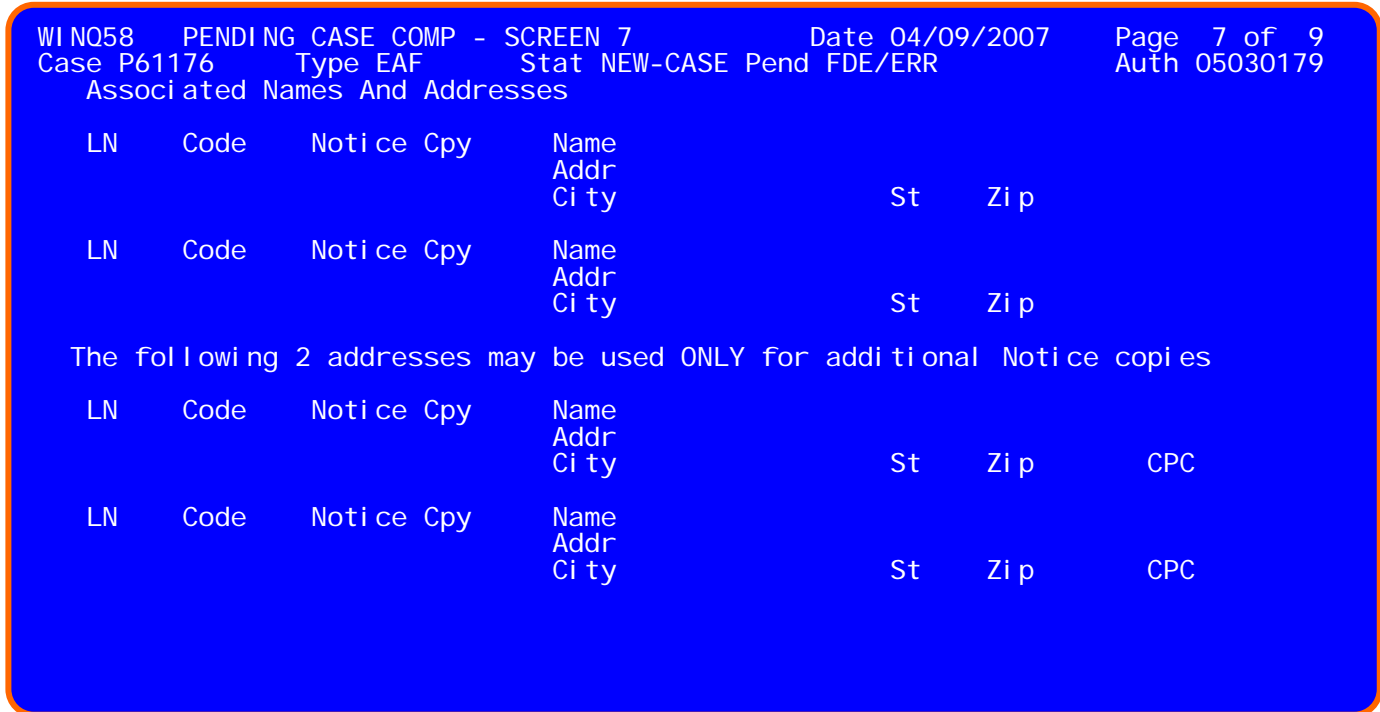


Figure 21 - Pending Case Comprehensive - Screen 7 (WINQ58)

Purpose

WINQ58 is the seventh screen in the Pending Case Comprehensive series which provides information on a Non-Services pending record. WINQ58 displays associated names and addresses. The screen can accommodate up to four addresses associated with the case. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, 7 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ54 - Pending Case Comprehensive - Screen 6, **or**
- F3 from WINQ59 - Pending Case Comprehensive - Screen 8, **or**
- F4 from WINQ28 - Case Comprehensive - Screen 7, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ59 - Pending Case Comprehensive - Screen 8. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ54 - Pending Case Comprehensive - Screen 6. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ28 - Case Comprehensive - Screen 7
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ58

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>ASSOCIATED NAMES AND ADDRESSES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (28)	2 occurrences
ADDR	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences
<b>THE FOLLOWING 2 ADDRESSES MAY BE USED ONLY FOR ADDITIONAL NOTICE COPIES</b>		
LN	05015 - ASSOCIATED NAME NUMBER (2)	2 occurrences
CODE	05010 - ASSOCIATED NAME AND ADDRESS CODE (2)	2 occurrences
NOTICE CPY	05002 - ASSOCIATED NOTICE CODE (1)	2 occurrences
NAME	05011 - ASSOCIATED NAME (28)	2 occurrences
ADDR	05020 - ASSOCIATED STREET (35)	2 occurrences
CITY	05030 - ASSOCIATED CITY/TOWN (15)	2 occurrences
ST	05040 - ASSOCIATED STATE (2)	2 occurrences
ZIP	05050 - ASSOCIATED ZIP (5)	2 occurrences

WINQ59 - Pending Case Comprehensive - Screen 8

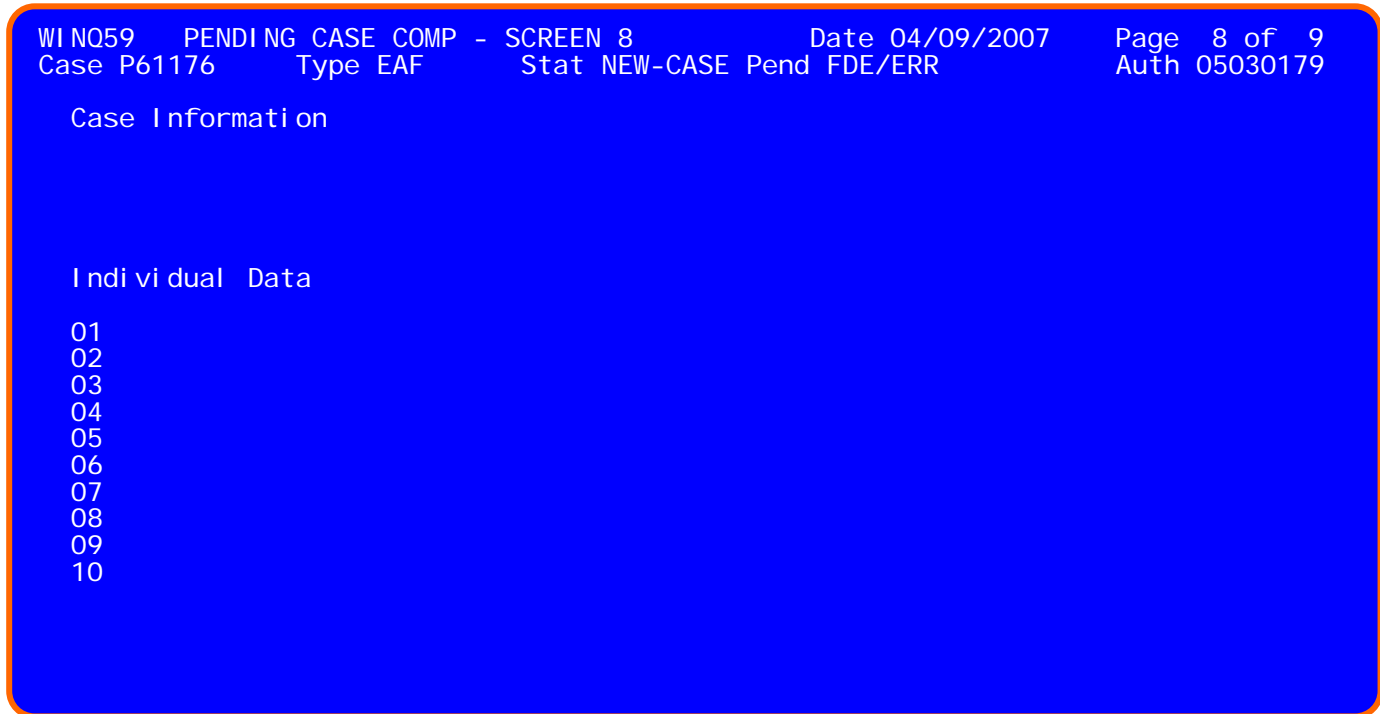


Figure 22 - Pending Case Comprehensive - Screen 8 (WINQ59)

**Purpose**

WINQ59 is the eighth screen in the Pending Case Comprehensive series which provides information on a pending Non-Services case and the individuals in that case. A second page of this screen is available if there are more than ten individuals in the case. WINQ59 displays LDSS-entered/LDSS-specific information for the case and for up to twenty individuals. All fields on this screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will appear on Line 23. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will appear on Line 23. MM/DD/YY is the Authorization TO Date of the closing transaction.

**Access**

- Entering Selection D, a valid Case Number, 8 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ58 - Pending Case Comprehensive - Screen 7, **or**
- F3 from WINQ60 - Pending Case Comprehensive - Screen 9, **or**
- F4 from WINQ29 - Case Comprehensive - Screen 8, **or**

- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen.

#### Screen Response

##### Positive

- See **Function Keys**.

##### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F2	WINQ60 - Pending Case Comprehensive - Screen 9 - A second page of WINQ59 is available if there are more than 10 individuals in the Pending Record. See <b>Function Keys</b> in the Overview of this Section.
F3	WINQ58 - Pending Case Comprehensive - Screen 7. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ29 - Case Comprehensive - Screen 8
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ59

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>CASE INFORMATION</b>		
(NONE)	24760 - CASE DATA (57)	
<b>INDIVIDUAL DATA</b>		
01-10 or 11-20	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	10 occurrences
(NONE)	24770 - INDIVIDUAL LOCAL DATA (2)	5 occurrences for each individual



WINQ60 - Pending Case Comprehensive - Screen 9

LN	Act	Typ	Pay Meth	Pay Amount	Iss	Sch	Cd	From	To	Ln	Cd	Vend	Id	Manual Issue
01														
02														
03														
04														
05														
06														
07														
08														
09														
10														
11														
12														

Figure 23 - Pending Case Comprehensive - Screen 9 (WINQ60)

Purpose

WINQ60 is the ninth screen in the Pending Case Comprehensive series and displays child care payment line data. All fields on the screen are protected.

If one or more individuals in the case have resource data that has not been resolved, the message UNRESOLVED RFI DATA EXISTS will be displayed on Line 24. See **SRM Resource File Integration**.

If a closing transaction is Clocking Down, the message CLOCKING DOWN - MM/DD/YY will be displayed on Line 24. MM/DD/YY is the Authorization TO Date of the closing transaction.

Access

- Entering Selection D, a valid Case Number, 9 in the SCREEN field, and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F2 from WINQ59 - Pending Case Comprehensive - Screen 8, **or**
- F4 from WINQ30 - Case Comprehensive - Screen 9, **or**
- F9 from WINQ35 - Pending Case - Errors/Warnings screen, if WINQ35 was accessed from this screen

### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - NO ERRORS OR WARNINGS FOR THIS CASE
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 2, 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Function Keys

Key	Description
F1	WINQ49 - Pending Case Comprehensive - Screen 1
F3	WINQ59 - A second page of WINQ59 is available if there are more than 10 individuals in the case. See <b>Function Keys</b> in the Overview of this Section.
F4	WINQ30 - Case Comprehensive - Screen 9
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ35 - Pending Case - Errors/Warnings, if available
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

### Screen Field Description - WINQ60

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>AUTHORIZATION INFORMATION</b>		
LN	95210 - PAYMENT LINE NUMBER (2)	12 occurrences
ACT	14009 - LOCAL ACTION CODE (1)	12 occurrences
PAY TYP	14010 - PAYMENT TYPE (2)	12 occurrences
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	12 occurrences
AMOUNT	14011 - PAYMENT AMOUNT (6)	12 occurrences
ISS	14045 - PAYMENT ISSUE CODE (1)	12 occurrences
PAY SCH	14040 - PAYMENT SCHEDULE (1)	12 occurrences
P-U CD	14030 - PICK-UP CODE (1)	12 occurrences
<b>--EFFECTIVE--</b> 12 occurrences		
FROM	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 1-6
TO	14012 - PAYMENT PERIOD (12)	12 occurrences; Characters 7-12
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	12 occurrences
CLM CD	14035 - SPECIAL CLAIMING CATEGORY (1)	12 occurrences
VEND ID	14023 - VENDOR IDENTIFICATION (8)	12 occurrences
MANUAL ISSUE CHECK NO	14013 - CHECK/ATP/VOUCHER NUMBER (12)	12 occurrences
<b>REPLACE</b>		
LN	14002 - REPLACEMENT PAYMENT LINE NUMBER (2)	
CHK/FSB	14001 - REPLACED CHK/FSB NUMBER (12)	

WINQ25 - Authorization Payment History

Case Name	WINO25	BI	CS120090	AUTHORIZATION Type	PAYMENT ADC	HISTORY Stat	ACTIVE Dist	Date	01/20/03	Page	01 of MM
								Pend NO	PEND	Auth	01000414
								Auth-Period		11/01/01-10/31/02	
Auth No	Action	Period	Type	Meth-Ind	Pay-LN	Amount	Issue	Schedule	Pickup		
01000414	AUTH	01/01/02	PART-AL	UNREST		25.00	ONCE		MAILED		
01000414	AUTH	11/01/01	SHELTER	VENDOR		139.00	RECUR	MONTHLY	MAILED		
01000414	AUTH	11/01/01	FUEL	VEN-BILL		21.00	RECUR	MONTHLY	MAILED		
01000414	AUTH	01/16/02	PART-AL	UNREST		25.00	ONCE		MAILED		
01000414	AUTH	12/16/01	RECUR-G	UNREST		86.00	RECUR	SEMI-MO	MAILED		
01000414	AUTH	01/01/02	FS-ONGNG	UNREST		176.00	RECUR		MAILED		

Figure 24 - Authorization Payment History (WINQ25)

Purpose

Each page of this screen displays up to six authorized payments for a Non-Services case. The most current authorizations are listed first. Authorized payments are displayed on this screen after the case transaction has completed Batch Update. All fields on the screen are protected.

Access

- Entering Selection E and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, or
- Entering E on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7, 9, 10, 14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DESPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

### Screen Field Description - WINQ25

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
CASE NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First 4 characters of district name
AUTH-PERIOD	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
<b>AUTHORIZATION PAYMENT INFORMATION</b>		
AUTH NO	02040 - AUTHORIZATION NUMBER (8)	6 occurrences per page

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ACTION	14009 - LOCAL ACTION CODE (1)	Mnemonic; 6 occurrences per page
TYPE	14010 - PAYMENT TYPE (2)	Mnemonic; 6 occurrences per page
METH PAY	14022 - METHOD OF PAYMENT CODE (2)	Mnemonic; 6 occurrences per page
AMOUNT	14011 - PAYMENT AMOUNT (6)	6 occurrences per page
ISSUE	14045 - PAYMENT ISSUE CODE (1)	Mnemonic; 6 occurrences per page
SCHEDULE	14040 - PAYMENT SCHEDULE (1)	Mnemonic; 6 occurrences per page
PICKUP	14030 - PICK-UP CODE (1)	Mnemonic; 6 occurrences per page
PERIOD	14012 - PAYMENT PERIOD (12)	6 occurrences per page; Formatted as MM/DD/YY-MM/DD/YY
IND LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	6 occurrences per page.
CLCAT	14035 - SPECIAL CLAIMING CATEGORY (1)	Mnemonic 6 occurrences per page.
VEND-ID	14023 - VENDOR IDENTIFICATION (8)	6 occurrences per page.
CHECK-NO	14013 - CHECK/ATP/VOUCHER NUMBER (12)	6 occurrences per page.

WINQ35 - Pending Case - Errors/Warnings

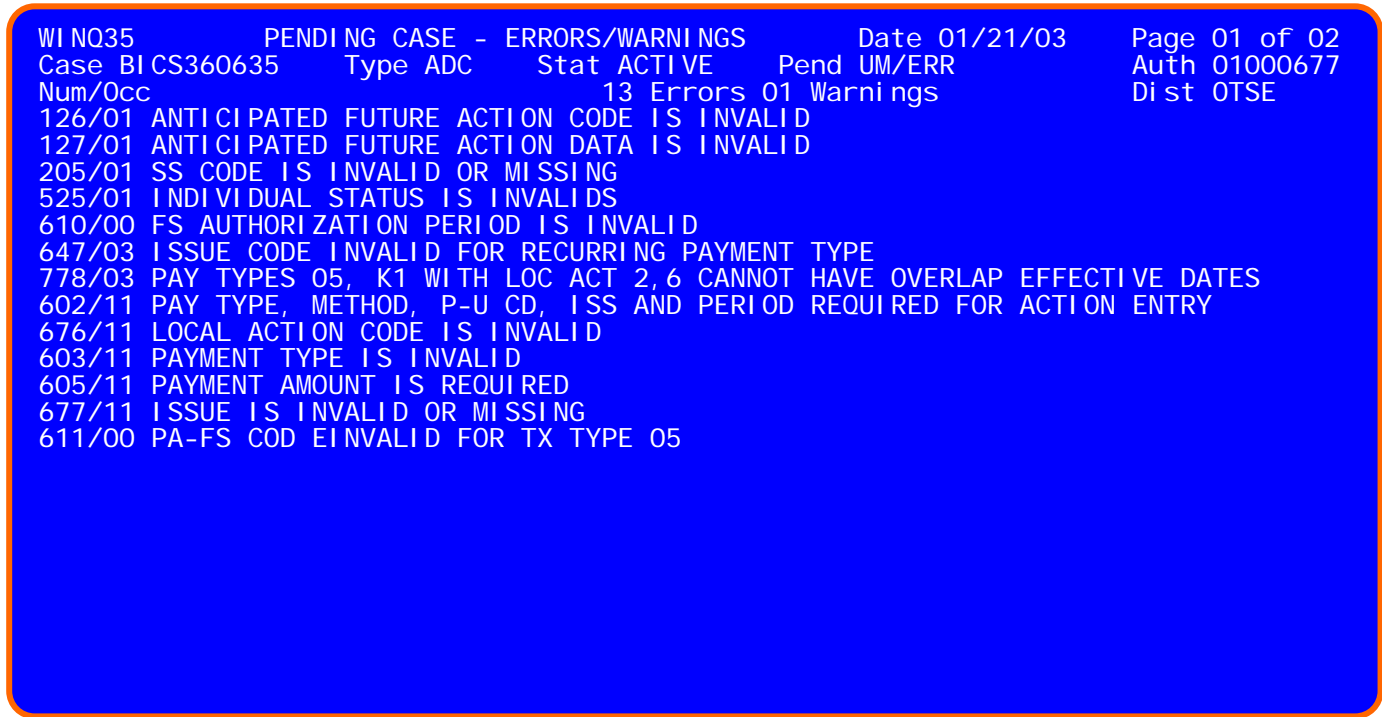


Figure 25 - Pending Case - Errors/Warnings (WINQ35)

Purpose

This screen is comprised of up to three pages which list errors and/or warnings on a pending case record. All fields on this screen are protected.

Access

- Entering F and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F9 from WINQ19-24, 28-30 - Case Comprehensive - Screens 1-9, and WINQ49-54, 58-60 Pending Case Comprehensive - Screens 1-9

Screen Response

Positive

- WINQ35, Page 2 and 3 (if available) when F2 key is pressed. A total of 40 errors and 20 warnings may be displayed on these 3 pages. Page 1 may have up to 20 errors; Page 2 may have up to 20 additional errors or up to 20 warnings if the number of errors on Page 1 is 20 or less; Page 3 may have up to 20 warnings. Warnings are always listed on a separate page
- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7, 10, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F8	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F9	WINQ49 - Pending Case Comprehensive - Screen 1 or the previously displayed Case Comprehensive - Screen
F11 or Ctrl+F1	WINQ01/WINQ02 - Case/Individual Inquiry Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ35

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
ERRORS	NONE	Total Number of Errors
WARNINGS	NONE	Total Number of Warnings
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First 4 characters of district name
<b>ERROR/WARNING INFORMATION</b>		
NUM/OCC	NONE	20 occurrences; Error or warning number followed by its occurrence (location on screen). (For example, 40/20 occurrences where 40 = Error/Warning Number; 20 = Occurrences (location on screen))
ERROR	NONE	20 occurrences; Error or Warning Message.

WINQ05 - Case Address History

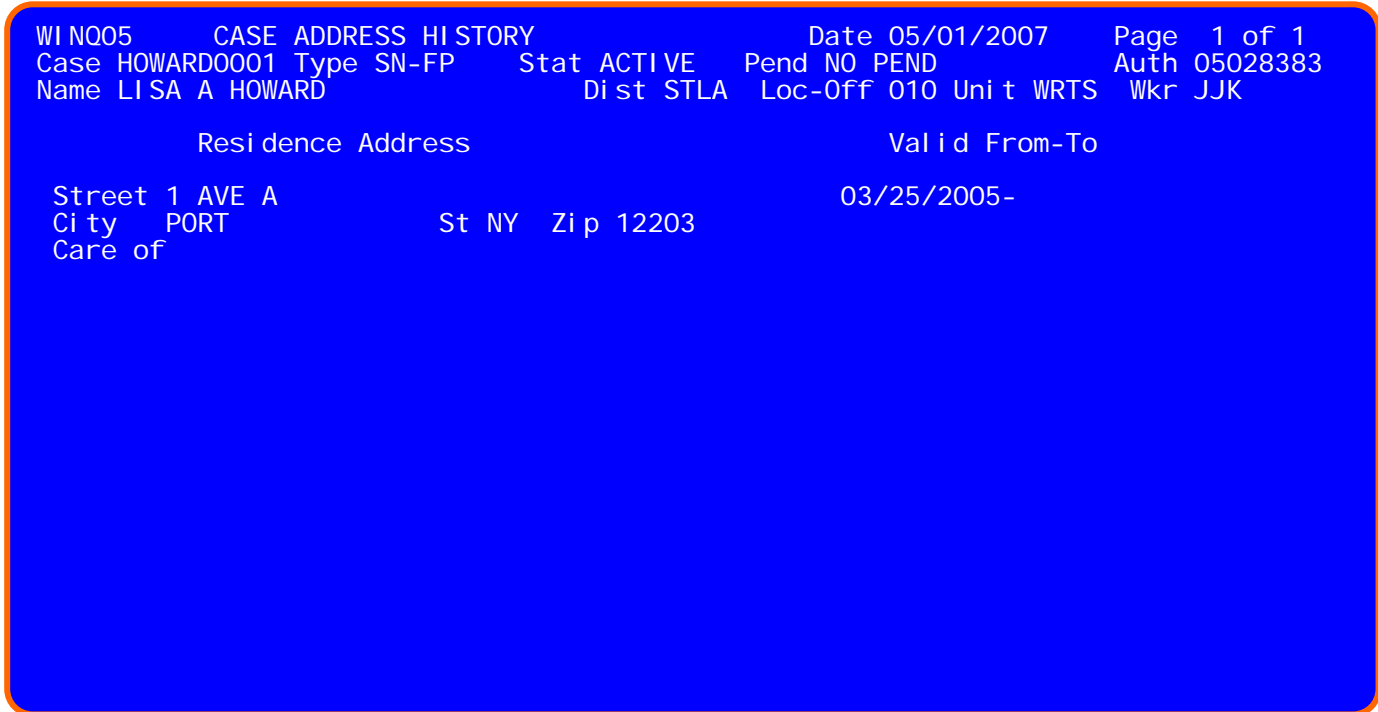


Figure 26 - Case Address History (WINQ05)

Purpose

This screen displays the history of address changes that have been applied to the case. The screen defaults to showing residential addresses first. The user can toggle between mailing addresses and residential addresses using the F4 key. All fields on the screen are protected.

Access

- Entering G and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- NO MAILING ADDRESS AVAILABLE
- SF99 NOT SUPPORTED - REXMT (99 = 5, 7-14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ05 - Case Address History is toggled between displaying mailing and residential addresses.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ05

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First 4 characters of district name
LOC-OFF	01020 - LOCAL OFFICE (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WRKR	01040 - WORKER IDENTIFIER (5)	
<b>RESIDENTIAL ADDRESS INFORMATION - using the F4 key, the user can toggle between residential and mailing addresses.</b>		
STREET	01080 - RESIDENCE STREET (35)	4 occurrences per page
CITY	01082 - RESIDENCE CITY/TOWN (15)	4 occurrences per page

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ST	01083 - RESIDENCE STATE (2)	4 occurrences per page
ZIP	01084 - RESIDENCE ZIP (5)	4 occurrences per page
CARE OF	05110 - IN CARE OF NAME (28)	4 occurrences per page
VALID FROM-TO	02020 - TRANSACTION INPUT DATE (6)	4 occurrences per page
	02020 - TRANSACTION INPUT DATE (6)	4 occurrences per page
<b>MAILING ADDRESS INFORMATION - using the F4 key, the user can toggle between residential and mailing addresses.</b>		
STREET	05120 - MAILING STREET (35)	4 occurrences per page
CITY	05130 - MAILING CITY/TOWN (15)	4 occurrences per page
ST	05140 - MAILING STATE (2)	4 occurrences per page
ZIP	05150 - MAILING ZIP (5)	4 occurrences per page
CARE OF	05110 - IN CARE OF NAME (28)	4 occurrences per page
VALID FROM-TO	02020 - TRANSACTION INPUT DATE (6)	4 occurrences per page
	02020 - TRANSACTION INPUT DATE (6)	4 occurrences per page

WINQ15 - SFED - Client Information

LN	CIN	LOC-OFF	GAS	UNIT	AP-LN	SC/FC	PIN	SERVICES
WINQ15 SFED - CLIENT INFORMATION DATE 04/18/07 PAGE 01 OF 01 CASE # S003 TYPE SERV STAT ACTIVE PEND-STAT UM/ERR AUTH 05012148 NAME ROBERTS DIST STLA AUTH-PER 06/01/00-12/01/00 LOC-OFF 200 UNIT 10 WORKER X APP-DATE 06/01/00 NAME CLCAT ELIG FAM H I ABPW								
02	AW90988A			INST-CRE				FM-PL NHSK-CHO NHSG-IMP
	ROBERTS			JOHN				
	SN	SN		A				
03	AW90989Y			SLF-SUP				CHAP-SER
	ROBERTS			SUE				
	MA	MA		A				

Figure 27 - SFED - Client Information (WINQ15)

Purpose

Each page of this screen displays direct services information on up to four individuals in a Services case. All fields on the screen are protected.

Access

- Entering Selection J and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ45 - Pending SFED - Client Information, **or**
- Entering J on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22 )
  - CIN UNDUP PENDING - NO PEND INQ PERMITTED
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ45 - Pending SFED - Client Information, if pending data exists
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ15

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
<b>INDIVIDUAL (LINE) INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	4 occurrences per page
GAS	23015 - GOAL ACHIEVEMENT STATUS (1)	Mnemonic; 4 occurrences per page
GOAL	23010 - SERVICES GOAL (2)	Mnemonic; 4 occurrences per page
AP-LN	23060 - ASSOCIATED PRIMARY LINE NUMBER (2)	4 occurrences per page.
SC/FC	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	Mnemonic; 4 occurrences per page
PIN	03152 - JD/PINS CODE (1)	Mnemonic; 4 occurrences per page
SERVICES	23021- SERVICE TYPE SUFFIX CODE (1)	Mnemonic; 3 occurrences per line; If available, appears as part of the Service Type mnemonic
	23020 - SERVICE TYPE (2)	Mnemonic; 3 occurrences per line.
NAME	24110 - SURNAME (17)	4 occurrences per page
	24120 - GIVEN NAME (10)	4 occurrences per page
	24130 - MIDDLE INITIAL (1)	4 occurrences per page
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	4 occurrences per page
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	4 occurrences per page.
A	03055 - ASIAN (1)	4 occurrences per page.
B	03056 - BLACK OR AFRICAN AMERICAN (1)	4 occurrences per page.
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	4 occurrences per page.
W	03058 - WHITE OR CAUCASIAN (1)	4 occurrences per page.
CLCAT	23051- CLAIMING CATEGORY (2)	Mnemonic; 4 occurrences per page
ELIG	23050 - SERVICES RECIPIENT ELIGIBILITY CATEGORY (2)	Mnemonic; 4 occurrences per page
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	4 occurrences per page

WINQ45 - Pending SFED - Client Information

LN	CIN	GAS	GOAL	AP-LN	SC/FC	PIN	SERVICES
02	AW90988A ROBERTS SN	SN	INST-CRE JOHN A			Y YYYYY	FM-PL NHSK-CHO NHSG-IMP
03	AW90988Y ROBERTS MA	MA	SLF-SUP SUE A			Y YYYYN	CHAP-SER
04	AX94289V ROBERTS	INC	ALI CE A			Y YYYYY	

Figure 28 - Pending SFED - Client Information (WINQ45)

Purpose

Each page of this screen displays direct services information on up to four individuals in a Services case. All fields on the screen are protected.

Access

- Entering Selection J and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ45 - Pending SFED - Client Information, **or**
- Entering J on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:



- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- NO PENDING RECORD - SF04 INVALID
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- CIN UNDUPLICATE PENDING - NO PENDING INQUIRY PERMITTED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ45 - Pending SFED - Client Information, if pending data exists
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ45

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic First four characters of district name.
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
<b>INDIVIDUAL (LINE) INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	4 occurrences per page
GAS	23015 - GOAL ACHIEVEMENT STATUS (1)	Mnemonic; 4 occurrences per page
GOAL	23010 - SERVICES GOAL (2)	Mnemonic; 4 occurrences per page
AP-LN	23060 - ASSOCIATED PRIMARY LINE NUMBER (2)	4 occurrences per page
SC/FC	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	Mnemonic;c 4 occurrences per page
PIN	03152 - JD/PINS CODE (1)	Mnemonic; 4 occurrences per page
SERVICES	23021- SERVICE TYPE SUFFIX CODE (1)	3 occurrences per line; If available, appears as part of the Service Type mnemonic
	23020 - SERVICE TYPE (2)	Mnemonic; 3 occurrences per line
NAME	24110 - SURNAME (17)	4 occurrences
	24120 - GIVEN NAME (10)	4 occurrences
	24130 - MIDDLE INITIAL (1)	4 occurrences
<b>RACE</b>		
H	03059 - HISPANIC OR LATIN (1)	4 occurrences per page
I	03054 - AMERICAN INDIAN OR ALASKA NATIVE (1)	4 occurrences per page
A	03055 - ASIAN (1)	4 occurrences per page
B	03056 - BLACK OR AFRICAN AMERICAN (1)	4 occurrences per page
P	03057 - HAWAIIAN OR PACIFIC ISLANDER (1)	4 occurrences per page
W	03058 - WHITE OR CAUCASIAN (1)	4 occurrences per page
CLCAT	23051- CLAIMING CATEGORY (2)	Mnemonic ;4 occurrences
ELIG	23050 - SERVICES RECIPIENT ELIGIBILITY CATEGORY (2)	Mnemonic; 4 occurrences
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	4 occurrences

WINQ16 - SFED - Purchase of Service

WINQ16	SFED - PURCHASE OF SERVICE				Date 02/22/2007	Page 01 of 01			
CASE #	SDAY002	TYPE	SERV	STAT	ACTIVE	PEND-STAT	NO PEND	Auth	05028383
NAME	PROGRAM	DEMO		DI ST	STLA	AUTH-PER	01/01/05-07/01/05		
	LOC-OFF		UNIT	VIE	WORKER	VIE	APP-DATE	01/01/05	
PSS	LN	CIN	SERVICE	POS-AUTH-PER	RATE-AMT	PRD	MAX-TIME	METH-PAY	
GOAL	FEE-PORT	PROVIDER ID	ASSOCIATE / PROVIDER NAME	ASSOC CIN					
CHK/VCHR	ANI	LDF/RI	ADDRESS						
NEW POS	02 AX80794N	DC-H-FT	01/01/05-07/01/05	0020.00	DAY	0050	D/W	POS-PR	
S-S-EMP	1.00	00002111	SERVICE 3E						
			99 MAIN ST				CANTON		NY

Figure 29 - SFED - Purchase of Service (WINQ16)

Purpose

Each page of this screen displays information on up to four services purchased in a Services case. All fields on the screen are protected.

Access

- Entering Selection K and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ46 - Pending SFED - Purchase of Service, **or**
- Entering K on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- NO PENDING RECORD - SF04 INVALID
- SF99 - NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- CIN UNDUPLICATE PENDING - NO PENDING INQUIRY PERMITTED
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ46 - Pending SFED - Purchase of Service, if pending data exists
F6	<i>Renders Workstation Inactive</i>
Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the Case Number previously entered appearing in the appropriate field.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ16

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (10)	Mnemonic First four characters of district

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
		name.
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
<b>SERVICE INFORMATION</b>		
PSS	23105 - PURCHASE OF SERVICE STATUS (2)	Mnemonic; 4 occurrences per page
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	4 occurrences per page
SERVICE	23020 - SERVICE TYPE (2)	Mnemonic; 4 occurrences per page.
	23021 - SERVICE TYPE SUFFIX CODE (1)	Mnemonic; If available, appears as part of Service Type. 4 occurrences per page.
POS-AUTH-PER	23110 - POS AUTHORIZATION PERIOD (12)	4 occurrences per page; Formatted as MM/DD/YY-MM/DD/YY
RATE-AMT	23115 - RATE AMOUNT (6)	4 occurrences per page
PRD	23114 - RATE PERIOD (1)	Mnemonic; 4 occurrences per page
MAX-TIME	23111 - MAXIMUM TIME UNITS PER FREQUENCY INTERVAL (6)	4 occurrences per page
METH-PAY	14020 - METHOD OF PAYMENT INDICATOR (2)	Mnemonic; 4 occurrences per page
GOAL	23010 - SERVICE GOAL (2)	Mnemonic; 4 occurrences per page
FEE-PORT	23112 - RECIPIENT FEE PORTION (6)	4 occurrences per page
PROVIDER ID	11140 - SERVICES VENDOR PROVIDER ID NUMBER (8)	4 occurrences per page
ASSOCIATE / PROVIDER NAME	23113 - PROVIDER/VENDOR NAME (28) or 05011 - ASSOCIATED NAME (28)	4 occurrences per page
ASSOC CIN	95557 - DISCHARGE RESOURCE PERSON CIN NUMBER (8)	4 occurrences per page
CHK/VCHR	14013 - CHECK VOUCHER NUMBER (12)	4 occurrences
ANI	95556 - ASSOCIATED NAME INDICATOR (1)	4 occurrences
LDF/RI	95548 - LEVEL OF DIFFICULTY CODE (1)	4 occurrences
	96613 - CODE INDICATING PAYMENT REQUIRES SPECIAL BICS PROCESSING (1)	4 occurrences
ADDRESS	23116 - SERVICE PROVIDER VENDOR ADDRESS or 05020 - ASSOCIATED STREET (35) 05030 - ASSOCIATED CITY/TOWN (15) 05040 - ASSOCIATED STATE (2) 05050 - ASSOCIATED ZIP (5)	4 occurrences

WINQ46 - Pending SFED - Purchase of Service

WINQ46	SFED - PURCHASE OF SERVICE				Date 02/22/2007	Page 01 of 01	
CASE #	SDAY002	TYPE	SERV	STAT ACTIVE	PEND-STAT NO PEND	Auth 05028383	
NAME	PROGRAMDEMO			DI ST STLA	AUTH-PER 01/01/05-07/01/05		
	LOC-OFF	UNIT VIE	WORKER VIE		APP-DATE 01/01/05		
PSS	LN	CIN	SERVICE	POS-AUTH-PER	RATE-AMT PRD	MAX-TIME	METH-PAY
GOAL	FEE-PORT	PROVIDER ID	ASSOCIATE / PROVIDER NAME	ASSOC CIN			
CHK/VCHR	ANI	LDF/RI	ADDRESS				
NEW POS	02 AX80794N	DC-H-FT	01/01/05-07/01/05	0020.00	DAY	0050 D/W	POS-PR
S-S-EMP	1.00	00002111	SERVICE 3E				
			99 MAIN ST			CANTON	NY

Figure 30 - Pending SFED - Purchase of Service (WINQ46)

Purpose

Each page of this screen displays information on up to four services purchased in a pending Services case record. All fields on the screen are protected.

Access

- Entering Selection K, a valid Case Number, and Y in PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ16 - SFED - Purchase of Services.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ16 - SFED Purchase of Service
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

### Screen Field Description - WINQ46

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	.
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (10)	Mnemonic ;First four characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>SERVICE INFORMATION</b>		
PSS	23105 - PURCHASE OF SERVICE STATUS (2)	Mnemonic; 4 occurrences per page
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	4 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	4 occurrences per page
SERVICE	23020 - SERVICE TYPE (2)	Mnemonic; 4 occurrences per page
	23021 - SERVICE TYPE SUFFIX CODE (1)	Mnemonic; 4 occurrences per page; If available appears as part of Service Type.
POS-AUTH-PER	23110 - POS AUTHORIZATION PERIOD (12)	Mnemonic; 4 occurrences per page; Formatted as MM/DD/YY-MM/DD/YY
RATE-AMT	23115 - RATE AMOUNT (6)	4 occurrences per page
PRD	23114 - RATE PERIOD (1)	Mnemonic; 4 occurrences per page
MAX-TIME	23111 - MAXIMUM TIME UNITS PER FREQUENCY INTERVAL (6)	4 occurrences per page
METH-PAY	14020 - METHOD OF PAYMENT INDICATOR (2)	Mnemonic; 4 occurrences per page
GOAL	23010 - SERVICE GOAL (2)	Mnemonic; 4 occurrences per page
FEE-PORT	23112 - RECIPIENT FEE PORTION (6)	4 occurrences per page
PROVIDER ID	11140 - SERVICES VENDOR PROVIDER ID NUMBER (8)	4 occurrences per page
ASSOCIATE / PROVIDER NAME	23113 - PROVIDER/VENDOR NAME (28) or 05011 - ASSOCIATED NAME (28)	4 occurrences per page
ASSOC CIN	95557 - DISCHARGE RESOURCE PERSON CIN NUMBER (8)	4 occurrences per page
CHK/VCHR	14013 - CHECK VOUCHER NUMBER (12)	4 occurrences per page
ANI	95556 - ASSOCIATED NAME INDICATOR (1)	4 occurrences per page
LDF/RI	95548 - LEVEL OF DIFFICULTY CODE (1)	4 occurrences per page.
	96613 - CODE INDICATING PAYMENT REQUIRES SPECIAL BICS PROCESSING (1)	4 occurrences per page
ADDRESS	23116 - SERVICE PROVIDER VENDOR ADDRESS or 05020 - ASSOCIATED STREET (35) 05030 - ASSOCIATED CITY/TOWN (15) 05040 - ASSOCIATED STATE (2) 05050 - ASSOCIATED ZIP (5)	4 occurrences per page



WINQ17 - Services Case Information

```

WINQ17          SERVICES CASE INFORMATION          DATE 02/22/2007          Page 01 of 01
CASE # SDAY002  TYPE SERV      STAT ACTIVE     PEND-STAT NO PEND      Auth 05028383
NAME PROGRAMDEMO          DIST STLA          AUTH-PER 01/01/05-07/01/05
  LOC-OFF              UNIT VIE          WORKER VIE          APP-DATE 01/01/05
MAILING ADDRESS

                                TRANS-TYPE 02
                                TRANS-DATE 01/19/05 REUSE-IND
                                REASON
RELATED CASE # S  TRANSACTING  TRANSACTING
                   F/L UNIT  WKR   F/L UNIT  WKR

                                ANTI CIPATED FUTURE ACTION
                                LN     CODE          DATE

***** INCOME *****
LN  SOURCE  AMT    PERIOD  FAM  ELIG-PROC
01 SAL-WGE   50.00 WEEKLY  A
    
```

Figure 31 - Services Case Information (WINQ17)

Purpose

This screen is the first of at least two screens which provide information on a Services case and the individuals in that case. WINQ17 provides Services case-related data. WINQ18 is the second screen and is described later in this section. All fields on the screen are protected.

Access

- Entering Selection L and a valid Case Number of WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ47 - Pending Services Case Information, **or**
- Entering L on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - CIN UN DUP PENDING - NO PEND INQ PERMITTED
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ47 - Pending Services Case Information, if pending data exists
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ17

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
		comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
TRANS-TYPE	02010 - TRANSACTION TYPE (2)	
LOC-AUTH	02041 - LOCAL AUTHORIZATION NUMBER (8)	
TRANS-DATE	02020 - TRANSACTION INPUT DATE (6)	Formatted as MM/DD/YY.
REUSE-IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	
<b>MAILING ADDRESS</b>		
(NONE)	05110 - IN CARE OF NAME (28)	
(NONE)	05120 - MAILING STREET (35)	
(NONE)	05130 - MAILING CITY/TOWN (15)	
(NONE)	05140 - MAILING STATE (2)	
(NONE)	05150 - MAILING ZIP (5)	
REASON	02050 - REASON CODE (3)	
RELATED CASE # S	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
<b>TRANSACTIONING INFORMATION</b>		
F/L	23123 - SSRR REPORTING CONTROL NUMBER (2)	6 occurrences
UNIT	23122 - SERVICES TRANSACTIONING UNIT (5)	6 occurrences
WKR	23121 - SERVICES TRANSACTIONING WORKER (5)	6 occurrences
<b>ANTICIPATED FUTURE ACTION INFORMATION</b>		
LN	01142 - LINE NUMBER OF INDIVIDUAL WITH AN ANTICIPATED FUTURE ACTION CODE (2)	10 occurrences
CODE	01140 - ANTICIPATED FUTURE ACTION CODE (3)	Mnemonic; 10 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	10 occurrences
<b>INCOME INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	8 occurrences
SOURCE	23126 - SERVICES INCOME SOURCE (2)	Mnemonic; 8 occurrences
AMT	23127 - SERVICES INCOME AMOUNT (7)	8 occurrences
PERIOD	23128 - SERVICES INCOME PERIOD (2)	Mnemonic; 8 occurrences
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	8 occurrences
ELIG-PROC	23055 - SERVICES ELIGIBILITY PROCESS CODE (2)	Mnemonic; 8 occurrences

WINQ47 - Pending Services Case Information

WI NQ47	PENDI NG SERVI CES	CASE I NFORMATION	DATE	02/22/2007	Page 01 of 01
CASE # SDAY002	TYPE SERV	STAT ACTIVE	PEND-STAT	FDE/BU P	Auth 05028383
NAME PROGRAMDEMO		DI ST STLA		AUTH-PER	01/01/05-07/01/05
LOC-OFF	UNIT VIE	WORKER VIE		APP-DATE	01/01/05
MAILI NG ADDRESS					
			TRANS-TYPE	02	
			TRANS-DATE	01/19/05	REUSE-I ND
			REASON		
RELATED CASE # S	TRANSACTI NG	TRANSACTI NG			
	F/L UNIT WKR	F/L UNIT WKR			
			ANTI CI PATED	FUTURE	ACTI ON
			LN	CODE	DATE
***** I NCOME *****					
LN SOURCE	AMT	PERI OD	FAM	ELI G-PROC	
01 SAL-WGE	50.00	WEEKLY	A		

Figure 32 - Pending Services Case Information (WINQ47)

Purpose

This screen is the first of at least two screens which provide information on a pending Services case and the individuals in that case. WINQ47 provides Services case-related data. WINQ48 is the second screen and provides information on pending service eligibility. All fields on the screen are protected.

Access

- Entering Selection L, a valid Case Number and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ17 - Services Case Information

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ17 - Services Case Information
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

#### Screen Field Description - WINQ47

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8))	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
LOC-OFF	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
WORKER	01040 - WORKER IDENTIFIER (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
TRANS-TYPE	02010 - TRANSACTION TYPE (2)	
LOC-AUTH	02041 - LOCAL AUTHORIZATION NUMBER (8)	
TRANS-DATE	02020 - TRANSACTION INPUT DATE (6)	Formatted as MM/DD/YY
REUSE-IND	01051 - CASE NUMBER RE-USE INDICATOR (1)	
<b>MAILING ADDRESS</b>		
(NONE)	05110 - IN CARE OF NAME (28)	
(NONE)	05120 - MAILING STREET (35)	
(NONE)	05130 - MAILING CITY/TOWN (15)	
(NONE)	05140 - MAILING STATE (2)	
(NONE)	05150 - MAILING ZIP (5)	
REASON	02050 - REASON CODE (3)	
RELATED CASE # S	01110 - COOPERATIVE CASE NUMBER (10)	3 occurrences
<b>TRANSACTIONING INFORMATION</b>		
F/L	23123 - SSRR REPORTING CONTROL NUMBER (2)	6 occurrences
UNIT	23122 - SERVICES TRANSACTIONING UNIT (5)	6 occurrences
WKR	23121 - SERVICES TRANSACTIONING WORKER (5)	6 occurrences
<b>ANTICIPATED FUTURE ACTION INFORMATION</b>		
LN	01142 - LINE NUMBER OF INDIVIDUAL WITH AN ANTICIPATED FUTURE ACTION CODE?DATE (2)	10 occurrences
CODE	01140 - ANTICIPATED FUTURE ACTION CODE (3)	Mnemonic; 10 occurrences
DATE	01141 - ANTICIPATED FUTURE ACTION DATE (6)	10 occurrences
<b>INCOME INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	8 occurrences
SOURCE	23126 - SERVICES INCOME SOURCE (2)	Mnemonic; 8 occurrences
AMT	23127 - SERVICES INCOME AMOUNT (7)	8 occurrences
PERIOD	23128 - SERVICES INCOME PERIOD (2)	Mnemonic; 8 occurrences
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	8 occurrences
ELIG-PROC	23055 - SERVICES ELIGIBILITY PROCESS CODE (2)	Mnemonic; 8 occurrences

WINQ18 - Services Workbook 2 - Individual

WINQ18		SERVICES WKBK 2 - INDIV				DATE 02/22/2007	Page 01 of 01	
CASE #	SDAY002	TYPE	SERV	STAT	ACTIVE	PEND-STAT	NO PEND	Auth 05028383
NAME	PROGRAMDEMO			DI	ST STLA			AUTH-PER 01/01/05-07/01/05
								APP-DATE 01/01/05
LN	CIN	FAM	MAR-STAT	STUD-ID	LVNG-ARNG	EM	CITIZEN	ELIG
	NAME				OTH-NAME			
01	AX80793Q	A	SNGL		IN-HH		CZ	INC
	PROGRAMDEMO		DAN					
02	AX80794N	A	SNGL		IN-HH		CZ	INC
	PROGRAMDEMO		DEBBIE					
03	AX80795K	A	SNGL		IN-HH		CZ	INC
	SMITH		JOHN					

Figure 33 - Services Workbook 2 - Individual (WINQ18)

Purpose

This screen is the second of at least two screens which provide information on a Services case and the individuals in that case. WINQ18 displays the services eligibility data for up to five individuals per page. All fields on the screen are protected.

Access

- Entering Selection M and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ48 - Pending Services Workbook 2 - Individual, **or**
- Entering M on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - NO PENDING RECORD - SF04 INVALID
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - CIN UN DUP PENDING - NO PEND INQ PERMITTED
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ48 - Pending Services Workbook 2 - Individual, if pending data exists
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ18

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
117(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First 4 characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
<b>INDIVIDUAL INFORMATION</b>		
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	5 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	5 occurrences per page
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	5 occurrences per page
MAR-STAT	03070 - CURRENT MARITAL STATUS (1)	Mnemonic; 5 occurrences per page
STUD-ID	03185 - STUDENT IDENTIFIER (2)	Mnemonic; 5 occurrences per page
LVNG-ARNG	23090 - LIVING ARRANGEMENT (2)	Mnemonic; 5 occurrences per page
EM	23100 - EMANCIPATED MINOR (1)	5 occurrences per page
CITIZEN	03180 - CITIZENSHIP INDICATOR (1)	Mnemonic; 5 occurrences per page
ELIG	23050 - SERVICES RECIPIENT ELIGIBILITY CATEGORY (2)	Mnemonic; 5 occurrences per page
<b>NAME INFORMATION</b>		
NAME	24110 - SURNAME (17)	5 occurrences per page
	24120 - GIVEN NAME (10)	5 occurrences per page
	24130 - MIDDLE INITIAL (1)	5 occurrences per page
OTH-NAME	03040 - OTHER NAME CODE (1)	Mnemonic; 5 occurrences per page

WINQ48 - Pending Services Workbook 2 - Individual

WINQ48	PENDING	SERVICES	WKBK 2 - INDIV	DATE 02/22/2007	Page 01 of 01			
CASE #	SDAY002	TYPE SERV	STAT ACTIVE	PEND-STAT AT-FDE	Auth 05028383			
NAME	PROGRAMDEMO		DIST STLA	AUTH-PER 01/01/05-07/01/05	APP-DATE 01/01/05			
LN	CIN	FAM	MAR-STAT	STUD-ID	LVNG-ARNG	EM	CITIZEN	ELIG
	NAME				OTH-NAME			
01	AX80793Q	A	SNGL		IN-HH		CZ	INC
	PROGRAMDEMO		DAN					
02	AX80794N	A	SNGL		IN-HH		CZ	INC
	PROGRAMDEMO		DEBBIE					
03	AX80795K	A	SNGL		IN-HH		CZ	INC
	SMITH		JOHN					

Figure 34 - Pending Service Workbook 2 - Individual (WINQ48)

Purpose

This screen is the first of at least two screens which provide information on a Services case pending authorization and the individuals in that case. WINQ48 displays the services eligibility data for any number of individuals. All fields on the screen are protected.

Access

- Entering Selection M, a valid Case Number and Y in the PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ18 - Services Workbook 2 - Individual

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:

- CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ18 - Services Workbook 2 - Individual
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ48

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
(NONE)	02004 - CLOCKDOWN STATUS CODE (1)	Mnemonic; This field is unlabeled and comes immediately after status.
AUTH	02040 - AUTHORIZATION NUMBER (8)	
NAME	01070 - CASE NAME (28)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First 4 characters of district name
AUTH-PER	01100 - AUTHORIZATION PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
<b>INDIVIDUAL INFORMATION</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LN	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	5 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	5 occurrences per page
FAM	23080 - SERVICES FAMILY UNIT IDENTIFIER (1)	5 occurrences
MAR-STAT	03070 - CURRENT MARITAL STATUS (1)	Mnemonic; 5 occurrences
STUD-ID	03185 - STUDENT IDENTIFIER (2)	Mnemonic; 5 occurrences
LVNG-ARNG	23090 - LIVING ARRANGEMENT (2)	Mnemonic; 5 occurrences
EM	23100 - EMANCIPATED MINOR (1)	5 occurrences
CITIZEN	03180 - CITIZENSHIP INDICATOR (1)	Mnemonic; 5 occurrences
ELIG	23050 - SERVICES RECIPIENT ELIGIBILITY CATEGORY (2)	Mnemonic; 5 occurrences
<b>NAME INFORMATION</b>		
NAME	24110 - SURNAME (17)	5 occurrences
	24120 - GIVEN NAME (10)	5 occurrences
	24130 - MIDDLE INITIAL (1)	5 occurrences
OTH-NAME	03040 - OTHER NAME CODE (1)	Mnemonic; 5 occurrences

WINQ27 - Services Local Data Feedback

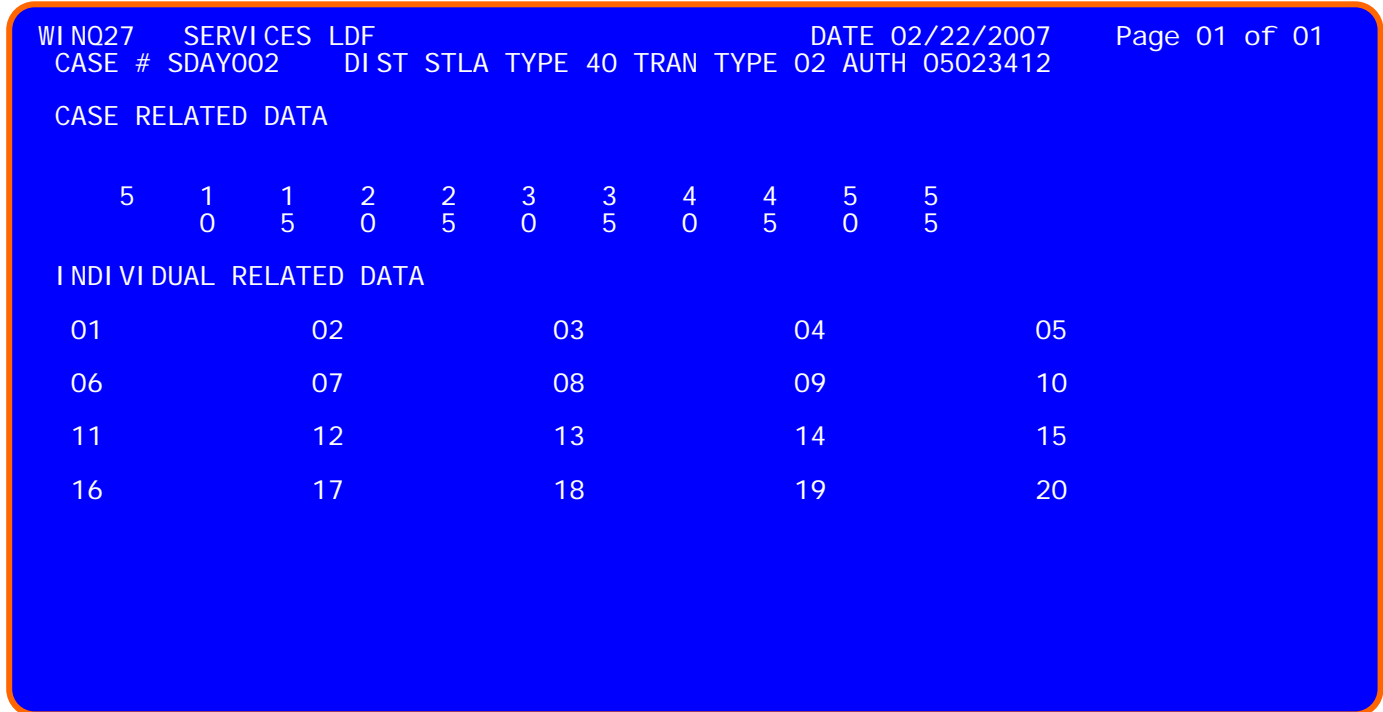


Figure 35 - Services Local Data Feedback (WINQ27)

Purpose

This screen displays LDSS entered information for a Services case. All fields on the screen are protected.

Access

- Entering Selection N and a valid Case Number on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ57 - Pending Services Local Data Feedback, **or**
- Entering N on WINQ12 - Case Involvement

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- NO LDF PENDING DATA EXISTS FOR THIS CASE
- NO PENDING RECORD - SF04 INVALID
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- CIN UNDUP PENDING - NO PEND INQ PERMITTED
- RECORD NOT FOUND
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ57 - Pending Services Local Data Feedback, if pending data exists
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the case number previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ27

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
TYPE	01060 - CASE TYPE (2)	Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>CASE RELATED DATA</b>		

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
(NONE)	24760 - CASE LOCAL DATA (57)	
<b>INDIVIDUAL RELATED DATA</b>		
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	20 occurrences

WINQ57 - Pending Services Local Data Feedback

WI NQ27	PENDI NG	SERVI CES	LDF	DATE	02/22/2007	Page 01 of 01
CASE #	SDAY002	DI ST	STLA	TYPE	40	TRAN TYPE
				02	AUTH	05023412
CASE RELATED DATA						
5	1	1	2	2	3	3
0	0	5	0	5	0	5
INDI VI DUAL RELATED DATA						
01		02		03		04
						05
06		07		08		09
						10
11		12		13		14
						15
16		17		18		19
						20

Figure 36 - Pending Services Local Data Feedback (WINQ57)

Purpose

This screen displays LDSS entered information for a Services case pending record. All fields on the screen are protected.

Access

- Entering Selection N, a valid Case Number and Y in PENDING field on WINQ01/WINQ02 - Application and Case Inquiry Menu, **or**
- F4 from WINQ27 - Services Local Data Feedback

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED



- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ27 - Services Local Data Feedback
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ57

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01050 - CASE NUMBER (10)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
TYPE	01060 - CASE TYPE (2)	Mnemonic
TRANS TYPE	02010 - TRANSACTION TYPE (2)	
AUTH	02040 - AUTHORIZATION NUMBER (8)	
<b>CASE RELATED DATA</b>		
(NONE)	24760 - CASE LOCAL DATA (57)	
<b>INDIVIDUAL RELATED DATA</b>		
(NONE)	24770 - INDIVIDUAL LOCAL DATA (10)	20 occurrences

## Individual, CIN, and SSN Inquiry

### Overview

The lower portion of the inquiry menu, WINQ02, is used to inquire about individuals. A Client Identification Number (CIN), a Social Security Number (SSN) or an individual's name and sex can be used to initiate inquiry. Five types of Individual Inquiry are possible. These are designated as Selections A through E.

### Selections for Individual, CIN and SSN Inquiry

The following is a brief description of each Selection:

#### A - Case Involvement

Selection A returns the **WINQ12 - Case Involvement** screen. This screen displays information about all Active, Closed or Denied cases in which the individual has been or is involved.

This screen allows direct access to any Case Inquiry screen. The selection number for the desired case, 1), 2) or 3) is entered in the CHOOSE 1, 2 or 3 field and the type of Case Inquiry B-F or J - N (described on the preceding pages) is entered in the SELECTION field.

#### B - MA Coverage History

Selection B returns the **WINQ55 - MA Coverage History** screen. This screen displays the history of an individual's MA Coverage in all cases in which the individual has been or is involved.

#### C - Purchase of Service History

Selection C returns the **WINQ60 - Purchase of Service History** screen. This screen displays all services that have been purchased for an individual who has been or is in a Services case.

#### D - Other Identifiers

Selection D returns the **WINQ38 - Other Identifiers Inquiry** screen. This screen displays all "other names" (maiden and/or alias) by which the individual is known in WMS. This screen also displays any prior CINs that the individual may have had as identified by the CIN Consolidation process. **See SRM CIN Assignment and Verification.**

#### E - Client Information

Selection E returns the **WINQ11 - Client Information** screen. This screen displays complete information about an individual in all cases in which the individual has been or is involved.

### Individual Inquiry Using a CIN

On the WINQ02 portion of the inquiry menu, enter a Selection (A through E) and a CIN. An individual CIN search is done for all Upstate clients. To restrict the search to single district, the first four letters of that district are entered in the DIST field. The screen may be transmitted with the cursor at any point on the SELECTION line as long as the cursor is after the last character of the desired entry. After transmitting, the selected screen will be returned. Note that if both a CIN and an SSN are entered, the system will ignore the CIN entry and search only for the SSN.

### Individual Inquiry Using an SSN

On the WINQ02 portion of the inquiry menu, enter a Selection (A through E) and an SSN for an individual with an active or closed status. For an individual who may be applying, leave Selection blank. An individual SSN search is done for all Upstate clients. To restrict the search to a single district, the first four letters of that district are entered in the DIST field. The screen may be transmitted with the cursor at any point on the SELECTION line as long as the cursor is after the last character of the desired entry. Note that if both a CIN *and* an SSN are entered, the system will ignore the CIN entry and search only for the SSN.

After transmitting, the screen that is returned depends on the number of individuals that are found with the same SSN. If only one individual is found, and that individual does not have an Other Name, then the selected screen (A through E) is returned. (If no selection was made, then WINQ12 or WINQ70 is returned.) If two or more individuals are found with the same SSN, or if one individual with an Other Name is found, then the **WINQ14 - ILIST Individual List Response** screen is returned. On this ILIST will be all the individuals who have the SSN that was entered. See the topic **ILIST Selection** below for a description of this screen and how it is used.

### Individual Inquiry Using Name and Sex

On the WINQ02 portion of the inquiry menu screen, enter a name and sex (required), and date of birth (optional). A Name search is made in all Upstate districts. To restrict the search to a single district, the first four letters of that district are entered in the DIST field. The screen may be transmitted with the cursor at any point on the SELECTION line as long as the cursor is after the last character of the desired entry.

The **WINQ14 - ILIST Individual List Response** screen will be returned. On this screen will be all the individuals of the Sex entered who have the exact same Last Name and same *or similar* First Name. The Middle Initial is ignored. If the Date of Birth was entered, then the ILIST will display only those individuals with the same Last Name, same or similar First Name, and the exact same Date of Birth. A partial Date of Birth can be entered i.e., month and year, month and day, year only etc. Year must always include the full four digits, e.g., 1982, not \_\_ \_\_82. See the topic **ILIST Selection** below for a description of this screen and how it is used.

### ILIST Selection

To obtain further information about any one of the individuals on the ILIST, enter his or her line number in the ENTER DESIRED NO field, and the screen selection desired (A - E) in the SELECTION field.

Transmit and the desired screen will be returned. If SELECTION is blank, WINQ12 or WINQ70 is returned.

If the selected individual has APP in APP/CSE column, this indicates that the individual is in an application. The **WINQ70 - Application Inquiry** screen will be returned regardless of the entry in the SELECTION field.

If the selected individual has CSE in the APP/CSE column, this indicates that the individual is involved in one or more cases. The selected screen, A - E, will be returned. If the SELECTION field is left blank, then Selection A - the **WINQ12 - Case Involvement** screen is returned.

WINQ02 - Individual CIN or SSN Inquiry Menu

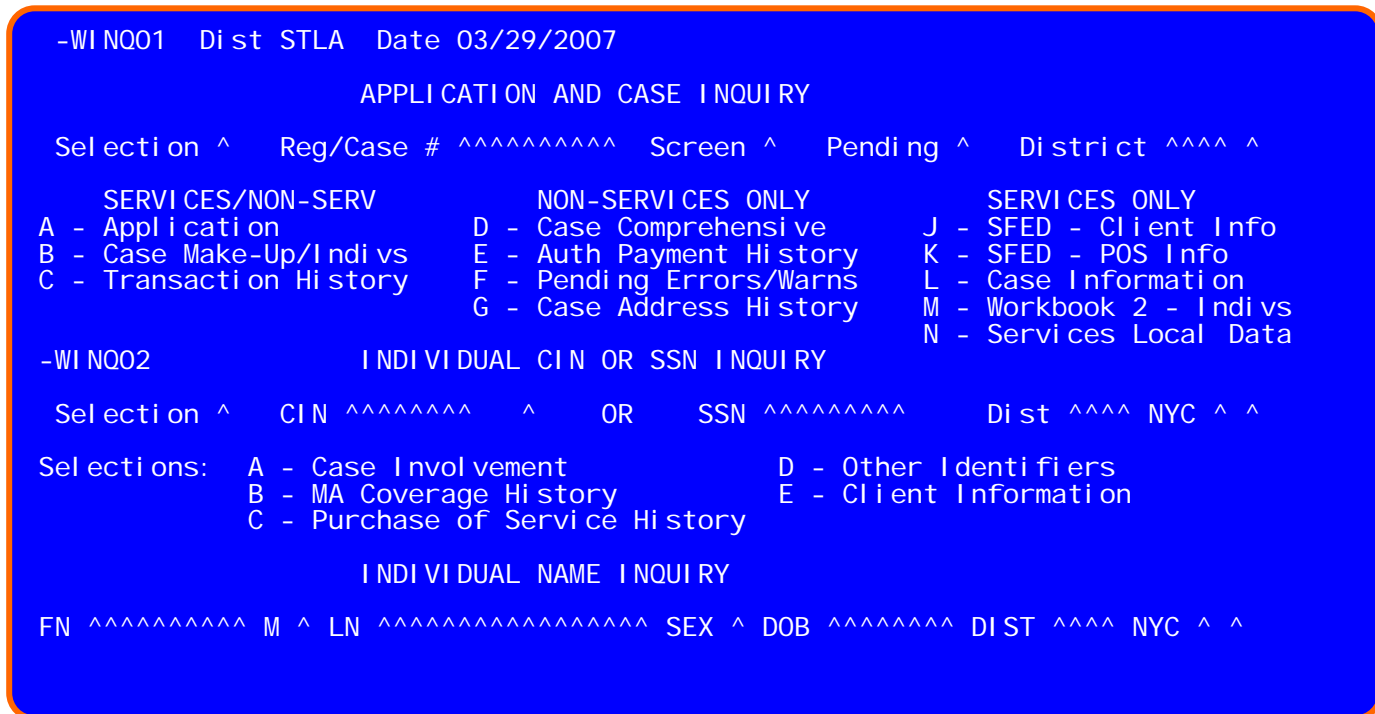


Figure 37 - Individual CIN or SSN Inquiry Menu (WINQ02)

Purpose

The WINQ02 portion of this screen is used to initiate inquiry on an individual.

For INDIVIDUAL NAME INQUIRY, if the DIST field is left blank, the ILIST returns matching individuals from all Upstate districts. When the first four characters of a district are entered in the DIST field, the ILIST will return only those individuals associated with applications or cases in the district entered.

For CIN or SSN INQUIRY, if the DIST field is left blank, all Upstate districts will be searched. When the first four characters of a district are entered in the DIST field, only the district entered will be searched.

Access

- Entering 12 on WMSMNU - Welfare Management System Menu, **or**
- F12 from SIGN-ON COMPLETE, WMSMNU, most Non-Services menus, and from all inquiry screens except W4139R - Auto Closings/Case Conflicts Initiator. See **Function Keys** under each screen for detail, **or**
- F4 from WINQ12 - Case Involvement or WINQ70 - Application Inquiry, if WINQ14 - ILIST Individual List Response was not the previous screen

## Screen Response

### Positive

- Selection A displays WINQ12 - Case Involvement
- Selection B displays WINQ55 - MA Coverage History, if available
- Selection C displays WINQ60 - Purchase of Service History, if available
- Selection D displays WINQ38 - Other Identifiers
- Selection E displays WINQ11 - Client Information
- Individual Name Inquiry displays WINQ14 - ILIST
- SSN or Individual Name Inquiry with a “Y” in NYC on the appropriate line displays WINQ32 - NYC Individual List.

### Negative

- Fields in error return highlighted with one of the following messages on Line 24:
  - CIN NOT FOUND
  - ENTRY FOR CIN OR SSN OR NAME AND SEX REQUIRED
  - ENTRY OF CINNOT ALLOWED FOR NYC OPTION
  - INDIVIDUAL SELECTED HAS NO OTHER NAME/OTHER CIN DATA
  - INVALID CIN
  - NAME NOT FOUND
  - NO ACTIVE INDIVIDUAL FOUND FOR SUPPLIED SSN AND DISTRICT
  - NO INDIVIDUALS FOUND FOR SUPPLIED NAME/SEX
  - NO MA COVERAGE DATA
  - NO PURCHASE OF SERVICE HISTORY FOR THIS INDIVIDUAL
  - OLD CIN ENTERED - NEW CIN IS...
  - SEX REQUIRED ON NAME SEARCH - ENTER F, M OR U
  - SSN NOT FOUND

- UNKNOWN TRANSACTION
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Applications Register
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	KPTMNU - NYS DSS State Central Register System Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WINQ02

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SELECTION	NONE	Valid values are A, B, C, D, or E
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NYC	NONE	NYC Indicator; Must be Y or blank
<b>NAME INFORMATION</b>		
LAST	24110 - SURNAME (17)	
FIRST	24120 - GIVEN NAME (10)	
MI	24130 - MIDDLE INITIAL (1)	
SEX	03050 - SEX (1)	
DOB	03060 - DATE OF BIRTH (8)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic
NYC	NONE	NYC Indicator; Must be Y or blank

WINQ12 - Case Involvement

```

-WINQ12  ** CASE INVOLVEMENT FOR CIN: AB18738F **   Date 10/09/00   Page 01 of 01
Name HOWLETT          AMY          Sex F  SSN 812-55-4392  DOB 06/15/1982
                                FOR CASE INQUIRY: (Choose 1, 2, or 3) ^  Selection ^
Case - Num   Case - Typ   Case-State   Ind-Stat   Case Name
Authorizati on-Period   Auth - Num   Eff-Date   Street Address
Offi ce      Uni t       Pend-MAE/SD  Act-Date   City        St Zip
Dist        Worker    Pend-FS/TBA  Lst-Stat   Telephone   EI

1) IOTRAI N612  NPA-FS      CLOSED      CA-CL      HOWLETT, AMY
08/01/00 -- 09/30/00  01000002   09/30/00  80 ARCHER ST
TOMP        PAL          -           ACT        HELM        NY 12344
                                -           -           -           X

2) IOTRAI N630  NPA-FS      ACTIVE      INA-SN      HOWLETT, AMY
08/01/00 -- 07/31/01  01000398   08/01/00  55 SOUTH ST
DELA        PAL          -           ACT        PORT        NY 12345
                                -           -           -           X

3) IOTRAI N631  MA          ACTIVE      ACT        HOWLETT, AMY
08/01/00 -- 07/31/01  01000011   08/01/00  55 SOUTH ST
DELA        PAL          -           ACT        PORT        NY 12345
                                -           -           -           X

SEARCH COMPLETED
    
```

Figure 38 - Case Involvement (WINQ12)

Purpose

This screen provides an individual's status in all cases in which he or she has ever been associated. It contains up to three cases per page. More extensive information may be obtained using the desired case number for further case inquiries. All fields on the screen are protected.

If a person is involved in more than one case, that person's past and current individual status may be different in each case. The WINQ12 - Case Involvement Inquiry screen contains four fields that provide this Individual Status and selected information for each specific case shown. These four fields are listed below and described in more detail under **Screen Field Description**:

- IND-STAT
- EFF-DATE
- ACT-DATE
- LST-STAT



### Access

- Entering A and a valid CIN or SSN on WINQ02 - Individual CIN or SSN inquiry Menu. If the SSN is associated with more than one individual, or if the individual with the SSN has an Other Name, then the ILIST is returned first, **or**
- Entering a valid line number for an Individual with CSE in APP/CSE field, and entering selection A on WINQ14 - ILIST Individual List Response. If this screen was obtained from WINQ14 - ILIST by entering a Line Number for an individual with an O in the OTH NAM column on WINQ14, then this screen will display that individual's prime name on the top of this screen, **or**
- Entering a valid CIN on WEMMNU - Employment Menu and selecting Case/Individual Inquiry, **or**
- Entering 12 in FUNCTION along with Case Number, CIN, and District (optional) on the WIDMNU - WMS ID Card Menu, **or**
- Entering 10 in FUNCTION and a valid CIN on WIDMNU - WMS ID Card Menu

### Screen Response

#### Positive

- If Case 1, 2, or 3 is chosen, then the following case Inquiry screens can be accessed:
  - Selection blank or A displays WINQ07/WINS07 - WMS Case Inquiry, or
  - Selection C displays WINQ08 - Transaction Disposition History, or
  - Selection D displays WINQ19 - Case Comprehensive - Screen 1, or
  - Selection E displays WINQ25 - Authorization Payment History, or
  - Selection F displays WINQ35 - Pending Case - Errors/Warnings, or
  - Selection J displays WINQ15 - SFED - Client Information, or
  - Selection K displays WINQ16 - SFED - Purchase of Service, or
  - Selection L displays WINQ17 - Services Case Information, or
  - Selection M displays WINQ18 - Services Workbook 2 - Individual, or
  - Selection N displays WINQ27 - Services Local Data Feedback

#### Negative

- One of the following messages on Line 24:
  - CASE CHOICE ENTRY REQUIRED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- INVALID CASE CHOICE ENTRY
- INVALID SELECTION ENTRY
- NON-SVC INQUIRY SELECTED FOR A SERVICES CASE
- SERVICES INQUIRY SELECTED FOR A NON-SVC CASE
- SF-99 NOT SUPPORTED - REMXT (99 = 7-11, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	Displays ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F5	WEMMNU - Employment Menu with CIN (and Case Number if originally entered on WEMMNU) appearing in appropriate fields if WINQ12 was obtained from WEMMNU or WIDMNU - WMS ID Card menu if WINQ12 was obtained from WEMMNU
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F3	KPTMNU - NYSDSS State Central Register System Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ12

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Format is 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Format is MM/DD/CCYY
FOR CASE INQUIRY (CHOOSE 1, 2, OR 3)	NONE	1, 2, or 3 representing the cases on the screen.
SELECTION	NONE	User enters blank, A, C, D, E, J, K, L, M, or N
<b>INDIVIDUAL INFORMATION</b>		
(NONE)	NONE	System generated number
CASE - NUM	01050 - CASE NUMBER (10)	3 occurrences
CASE-TYP	01060 - CASE TYPE (2)	Mnemonic; 3 occurrences
CASE—STAT	02090 - CASE STATUS (2)	Mnemonic; 3 occurrences
IND-STAT	03120 - INDIVIDUAL STATUS (2)	Mnemonic; 3 occurrences; This field contains then mnemonic for the current Individual Status of the person in the specific case shown.
CASE NAME	01070 - CASE NAME (28)	3 occurrences
AUTHORIZATION-PERIOD	01100 - AUTHORIZATION PERIOD	3 occurrences; Formatted as MM/DD/YY - - MM/DD/YY
AUTH - NUM	02040 - AUTHORIZATION NUMBER (8)	3 occurrences
EFF-DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	3 occurrences; Formatted as MM/DD/YY; This field contains the date that the person received their current Individual Status in the specific case shown.
STREET ADDRESS	01080 - RESIDENCE STREET (35)	3 occurrences
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	3 occurrences
UNIT	01030 - UNIT IDENTIFIER (5)	3 occurrences
PEND MAE/SD	24395 - PENDING MA EXT/SEPARATE DETERMINATION CASE NUMBER (10)	3 occurrences
ACT-DATE	03119 - CLIENT ACTIVE DATE (6)	3 occurrences; Formatted as MM/DD/YY; This field contains the date that the person last became active, i.e., has an Individual Status of 07, 08, or 10.
CITY	01082 - RESIDENCE CITY/TOWN (15)	3 occurrences
ST	01083 - RESIDENCE STATE (2)	3 occurrences
ZIP	01084 - RESIDENCE ZIP (5)	3 occurrences
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; 3 occurrences; First four characters of district name
WORKER	01040 - WORKER IDENTIFIER (5)	3 occurrences
PEND FS/TBA	24395 - PENDING MA EXT/SEPARATE DETERMINATION CASE NUMBER (10)	3 occurrences
LST-STAT	03117 - LAST INDIVIDUAL STATUS (2)	Mnemonic; 3 occurrences; This field contains the mnemonic for the person's Individual Status just prior to their current Individual Status in the specific case shown. This field may be blank if the person's Individual Status has never changed in the specific case shown.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
TELEPHONE	01085 - TELEPHONE NUMBER (10)	3 occurrences
EI	09300 - EMPLOYMENT RECORD IND. (1)	3 occurrences

Individual Status Information on WINQ12

If Last Transaction Type (DE #02010) Of Case Was:	And Person's Individual Status (DE #03120) In Case Is Now:	Then the Following Fields on WINQ12 Will Be:			
		IND-STAT Individual Status (DE #03120)	LST-STAT Last Status (DE #03117)	EFF-DATE Client Status Effective Date (DE # 03118)	ACT-DATE Client Active Date (DE #03119)
02, 09, 10 or 11	07, 08 or 10	07, 08 or 10	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.	Auth Period From Date	Auth Period From Date
	11, 13 or 15	11, 13 or 15	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.)	Auth Period From Date. If the Individual Status is 13-Deceased, then the Client Status Effective Date (Date of Death) was a required entry on screen 05 and that date is used.	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.
01	11	11	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.	Auth Period From Date. If the Individual Status is 13-Deceased, then the Client Status Effective Date (Date of Death) was a required entry on screen 05 and that date is used. For an Application Denial (Transaction Type 01), the Application Denial Date becomes the Authorization Period From Date.	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last

If Last Transaction Type (DE #02010) Of Case Was:	And Person's Individual Status (DE #03120) In Case Is Now:	Then the Following Fields on WINQ12 Will Be:			
		IND-STAT Individual Status (DE #03120)	LST-STAT Last Status (DE #03117)	EFF-DATE Client Status Effective Date (DE # 03118)	ACT-DATE Client Active Date (DE #03119)
					became active.
03	11, 13 or 15	11, 13 or 15	If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.	Auth Period From Date. If the Individual Status is 13-Deceased, then the Client Status Effective Date (Date of Death) was a required entry on screen 05 and that date is used.	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.
	07, 08, 10, 13 or 15 (Was not changed)	07, 08, 10, 13 or 15	Remains as it was prior to transaction	Remains as it was prior to transaction	Remains as it was prior to transaction
05 or 06	13, 15 (Changed from 07, 08 or 10)	13 or 15	Previous Individual Status (07, 08 or 10)	Auth Period From Date. If the Individual Status is 13-Deceased, then the Client Status Effective Date (Date of Death) was a required entry on screen 05 and that date is used.	Remains as it was prior to transaction
	07, 08, 10 or 11 Individual added	07, 08, 10 or 11	Blank. If a person who was a member of a closed or denied case is included in a new case which re-uses the Case Number of the closed or denied case, then the Last Status of that person in the new case will be whatever Individual Status they has just prior to the first case being closed or denied. If that status was 07, 08 or 10, then the Client Active Date will be the date that the person last became active.	Auth Period From Date.	Auth Period From Date

If Last Transaction Type (DE #02010) Of Case Was:	And Person's Individual Status (DE #03120) In Case Is Now:	Then the Following Fields on WINQ12 Will Be:			
		IND-STAT Individual Status (DE #03120)	LST-STAT Last Status (DE #03117)	EFF-DATE Client Status Effective Date (DE # 03118)	ACT-DATE Client Active Date (DE #03119)
07, 08 or 12	13, 15 or 20	13, 15 or 20	Previous Individual Status	Auth Period To Date. If the Individual Status is 13-Deceased, then the Client Status Effective Date (Date of Death) was a required entry on screen 05 and that date is used.	Remains as it was prior to transaction

WINQ55 - MA Coverage History

WINQ55 MA COVERAGE HISTORY									
Name	Sex	CIN	SSN	DOB	Date	Page	Cont	Cov	Dt SP
PRI NCETON	F	AB18717S	221-66-1170	09/11/1981	04/23/2000	01 of 01	02/01/2000		C
Auth No.	Case-No.	Di st	Begin	End	Catgrcl	Aid State/Fed	Medicaid	Coverage	IS
01000069	I QTRAI N602	DELA	02/01/00	01/31/01	NO-DEPR		OPAT-COV		
01000001	I QTRAI N602	DELA	02/01/00	01/31/01	NO-DEPR		FUL-COVR		

Figure 39 - MA Coverage History (WINQ55)

**Purpose**

Each page of this screen displays up to 14 MA Coverage Authorizations for an individual. The most current authorization is listed first. All fields on the screen are protected.

An asterisk (\*) in the field labeled CU indicates that the coverage shown is from a deleted CIN that was consolidated with the retained CIN for this individual. The message \*POSTED THROUGH CIN UNDUPLICATION will appear on line 23.

MA Coverage Authorizations are posted to the WMS Database by the Batch Update process which processes pending records or by the CIN Consolidation process.

**Access**

- Entering B and a valid CIN or SSN on WINQ02 - Individual CIN or SSN Inquiry Menu. If the SSN is associated with more than one individual or the individual with the SSN has an Other Name, then the ILIST is returned, **or**
- Entering a valid line number of an individual with CSE in the APP/CSE field, and entering selection D on WINQ14 - ILIST. If this screen was obtained from WINQ14 - ILIST by entering a Line Number for an individual with an O in the OTH NAM column on WINQ14, then this screen will display that individual's prime name on the top of this screen.



### Screen Response

#### Positive

- See **Function Keys**.

#### Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

### Printed Response

None

### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	Displays ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F5	WINQ55 – Same as previous screen except: Audit dt. has replaced Auth No.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ55

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
SEX	03050 - SEX (1)	
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY
CONT COV DT	03043 - MA CONTINUOUS COVERAGE DATE (8)	Formatted as MM/DD/CCYY
SP	03076 - CHAFEE INDICATOR (1)	Formatted as C
<b>AUTHORIZATION INFORMATION</b>		
AUTH NO.	02040 - AUTHORIZATION NUMBER (8)	14 occurrences per page
AUDIT DT.	24070 - AUDIT DATE (8)	Occurs after SF5 is used
CASE-NO.	01050 - CASE NUMBER (10)	14 occurrences per page
DIST	01010 - TRASACTION DISTRICT (2)	14 occurrences per page
<b>MA COVERAGE DATES</b>		
BEGIN	21110 - RECIPIENT MEDICAID COVERAGE DATES (12)	14 occurrences per page; Characters 1-6. Formatted as MM/DD/YY
END		14 occurrences per page; Characters 7-12; Formatted as MM/DD/YY
CU	24861 - UNDUPLICATION FLAG (1)	14 occurrences per page; Blank
CATGRCL CODE	03110 - INDIVIDUAL CATEGORICAL CODE (2)	Mnemonic; 14 occurrences per page
AID CAT	21010 - RECIPIENT AID CATEGORY (2)	14 occurrences per page
STATE/FED CHARGE	03150 - STATE CHARGE/FEDERAL CHARGE INDICATOR (2)	Mnemonic; 14 occurrences per page
MEDICAID COVERAGE	21090 - RECIPIENT MEDICAID COVERAGE (2)	Mnemonic; 14 occurrences per page
IS	03120 - INDIVIDUAL STATUS (2)	Mnemonic; 14 occurrences

WINQ60 - Purchase of Service History

WI NQ60	PURCHASE OF SERVICE HISTORY				DATE	PAGE	
NAME	SEX	CIN	SSN	DOB	01	OF	01
ROBERTS	JOHN	M	AW90988A	-	-	01/01/1985	
AUTH-NO	SERVI CE	POS-AUTH-PER	RATE-AMT	PRD	MAX-TIME	METH-PAY	PSS
CHECK/VCHR	GOAL	FEE-PORT ANI	LDF/RI	PROV-ID	ASSOCIATE /	PROVI DER	NAME
ASSOC CIN	CLCAT	CASE #	DI ST	ASSOCIATE /	PROVI DER	ADDRESS	
05012148	NHSK-CHO	06/01/05-12/01/05	0020.00	HR	0051 H/D	POS-PR	MOD-POS
	INST-CRE		99		LULFORD, JOANNE		
	SN	S003	STLA	55 WATER ST.		CANTON	NY
05006500	NHSK-CHO	01/01/05-07/01/05	0020.00	HR	0051 H/D	POS-PR	NEW POS
	INST-CRE		99		LULFORD, JOANNE		
	SN	S003	STLA	55 WATER ST.		CANTON	NY
05002863	NHSK-CHO	04/02/04-10/02/04	0035.00	WK	0020 W/M	POS-PR	
	INST-CRE	P	PREALTY				
	SN	S003	STLA	VENDOR RECORD NOT ON LDMI			

Figure 40 - Purchase of Service History (WINQ60)

Purpose

This screen displays a record of services purchased for an individual involved in a Services case. Up to 4 purchased services are shown on each page. Multiple pages of purchased services information are available. All fields on the screen are protected.

Access

- Entering C and a valid CIN or SSN on WINQ02 - Individual CIN or SSN Inquiry Menu. If the SSN is associated with more than one individual or the individual with the SSN has an Other Name, then the ILIST is returned, **or**
- Entering a valid line number of an individual with CSE in the APP/CSE field, and entering selection D on WINQ14 - ILIST Individual List Response. If this screen was obtained from WINQ14 - ILIST by entering a Line Number for an individual with an O in the OTH NAM column on WINQ14, then this screen will display that individual's prime name on the top of this screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WINQ14 - Displays ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ60

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
SEX	03050 - SEX (1)	
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
AUTH-NO	02040 - AUTHORIZATION NUMBER (8)	4 occurrences per page
SERVICE	23020 - SERVICE TYPE (2)	Mnemonic; 4 occurrences per page
DIST	23021 - SERVICE TYPE SUFFIX CODE (1)	4 occurrences per page; If available, appears as part of Service Type Mnemonic
POS-AUTH-PER	23110 - POS AUTHORIZATION PERIOD (12)	4 occurrences per page; Formatted as MM/DD/YY-MM/DD/YY
RATE-AMT	23115 - RATE AMOUNT (6)	4 occurrences per page
PRD	23114 - RATE PERIOD (1)	Mnemonic; 4 occurrences per page
MAX-TIME	23111 - MAXIMUM TME UNITS PER FREQUENCY INTERVAL (6)	4 occurrences per page
METH-PAY	14020 - METHOD OF PAY IND (2)	Mnemonic; 4 occurrences per page
PSS	23105 - PURCHASE OF SERVICE STATUS (2)	Mnemonic; 4 occurrences per page
CHECK/VCHR	14013 - CHECK VOUCHER NUMBER (12)	4 occurrences per page
GOAL	23010 - SERVICE GOAL (2)	Mnemonic; 4 occurrences per page
FEE-PORT	23112 - RECIPIENT FEE PORTION (6)	4 occurrences per page
ANI	95556 - ASSOCIATED NAME INDICATOR (1)	4 occurrences per page
LOD	95548 - LEVEL OF DIFFICULTY (1)	4 occurrences per page
PROV-ID	21068 - PROVIDER IDENTIFICATION NO (8)	4 occurrences per page
ASSOCIATE / PROVIDER NAME	23113 - PROVIDER/VENDOR NAME (28) or 05011 - ASSOCIATED NAME (28)	4 occurrences per page
ASSOC CIN	95557 - DISCHARGE RESOURCE PERSON CIN NUMBER (10)	4 occurrences per page
CLCAT	23051 - CLAIMING CATEGORY (2)	Mnemonic; 4 occurrences per page
CASE #	01050 - CASE NUMBER (10)	4 occurrences per page
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; 4 occurrences per page
ASSOCIATE / PROVIDER ADDRESS	23116 - SERVICES PROV VENDOR ADDRESS (4) or 05020 - ASSOCIATED STREET (35) 05030 - ASSOCIATED CITY/TOWN (15) 05040 - ASSOCIATED STATE (2) 05050 - ASSOCIATED ZIP (5)	4 occurrences per page

WINQ38 - Other Identifiers Inquiry

WI NQ38	OTHER IDENTIFIERS INQUIRY			Date	04/20/00	Page 01 of 01			
Name	JONES	Sex	J F	CIN	AB188292	SSN	148-91-6621	DOB	08/16/1976
	OTHER NAMES:			DELETED CINS:					
Code	Last	First	MI	Prior CIN	Undup	Date	Dist		
A AKA	JONES	DONNA							

Figure 41- Other Identifiers Inquiry (WINQ38)

Purpose

This screen displays a list of all OTHER NAMES (up to 12 per page) for an individual, and shows prior CINs that the individual may have had. All fields on the screen are protected.

Access

- Entering D and a valid CIN or SSN (If SSN is associated with more than one individual, or if the individual with the SSN has an Other Name, the ILIST is returned.) on WINQ02 - Individual CIN or SSN Inquiry Menu, **or**
- Entering a valid line number of an individual with CSE in the APP/CSE field, and entering selection D on WINQ14 - ILIST Individual List Response. If this screen was obtained from WINQ14 - ILIST by entering a Line Number for an individual with an O in the OTH NAM column on WINQ14, then this WINQ38 screen will display that individual's prime name on the top of this screen and will display that individual's "other" names (maiden and/or alias) under OTHER NAMES.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	Displays ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ38

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
SEX	03050 - SEX (1)	
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>OTHER NAMES</b>		
CODE	03040 - OTHER NAME CODE (1)	Mnemonic; 12 occurrences ; Also shows code
LAST	03041 - OTHER NAME (FIRST) (10)	12 occurrences; Characters 12-28
FIRST	03041 - OTHER NAME (MI) (1)	12 occurrences; Characters 1-10
MI	03041 - OTHER NAME (LAST) (17)	12 occurrences; Character 11
<b>DELETED CINS</b>		
PRIOR CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	12 occurrences
UNDUP DATE	03021 - CONSOLIDATION DATE (6)	12 occurrences; Formatted as MM/DD/YY
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic ;12 occurrences



WINQ11 - Client Information

```

WI NQ11      CLIENT INFORMATION      Date 05/02/2007      Page 1 of 1
Name        JOHN                      Sex      M          CIN      AW90988A      SSN
ROBERTS
CASE INFORMATION:
Case # S003      Type SERV      Stat ACTIVE      Pend-Stat UM/ERR      Auth 05012148
Dist STLA      Loc-Off 200      Unit 10      Auth-Period 06/01/00-12/01/00
Fiscal STLA      Wkr X      SCN      Reason Codes      PA-FS Cd
Name ROBERTS
Addr 56 ASH
ALBANY      NY 12210      PA/MA
PA/FS      Transaction
Phone      Type RECRT
Date 06/11/00
OTHER INDIVIDUAL INFORMATION:
Ind-Stat ACT      TPHI      SC      Categorical      SSF
Mar-Stat MRD      Citizen      CZ      Employ
Emp-Ind      SSN App Date
PA/MA Eff-Date 04/02/00      PA/MA Indv Reas
FS Eff-Date / /      FS Indv Reas
    
```

Figure 42 - Client Information (WINQ11)

Purpose

This screen provides individual identifying data with case-related information. A separate page is used for each case in which the individual is associated. All fields on the screen are protected.

Access

- Entering E and a valid CIN or SSN (If SSN is associated with more than one individual, then the ILIST is returned.) on WINQ02 - Individual CIN OR SSN Inquiry Menu, **or**
- Entering a valid line number of an individual with CSE in the APP/CSE field in the ENTER DESIRED NO field, and entering selection E on WINQ14 - ILIST Individual List Response, **or**
- If this screen was obtained from WINQ14 - ILIST Individual List Response by entering a Line Number for an individual with an O in the OTH NAM column on WINQ14, then this screen will display that individual's prime name on the top of this screen and will display that individual's "other" names (Maiden and/or alias) under OTHER NAMES.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-11, 13, 14, 17-22)
  - XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	Displays ILIST if ILIST was previous screen, else WINQ01/WINQ02 - Case/Individual Inquiry Menu.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ11

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
SEX	03050 - SEX (1)	
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>CASE INFORMATION</b>		
CASE #	01050 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND-STAT	24040 - PENDING DATA STATUS (2)	Mnemonic
AUTH	02040 - AUTHORIZATION NUMBER (8)	
DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; First four characters of district name
LOC-OFF	01020 - LOCAL OFFICE NUMBER(3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
AUTH PERIOD	01100 - AUTHORIZATION PERIOD	Formatted as MM/DD/YY-MM/DD/YY
FISCAL	01011 - FISCAL DISTRICT (2)	Mnemonic; First four characters of district name; When blank no screen caption is displayed
WKR	01040 - WORKER IDENTIFIER (5)	When blank no screen caption is displayed
SCN	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	
NAME	01070 - CASE NAME (28)	
ADDR	01080 - RESIDENCE STREET (28)	
	01082 - RESIDENCE CITY/TOWN (15)	
	01083 - RESIDENCE STATE (2)	
	01084 - RESIDENCE ZIP (5)	
<b>REASON CODES</b>		
REASON CODES	02050 - REASON CODE (3)	Mnemonic Code is also shown; When blank no screen caption is displayed
PA/MA	02005 - PA/MA REASON CODE (3)	Mnemonic Code is also shown; When blank no screen caption is displayed
PA/FS	02006 - PA/FS REASON CODE (3)	Mnemonic Code is also shown; When blank no screen caption is displayed
PA-FS CD	01130 - PUBLIC ASSISTANCE - FOOD STAMP CODE (2)	Mnemonic; When blank no screen caption is displayed
<b>TRANSACTION</b>		
TYPE	02010 - TRANSACTION TYPE (2)	Mnemonic
DATE	02020 - TRANSACTION INPUT DATE (6)	Formatted as MM/DD/YY
PHONE	01085 - TELEPHONE NUMBER (10)	
<b>OTHER INDIVIDUAL INFORMATION</b>		
IND-STAT	03120 - INDIVIDUAL STATUS (2)	Mnemonic; When blank no screen caption is displayed
TPHI	03067 - THIRD PARTY HEALTH INSURANCE CODE (1)	When blank no screen caption is displayed
SC	24025 - ELECTRONIC DOCUMENT INDICATOR (1)	When blank no screen caption is displayed
CATEGORICAL	03110 - INDIVIDUAL CATEGORICAL CODE (2)	Mnemonic; When blank no screen caption is displayed
SSF	00163 - UNIQUE POPULATION CODE (1)	When blank no screen caption is displayed.
MAR-STAT	03070 - CURRENT MARITAL STATUS (1)	Mnemonic; When blank no screen caption is displayed
CITIZEN	03180 - CITIZEN INDICATOR (1)	Mnemonic; When blank no screen caption is displayed
EMPLOY	03190 - EMPLOYABILITY CODE (2)	Mnemonic
EMP-IND	09300 - EMPLOYMENT RECORD INDICATOR (1)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SSN APP DATE	03001 - SOCIAL SECURITY NUMBER APPLICATION DATE (6)	Date client applied for Social Security Number; Formatted as MM/DD/YY
PA/MA EFF-DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	Formatted as MM/DD/YY
PA/MA INDV REAS	03121 - PA/MA INDIVIDUAL REASON CODE (3)	Mnemonic
FS EFF-DATE	03049 - FS INDIVIDUAL REASON CODE EFFECTIVE DATE (8)	Formatted as MM/DD/YY
FS INDV REAS	03049 - FS INDIVIDUAL REASON CODE (3)	Mnemonic

WINQ14 - ILIST Individual List Response

WINQ14		ILIST - INDIVIDUAL LIST RESPONSE				Date	04/20/07		Page 01 of 01	
Enter desired no. ^^ Selection ^										
Oth	Name	SSN	CIN	Sex	DOB	App/Cse	App-Dist			
Nam	First	MI	Last							
01	A	JAN	BACHELL	696-44-7198		F	07/03/1976	APP	DELA	
02		JAN	BACHELL	045-62-1354		F	12/25/1985	APP	CLIN	
03	M	JANE	BACHELL	025-63-2145		F	02/25/1980	APP	DELA	
04		JUNE	BACHELL			F	02/24/1964	APP	NASS	
05		JAHN	E BACHELL	117-39-4238	AB18731W	F	07/04/1964	CSE		
06		JAYNE	BACHELL	772-49-7112		F	08/08/1961	APP	TIOG	

SEARCH COMPLETED

Figure 43 - Individual List Response (WINQ14)

Purpose

This screen displays minimal identifying information for all individuals who match the data entered on the individual Name or SSN Inquiry lines on WINQ02. Up to 17 individuals will appear per ILIST page. The order in which individuals are displayed on the screen is random. All fields on this screen are protected.

In the field entitled APP/CSE, APP indicates that the individual is on an application. If an individual is involved in multiple applications, he or she will be listed once for each application. CSE indicates that the individual is in one or more Active, Closed or Denied cases. In the field entitled APP-DIST, the district in which the individual is applying is listed.

If a name on the ILIST has an A or M in the OTH NAME (Other Name) column, it means that the person shown on that line has an alias (A) or a maiden name (M). If a name on the ILIST has an O in the OTH NAME column, it means that the name shown is an individual's Other Name (Maiden Name or Alias) and not the Prime Name.

Access

- Entering a valid First and Last Name, and Sex Code, or SSN, on WINQ02 - Individual CIN or SSN Inquiry Menu, **or**
- F4 from WINQ12 - Case Involvement, WINQ55 - MA Coverage History, WINQ60 - Purchase of Service History, WINQ38 - Other Identifiers Inquiry, WINQ11 - Client Information, or WINQ70 - Application Inquiry if WINQ14 - ILIST Individual List Response was previous screen.

## Screen Response

### Positive

- If the Individual selected has an APP in APP/CSE field, then screen WINQ70 - Application Inquiry is displayed, or
- If the Individual selected has CSE in APP/CSE field, then one of the following screens can be accessed:
  - Selection blank or A displays WINQ12 - Case Involvement, or
  - Selection B displays WINQ55 - MA Coverage History, or
  - Selection C displays WINQ60 - Purchase of Service History, or
  - Selection D displays WINQ38 - Other Identifiers Inquiry, or
  - Selection E displays WINQ11 - Client Information.

### Negative

- The field after the message ENTER DESIRED NO. is returned highlighted with the message LINE NO. INVALID:
  - CROSS DISTRICT APPLICATION INQUIRY NOT ALLOWED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - ENTRY OF LINE NO REQUIRED
  - INDIVIDUAL SELECTED HAS NO OTHER NAME/OTHER CIN DATA
  - NO MA COVERAGE
  - NO PURCHASE OF SERVICE HISTORY FOR THIS INDIVIDUAL
  - SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-11, 13, 14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

## Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ14

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ENTER DESIRED NO	NONE	User-entered number from list.; Must be 01-17
SELECTION	NONE	Blank or A, B, C, D, E
<b>INDIVIDUAL INFORMATION</b>		
(NONE)	NONE	17 occurrences; Number from 01 through 17
OTH NAM	03040 - OTHER NAME CODE (1)	17 occurrences
FIRST	24120 - GIVEN NAME (10)	17 occurrences
MI	24130 - MIDDLE INITIAL (1)	17 occurrences
LAST	24110 - SURNAME (17)	17 occurrences
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	17 occurrences; Formatted as 999-99-9999
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8)	17 occurrences
SEX	03050 - SEX (1)	17 occurrences
DOB	03060 - DATE OF BIRTH (8)	17 occurrences; Formatted as MM/DD/CCYY
APP/CSE	NONE	17 occurrences
APP-DIST	01010 - TRANSACTION DISTRICT (2)	Mnemonic; 17 occurrences

## SSN or Name Inquiry for NYC Individuals

### Overview

Users can request an SSN or Name Inquiry for a NYC individual on the NYC WMS system by entering a Y in the appropriate NYC field on WINQ02. The results of a NYC individual inquiry are displayed on WINQ32 - NYC Individual List Response screen. CIN is not an allowable entry for NYC individual inquiry because Upstate CINs do not exist on the downstate system (with the exception of service cases).

The criteria used when requesting a Name Inquiry depends on the population that is being searched; NYC versus Upstate. For example, a NYC inquiry using John Smith will only return those individuals with that exact name. In the Upstate version of the inquiry, the logic utilized is different. In the Upstate inquiry, names are checked and given a six-digit numeric value called an encode. Encodes are utilized to search internal tables that provide a set of first and last names. This set of first and last names becomes the basis for the search of names in the WMS database. Individual's names that match the first name set and the second name set are considered matches that are returned with the inquiry results.

NYC inquiry is performed only when a Y is entered in one of the NYC fields on the WINQ02 portion of the inquiry menu. If the NYC field is left blank, normal Upstate inquiry takes place. If an Upstate district is entered in the DIST field and a Y is entered in the NYC field, NYC inquiry is performed. The results from the inquiry are random.



WINQ32 - NYC Individual List Response

LN	OTH	NAM	FIRST	M	LAST	CIN	SSN	SEX	DOB
NO		CASE	NUMBER		CASE		CASE	TYPE	STAT
		STREET	ADDRESS			CITY		STATE	ZIP
01		JOHN		F	SMITH	RZ71134W	1-123121234	M	12/12/1970
1)		010001974G			SMITH JOHN			NPA-FS	NEW-CASE
		99	UNDOMI		CILED	BROOKLYN		NY	11206
2)									
3)									
02		JOHN			SMITH	RX33528A	1-211215581	M	12/12/1970
1)		020011538E			JOHN SMITH			MA	NEW-CASE
		7002	HIGH ST.			12 BKLYN		NY	11215
2)									
3)									

WINQ32 NYC - INDIVIDUAL LIST RESPONSE Date 04/18/07 Page 01 of 01  
ENTER DESIRED LN NO ^^ ^

PAGE FOR MORE RESPONSES ^

Figure 44 - NYC Individual List Response (WINQ32)

Purpose

This screen or series of screens displays information for all New York City individuals who match the data entered on the Individual Name or SSN Inquiry lines on WINQ02 when Y is entered in the NYC field. Up to 2 individuals will appear per ILIST page, and information on up to 3 cases per individual will appear. All fields on this screen are protected.

If a name on the screen has an A or M in the OTH NAME (Other Name) column, it means that the person shown on that line has an alias (A) or a maiden name (M).

Access

- Entering a valid First and Last Name, and Sex Code on WINQ02 - Individual CIN or SSN Inquiry Menu and Y in the NYC field, **or**
- Entering a valid SSN on WINQ02 - Individual CIN or SSN Inquiry Menu and Y in the NYC field, **or**
- F4 from WINQ32 - NYC Case Involvement screen.

Screen Response

Positive

- Entry of a line number will display the WINQ32 - Case Involvement Screen.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SELECTION LIMITED TO LINE NUMBERS ON PAGE
  - INVALID LINE NUMBER SELECTION
  - SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-14, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ32

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
<b>INDIVIDUAL INFORMATION</b>		
LN NO	03045 - LINE NUMBER OF HOUSEHOLD MEMBER (2)	2 occurrences per page
OTH NAME	03040 - OTHER NAME CODE (1)	2 occurrences per page

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FIRST	24120 - GIVEN NAME (10)	2 occurrences per page
MI	24130 - MIDDLE INITIAL (1)	2 occurrences per page
LAST	24110 - SURNAME (17)	2 occurrences per page
CIN	03010 - CLIENT IDENTIFICATION NUMBER(8)	2 occurrences per page
SSN	03200 - SOCIAL SECURITY ACCOUNT NUMBER CODE (1)	2 occurrences per page; Followed by - and then the SSN
	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	2 occurrences per page
SEX	03050 - SEX (1)	2 occurrences per page
DOB	03060 - DATE OF BIRTH (8)	2 occurrences per page; Formatted as MM/DD/CCYY
<b>CASE INFORMATION</b>		
CASE - NUM	01052 - CASE NUMBER (10)	3 occurrences per CIN
CASE-TYP	01060 - CASE TYPE (2)	Mnemonic; 3 occurrences per CIN
IND-STAT	02090 - CASE STATUS (2)	Mnemonic; 3 occurrences per CIN
CASE NAME		
STREET ADDRESS	01080 - RESIDENCE (25)	3 occurrences per CIN
CITY	01082 - RESIDENCE CITY/TOWN (15)	3 occurrences per CIN
STATE	01083 - RESIDENCE STATE (2)	3 occurrences per individual
ZIP	01084 - RESIDENCE ZIP (5)	3 occurrences per individual

WINQ32 - NYC Case Involvement

```

-WI NQ32 ** NYC CASE INVOLVEMENT FOR RZ71134W ** Date 04/20/90 Page 01 of 01
NAME SMITH JOHN F SEX M SSN 123-12-1234 DOB 12/12/1970
CASE (CHOOSE 1, 2, OR 3) ^ ^
CASE - NUM CASE-TYP CASE-STAT IND-STAT CASE NAME
AUTHORIZATI ON-PERI OD AUTH-NUM EFF-DATE STREET ADDRESS
CENTER UNIT WORKER ACT-DATE CITY ST ZIP
LST-STAT TELEPHONE

1) 010001874G NPA-FS NEW-CASE APLY SMITH JOHN
F23 FS POS 2/13/07 99 UNDOMI CILED
BROOKLYN NY 11206

2)

3)

SEARCH COMPLETED ^
    
```

Figure 45 - NYC Case Involvement (WINQ32)

Purpose

This screen or series of screens provides an individual's status in all New York City cases in which the individual has ever been associated. It contains up to three cases per page. More extensive information may be obtained by entering the screen line number which precedes the desired case number. All fields on this screen are protected.

Access

- Entering a valid line number for an Individual on WINQ32 - NYC Individual List Response.

Screen Response

Positive

- If Case 1, 2, or 3 is entered, then WINQ32 - NYC Case Make-Up is returned.

Negative

- One of the following messages on Line 24:
  - CASE CHOICE ENTRY REQUIRED
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED

- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- INVALID CASE CHOICE ENTRY
- INVALID SELECTION ENTRY
- SF-99 NOT SUPPORTED - REXMT (99 = 5, 7-14, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	Displays NYC ILLIST
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ32

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NAME	24110 - SURNAME (17)	
	24120 - GIVEN NAME (10)	
	24130 - MIDDLE INITIAL (1)	
SEX	03050 - SEX (1)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	Formatted as 999-99-9999
DOB	03060 - DATE OF BIRTH (8)	Formatted as MM/DD/CCYY
<b>CASE INVOLVEMENT</b>		
CASE - NUM	01052 - CASE NUMBER (10)	3 occurrences per page
CASE-TYP	01060 - CASE TYPE (2)	Mnemonic; 3 occurrences per page
CASE-STAT	02090 - CASE STATUS (2)	Mnemonic; 3 occurrences per page
IND-STAT	03120 - INDIVIDUAL STATUS (2)	Mnemonic; 3 occurrences per page
CASE NAME	01070 - CASE NAME (28)	3 occurrences per page
AUTHORIZATION-PERIOD	01100 - AUTHORIZATION-PERIOD (12)	3 occurrences per page; Formatted MM/DD/YY-MM/DD/YY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
AUTH-NUM	02040 - AUTHORIZATION NUMBER (3)	3 occurrences per page
EFF-DATE	03118 - CLIENT STATUS EFFECTIVE DATE (6)	3 occurrences per page; Formatted as MM/DD/YY
STREET ADDRESS	01080 - RESIDENCE STREET (35)	3 occurrences per page.
CENTER	01020 - TRANSACTION DISTRICT (2)	Mnemonic; 3 occurrences per page; NYC Center
UNIT	01030 - UNIT IDENTIFIER (5)	3 occurrences per page.
WORKER	01040 - WORKER IDENTIFIER (5)	3 occurrences per page.
ACT-DATE	03119 - CLIENT ACTIVE DATE (6)	3 occurrences per page; Formatted as MM/DD/YY
CITY	01082 - RESIDENCE CITY/TOWN (15)	3 occurrences per page.
ST	01083 - RESIDENCE STATE (2)	3 occurrences per page
ZIP	01084 - RESIDENCE ZIP (5)	3 occurrences per page
TELEPHONE	01085 - TELEPHONE NUMBER (10)	3 occurrences per page

WINQ32 - NYC Case Makeup

```
-WINQ32          NYC CASE MAKE-UP          DATE 04/19/07    PAGE 01 OF 01
CASE 010001874G TYPE NPA-FS  STAT NEW-CASE PEND AUTH
CENTER F23     UNIT          WORKER FSPOS    AUTH-PERIOD    / / - / /
FISCAL
NAME          SMITH JOHN
ADDRESS 99 UNDOMICILED
          BROOKLYN          NY          11206          APP-DATE 02/13/07
PHONE

INDIVIDUAL INFORMATION
LAST NAME    FIRST    M    DOB    SEX    SSN          CIN    STATUS RELAT
SMITH       JOHN    F    12/12/1970 M    1-123121234 RZ71134W APLY

SEARCH COMPLETED
```

Figure 46 - NYC Case Makeup (WINQ32)

Purpose

Each page of this screen displays New York City Non-Services case data plus individual data for up to 11 persons who are now or have been associated with this case. Fields on this screen are protected.

Access

- Entering 1, 2, or 3 for a Case Number on WINQ32 - NYC Case Involvement screen.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT SCREEN DISPLAYED IS PAGE ONE - SF01 IGNORED
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- SF-99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-14, 17-22)
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F5	WINQ01/WINQ02 - Case/Individual Inquiry Menu with the data previously entered appearing in all appropriate fields.
Ctrl+F6	WINQ01/WINQ02 - Case/Individual Inquiry Menu

Screen Field Description - WINQ32

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE	01052 - CASE NUMBER (10)	
TYPE	01060 - CASE TYPE (2)	Mnemonic
STAT	02090 - CASE STATUS (2)	Mnemonic
PEND	24040 - PENDING DATA STATUS (2)	Mnemonic
AUTH	02040 - AUTHORIZATION NUMBER (8)	
CENTER	01020 - TRANSACTION DISTRICT (2)	Mnemonic; NYC CENTER (3)
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
AUTH-PERIOD	01100 - AUTHORIZATION-PERIOD (12)	Formatted as MM/DD/YY-MM/DD/YY
NAME	01070 - CASE NAME (28)	
<b>ADDRESS</b>		
(NONE)	01080 - RESIDENCE STREET (35)	
(NONE)	01082 - RESIDENCE CITY/TOWN (15)	
(NONE)	01083 - RESIDENCE STATE (2)	
(NONE)	01084 - RESIDENCE ZIP (5)	
APP-DATE	01090 - APPLICATION DATE (6)	Formatted as MM/DD/YY
PHONE	01085 - TELEPHONE NUMBER (10)	
<b>INDIVIDUAL INFORMATION</b>		
LAST NAME	24110 - SURNAME (17)	11 occurrences



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FIRST	24120 - GIVEN NAME (10)	11 occurrences
M	24130 - MIDDLE INITIAL (1)	11 occurrences
DOB	03060 - DATE OF BIRTH (8)	11 occurrences; Formatted as MM/DD/CCYY
SEX	03050 - SEX (1)	11 occurrences
(NONE)	03200 - SOCIAL SECURITY NO CODE (1)	11 occurrences; Followed by - and SSN
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	11 occurrences
CIN	03010 - CLIENT IDENTIFICATION (8)	11 occurrences
STATUS	03120 - INDIVIDUAL STATUS (2)	Mnemonic; 11 occurrences
RELAT	03090 - RELATIONSHIP CODE (2)	Mnemonic; 11 occurrences

# General Information Processing

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## General Information Processing

### Overview

The General Information System (GIS) is a means of communicating information to all users of the Welfare Management System. GIS information is of two types:

- System Broadcast Information
- System Operations Information

### System Broadcast Information

The System Broadcast Information portion of GIS is used to send free form messages to all users. These messages are prepared and entered into the General Information System in Albany by authorized personnel of WMS Medical Assistance, Services, WMS Operations, and certain other offices. These messages are then available on all WMS workstations.

The WGIMNU - General Information System menu is used to request messages in six areas. These selections on the menu are:

- Income Maintenance (Employment and Transitional Support) - please note that although this choice is still available it is not used anymore. Instead, a web-based subscription system is now utilized to email subscribers regarding income maintenance activities.
- Medical Assistance
- Services
- Administration
- Operations - Eligibility System (WMS)
- Operations - Financial Systems (LDMIP/BICS)

Entering 23 on the WMSMNU - WMS Menu and transmitting returns the WGIMNU - General Information System Menu. From WGIMNU, the user enters "X" in front of the desired selection and transmits. This action will return the first screen page of up to six possible screen pages for that area. The standard Function keys for paging are used to page forward and backward among the six possible screen pages of the five areas.

The date and time to the left of each selection on the menu screen are the date and time of the last addition of information to that message area. Messages will remain on the system until they are changed or deleted by authorized WMS personnel in Albany.

## System Operations Information

The System Operations Information portion of GIS displays information and statistics about three types of system operations. These are:

### Pending Record Processing

Information and statistics about the Local Data Feedback (LDF) and Batch Update (B/U) processing activities of the previous business day, plus a count of all Pending Records grouped by Pending Data Status, Transaction Type and Case Type as a result of the Batch Update processing of the previous day.

### Special Transactions Processing

Information about various special batch processing activities is displayed to the user.

### Resource File Integration

Information about WRS, UIB, IRS and other resource comparisons is displayed to the user.

## Pending Record Processing

The Pending Record Processing information is obtained by entering "X" in front of PENDING RECORD PROCESSING on the WGIMNU - General Information System Menu and transmitting. Page 1 of the WGIPRP - Pending Record Processing Screen will be returned. This screen contains three types of information:

- LDF Processing
- Batch Update (B/U) Processing
- Pending Record Status (Partial)

### Abbreviations

The following abbreviations are used throughout this section to describe statuses:

- AT - Awaiting Transmission
- AU - Awaiting Update
- ALEC - Awaiting Local Error Correction
- BUP - Batch Update

### LDF Processing

The upper left portion of the first page of the WGIPRP screen documents the LDF activity performed against the district's pending record in each of eight different LDF categories, divided into Non-Services (N-S) and Services (SERV). The screen title of each category and its definition is:

- AWAIT EXTR - Pending Data Status (PDS) is AT/\_\_\_\_. The pending data in each signed-off transaction is awaiting "extract". (Extract is the moving of the pending data to the LDF file for later transmission.)

- **AWAIT TRANS** - PDS is AU/\_\_\_\_. The pending data has been extracted but it has not yet been successfully transmitted. (This pending data may be on the "primary" LDF file, or on a "back-up" LDF file which is created when there is an unsuccessful LDF transmission of the primary LDF file.)
- **AWAIT REPLY** - PDS is also AU/\_\_\_\_. The pending data has been successfully transmitted and WMS is awaiting a reply from the BICS LDF process on a case by case basis as to whether the pending data is "accepted" by them or "rejected". (There is an internal WMS indicator which distinguishes between those AU/\_\_\_\_ records that AWAIT TRANS and those that AWAIT REPLY.)
- **TOT UNRESOL** - The total number of transactions that have not been resolved. This number is the total of all AWAIT EXTR + AWAIT TRANS + AWAIT REPLY transactions.
- **ACC REPLIES** - The PDS is \_\_\_\_/NO PEND. A reply has been received by WMS indicating that the transaction has been "accepted" by the BICS LDF process (passed local edits). The PDS was changed to \_\_\_\_/BUP by WMS and the transaction was processed through Batch Update. (If for some reason Batch Update does not process the transaction, the PDS would remain \_\_\_\_/BUP).
- **REJ REPLIES** - The PDS is \_\_\_\_/ALEC. A reply has been received by WMS indicating that the transaction has been "rejected" by the BICS LDF process and should not be processed by WMS. (When the local edit errors are corrected via the WMS Error Correction and Pending Data Change process, the transaction is again ready for extract and LDF transmission.)
- **TOT REPLIES** - The total number of transactions for which "accepted" or "rejected" replies have been received by WMS. This number is the total of all ACC REPLIES + REJ REPLIES.
- **CASES FORCED** - The PDS is \_\_\_\_/NO PEND. This occurs when the LDF process changes the PDS from AU/\_\_\_\_ to \_\_\_\_/BUP because the BICS LDF process has either a transaction or has not replied to a transaction after a predetermined time period.

### Batch Update (B/U) Processing

The upper right portion of the first page of the WGIPRP screen documents the outcome of the previous business day's Batch Update for both Non-Services and Services transactions. The screen title of each category and its definition is:

- **N-S PEND** - Indicates the number of Non-Services pending records that had a PDS of \_\_\_\_/BUP or equivalent just prior to the Batch Update process being run. The Pending Data Status included in this count are:

PENDING DATA STATUS ABBREVIATION	DESCRIPTION (D.E. 24040)
FDE/BUP	SIGNED-OFF AFTER FDE - AWAITING BATCH UPDATE
FDEOVER	OVERRIDDEN FULL DATA ENTRY
DEN/BUP	SIGNED-OFF AFTER APP DENIAL - AWAITING BATCH UPDATE
UM/BUP	SIGNED-OFF AFTER UNDERCARE MAINTENANCE - AWAITING BATCH UPDATE
UMOVER	OVERRIDDEN UNDERCARE
REAC/BUP	SIGNED-OFF AFTER CASE REACTIVATION - AWAITING BATCH UPDATE
REAC/OVR	OVERRIDDEN REACTIVATION

FCFD/BUP	SIGNED OFF AWAITING BATCH UPDATE AFTER FORCED CLOSING
DBR-BUP	SIGNED OFF AFTER DIRECT BUDGET REAUTHORIZATION - AWAITING BATCH UPDATE
CUI-BUP*	CIN UNDUPLICATION AWAITING BATCH UPDATE OF INACTIVE CASE

\*If the B/U Processing count is greater than the LDF Processing count, it means that some CUI records went through BUP because the district did not request those records to go through LDF.

- N-S UPDATED - Indicates the number of Non-Services pending records which were actually updated by Batch Update.
- SERV PEND - Indicates the number of Services pending records that has a PDS of \_\_\_\_/BUP or equivalent just prior to the Batch Update process being run. The Pending Data Statuses included in this count are:

PENDING DATA STATUS ABBREVIATION	DESCRIPTION (D.E. 24040)
FDE/BUP	SIGNED-OFF AFTER FDE - AWAITING BATCH UPDATE
FDEOVER	OVERRIDDEN FULL DATA ENTRY
DEN/BUP	SIGNED-OFF AFTER APP DENIAL - AWAITING BATCH UPDATE
UM/BUP	SIGNED-OFF AFTER UNDERCARE MAINTENANCE - AWAITING BATCH UPDATE
UMOVER	OVERRIDDEN UNDERCARE
PEND/CAN	PENDING DATA CANCELLED
CUI-BUP*	CIN UNDUPLICATION AWAITING BATCH UPDATE OF INACTIVE CASE

\*If the B/U Processing count is greater than the LDF Processing count, it means that some CUI records went through BUP because the district did not request those records to go through LDF.

- SERV UPDATED - Indicates the number of Services pending records which were actually updated by Batch Update.

Any numbers in parenthesis to the right of SERV PEND or SERV UPDATED indicate the number of Services Pending records with the PDS of PEND/CAN. Although the number of pending records with PEND/CAN are included in the SERV PEND and SERV UPDATED counts, they are also displayed separately to allow reconciliation between the B/U PROCESSING and LDF PROCESSING counts since pending records with a PDS of PEND/CAN bypass LDF processing.

In non-LDF districts for Services, Services closing transactions with an Authorization Period TO Date in the future are not processed by Batch Update until the TO Date is reached. Therefore they are counted in the SERV PEND and SERV UPDATED counts only on the day they go through Batch Update.

### Pending Record Status

The lower half of page 1 of WGIPRP and all of page 2 (obtained by F2 from page 1) display a count of all the local district's pending records. The counts are taken after LDF processing and just prior to the previous business day's Batch Update. The counts for all columns except the SIGNED OFF column represent pending records still in

existence after Batch Update. Those pending records counted in the SIGNED OFF column that had a Pending Data Status of \_\_\_\_/BUP (or in an LDF district, AT/\_\_\_\_ and where transmitted and "accepted") have been processed and no longer exist. To determine the number of pending records with SIGNED OFF statuses after Batch Update, subtract the sum of N-S UPDATED + SERV UPDATED from the SIGNED OFF DISTRICT TOTAL.

Each pending record is counted once in the Pending Record Status. Definitions of each grouping follow:

TRANSACTION TYPE GROUPS		
FDE/APP	01 - APP-DEN	09 - OP-CLS
	02 - OPEN	10 - RE-OP
	03 - DEN	
UNDERCARE	05 - CHNG	13 - FORC-DEL
	07 - CLOS	25 - CPS-IND
	11 - REACT	26 - CPS-UNF
	12 - FORC-DEL	35 - RET-CLS
RECERT	06 - RECERT	08 - RCT-CLC

CASE TYPE GROUPS		
PA	11 - ADC	16 - HR
	12 - ADC-U	17 - VA
	13 - ADC-FC	18 - EAA
	14 - PG-ADC	19 - EAF
MA	20 - MA	22 - MA-SSI
FS	31 - NPA-FS	32 - FS-MIX
SERV	40 - SERV	42 - IND-CPA
	41 - PRE-CPS	43 - UNF-CPS
HEAP	60 - HEAP	

PENDING DATA STATUS GROUPS	
PEND EC	FDE/ERR
	SFED/ERR
	UM/ERR
	UM/CLERR
	REAC/ERR
PEND RES	AW/SFED
	UM/CL
	A/SFED-M
	REAC/UM
PEND-SS	FDE/SSG
	REAC/SSG
	UM/SSG
	DEN/SSG
ALEC	FDE-ALEC
	UM-ALEC

PENDING DATA STATUS GROUPS	
BUDGET	AC-DBR
	DBR-SSG
	DBR-BUP
	AT-DBR
	AU-DBR
SIGNED OFF	REAC/BUP
	FDE/BUP
	UM/BUP
	DEN/BUP
	PEND/CAN
	FDEOVER
	UMOVER
	AT/FDE
	AT/UM
	AT/REA
	AT/DEN
	AT/FDEOV
	AT/UMOV
	AU/FDE
	AU/UM
	AU/FCFD
	FCFD/BUP
	REAC/OVR
	AT/REAOV
	AU/REAOV
	AT-CUI
	AU-CUI
	CUI-BUP

### Special Transactions Processing

The Special Transactions Processing information is obtained by entering an “X” in front of SPECIAL TRANSACTIONS PROCESSING on the WGIMNU - General Information System Menu and transmitting. The WGISTP - Special Transaction Processing screen will be returned. This screen contains information in five areas:

- Automated SDX/WMS Interface (ASWI)
- CIN Consolidation
- Social Security Number Enumeration (no longer supported)
- Social Security Number Validation
- Data Migration



### Automated SDX/WMS Interface (ASWI)

This portion of the screen reports the results of the daily run of the Automated SDX/WMS Interface batch processing activity. See **SRM Automated SDX/WMS Interface** for details. The fields are:

- TOTAL Total number of Pending Records created by the run made on the date shown on the right.
- OPENINGS Total number of new MA/SSI cases opened. This does not include FS and NYSNIP cases which are always FS cases.
- CHANGES Total number of cases changed. This does not include FS and NYSNIP cases which are always FS cases.
- CLOSINGS Total number of MA/SSI cases closed. This does not include FS and NYSNIP cases which are always FS cases.
- DATE (No heading) The date that the program was run which produced the preceding totals.

### CIN Consolidation

This portion of the screen reports the results of the weekly run of the CIN Consolidation batch processing activity. See **SRM Batch Processing** for details. The fields are:

- TOTAL Total number of CIN consolidations processed by the run made on the date shown on the right.
- SUCCESSFUL Total number of successful CIN consolidations completed. A Pending Record is created for every case that is associated with the retained CIN and the deleted CIN.
- UNSUCCESSFUL The total number of CIN consolidations that could not be completed because of errors.
- DATE (No heading) The date the program was run that produced the preceding totals.

### Social Security Number Enumeration (no loner supported, values are 0's)

This portion of the screen reports the results of the monthly run of the SSN Enumeration batch processing. See **SRM Batch Processing** for details. The fields are:

- TOTAL Total number of SSNs produced by the run made on the date shown on the right.
- SUCCESSFUL Total number of SSNs that were added, changed or verified as correct. The SSN code was changed to 7.
- UNSUCCESSFUL Total number of SSNs that could not be completed because of errors. The SSN code remains as it was prior to the run.
- DATE (No heading) The date the program was run that produced the preceding totals.

### Social Security Number Validation

This portion of the screen reports the results of the weekly run of the SSN Validation batch processing activity. See **SRM Batch Processing** for details. The individual invalid SSN codes that returned from SSN Validation are written to TIP files. The TIP files are used to produce the counts of successful and unsuccessful SSN validations that are displayed in WGISTP (for example). The fields are:

- **TOTAL** Total number of SSNs processed by the run made on the date shown on the right.
- **SUCCESSFUL** Total number of SSNs that were verified as correct. The SSN code was changed to 8. The data from SSN validation is written to TIP files which show successful validations in screens such as WGISTP.
- **UNSUCCESSFUL** Total number of SSNs that could not be verified because of mis-matching demographic data. The Unsuccessful count represents a summation of all validation failures returned from the SSN Validation.
- **DATE (No heading)** The date the program was run that produced the preceding totals.

### Resource File Integration

This portion of System Operations Information displays information about the Resource File Integration matching activities. See **SRM Resource File Integration**.

To obtain the WCTSTT - Resource File Integration information screen, an X is entered in front of the selection RESOURCE FILE INTEGRATION on the WGIMNU - General Information System Menu, and the screen transmitted.

The WCTSTT - Resource File Integration information screen contains information about the most recent RFI data received from State and Federal files. See the page in this section containing the screen example for a complete description of the data displayed on this screen.

WGIMNU - General Information System Menu

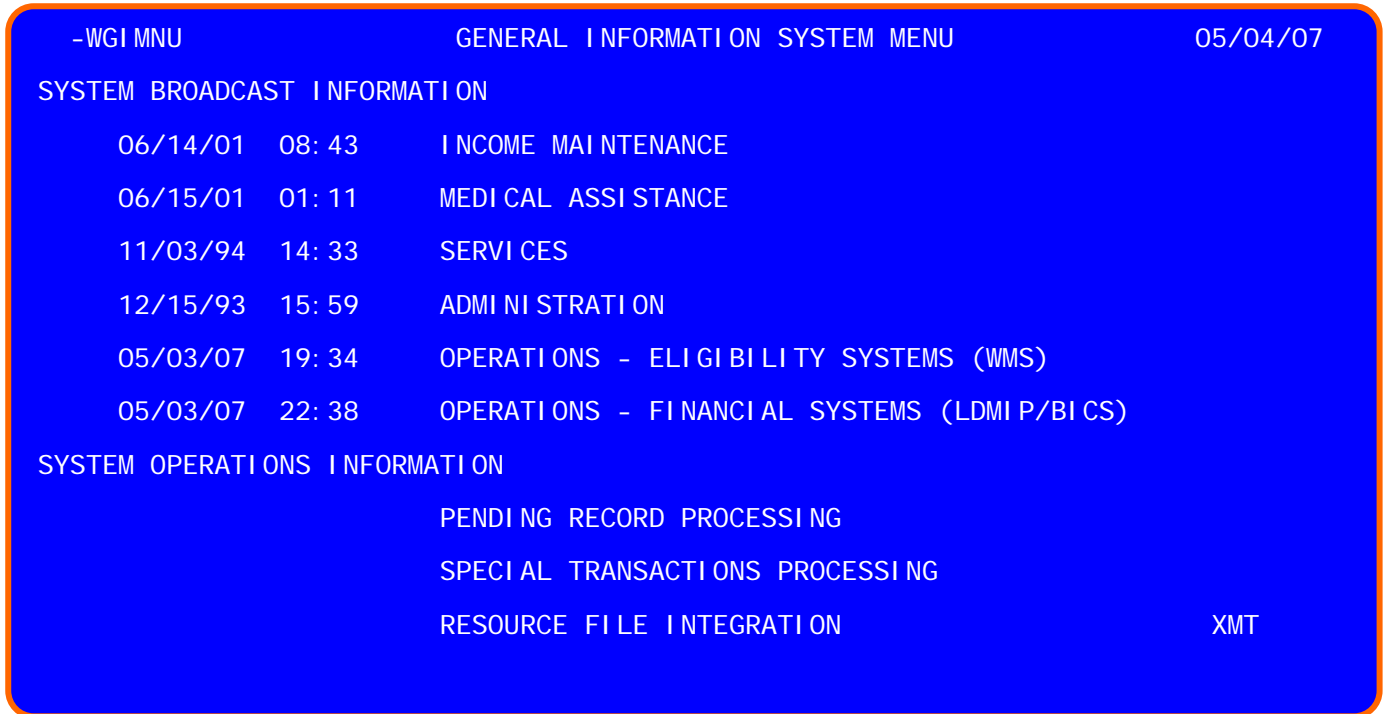


Figure 1 - General Information System Menu (WGIMNU)

Purpose

This screen is used to select either the latest System Broadcast Information for Medical Assistance, Services, Administration, Operations - WMS and/or Operations - LDMIP/BICS to select System Operations Information regarding Pending Record Processing, Special Transactions Processing or Resource File Integration.

Access

- Entering 23 on WMSMNU - WMS Menu

Screen Response

Positive

- WGIINQ - General Information System screen for Medical Assistance, Services, Operations - WMS, or Operations - LDMIP/BICS as selected. A web-based subscription system is now utilized to email subscribers regarding income maintenance activities.
  - Please note that an on-line, web-based subscription system is used by subscribers for information regarding income maintenance activities
  - WGIPRP - Pending Record Processing screen if Pending Record Processing is selected
  - WGISTP - Special Transactions Processing screen if Special Transactions Processing is selected

- WGIRFI - Resource File Integration screen if Resource File Integration is selected

#### Negative

- One of the following messages on Line 24:
  - MORE THAN ONE SELECTION NOT ALLOWED
  - PLEASE MAKE A SELECTION
  - SF99 NOT SUPPORTED - REXMT (99 = 8, 13)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	WBPAFS - PA/FS Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Process Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Data Entry
F10	WSUMNU - Services Undercare/Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menus
Ctrl+F4	WDISPM - Disposition Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WGIMNU

Not Applicable

WGIINQ - General Information Systems (Program Area)



Figure 2 - General Information Systems - Program Area (WGIINQ)

Purpose

This screen presents the latest System Broadcast Information for Income Maintenance, Medical Assistance, Services, Administration Operations - WMS or Operations - LDMIP/BICS.

Access

- Entering "X" in front of the desired program area on **WGIMNU - General Information System Menu**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - ALREADY ON LOWEST PAGE
  - INVALID SF-KEY.
  - NO MORE DATA
  - XMIT INVALID: MUST HIT SF-KEY

- SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-15, 17-22)
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages. (There can be a maximum of six pages for each program area.)
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WGIMNU - General Information System Menu

#### Screen Field Description - WGIINQ

Not Applicable

WGIPRP - Pending Record Processing (Page 1)

-WGI PRP		PENDING RECORD PROCESSING						5/04/07	
ST. LAWRENCE		CLOSE OF BUSINESS 5/04/07						PAGE 1	
LDF PROCESSING						* B/U PROCESSING			
	N-S	SERV		N-S	SERV				
AWAIT EXTR	5	25	ACC REPLIES	13	0	*	N-S PEND	24	
AWAIT TRANS	0	0	REJ REPLIES	0	0	*	N-S UPDATED	0	
AWAIT REPLY	0	0	TOT REPLIES	13	0	*	SERV PEND	0	
TOT UNRESOL	5	25	CASES FORCED	0	0	*	SERV UPDATED	0	
DISTRICT TOTAL		PEND-EC	PENDING RECORD STATUS	PEND-RES	PEND-SS	ALEC	BUDGET	SIGNED OFF	
		411		177	8	349	0	24	
TRANS TYPE									
FDE/APP									
PA		65	0	0	57	0	0	0	
MA		19	0	0	24	0	0	6	
FS		30	0	0	16	0	0	5	
SERV		129	114	4	79	0	0	0	
HEAP		5	0	0	4	0	0	0	
TOTAL FDE/APP		248	114	4	180	0	0	11 -	

Figure 3 - Pending Record Processing - Page 1 (WGIPRP)

Purpose

This screen displays LDF Processing and Batch Update Processing statistics. It also displays the district totals of Pending Record Statuses and the sub-totals for FDE/APP Transaction Type by Case Type category.

Access

- Selecting Pending Record Processing on **WGIMNU - General Information System Menu**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - ALREADY ON LOWEST PAGE
  - NO MORE DATA
  - SF KEY DEPRESSED-UNKNOWN PROBLEM
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-15, 17-22)



- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages. (There can be a maximum of six pages for each program area.)
F3	Previous Page if there are multiple pages.
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WGIMNU – General Information System Menu

Screen Field Description – WGIPRP

Note: The D.E NUMBER column has been removed from this table. This was done to reflect the fact that values on the screen are calculated and do not come directly from the WMS database.

SCREEN CAPTION	REMARKS
<b>LDF PROCESSING NON-SERVICE</b>	
AWAIT EXTR	The count of records awaiting extraction for LDF Processing
AWAIT TRANS	The count of records awaiting transmission for LDF Processing
AWAIT REPLY	The count of records transmitted to LDF and not acknowledged.
TOT UNRESOL	The total of AWAIT EXTR, AWAIT TRANS, and AWAIT REPLY
<b>LDF PROCESSING SERVICES</b>	
AWAIT EXTR	The count of records awaiting extraction for LDF Processing
AWAIT TRANS	The count of records awaiting transmission for LDF Processing
AWAIT REPLY	The count of records transmitted to LDF and not acknowledged.
TOT UNRESOL	The total of AWAIT EXTR, AWAIT TRANS, and AWAIT REPLY
<b>LDF PROCESSING NON-SERVICE</b>	
ACC REPLIES	The count of records processed by LDF that have responded to WMS and been accepted.
REJ REPLIES	The count of records processed by LDF that have responded to WMS and been rejected.
TOT REPLIES	The total of ACC REPLIES and REJ REPLIES.
CASES FORCED	The count of cases forced back into WMS from LDF Processing.
<b>LDF PROCESSING SERVICE</b>	
ACC REPLIES	The count of records processed by LDF that have responded to WMS and been accepted.

SCREEN CAPTION	REMARKS
REJ REPLIES	The count of records processed by LDF that have responded to WMS and been rejected.
TOT REPLIES	The total of ACC REPLIES and REJ REPLIES.
CASES FORCED	The count of cases forced back into WMS from LDF Processing.
<b>BATCH UPDATE (B/U) PROCESSING</b>	
N-S PEND	The count of non-services cases placed in pending status.
N-S UPDATED	The count of non-services cases made active by the Batch Update.
SERV PEND	The count of services cases placed in pending status.
SERV UPDATED	The count of services cases made active by the Batch Update.
<b>PENDING RECORD STATUS - DISTRICT TOTALS</b>	
PEND-EC	The total cases in a pending status at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status at the district due to errors awaiting correction. Applies only to case type 40.
PEND-SS	The total cases in a pending status at the district due to awaiting sign-off
ALEC	The total cases in a pending status at the district awaiting local error correction.
BUDGET	The total cases in a pending status at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden
<b>FDE/APP BY CASE TYPE</b>	
PEND-EC	The total cases in a pending status and FDE/APP transaction type at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status and FDE/APP transaction type at the district due to errors awaiting correction. Applies only to case type 40.
PEND-SS	The total cases in a pending status and FDE/APP transaction type at the district due to awaiting sign-off
ALEC	The total cases in a pending status and FDE/APP transaction type at the district awaiting local error correction.
BUDGET	The total cases in a pending status and FDE/APP transaction type at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status and FDE/APP transaction type at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden.
<b>TOTAL FDE/APP</b>	
PEND-EC	The total cases in a pending status and FDE/APP transaction type at the district due to errors awaiting correction across all case type groups. Applies to all case types.
PEND-RES	The total cases in a pending status and FDE/APP transaction type at the district due to errors awaiting correction across all case type groups. Applies only to case type 40.
PEND-SS	The total cases in a pending status and FDE/APP transaction type at the district due to awaiting sign-off across all case type groups.
ALEC	The total cases in a pending status and FDE/APP transaction type at the district awaiting local error correction across all case type groups.
BUDGET	The total cases in a pending status and FDE/APP transaction type at the district due to a problem in the case budget across all case type groups.
SIGNED OFF	The total cases in a pending status and FDE/APP transaction type at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden across all case type groups.

WGIPRP - Pending Record Processing (Page 2)

-WGI PRP		PENDING RECORD PROCESSING				5/04/07	
ST. LAWRENCE		CLOSE OF BUSINESS 5/04/07				PAGE 2	
TRANS TYPE	PEND-EC	PENDING RECORD STATUS	PEND-RES	PEND-SS	ALEC	BUDGET	SIGNED OFF
UNDERCARE							
PA	49		2	0	88	0	11
MA	5		0	0	0	0	1
FS	8		3	0	16	0	1
SERV	37		4	1	33	0	0
HEAP	0		0	0	1	0	0
TOTAL U/C	99		9	1	138	0	13
RECERT							
PA	19		0	0	16	0	0
MA	2		0	0	1	0	0
FS	4		0	0	0	0	0
SERV	39		54	3	14	0	0
TOTAL RECERT	64		54	3	31	0	0

Figure 4 - Pending Record Processing - Page 2 (WGIPRP)

Purpose

This screen displays the sub-totals for undercare and recertification transactions by case type category.

Access

- F2 from Page 1 of **WGIPRP - Pending Record Processing**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - NO MORE DATA
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 5, 7-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Message NO MORE DATA
F3	Same as F1
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WGIMNU – General Information System Menu


Screen Field Description – WGIPRP

Note: The D.E NUMBER column has been removed from this table. This was done to reflect the fact that most values on the screen are calculated and do not come directly from the WMS database.

SCREEN CAPTION	REMARKS
<b>PENDING RECORD STATUS - DISTRICT TOTALS FOR UNDERCARE BY CASE TYPE GROUP</b>	
PEND-EC	The total cases in a pending status at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status at the district due to errors awaiting correction. Applies only to case type 40.
PEND-SS	The total cases in a pending status at the district due to awaiting sign-off
ALEC	The total cases in a pending status at the district awaiting local error correction.
BUDGET	The total cases in a pending status at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden
<b>PENDING RECORD STATUS - DISTRICT TOTAL FOR UNDERCARE</b>	
PEND-EC	The total cases in a pending status at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status at the district due to errors awaiting correction. Only applies to case type 40.
PEND-SS	The total cases in a pending status at the district due to awaiting sign-off
ALEC	The total cases in a pending status at the district awaiting local error correction.
BUDGET	The total cases in a pending status at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden.
<b>PENDING RECORD STATUS - DISTRICT TOTALS FOR RECERT BT CASE TYPE GROUP</b>	
PEND-EC	The total cases in a pending status at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status at the district due to errors awaiting correction. Applies only to case type 40.

SCREEN CAPTION	REMARKS
PEND-SS	The total cases in a pending status at the district due to awaiting sign-off
ALEC	The total cases in a pending status at the district awaiting local error correction.
BUDGET	The total cases in a pending status at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden
<b>PENDING RECORD STATUS _ DISTRICT TOTAL FOR RECERT</b>	
PEND-EC	The total cases in a pending status at the district due to errors awaiting correction. Applies to all case types.
PEND-RES	The total cases in a pending status at the district due to errors awaiting correction. Applies only to case type 40.
PEND-SS	The total cases in a pending status at the district due to awaiting sign-off
ALEC	The total cases in a pending status at the district awaiting local error correction.
BUDGET	The total cases in a pending status at the district due to a problem in the case budget.
SIGNED OFF	The total cases in a pending status at the district that are awaiting batch update after sign-off, awaiting transmission, have been overridden

WGISTP - Special Transactions Processing



```
WGI STP   STLA           SPECIAL TRANSACTION PROCESSING           DATE 05/04/07
AUTOMATED SDX WMS INTERFACE (ASWI)
TOTAL: 00000  OPENINGS: 0000  CHANGES: 0000  CLOSINGS: 0000  11/21/06
-----
CIN CONSOLIDATION
TOTAL: 00000  SUCCESSFUL: 00000  UNSUCCESSFUL: 00000  11/30/94
-----
SOCIAL SECURITY NUMBERS
ENUMERATION TOTAL: 00000  SUCCESSFUL: 00000  UNSUCCESSFUL: 00000  11/29/94
VALIDATION  TOTAL: 44640  SUCCESSFUL: 72320  UNSUCCESSFUL: 72320  / /
-----
XMIT
```

Figure 5 - Special Transactions Processing (WGISTP)

Purpose

This screen is used to display the current statistics for ASWI processing, and SSN Validation for a district. It should be noted that SSN Enumeration is no longer supported and will contain all zeros.

Access

- Selecting Special Transactions Processing on **WGIMNU - General Information System Menu**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - ALREADY ON HIGHEST PAGE
  - ALREADY ON LOWEST PAGE
  - INVALID SF-KEY - MUST USE SF1 SF2 SF3 SF6 OR MENU
  - SF99 NOT SUPPORTED - REXMT (99 = 1-5, 7-22)

- XMIT NOT ALLOWED. MUST USE SF-KEY
- XMIT KEY NOT SUPPORTED - A SPECIAL FUNCTION KEY MUST BE DEPRESSED
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WGIMNU - General Information System Menu

Screen Field Description - WGISTP

Note: The D.E NUMBER column has been removed from this table. This was done to reflect the fact that values on the screen are calculated and do not come directly from the WMS database.

SCREEN CAPTION	REMARKS
<b>AUTOMATED SDX WMS INTERFACE (ASWI)</b>	
TOTAL	Total number of Pending Records created by the run made on the date shown on the right.
OPENINGS	Total number of new MA/SSI cases opened. This does not include FS and NYSNIP cases which are always FS cases.
CHANGES	Total number of cases changed. This does not include FS and NYSNIP cases which are always FS cases.
CLOSINGS	Total number of MA/SSI cases closed. This does not include FS and NYSNIP cases which are always FS cases.
(NONE)	The date that the program was run which produced the preceding totals.
<b>CIN CONSOLIDATION</b>	
TOTAL	Total number of CIN consolidations processed by the run made on the date shown on the right.
SUCCESSFUL	Total number of successful CIN consolidations completed. A Pending Record is created for every case that is associated with the retained CIN and the deleted CIN.
UNSUCCESSFUL	The total number of CIN consolidations that could not be completed because of errors.
(NONE)	The date the program was run that produced the preceding totals.
<b>SOCIAL SECURITY NUMBERS</b>	
ENUMERATION TOTAL	Total number of SSNs produced by the run made on the date shown on the right. This process is no longer supported and will contain 0.
ENUMERATION SUCCESSFUL	Total number of SSNs that were added, changed or verified as correct. The SSN code was changed to 7. This process is no longer supported and will contain 0.
ENUMERATION UNSUCCESSFUL	Total number of SSNs that could not be completed because of errors. The SSN code remains as it was prior to the run. This process is no longer supported and will contain 0.
VALIDATION TOTAL	Total number of SSNs processed by the run made on the date shown on the right.
VALIDATION SUCCESSFUL	Total number of SSNs that were verified as correct. The SSN code was changed to 8.
VALIDATION UNSUCCESSFUL	Total number of SSNs that could not be verified because of mis-matching demographic data. The SSN code was changed to 9.
(NONE)	The date the program was run that produced the preceding totals.

WCTSST - Resource File Integration

WCTSTT	STLA	RESOURCE	FILE	INTEGRATION	05/04/2007
LAST UPDATE		11/02/04		10: 56	
RESOURCE	LAST DAILY	INDIVIDUALS		EXTRACT DATE	
WRS	06/11/91	00053	06/11/91		
	06/10/91	00079	06/10/91		
	06/07/91	00028	06/07/91		
WTPY	06/11/91	00025	06/07/91		
	06/10/91	00012	06/06/91		
	06/07/91	00029	06/05/91		
UI B	06/10/91	00015	06/06/91		
	06/07/91	00027	06/05/91		
	06/06/91	00013	06/04/91		
	LAST MONTHLY				
WRS	05/17/91	01246			
BDX	06/07/91	00035			
SPR	06/07/91	00056			
UI B	05/17/91	00107			
FED	00/00/00	00000			
IRS	06/07/91	00451			

Figure 6 - Resource File Integration (WCTSST)

Purpose

This screen is used to display the date and the time that the Application/Case information was sent to files for matching, the date the Application/Case was flagged, the type of Resource and Number of individuals.

Access

- Entering 4 in Selection on WCTMNU - RFI Menu, **or**
- Entering "X" from System Operations Information - Resource File Integration.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-3, 5, 7-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.



Printed Response

None

Function Keys

Key	Description
F4	WCTSST - Statewide Resource File Integration
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WGIMNU - General Information System Menu

Screen Field Description - WGIMNU

Note: The D.E NUMBER column has been removed from this table. This was done to reflect the fact that values on the screen are calculated and do not come directly from the WMS database.

SCREEN CAPTION	REMARKS
LAST UPDATE	Displays date and time of the last update of the RFI data received from the State and Federal files.
RESOURCE	Type of Resource
LAST DAILY	For Applicants only, the dates displayed include the dates for the last three times RFI information was received from WRS, WTPY and UIB and then posted. This information results from the comparison of the files with the application data sent on three separate dates as shown under the Extract Date column. If the information received covered more than these three days, the message "OVER THREE DAYS POSTED" is displayed under the last date listed under the Last Daily column for the Resource.
INDIVIDUALS	Number of individuals with RFI data.
EXTRACT DATE	This is the date the application was sent to the various state and federal agencies.
LAST MONTHLY	For Recipients only, the dates displayed indicate the dates of the posting of the RFI information received monthly from BDX, SPR, UIB, annually from IRS and quarterly from WRS. For individuals added to a case only, the dates displayed indicate the dates of the posting of the RFI information received monthly from BDX, SPR, UIB and IRS and quarterly from WRS.

# Standards, Conventions, and General Information

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## Standards, Conventions, and General Information

### Overview

The **System Reference Manual** is organized by devoting a separate section to each WMS process or class of activity. However there are a number of broad concepts in the Welfare Management System that are common to many or all of the separate WMS processes.

This section is used to describe these concepts. It provides a source of information about various standards and conventions that are used in WMS and describes processes that are fundamental to the WMS design.

### Non-Services Pending Data Status Charts - Explanation

Non-Services Pending Data Status Charts are used to define how WMS transactions will change pending data statuses, when they are allowed, and how they are affected by error-free and non-fatal errors. The chart consists of a number of columns which are defined below.

The first column, entitled **Transaction Type**, lists all of the WMS Non-Services data entry transactions.

The second column, entitled **Pending Data Statuses Allowed For This Transaction**, lists the Pending Data Statuses that a Pending Record must have for that Transaction to be accomplished.

The third column, entitled **Pending Data Status After "Transaction Accepted" With Non-Fatal Errors**, lists the possible Pending Data Statuses that a Pending Record may have when the Transaction in the first column is completed successfully but there are non-fatal errors.

The fourth column entitled **Pending Data Status After "Transaction Accepted" and Error-Free**, lists the possible Pending Data statuses that a Pending Record may have when the Transaction in the first column is completed successfully without errors.

No transactions of any type will be allowed on a Pending Record with any one of the following Reason Codes (DE #02050):

- 986 CIN-UND - CIN UNDUPLICATE
- 990 SSN-VAL - WMS/SSN VALIDATION

If a Pending Record has a Reason Code of 988 AUTO-SDX - AUTOMATEDSDX/WMS INTERFACE, then only Screen 8 can be accessed.

Non-Services Pending Data Status Charts

TRANSACTION TYPE	PENDING DATA STATUSES ALLOWED FOR THIS TRANSACTION	PENDING DATA STATUS AFTER "TRANSACTION ACCEPTED" WITH NON-FATAL ERRORS	PENDING DATA STATUS AFTER "TRANSACTION ACCEPTED" AND ERROR-FREE
<b>WKBK00</b>	Not Applicable	<b>FDE/ERR</b>	<b>FDE/RFI</b>
<b>WKER00 (via WDXMNU)</b>	<b>FDE/RFI</b> <b>FDE/ERR</b> <b>AT/FDE</b> <b>AT/DEN</b> (only Screen 8 allowed to be accessed) <b>FDE/ALEC</b>	<b>FDE/ERR</b>	<b>FDE/RFI</b> <b>AT/FDE</b>
<b>WKBKWD (via WDXMNU)</b> (A Pending Record for an opening cannot be withdrawn if it was created by the MA/FS Separate Determination Process)	<b>FDE/ERR</b> <b>AT/FDE</b> <b>FDE/ALEC</b>	None (Application record is also withdrawn)	None (Application record is also withdrawn)
<b>WANDEN</b>	Not Applicable	Not Possible	<b>AT/DEN</b>
<b>WKUM00 (via WDXMNU)</b> (Only screen 8 in an LDF district can be accessed for a Pending Record for a PA closing (TT = 07 or 08) if there exists an MA or FS Pending Record created by the MA/FS Separate Determination process for that PA closing)	<b>NO PEND</b>	<b>UM/ERR</b> <b>UM/CLERR</b>	<b>UM/RFI</b> (A Pending Record with this status is created only if the Transaction Type is 06, 07, 08 or 11 and there is Unresolved RFI Data.) <b>UM/CL</b> <b>AT/UM</b>
<b>WKUMER (via WDXMNU)</b> (A Pending Record created by the CIN Consolidation or SSN Validation process cannot be accessed.)	<b>UM/RFI</b> <b>UM/ERR</b> <b>UM/CLERR</b> <b>UM/CL</b> <b>UM/ALEC</b> <b>AT/UM</b> <b>REAC/ERR</b> <b>REAC/UM</b> <b>AT/REA</b> <b>AT/FCFD</b> (Only Screen 8 allowed to be accessed)	<b>UM/ERR</b> <b>UM/CLERR</b> <b>REAC/ERR</b>	<b>UM/RFI</b> <b>UM/CL</b> <b>AT/UM</b> <b>AT/REA</b>
<b>WMSSIG</b>	Not Applicable	Not Applicable	Not Applicable
<b>WMSOVR</b>	<b>FDE/ERR</b> <b>UM/ERR</b> <b>REAC/RFI</b>	Not Possible	<b>AT/FDEOV</b> <b>AT/UMOV</b> <b>AT/REAOV</b>
<b>WCANCL</b> (A Pending Record for a PA closing (TT = 07 or 08) cannot be canceled if there exists an MA or FS Pending Record created by the MA/FS Separate Determination process from that PA closing)	<b>FDE/RFI</b> <b>AT/DEN</b> <b>FDE/ERR</b> <b>FDE/ALEC</b> <b>AT/FDE</b> <b>AT/FDEOV</b> <b>UM/RFI</b> <b>UM/CL</b>	<b>NO PEND</b>	<b>NO PEND</b>

TRANSACTION TYPE	PENDING DATA STATUSES ALLOWED FOR THIS TRANSACTION	PENDING DATA STATUS AFTER "TRANSACTION ACCEPTED" WITH NON-FATAL ERRORS	PENDING DATA STATUS AFTER "TRANSACTION ACCEPTED" AND ERROR-FREE
	<p><b>UM/CLERR</b> <b>UM/ERR</b> <b>UM/ALEC</b> <b>AT/UM</b> <b>AT/UMOV</b> <b>REAC/ERR</b> <b>REAC/UM</b> <b>AT/REA</b> <b>AT/REAOV</b> <b>AT/DBR</b> (Pending Records with these statuses may only be Canceled by Users authorized to store budgets). <b>AC/DBR</b> (Pending Records with these statuses may only be Canceled by Users authorized to store budgets).</p>		

### Authorization Generation and Availability

The WMS Authorization Form (DSS-3209) lists all case and individual information required by NYSDSS regulations to provide authorization for the assistance given to the clients in a case.

Up to five individuals are listed on each page of the Authorization Form. If a case has more than five individuals, then the Authorization Form will have one page for each five individuals up to a maximum of four pages for 20 individuals which is the maximum that a single case may have. Each additional page of an Authorization includes the page number plus the Case Name and the Office, Unit and Worker. The other case data is *not* repeated on the additional pages.

The printing of an authorization can be accomplished in four different ways:

- At the time a FDE or U/M transaction is completed error-free.
- By using the Authorization Report Request transaction, selection E on the WDXMNU - Non-Services Data Entry menu.
- By using the Authorization Report Request (Function 5) in the WBPAPS - PA/FS Budget Menu.
- From the BICS RFM Cluster after the 3209AUTH Report File has been received.

### Printing an Authorization When Transaction is Complete

A local district may choose to have an authorization printed at the time a FDE or U/M transaction is completed error-free. To do so, they must select one of the five possible options shown in the **Authorization Printing Options** table below.

TRANSACTION TYPE	OPTION 0		OPTION 1**		OPTION 2		OPTION 3		OPTION 4	
	AUTO PRINT	SYSAK SELECT	AUTO PRINT	SYSAK SELECT	AUTO PRINT	SYSAK SELECT	AUTO PRINT	SYSAK SELECT	AUTO PRINT	SYSAK SELECT
01 - APP Denial			Y					Y		Y
02 - Opening			Y		Y			Y	Y	
03 - FDE Denial			Y		Y			Y	Y	
05 - Change			Y					Y		Y
06 - Recert			Y					Y		Y
07 - Close*			Y					Y		Y
08 - Recert/Close*			Y					Y		Y
09 - Open/Close			Y		Y			Y	Y	
10 - Reopen			Y		Y			Y	Y	
11 - Reactivate			Y					Y		
14 - Closed Case Maintenance			Y					Y		Y

\* If the closing of a PA case creates an MA Extension case, then the Authorization for the MA case will be printed with the authorization for the PA closing case. Likewise, if the closing of a PA case creates an FS-TBA case, then the Authorization for the FS case will be printed with the authorization for the PA closing case.

\*\* Authorization Number is required for Undercare Maintenance when LDSS uses this option.

In this table, a Y in the AUTO PRINT column indicates that an authorization will be automatically printed upon error-free completion of the Transaction Type. A Y in the SYSAK column indicates that an authorization may be requested to be printed. This is done by entering an X in the "AUTHORIZATION" selection on the bottom of the WSYSAK - System Acknowledgment screen when the screen is displayed at the completion of an error-free transaction.

An authorization is *not* available if the Pending Data Status is one that is listed in the **No Authorization Available** table below.

### The WK3209 Authorization Report Request

An authorization may be requested at any time by using the Authorization Report Request transaction which is selection E on the WDXMNU - Non-Services Data Entry menu. The Case Status must be 01 - New Case, 10 - Active, 21 - Active Override, 14 - Closed, or 22 - Closed Override and the Pending Data Status must *not* be one listed in the **No Authorization Available** table below.

On the WDXMNU menu, the Case Number is required. The Authorization Number is *not* required unless the local district has selected Authorization Printing Option 1. See the **Authorization Printing Options** table in the previous section.

If a Pending Record exists and the Pending Data Status is *not* one listed on the **No Authorization Available** table below, then only the Authorization for the Pending Record is available and will be printed. If no Pending Record exists, or there is a Pending Record that has a Pending Data Status listed on the table below, then only the Authorization for the case is available and will be printed.

NO AUTHORIZATION AVAILABLE FOR THESE PENDING DATA STATUSES	
02 - FDE/ERR	45 - FDE/ALEC
09 - UM/ERR	46 - UM/ALEC
17 - UM/CL	60 - AT/CUI
18 - UM/CLERR	61 - AU/CUI
40 - REAC/UM	62 - CUI/BUP
41 - REAC/ERR	90 - FDE/RFI
	91 - UM/RFI

#### Authorization Report Request on WBPAFS - Budget Calculation Menu

A local district may choose to allow authorizations to be requested from the WBPAFS - Budget Calculation Menu. If allowed, an authorization can be printed by entering Function 5 and the Case Number on this screen. An Authorization Number is not required. The Case Status must be 10 - Active, 21 - Active - Override, 14 - Closed, or 22 - Closed-Override. If the case has no Pending Record, then the most recent authorization for the case is printed. If the case has a Pending Record, and the Pending Record Status is *not* one that is listed on the **No Authorization Available** table above, then the authorization for the Pending Record is printed.

#### Printing Authorizations on the BICS RFM Cluster

Upon completion of the BICS LDF/File Maintenance process, all error-free authorizations are transmitted to the local district's RFM Cluster in the BICS Report File entitled 3209AUTH. These authorizations are then printed by the local district as desired.

#### Authorization Number Assignment

A new Authorization Number will be assigned to a Pending Record created as a result of either successful data entry activities, or system generated activities.

##### From Successful Data Entry

- Full Data Entry
  - *Exception:* When the Transaction Type is 09 (Open/Close), new Authorization Number is generated when the Pending Record is established and a second (higher) Authorization Number is generated after the Pending Record goes through Batch Update.
- Application Denial

- Full Data Entry Error Correction and Pending Data Change
  - *Exception:* A new Authorization Number is not generated if the previous Pending Data Status was in error (FDE/ERR or FDE/ALEC) or if you are accessing Screen 8 on a Pending Record created by Application Denial.
- Undercare Maintenance
- Undercare Maintenance Error Correction and Pending Data Change
  - *Exception:* A new Authorization Number is not generated if the previous Pending Data Status was:
    - UM/ERR
    - UM/CLERR
    - UM/ALEC
    - REAC/UM
    - UM/CL
    - REAC/ERR

#### From System-Generated Pending Records

System-generated, pending records create authorization numbers that are based on patterns. Patterns decompose the authorization number into pieces that are recognized by users. For example, the HEAP Mass Close process creates pending records that have an authorization number with the pattern:

YYHEAPCL

where YY represents the last two digits of a year. Using the pattern, 05HEAPCL represents the Mass Closure of HEAP cases for 2005.

Patterns are used to enforce certain rules regarding how system generated authorization should be structured. The rules are discussed below:

- Underlining means the characters involved are fixed (do not change)
- YY represents a year. If two YYs are in the same pattern they represent year pairs such as 99 and 00 (1999 and 2000).
- A is an alphabetic character.
- DD is a District Number.
- # is a numeric value (0-9).
- X is an alphabetic or numeric character.



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The processes listed in the table below, which are not data entry activities, are examples of the creation of system-generated pending records. The table indicates whether or not a new Authorization Number is assigned, the format of the new number, and if a new Authorization is available. Any authorization numbers that are generated utilize one of the patterns discussed previously.

PROCESS/MODULE	CASE REASON CODE	NEW AUTH #	AUTHORIZATION NUMBER PATTERN/EXAMPLES	AUTH AVAILABLE Note: Numbers in parentheses reference notes following this table	REMARKS
PA/FS HEAP MRB/A UT0610	924	Yes	YYHEAPYY (2) 04HEAP05 05HEAP06 06HEAP07 07HEAP08	(1)	First YY represents a two digit year. Second YY represents two digit year plus 1.
HEAP Mass Close MRB/A	924	Yes	YYHEAPCL(5)  94HEAPCL Through 07HEAPCL	Yes	
IV-D MRB/A WIV030	965	Yes	9XXNMMYY (3)	Yes	
PA & FS Change MRB/A					
Congregate Care Increase	B25	Yes	9XXNMMYY (3)	Yes	
FS Allotment Increase	924	Yes	9XXNMMYY (3)	Yes	
FS Increase/Decrease in Expense Allowance	924	Yes	9XXNMMYY (3)	Yes	
Federal Benefits Increase	937	Yes	9CCNMMYY (3)	Yes	
EID MRB/A	B20	Yes	9XXNMMYY (3)	Yes	
Forced Close/Forced Delete	740	Yes	Next number in District sequence	Yes	
CIN Consolidation	986	No	Auth number does not change	(4)	
Automated SDX/WMS Interface	988	Yes	Next number in District sequence	Yes	
WMS SSN Enumeration	990	No	Auth Number does not change	Yes	
Veteran's Code Update	Y22	Yes	9DDMMYYV	Yes	
Office/Unit/Worker Case Redistribution SP5006	Y22	Yes	9DDXXOUW	Yes	
Prepaid Capitation Provider Fix UT0710	(6)	Yes	PCPFIXYY	Yes	
Prisoner Match Automatic Closure	I92, F63	Yes	9DDPMMYY	Yes	

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PROCESS/MODULE	CASE REASON CODE	NEW AUTH #	AUTHORIZATION NUMBER PATTERN/EXAMPLES	AUTH AVAILABLE Note: Numbers in parentheses reference notes following this table	REMARKS
SSA Auto-Close Process	I92	Yes	9DDXMMYY	Yes	A monthly auto-close process will be performed for single-individual TA and FS cases that are identified as a result of a monthly match performed by comparing SSA/RFI Death Match file against WMS
State/Federal Charge Fix CU1070	(6)	(6)	SFAL####	(6)	
MSP Buy-In Conversion	588	(6)	MSPC####	(6)	One time run for conversion in March 2005
SSI Y2K Generate 12/31/49 To Date	(6)	(6)	MASSIY2K MA200052 - MASSIY2K	(6)	
MA Extensions for 2006	(6)	(6)	MAEXTT06 M213238 - MAEXTT06	(6)	
Family Planning Automatic Reauthorization	C05	(6)	FPBPDDMM	(6)	FPBP no longer has two year authorization - last time this process ran was 8/31/06
Reduce MA Eligibility for Children 6-18, 133% to 100% FPL	C25	(6)	C25CRJCL	(6)	One time run in July 2005
(6)	(6)	(6)	9N1DD### F108710 - 9N100306	(6)	
(6)	(6)	(6)	9DDXXTHI MA0003249802 - 90204THI	(6)	
(6)	(6)	(6)	9DDXXMSP M137380 - 90304MSSP	(6)	
Bypass Downgrade for Retro MA	U66	(6)	DDRCMMYY	(6)	
NYSNIP	A39, B27	Yes	9NXXMMYY	Yes	
60 Month Conversion	B50	Yes	9DDCMMYY	Yes	
"Luberto" County to County Transfer	898	Yes	TRANMMYY		The first two digits in a case number for NYC to Upstate is "NT". The first two for Upstate to Upstate is "UT".

**Notes:**

- 1) The PA HEAP Mass Authorization List is the authorizing document.
- 2) 94 and 95 are the beginning and ending years, respectively, of the current PA HEAP year. You cannot use this number to perform the next Undercare transaction for any PA HEAP cases. You must use the authorization number assigned to the transaction that preceded this MRB/A.

- 3) The coding for MRB/A is:

9 is fixed

XX is the TRANSACTION DISTRICT

N indicates the type of change:

1 - PA

2 - FS

3 - PA & FS

4 - IV-D

MMYY is the month and year of the EFFECTIVE DATE of the mass change.

- 4) Each LDSS has made a decision whether or not they want the Pending Records created by the CIN Consolidation process included in their BICS/LDF transmission. If the decision was YES, then an Authorization is available. If NO, then an Authorization is not available.
- 5) HEAP Mass Close MRB/A Process - Performed annually since 1994.
- 6) The values for this cell were not available at the time of publication.

**Authorization Messages**

There are a few situations which cause a message to be displayed in the ALERTS section of the DSS-3209. These situations and the appropriate messages appear in the following table.

MESSAGE	CAUSE
UNRESOLVED RFI DATA - FLAG ON	A transaction with Transaction Type 05, 12 or 13 is entered on a case which has been flagged as having RFI data.
CLOCKDOWN CLOSING EFFECTIVE MM/DD/YY	A closing transaction (07 or 08) with a future MM/DD/YY effective date is entered for a case. The new Clockdown Status is CLKDWN.
CLOCKDOWN STOPPED; ACTION REQUIRED	A change transaction (05) using Reason Code 994 is entered for a case which was clocking down. The new Clockdown Status is STPCLK.

MESSAGE	CAUSE
CLOCKDOWN STOPPED	A change or recert (05 or 06) transaction which extends the authorization period beyond the future effective date of a closing is entered. This case will have no Clockdown status.

### Associated Name and Address Fields

The Associated Name and Address fields on the back of the Authorization Change Form and on screen 7 may be used for several different purposes. These are described below:

#### Changing Direct Check Payee and/or Address to Which the Direct Check is Mailed

The direct check Payment Line must have a Method of Payment of 05 or 06. If 05, then the name and address information must be put in the first occurrence of the Associated Name and Address (A). If 06, then the second occurrence (B) must be used.

- To Make the Payee Another Individual in the Case:
  - In the Associated Name and Address LN NO field, enter the individual's Line Number from Section 2. (The payee name on the check will be exactly as it appears on that Line Number in Section 2).
  - In the CODE field, enter one of the following Associated Name and Address Codes:
    - 17 - Essential Person or 13 - Alternate Payee
  - The NAME field is left blank.
  - In the Address fields, enter the address to which the check is to be mailed. (If Code 17 is used, the address can be left blank if the check is to be mailed to the case address).
- To Make the Payee a Person Who is Not in the Case:
  - The BICS Manual provides a description of the uses of Associated Names and Codes when a user wishes to make the payee a person who is not in the case. The reviewer is directed to the following manual for more information:
    - [Payment Issuance & Control Sub-System Manual](#)

#### To Have the CBIC Delivered to an Address Different From the Case Address.

- In the LN NO field, enter the Cardholder Individual Line Number in the case from Section 2.
- In the CODE field, enter the Code 10 (Address for Delivery of Client's NYSDSS ID Card).
- The NAME field is left blank.
- In the Address fields, enter the address to which the CBIC for the referenced individual is to be sent.

To Send a Client Notice to Someone in Addition to the Applicant/Payee

- To Enter a Name and Address
  - In the NOT IND (Associated Notice Code) field, enter one of the following codes:
    - 1 - Send Client Notice only
    - 2 - Send Client Notice and Attachments
    - 3 - Send Client Notice and Attachment. Do not send Attachments to Case Name.
  - In the CODE field, enter an Associated Name and Address Code. When a Name and Address are entered, Associated Name and Address Code 67 - Institutional Provider ID Number should not be entered.
  - In the NAME field, enter the name of the person to whom the Notice should be sent.
  - In the Address fields, enter the address of the person to which the Notice should be sent.
- To Enter a Provider ID
  - On the NOT IND (Associated Notice Code) field, enter one of the following codes:
    - 1 - Send Client Notice only
    - 2 - Send Client Notice and Attachments
    - 3 - Send Client Notice and Attachment. Do not send Attachments to Case Name.
  - In the CODE field, enter the Associated Name and Address Code 67 - Institutional Provider ID Number.
  - In the NAME field, enter the Provider ID to which the Notice should be sent. If the Provider ID is not found on the Provider database, the Client Notice is sent to the client, but a copy is not sent to the provider.

Once this information is added to the 3209, **all** notices, or notices with attachments, will be sent to the identifying NAME or Provider ID in addition to the Applicant/Payee. If a notice should not go to the identifying NAME, it must be deleted from the 3209.

- To Identify a Case Member at a Different Address
  - In the LN NO field, enter the individual's Line Number in the case from Section 2.
  - The NAME field is left blank.
  - In the CODE field, enter the Associated Name and Address Code 01 (Case Member Not at Case Residence). Enter the Address.
- To Identify a Child Under 21 Who is Not a Case Member and Who Lives Outside the Case Household
  - In the CODE field, enter the Code 12 (Child Under 21 Living Outside Household-Not a Case Member). Enter the Name and the Address.

- To Identify Certain Employers
  - Enter the Code 16 (TEAP Employer) plus Name and Address to identify a Temporary Employment Assistance Program Employer.
  - Enter the Code 18 (Job Opportunity Employer) plus Name and Address to identify a Job Opportunity Development Program Employer.

## System Acknowledgement and Error Inquiry

System Acknowledgement and Error Inquiry are common functions that can be accessed from several places within WMS including Application Registration, Full Data Entry, Undercare Maintenance and Direct Re-authorization. The System Acknowledgement and Error Inquiry functions are executed to inform users about the status of their requested transaction(s) and provide a means for a more detailed explanation of errors.

The following pages describe these functions in terms of what happens when a transaction (from Application Registration, etc.) is accepted, rejected, or cancelled by the user. Functions that provide the end user with additional information regarding errors are also discussed.

WSYSAK – Transaction Accepted

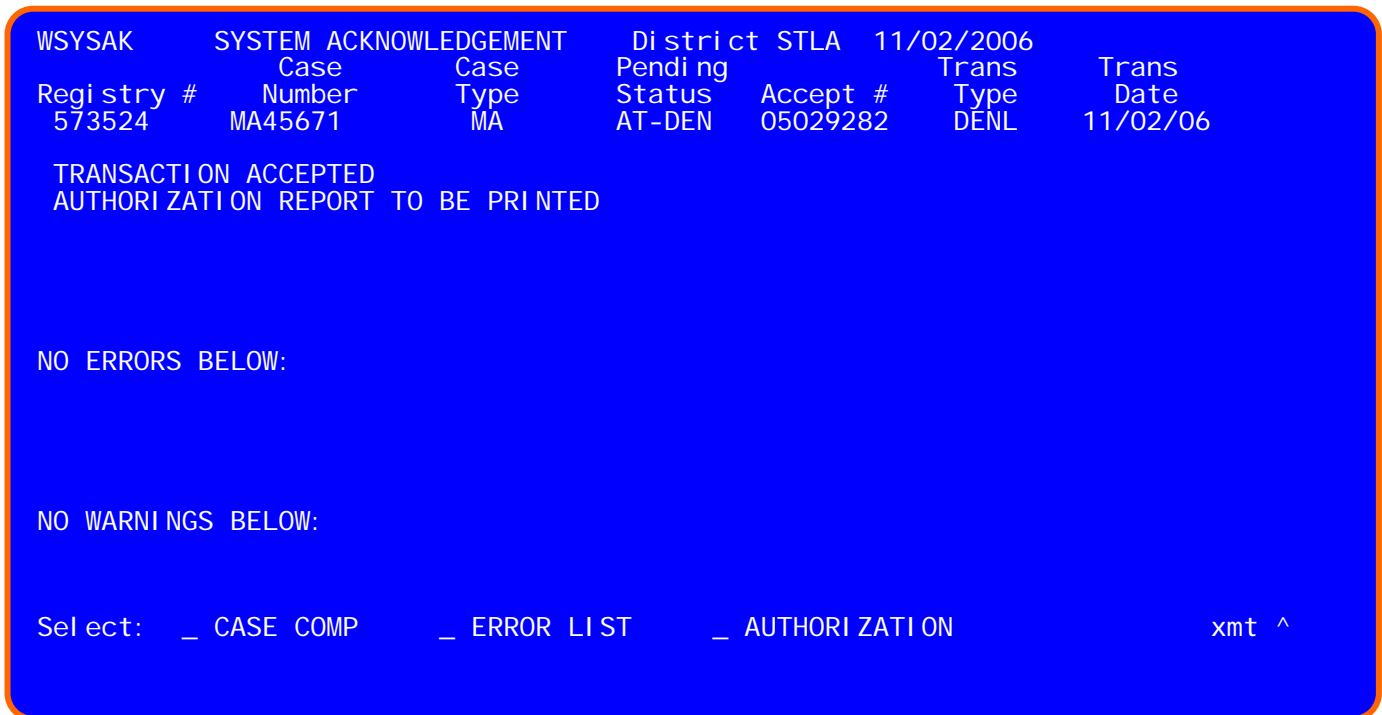


Figure 1 – Transaction Accepted (WSYSAK)

Purpose

This screen is the system acknowledgement that a transaction has been accepted. (See **SRM Full Data Entry and Undercare Error Messages** for an explanation of any additional messages that appear on this screen with the message TRANSACTION ACCEPTED.) The types of transactions are:

- Non-Services Application Denial
- Full Date Entry
- Error Correction/Change Pending
- Full Data Entry Withdrawal
- Undercare Maintenance and Recertification
- Direct Budget Reauthorization of new payment lines
- Authorization Report Request

Access

- Transmitting of last page of WAPNDE – Application Denial Entry Screen, or



- Transmitting of last screen in Full Data Entry, Full Data Entry/Error Correction, Undercare Maintenance and Recertification and Pending Data Change or Full Data Entry Withdrawal, **or**
- Transmitting WBGT06 – Direct Reauthorization, **or**
- Transmitting WK3209 - Authorization Report Request.

### Screen Response

#### Positive

- If a selection is made on line 23, then one of the following messages is displayed on Line 24:
  - AUTHORIZATION REPORT TO BE PRINTED (If District Option is 1)
  - AUTHORIZATION REPORT HAS BEEN SCHEDULED (if District Option is 3 or 4, and Authorization has been requested by typing an 'X' in the Authorization field)
  - CASE COMPREHENSIVE REPORT SCHEDULED
  - ERROR REPORT SCHEDULED
  - ERROR REPORT AND CASE COMPREHENSIVE REPORT SCHEDULED
  - NO ERRORS OR WARNINGS (displayed if user presses F4)
  - NO ERRORS OR WARNINGS EXIST – NO REPORT SCHEDULED
  - NO ERRORS. PAGE FORWARD FOR WARNINGS, IF ANY
- See **Function Keys**.

#### Negative

- One of the following messages is displayed on Line 24:
  - AUTHORIZATION REPORT AND CASE COMP MAY NOT BOTH BE SELECTED
  - AUTHORIZATION REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED, SELECT CASE COMP
  - AUTHORIZATION REPORT SELECTION INVALID
  - BOTH REPORTS HAVE BEEN PREVIOUSLY SELECTED
  - CASE COMP MAY NOT BE SELECTED
  - CASE COMP MAY NOT BE SELECTED, SELECT AUTHORIZATION
  - CASE COMP REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - ERROR REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - MUST USE MENU OR SF6 OR SF& AFTER WK3209 AUTH REQUEST (For F1, F2, F3, F9, & F12)
  - MUST USE SF6 KEY AFTER WITHDRAWAL

- NO ERRORS OR WARNINGS, PAGING FORWARD NOT PERMITTED
- PAGING BACK NOT PERMITTED – PAGE FORWARD FOR ERRORS, IF ANY
- SF7 SUPPORTED FOR LDF DISTRICTS ONLY
- SF7 SUPPORTED FOR APP DENIALS ONLY
- SF99 NOT SUPPORTED – REXMT (99 = 1-3, 8, 10-15) – Application Registration and Denial
- SF99 NOT SUPPORTED – REXMT (99 = 4, 8, 10, 11, 13-14, HELP) – Full Data Entry and Undercare Maintenance
- USE AN SF KEY OR SELECT A HARD COPY OUTPUT OPTION
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

- If the District Authorization Option is 1, then the message AUTHORIZATION REPORT TO BE PRINTED will appear below the message TRANSACTION ACCEPTED and an Authorization will be printed (following successful editing by BICS). The District Authorization Option is usually set to 1 for most local districts.
- If the District Authorization Option is 3 or 4, then an Authorization will *not* be automatically printed but may be requested by typing an X in front of the AUTHORIZATION field on line 23 and transmitting. The message AUTHORIZATION REPORT HAS BEEN SCHEDULED will appear on Line 23 and an Authorization will be printed. See **Authorization Generation and Availability** for further explanation of Authorization printing options.
- If AUTHORIZATION is selected, then Authorization (if no errors or only warnings)
- If CASE COMP is selected, then Case Comprehensive Report (if errors and/or warnings)
- If ERROR LIST is selected, then Error List (if errors and/or warnings).

#### Function Keys

Key	Screen
F1	WKERQY (if errors and/or warnings exist)
F2	WKERQY (if errors and/or warnings exist)
F5	WSVIVD - Child Support Enforcement Referral
F6	<i>Renders Workstation Inactive</i>
F9	WCLSOP – FS Separate Determination or WDXMNU - Non-Services Data Entry and Case Disposition Menu
Ctrl+F2	WSYSAK

Key	Screen
Ctrl+F6	WDXMNU – Non-Services Data Entry Menu or WCLSOP – FS Separate Determination if this WSYSAK screen is the result of a case opened by Separate Determination or WDENIL - Non-Services Application Denial Menu ( if from Application Denial) or WBPAFS - PA/FS Budget Calculation Menu (if from Budget Calculation)

Screen Field Description – WSYSAK

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Protected. Mnemonic.
MM/DD/YYYY	NONE	System Supplied
REGISTRY #	01046 - REGISTRY NUMBER (6)	Protected
CASE NAME	01070 – CASE NAME (28)	Protected
CASE TYPE	01060 - CASE TYPE (2)	Protected. Mnemonic.
PENDING STATUS	02090 - CASE STATUS (2)	Protected. Mnemonic.
ACCEPT #	02045 - ACCEPTANCE NUMBER (8)	Protected
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected
TRANS DATE	02020 - TRANSACTION DATE (6)	Protected

WSYSAK – Transaction Rejected

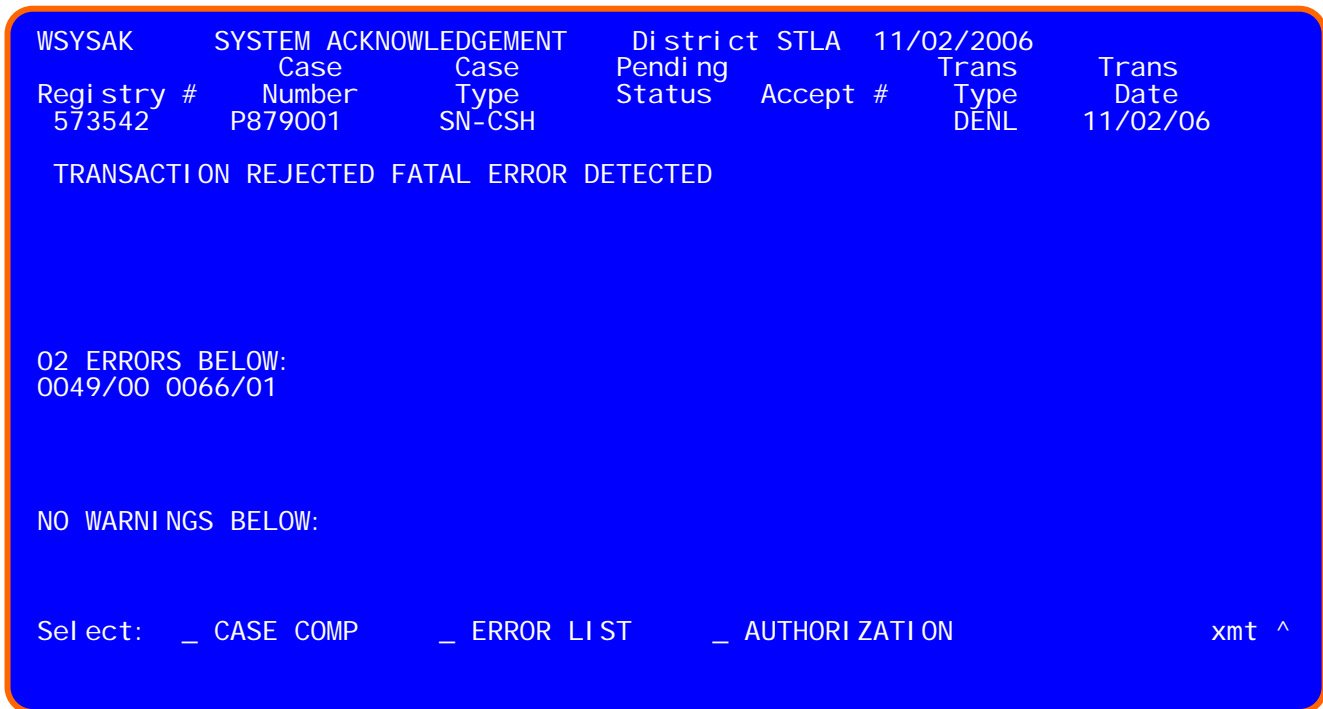


Figure 2 – Transaction Rejected (WSYSAK)

Purpose

This screen is the system acknowledgement that a transaction has been rejected because of unresolved fatal errors. (See **SRM Full Data Entry and Undercare Error Messages** for an explanation of any additional messages that may appear on this screen with TRANSACTION REJECTED or TRANSACTION REJECTED FATAL ERROR DETECTED.)

Access

- Transmission of any screen (excluding Client Notices Subsystem screens) which contained an unresolved error. This includes:
  - WAPDNE
  - WKBK01
  - WKBK02
  - WKBK03
  - WKBK04
  - WKBK05
  - WKBK06

- WKBK07
- WKBK08
- WKBK09
- WKER01
- WKER02
- WKER03
- WKER04
- WKER05
- WKER06
- WKER07
- WKER08
- WKER09
- F11 from screen WBGTPA – PA Budget or WBGTF5 – FS Budget with unresolved fatal errors.

#### Screen Response

##### Positive

- If a selection is made on line 23, then one of the following messages is displayed on Line 24:
  - ERROR REPORT AND CASE COMP REPORT SCHEDULED
  - CASE COMP REPORT SCHEDULED
  - ERROR REPORT SCHEDULED
- See **Function Keys**.

##### Negative

- If a selection is made on line 23, then one of the following messages is displayed on Line 24:
  - AUTHORIZATION REPORT AND CASE COMP MAY NOT BOTH BE SELECTED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED, SELECT CASE COMP
  - AUTHORIZATION REPORT SELECTION INVALID
  - BOTH REPORTS HAVE BEEN PREVIOUSLY SELECTED
  - CASE COMP MAY NOT BE SELECTED
  - CASE COMP MAY NOT BE SELECTED, SELECT AUTHORIZATION
  - CASE COMP REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - ERROR REPORT HAS BEEN PREVIOUSLY SCHEDULED

- MUST USE SF6 KEY AFTER WITHDRAWAL
- NO ERRORS OR WARNINGS, PAGING FORWARD NOT PERMITTED
- PAGING BACK NOT PERMITTED – PAGE FORWARD FOR ERRORS, IF ANY
- SF7 SUPPORTED FOR LDF DISTRICTS ONLY
- SF7 SUPPORTED FOR APP DENIALS ONLY
- SF99 NOT SUPPORTED – REXMT (99 = 1-3, 8, 10-15) – Application Registration and Denial
- SF99 NOT SUPPORTED – REXMT (99 = 4, 8, 10, 11, 13-14, Ctrl+F5) – Full Data Entry and Undercare Maintenance
- USE AN SF KEY OR SELECT A HARD COPY OUTPUT OPTION
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- If CASE COMP and ERROR LIST are selected, then CASE Comprehensive Report and Error Report, or
- If CASE COMP is selected, then only Case Comprehensive Report, or
- If ERROR LIST is selected, then only Error List.

##### Negative

None

#### Function Keys

Key	Screen
F1	WKERQY (if errors and/or warnings exist)
F2	WKERQY (if errors and/or warnings exist)
F5	WSVIVD - Child Support Enforcement Referral
F6	<i>Renders Workstation Inactive</i>
F9	WCLSOP – FS Separate Determination
F12 or Ctrl+F2	WSYSAK - System Acknowledgement
Ctrl+F6	WDENIL - Application/Services Denial Menu (if from Application Denial) or WDXMNU - Non-Services Data Entry Menu (if from Full Data Entry or Undercare Maintenance) or WREACT/WCLOCM - Selection Screen (if from Case Reactivation or Closed Case Maintenance) or WBPAFS - PA/FS Budget Calculation Menu

Screen Field Description – WSYSAK

See screen field descriptions for **WSYSAK - Transaction Accepted**.

WSYSAK – Transaction Cancelled

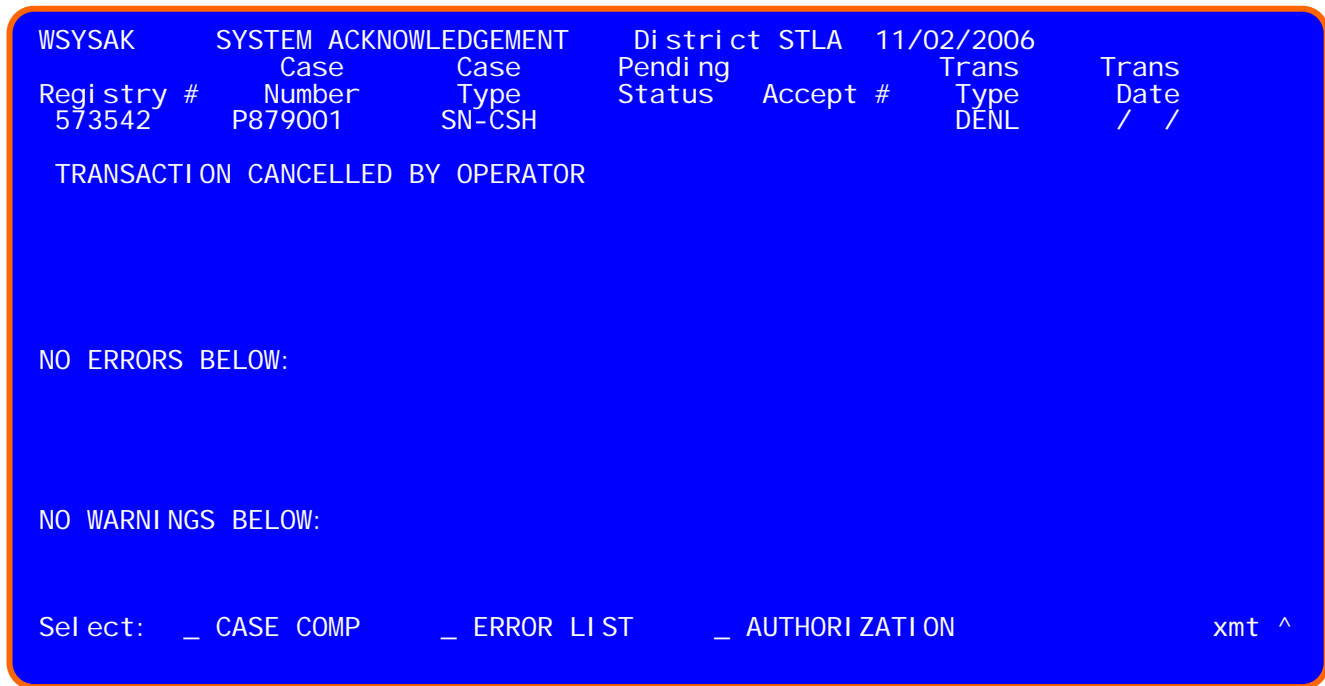


Figure 3 – Transaction Cancelled (WSYSAK)

Purpose

This screen is the system acknowledgement that a:

- Non-Services Application Denial transaction, or
- Full Data Entry or Full Data Entry Error Correction/Change Pending, or
- Undercare Maintenance, or
- Recertification, or
- Direct Budget Reauthorization transaction

has been cancelled by the user.

Access

- Pressing Ctrl+F5 on WAPNDE - Application Denial, or
- Pressing Ctrl+F5 prior to transmission of WBGT06 – Direct Reauthorization.



## Screen Response

### Positive

- See **Function Keys**.

### Negative

- If a selection is made on line 23, then one of the following messages is displayed on Line 24:
  - AUTHORIZATION REPORT SCHEDULED
  - AUTHORIZATION REPORT AND ERROR REPORT SCHEDULED
  - CASE COMPREHENSIVE REPORT SCHEDULED
  - ERROR REPORT SCHEDULED
  - ERROR REPOR AND CASE COMPREHENSIVE REPORT SCHEDULED
  - NO ERRORS OR WARNINGS (displayed if user presses F4)
  - NO ERRORS OR WARNINGS EXIST – NO REPORT SCHEDULED
  - NO ERRORS. PAGE FORWARD FOR WARNINGS, IF ANY

### Negative

- One if the following messages on Line 24:
  - AUTHORIZATION REPORT AND CASE COMP MAY NOT BOTH BE SELECTED
  - AUTHORIZATION REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - AUTHORIZATION REPORT HAS BEEN SCHEDULED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED
  - AUTHORIZATION REPORT MAY NOT BE SELECTED, SELECT CASE COMP
  - AUTHORIZATION REPORT SELECTION INVALID
  - BOTH REPORTS HAVE BEEN PREVIOUSLY SELECTED
  - CASE COMP MAY NOT BE SELECTED
  - CASE COMP MAY NOT BE SELECTED, SELECT AUTHORIZATION
  - CASE COMP REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - ERROR REPORT HAS BEEN PREVIOUSLY SCHEDULED
  - MUST USE MENU OR F6 KEY AFTER CANCEL, SYSTEM ERROR (Displayed for F4, F5, and F9, or if any character is entered for COMP CASE, ERROR REPORT, or AUTHORIZATION and the screen is transmitted)
  - MUST USE SF6 KEY AFTER WITHDRAWAL
  - NO ERRORS OR WARNINGS, PAGING FORWARD NOT PERMITTED
  - PAGING BACK NOT PERMITTED – PAGE FORWARD FOR ERRORS, IF ANY

- SF7 NOT SUPPORTED FOR FATAL ERROR
- SF7 SUPPORTED FOR LDF DISTRICTS ONLY
- SF7 SUPPORTED FOR APP DENIALS ONLY
- SF99 NOT SUPPORTED – REXMT (99 = 1-3, 8, 10-15) – Application Registration and Denial
- SF99 NOT SUPPORTED – REXMT (99 = 4, 8, 10, 11, 13-14, Ctrl+F5) – Full Data Entry and Undercare Maintenance
- USE AN SF KEY OR SELECT A HARD COPY OUTPUT OPTION
- Any Universal Screen Message - See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Screen
F5	WSVIVD - Child Support Enforcement Referral
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WDENIL - Application/Services Denial Process (if from Application Denial) or WDXMNU - Non-Services Data Entry Menu (if from Full Data Entry or Undercare Maintenance) or WBPAFS - PA/FS Budget Calculation Menu (if from Budget Calculation)

#### Screen Field Description – WSYSAK

See screen field descriptions for **WSYSAK - Transaction Accepted**.

WKERQY – Error Inquiry

WKERQY	CASE #	P879001	TYPE	SN-CSH	TRANS	TYPE	DENL	Page	11/02/2006
NUM/OCC	Error Message								1 of 1
	ERRORS FOR APP DENIAL								
0093/00	REASON CODE INVALID FOR BENEFIT CATEGORY								
0047/00	DENIAL DATE REQUIRED								
0066/01	CIN FIELD REQUIRED								
0066/02	CIN FIELD REQUIRED								

Figure 4 – Error Inquiry (WKERQY)

Purpose

This screen is accessed by the user to display error and/or warnings detected from:

- Full Data Entry
- Full Data Entry Error Correction / Pending Change
- Non-Services Application Denial
- Undercare Maintenance/Error Correction/Change Pending

Access

- F1 or F2 from **WSYSAK – System Acknowledgement Screen**, or
- F4 from Full Data Entry, Full Data Entry Error Correction / Pending Change, non-Service Application Denial, or Undercare Maintenance/Error Correction/Change Pending

## Screen Response

### Positive

- WKERQY Pages 2 and 3 (if available) when F2 key is pressed. A total of 40 errors and 20 warnings may be displayed on these 3 pages. Page 2 may have up to 20 additional errors or up to 20 warnings if number of errors on Page 1 is 20 or less; Page 3 may have up to 20 warnings.

### Negative

- One of the following messages on Line 24:
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE - F2 IGNORED
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE - F3 IGNORED
  - CURRENT PAGE DISPLAYED IS PAGE ONE - F1 IGNORED
  - INVALID NEXT SCREEN ENTRY
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - PLEASE USE A FUNCTION KEY OR ENTER Y IN ACCEPT
  - SF7 NOT SUPPORTED FOR FATAL ERROR
  - SF7 SUPPORTED FOR LDF DISTRICTS ONLY
  - SF99 NOT SUPPORTED (99 = 8, 10 - 15)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

## Printed Response

None

## Function Keys

Key	Screen
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F4	WSYSAK - System Acknowledgement
F5	WSVIVD - Child Support Enforcement Referral
F6	<i>Renders Workstation Inactive</i>

F7                    WDXMNU - Non-Services Data Entry Menu or  
                          WKER08 - FDE Error Correction and Pending Data Screen (LDF Districts only)

F9                    WCLSOP - FS Separate Determination

F12 or Ctrl+F2      WSYSAK - System Acknowledgement

Ctrl+F6             WDXMNU - Non-Services Data Entry Menu

Screen Field Description – WKERQY

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE #	01046 - CASE NUMBER (10)	Protected.
CASE TYPE	01060 - CASE TYPE (2)	Protected. Mnemonic.
TRANS TYPE	02010 - TRANSACTION TYPE (2)	Protected.
MM/DD/YYYY	NONE	System Supplied.
NUM/OCC	NONE	Error message numbers and number of occurrences for each message are listed below this label.
ERROR MESSAGE	NONE	Actual error messages are listed below this label.

# Resource File Integration

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## Resource File Integration (RFI)

### Overview

Resource File Integration (RFI) is a WMS subsystem which compares individuals on WMS against individuals on the resource files of various State and Federal agencies. If an individual is found to have any resource information, it is reported to WMS. The worker must review the resource information and then indicate that the resource information has been considered in determining the individual's eligibility by entering a resolution code on the appropriate WMS screen. Currently, RFI is reporting the results of comparing WMS individuals against the following State and Federal files:

- **WRS** - Wage Reporting System of the New York State Department of Taxation and Finance
- **BDX** - Social Security Title II Benefits (Retirement, Survivor or Disability Insurance - RSDI) (Beneficiary Earnings and Data Exchange (BENDEX))
- **UIB** - Unemployment Insurance Benefits File of the New York State Department of Labor
- **FRM** - Financial Institution Recipient Match from TIER, a private contractor
- **NHR** - New hire information from the New York State Department of Taxation and Finance
- **VED** - Verified Employment Data from TALX and MEV

The RFI subsystem consists of the following processes:

1. Comparing and matching the prime names of certain Applicants and Recipients on WMS and their associated Social Security Numbers against the resource files. The comparing of applicants and recipients is done Daily, Monthly, and Quarterly depending on the type of file.
2. Reporting the resource information, known as RFI data, to WMS.
3. Marking with a system "flag" the Application Records and Case Records which have individuals with RFI data. This flag may prevent the completion of processing for *certain* transactions. See **The Effect of Unresolved RFI Data on Transactions** later in this document for further information.
4. Providing an opportunity for the worker to review the RFI data and remove the Flag by entering a resolution code on the following screens:
  - **WCTWRS** - Wage Reporting Individual Information
  - **WCTBDX** - Bendex Reporting Individual Information
  - **WCTUIB** - UIB Reporting Individual Information
  - **WCTNHR** - New Hire Individual Information



- **WCTACT** - FIRM - Match/Balance Individual Information
- **WCTVED** - Verified Employment Data

### Criteria for Matching

In the RFI process, Applicants and Recipients are defined as follows:

- **Applicants** - Individuals with a Social Security Number who are on a new application or on an application on which maintenance was performed to add or change a Social Security Number.
- **Recipients** - All individuals with an Individual Status of 07 - Active or 10 - Inactive-Sanctioned and Case Status of 10 - Active or 21 - Active Override.

Applicants and Recipients in WMS are compared against the State and Federal Files if they meet the following two conditions:

1. The individual must have a Social Security Number. (The comparison for the State Payroll and UIB uses only the Social Security Number. The Comparison for the BENDEX (BDX) file uses Date of Birth as well as Name and Social Security Number)
2. The Case Type of the Individual's application or case must be 11, 12, 13, 16, 17, 19, 20, 21, 24, 31, or 32.

Additionally, for Wage and Unemployment Benefits matches (WRS and UIB), the applicant or recipient must be 18 or older.

### Frequency of Matching

Individual	WRS	BDX	UIB	FRM	NHR	VED
Applicant	Daily	Daily	Daily	N/A	Daily	N/A
Individual added to case	Monthly	Monthly	Monthly	Monthly	Monthly	Bi-Weekly
Recipient	Monthly	Monthly	Monthly	Monthly	Monthly	Bi-Weekly

### SSN and RFI

Each day the Application Support subsystem reads the RFI data. If the subsystem finds the client has died it changes the SSN for the individual to "X". The information is sent to WRTS.

If there is a conflict between the Application Support subsystem and the SSN validation process results, the SSN validation code is changed to "1" to be reevaluated.

## RFI Data Received by WMS

### Data Reported to WMS From WRS

The data from the WRS - New York State Wage Match is displayed on screen WCTWRS and includes applicant and recipient (age 18 or older) data as follows:

- **FILE DATE** - Date Application or Case is Flagged
- **EMPLOYEE/EMPLOYER NAME AND ADDRESS**
- **EMPLOYER NUMBER**
- **QTR** - quarter number and year
- **WAGES** - wages reported for the quarter

For Applicants (following the Daily Match), WRS Data (Wages) reported during the year prior to the application date are displayed for up to four employers, or for up to four quarters if number of employers is less than four. The most recent wages are displayed first. For recipients, only one quarter is displayed and the employer that paid the highest wages is displayed first.

If wage data has been transferred to the Income and Resource Collection System (IRCS) from a stored budget (not Bottom-Line) and is within 10% of the amount reported for MA and 20% of the amount reported for PA, then the *Recipient* match will not be displayed on the WCTWRS screen and the case will not be "Flagged". See **SRM Income and Resource Collection System**.

### Data Reported to WMS From BDX

The data from the BDX match is displayed on screen WCTBDX as follows:

- **FILE DATE** - Date application or case is flagged.
- **CLAIM NUMBER** - Social Security Account on which the applicant/recipient's benefits are based
- **SSA MESSAGE** -

These messages indicate a problem with the SSN (Applicants only) and include the following:

**FAILED: NO MATCH ON DOB** - Applicant's Name, SSN and Sex match but Date of Birth is different from the SSA file. The application will be flagged and the rest of the fields will be blank as SSA cannot verify any benefits.

**SSA RETURNED DIFF SSN SEE RFI** - This message appears for applicants whose SSN is different from the SSN in the SSA file by one number. When this message appears the blank space to the left of the screen caption "DISABILITY" will contain the blinking message - VERIFIED SSN and the actual SSN that is in the SSA file. The PAY STATUS field will display the message RECEIVING BENEFITS if there are any as well as other appropriate benefit data and the application will be flagged.

If the SSN matches the SSN in the SSA file the SSA MESSAGE field and the space to the left of the screen caption "DISABILITY" will be blank but the PAY STATUS field will display the message RECEIVING BENEFITS if there are any as well as other appropriate benefit data and the application will be flagged. If there are no benefits, there will be no WCTBDX screen and the application will not be flagged.

If the SSN mismatches the SSN in the SSA file by more than one number, there will be no WCTBDX screen and the application is not flagged as there is no match possibility.

**FAILED: NO MATCH ON NAME** - This message indicates the SSN is in the SSA file but the name is different. Consequently SSA does not verify DATA OF BIRTH. The application will be flagged and the rest of the WCTBDX fields will be blank as SSA cannot verify any benefits.

**SSN SSA VALIDATION/DECEASED** - Message only appears for deceased applicants. The blank space to the right of the screen caption "ADDITIONAL ENTITLEMENT" will contain the blinking message DATE OF DEATH and the actual date the applicant died. The application will be flagged.

**FAILED: SSN NOT ON SSA FILE** - This message is displayed when the SSN has not been issued by SSA. The application will be flagged and the rest of the WCTBDX fields will be blank as SSA cannot verify any benefits.

**SSN INVALID OR MISSING** - The SSN submitted to the SSA was an invalid SSN.

**SSA VALIDATED SSN** - The SSN submitted to the SSA is a valid SSN for the individual.

**SSN FAILED SSA VALIDATION** - The SSN submitted to SSA is not valid for the individual.

The following messages are for Recipients only.

**TYPE A CONFLICT \* STATE** - This message is displayed when another state has been assigned jurisdiction for this individual's data exchange.

**TYPE B CONFLICT \* STATE** - This message is displayed when another state has attempted to establish a data exchange on the individual but jurisdiction is assigned to New York State.

**POSSIBLE CONFLICT - DECEASED** - SSA records show this individual has died.

**BENEFICIARY DIED MM YY** - Benefits terminated for this individual due to the death of the beneficiary.

**REPRESENTATIVE PAYEE** - The payment check is payable to a representative payee for the beneficiary.

- **ENTITLEMENT** - Date the applicant or recipient first became eligible for benefits.
- **NET BENEFIT** - Displays the current net amount the applicant or recipient receives.
- **HEALTH INS** - Part A and/or Part B - Displays the following data:
  - ENT DATE** - The initial date of coverage, and
  - PREMIUM \$** - The current premium amount, or
  - TERM DATE** - The date coverage ended.
- **PART B PAYOR** - For recipients only.
- **SSI** - For recipients only.

- **SSI START/END DATE** - For recipients only.
- **DISABILITY** - Date of Applicant's or Recipient's Disability onset if appropriate.
- **ADDITIONAL ENTITLEMENT** - Displays additional Social Security Account Numbers if the claim is based on multiple accounts.
- **BLACK LUNG IND, RAILROAD IND** - The word, YES, will be displayed in the space following BLACK LUNG IND and/or RAILROAD IND if the benefit is being received.
- **PAY STATUS** - The message, RECEIVING BENEFITS will be displayed if there is a date in the ENTITLEMENT field and an Amount in the NET BENEFIT field.

#### Data Reported to WMS From UIB

The data from the UIB - New York State Match is displayed on screen WCTUIB and includes Applicant and Recipient (age 18 and older) data as follows:

- **FILE DATE** - Date Application or Case is Flagged
- **PROGRAM CODE**
- **EMPLOYEE NAME AND ADDRESS** from UIB (Since the match is done on the SSN only, verification that the employee's name is the same as the client's name may be necessary).
- **EMPLOYEE BENEFIT RATE**
- **EMPLOYER NAME AND ADDRESS** (Client's last employer)
- **EXPIRATION** date (WK/YR) of claim (Must be within one year of file date.)
- **BENEFIT DAYS USED**
- **BENEFIT DAYS LEFT**
- **DISQUALIFICATION CODE**
- **PAYMENTS** (Recipient matches only)

For Applicants and Recipients, UIB data (including claims established during the 6 months prior to the application date) will not be displayed until the start of the second day. For example, an Application is registered on Monday. UIB comparison is on Tuesday and is not displayed until Wednesday.

If UIB data has been transferred to the IRCS system from a stored budget (not Bottom-Line), then the recipient match will not be displayed on WCTUIB and the case will not be "Flagged". See **SRM IRCS Income Collection System**.

#### Data Reported to WMS From NHR

Data from the NHR match is displayed on screen WCTNHR and includes the following data:

- **FILE DATE** – Date application or Case Flagged
- **EMPLOYEE NAME & ADDRESS** - from Tax Department (since the match is done on the SSN only, verification that the employee's name is the same as the client's name may be necessary)
- **EMPLOYER/ADDRESS** - Employer reported for this person from Tax Department
- **EMP. ID.** - Employer ID from Tax Department
- **W4 DATE** - Date person started employment

#### Data Reported to WMS From FIRM (Financial Institution Recipient Match) (FRM)

Data received from the FIRM interface is displayed on the WCTFRM screen. There may be multiple screens per individual with one bank account displayed per screen. Data elements include:

- **FILE DATE** – Date Case is Flagged
- **PAYEE INFORMATION** - Name and address of person reported by FIRM for supplied SSN. Since the match is on SSN only, verification that the person received from FIRM is the same as the client may be necessary.
- **PAYER INFORMATION (BANK)** - Name and address of bank from FIRM
- **ACCOUNT NUMBER** - Bank account number from FIRM
- **TRUST FUND I** - Values are:
  - 0 – Not a registered trust/escrow account or the account is closed
  - 1 – UTMA/UGMA Account
  - 2 – IOCTA Account
  - 3 – Mortgage Escrow Account
  - 4 – Security Deposits (including Real Estate)
  - 5 – Other Trust/Escrow
  - 6 – Information Not Available
- **ACCOUNT TYPE** - Values are:
  - NOT APPLICABLE
  - SAVINGS
  - CHECKING
  - TERM DEPOSIT
  - MONEY MARKET
  - IRA/KEOGH

- ERISA PLAN
- CASH BALANCE
- COMPOUND
- OTHER

The following fields can occur up to 5 times per screen.

- **BANK BALANCE** - Balance on reported bank account from FIRM
- **MATCH DATE** - Date of match reported by FIRM
- **POSTED** - Date data was posted on RFI
- **RESOLUTION**
- **CODE** - Response to data by worker or system
- **DATE** - Date of response
- **WORKER** - If response is from worker, worker ID of worker who responded to data

#### Verified Employment Data (VED)

The VED process consists of the following steps:

1. A file of active social security numbers for adults in active TANF cases is extracted from WMS and sent to the National Directory of New Hires (NDNH) where it is matched against their database of SSNs and employer IDs. This is a monthly match.
2. The matched response file from NDNH is used by Audit and Quality Improvement (A&QI) to obtain payment information by matching this file against the TALX Work Number file or using their Manual Employment Verification process, MEV. TALX is the name of a private company that maintains an employment database – (Work Number Corporation).
3. A&QI sends a file to WMS on a weekly basis that contains data obtained by either matching with the TALX file or identified via the MEV process.

Unlike data received from the other RFI sources, workers do not have to verify the VED payment information.

Both TALX and MEV data are displayed on the WCTVED screen. However, lines 13 and 14 of this screen will display different information depending on whether the data was verified by TALX or MEV.

#### Data Received from A&QI on the VED File

The file sent by A&QI for inclusion in the RFI system will contain the VED data obtained from matching the NDNH data to the TALX Work Number file, as well as employment data obtained through the Manual Employment Verification process (direct mail contact with employers identified via NDNH to confirm employment income). The frequency of the VED file feed from A&QI will be weekly.

- **FILE DATE** - CINTRAK Match Date
- **EMPLOYEE/EMPLOYER NAME AND ADDRESS**
- **EMPLOYER NUMBER**
- **W4 DATE**
- **ANNUAL TOTAL INCOME YEAR TO DATE**
- **EMPLOYEE TITLE** - only for TALX matches
- **EMPLOYER STATUS**
- **PRINTED NAME** - only for MEV data
- **RESPONDER TITLE** - only for MEV data
- **RESPONDER PHONE** - only for MEV data
- **POST DATE**
- **CHECK/PAYMENT RELEASE DATE**
- **WORK PERIOD FROM DATE**
- **WORK PERIOD TO DATE**
- **PAY FOR WORK PERIOD**
- **HOURS FOR WORK PERIOD**

## RFI Flagging

When the match and the data are reported to WMS, the Application or the Case is flagged as having RFI with the following exception. If there is Wage or UIB Pension data in the IRCS record for a recipient, the case will **not** be flagged. For further information see **SRM Income and Resource Collection System**.

The flagging results in the message UNRESOLVED RFI DATA - RFI FLAG ON appearing on the screens that are used in the following processes:

- Application Maintenance - WAR001 - Application Register Menu
- Application Denial - WSYSAK - System Acknowledgment
- Full Data Entry - WKBK01 - Screen 1 of FDE
- Error Correction - WKER01 - Screen 1 of change or error correction

- Undercare Maintenance - WKUM01 - Screen 1 of Undercare
- Budget Calculation -
  - WBPAWB - PA Input (if no stored budget)
  - WBGTPA - PA Budget (if stored)
  - WBFSWD - FS Input (if no stored budget)
  - WBGTFB - FS Budget (if stored)
  - WBGTB - PA/FS Bottom Line
  - WBMAWB - MA Budget Record (if no stored budget)
  - WBGTMA - MA Budget (if stored)
  - WBGTMA - MA-SSI Budget (if stored)
  - WBGTMA - MA CC Budget (if stored)
  - WBGTMA - MA CC COMM (if stored)
  - WBGTMA - Expanded Eligibility (if stored)
  - WBGTMA - Expanded Eligibility/FHP (if stored)
  - WBMABL - MA Bottom Line
- Case Inquiry -
  - WINQ07 - Case Make-up
  - WINQ37 - Pending Case Makeup
  - WINQ19-24, 28, 29, 30 - Case Comprehensive Screens 1-9
  - WINQ49-54, 58, 59, 60 - Pending Case Comprehensive Screens 1-9
- Application Inquiry - WINQ70 - Application Inquiry
- Disposition - WMSOVR - Override

## Resolving RFI Data

The appearance of the message, UNRESOLVED RFI DATA - RFI FLAG ON, on various screens is a reminder that the worker should review the RFI data for the case and, if possible, remove the flag by resolving the data before attempting any other type of transaction.



Obtaining the RFI screens used for resolving RFI data is accomplished by entering 14 on WMSMNU - WMS Menu screen and transmitting. The WCTMNU - RFI Menu screen is returned.

Entering Selection 1 - Case Resolution and the Case Number (for Recipient) or the Registry Number (for Applicant) will return the RFI screens for resolving RFI data for the individual(s) who have matches. Optionally Social Security Number and/or Resource Type can be entered to narrow down the data that is displayed ('RESOURCE TYPE' is the same as the resource types on the WCTOUW and WCTDLI screens W – WRS, B – BENDEX, U – UIB, N – NDNH, F – FIRM, V – VED). If there is more than one individual on the Application or in the Case then the screens are sorted by Social Security Number, (lowest first). Regardless of the number of Applicants or Recipients in the Application or Case, the available data for each individual is displayed in the following order:

- **WCTVED** - Verified Employment Data
- **WCTWRS** - Wage Reporting Individual Information (one screen)
- **WCTBDX** - Bendex Reporting Individual Information (one screen)
- **WCTUIB** - New Hire Individual Information
- **WCTNHR** - UIB Reporting Individual Information (one screen)
- **WCTACT** - FIRM - Match/Balance Individual Information

These screens are used to:

- 1) view the RFI data, and
- 2) resolve RFI data by entering the appropriate code in the ACTION field (see codes below).

### RFI Resolution History

Prior to choosing a resolution code, the worker may find it useful to view old resolution data for a particular individual. If history data is present, a "HISTORY" indicator will signify the presence of history for the current Case, Individual, and Resource Type at the bottom of the screen. The worker will have the option to enter an "X" on the input line preceding "HISTORY" to access the history detail.

### RFI Resolution Codes (DE #09021)

One of the following RFI Resolution codes can be entered in the Action field:

Code	Definition
1	No case change - Application denied or withdrawn or case closed without regard to RFI information
2	No case change. Current case data is correct
3	Case rebudgeted due to RFI Data. (Old and New Budget Amounts Required)
4	Application denied or withdrawn due to RFI data

- 5\* Case closed - Client failed to respond to request for RFI explanation.
- 6\* Case closed - Financially or categorically ineligible due to RFI data.
- 7 No case change - referred for investigation
- 8 Client and matched individual not the same person
- 9 SSA data acknowledged. (Bendex daily only)
- X Emergency processing required. This code releases the flag for only three business days to allow emergency processing. The RFI data remains and requires resolution. This code should *not* be used for closings. Only workers with the correct security can use this code.
- \* Old Budget Amount Allowed with New Budget Amount Prohibited.

Resolution data is entered on WCTWRS and/or WCTBDX and/or WCTNHR and/or WCTUIB and/or WCTACT and/or WCTVED screens and is stored by using either XMIT or Ctrl+F3. XMIT stores data on the current screen and returns the next screen, if any. When XMIT is used from the last screen, all data entered and transmitted on previous screens and the last screen are stored and WCTMNU is returned. Ctrl+F3 stores only data on previous screens for which XMIT was used and returns WCTMNU. Ctrl+F3 will not store resolution data on the screen from which F13 is pressed.

In addition to user entered Resolution Codes there are system generated Resolution Codes. These codes should not be entered by the user. The system generated Resolution Codes are:

Code	Definition
C	Case closed by daily process
D	Case denied
N	App/Case not found
P	Case closed by monthly process
R	Resolved
S	App/Case not locked, or it is 1 year prior
W	App Withdrawn

WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, and WCTVED have only one screen of data to resolve.

When *all* individuals in the application or case have had *all* their RFI data resolved, the flag is removed immediately and the RFI Menu is returned with the message CASE/REG NO. XXXXXX\*\*RESOLVED\*\*FLAG REMOVED.

After the flag has been removed but prior to Batch Update, the Resolution Action Code may be changed to any valid code but may not be made blank. After Batch Update, any individuals whose RFI data has been resolved will no

longer appear on the WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED screens. However, workers will be able to view a history of VED data via Selection 8 on the WCTMNU - RFI Menu screen.

If an individual is in more than one Application or Case, then each Application Record or Case Record will be flagged as having RFI data to resolve. Resolution must then be done for each case and/or application. Resolving the RFI data in the case or application does not resolve it in other cases or applications.

RFI Resolution Supplemental Codes (VED resource only)

Depending on the resolution code chosen, the VED resource may require that a supplemental code be entered in addition to the resolution code.

Entry in Supplemental Code Entered	Status	Code Definition
A	OK	Referred to Investigation Unit for IPV
B	OK	Recoupment being Assigned
C	OK	Recoupment being Assigned AND Referred to Investigation Unit for IPV
N	OK	No Supplemental Code Assigned
Space or Blank	OK*	Allowed ONLY with X Resolution Code; or if worker blanks out resolution within same business day and the case is still locked in RFI
Any Value other than above	NOT OK	NOT ALLOWED; error message "Supplemental Code is Invalid for VED Resource"
If Entry in Resolution Code Field is...	...Then Only Value Allowed in Supplemental Code Field is:	
01	A, B, C, N	
02	A, B, C, N	
03	A, B, C, N	
06	A, B, C, N	
08	N	
X	There is NO allowable value--if a value is entered, the following error message must appear, "Supplemental Code is Invalid for VED Action Code"	
Space or Blank	There is NO allowable value--if a value is entered, the following error message must appear, "Supplemental Code is Invalid for VED Action Code"	
System Resolution Codes: C, D, N, P, R, S, W	There is NO allowable value -- hit has been system-resolved	

Screen Sequence

The RFI screens for a particular case or application are always displayed in the following sequence:

- For the *first* individual who has RFI data ( the one with the lowest SSN)
  - WCTVED
  - WCTWRS
  - WCTBDX
  - WCTUIB
  - WCTNHR
  - WCTACT
- then, for the *second* individual who has RFI data (the one with the next lowest SSN), the above screens are repeated in the same sequence, and so on, until all RFI data for all individuals is displayed.

Any screen in the above sequence will not be displayed if it has no RFI data. The current page and total number of pages with RFI data for each application or case is shown at the top of each screen. Pressing F1 on any screen in the RFI screen sequence will return to the *first* screen of the *first* individual in the case with RFI data.

#### Function Keys for Paging

From any screen in the RFI screen sequence, the "paging" keys, F1, F2 and F3 function as follows:

- F1 Always returns the *first* screen of the first individual with data in the RFI screen sequence. (If pressed while on the first screen, the message CURRENT SCREEN IS PAGE ONE - SF01 IGNORED is displayed).
- F2 Always returns the *next* screen with data in the RFI screen sequence. (If pressed while on the last screen, the message CURRENT SCREEN DISPLAYED IS HIGHEST PAGE - SF02 IGNORED is displayed).
- F3 Always returns the *previous* screen with data in the RFI screen sequence. (If pressed while on first screen, the message CURRENT SCREEN DISPLAYED IS LOWEST PAGE - SF03 IGNORED is displayed).

#### Function Keys for Screen History

When navigating between multiple RFI screens, the following keys may be available to return the user to a previous location:

- F5 Return to previous screen
- F8 Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 - New Office Unit Worker Records Inquiry
- F9 Return to previous District List (WCTDLI) screen, includes Option 6 - New Records Inquiry
- F10 Return to previous Individual Case Summary (WCTIND) screen
- F11 Return to previous Individual Case Involvement (WCTINV) screen

### Column 80 "Quick Query" field

In the RFI screens, a "Quick Query" field has been added to quickly use data from one screen as input parameters to other screens without having to return to the RFI menu. When cases are completely resolved (flag is removed), the "Quick Query" option field will change from a "\_" to a "." so the eligibility worker knows that no more resolutions are necessary for the case, although it is still possible to alter an existing resolution for these recently entered resolutions. Altering a resolution means the previously entered resolution cannot be spaced out; another resolution must be entered. Recently entered means a resolution entered during the current day. The available "Quick Query" options will vary depending on the data available on the screen. Listed below are all of the possible options:

- R Go directly to resolution screen for Case/Reg
- X Go directly to resolution screen for the current Social Security Number, Case/Reg
- C Bring up the Individual Case Involvement (WCTINV) screen for Social Security
- I Bring up the Summary screen (WCTIND) by individual for Case/Reg
- O Bring up WCTOUW screen for Office Unit Worker

### RFI Menu Messages

Regardless of whether a resolution code is entered, pressing XMIT from the last screen with RFI data or F16 from any screen will return WCTMNU - RFI Menu with one of the following messages on line 22:

- CASE/REG NO XXXXXX \*\*RESOLVED\*\* FLAG REMOVED - when all RFI data for all individuals in the case or application has been resolved and there is no Pending Record for the case.
- CASE/REG NO XXXXXX \*\*RESOLVED\*\* FLAG RESOLVED - AUTH REPORT TO BE PRINTED - when Transaction Types 01-03, 06-11 had been attempted before the RFI data for the case has been resolved and the pending status was FDE/RFI or UM/RFI. Immediately upon resolution the pending status changes to AT/FDE or AT/UM and the above message appears if the local district option for Authorization Generation is one in which an Authorization will be printed for the Transaction Type. See **SRM Standards, Conventions and General Information**.
- CASE/REG NO XXXXXX \*\*RESOLVED\*\* FLAG PREVIOUSLY REMOVED - when the RFI data for all individuals has been previously resolved.
- CASE/REG NO XXXXXX \*\*NOT RESOLVED\*\* FLAG REMAINS - when at least one individual in the case or application still has RFI data that has not been resolved.

### The Effect of Unresolved RFI Data on Transactions

When a transaction is attempted against an Application Record or Case Record which has been flagged as having RFI data, and this RFI data has not been resolved, one of three situations can occur:

- 1) **Transaction can be completed but Case is not authorized.** This situation occurs for the following Transaction Types:
  - 01 - Application Denial
  - 02 - Opening

- 03 - FDE (Workbook) Denial
- 06 - Recertification
- 07 - Closing
- 08 - Recert/Closing
- 09 - Open/Close
- 10 - Reopening
- 11 - Reactivation

After the transaction is completed, the Pending Data Status is FDE/RFI or UM/RFI. The message UNRESOLVED RFI DATA - RFI FLAG ON - NO 3209 WILL BE PRODUCED will appear on the System Acknowledgment screen. The Pending Record for the transaction will not be processed by Batch Update and an Authorization is not available for printing.

Immediately on resolution of the RFI Data the Case will be authorized and an Authorization is available for printing depending on local district option (See **SRM Standards, Conventions and General Information**). The Pending Data Status will change to the appropriate error-free status for that transaction. If in the time between an Application Registration and Full Data Entry an Applicant is flagged as having RFI data, then when the Pending Record completes Batch Update the case will be flagged.

- 2) **Transaction can be completed and Case is Authorized.** This situation occurs for the following Transaction Types:

- 05 - Change, or Mass Rebudgeting, or Direct Budget Reauthorization
- 12 - Forced Closing of Case
- 13 - Forced Deletion of Individual(s)

After transaction is completed the Pending Data Status is AT/XXX and the Pending Record will be processed by Batch Update and an Authorization will be available for printing depending on local district option. (See **SRM Standards, Conventions and General Information**.) The RFI flag will remain if the RFI data has not been resolved.

The message UNRESOLVED RFI DATA - RFI FLAG ON will appear on the System Acknowledgment screen and will be printed on the Authorization.

- 3) **Transaction can be completed - RFI flag has no effect.** The following Transaction Types can be completed even if the RFI data has not been resolved:

- Application Maintenance
- Application Withdrawal
- FDE (Workbook) Withdrawal

The message UNRESOLVED RFI DATA - RFI FLAG ON will appear on the WAR001 - System Acknowledgment screen for Application Maintenance and Withdrawal, or on the WSYSAK - System Acknowledgment Screen for FDE Withdrawal.

4) **Transaction Not Allowed.** The UM/RFI pending status is considered Invalid for the following transactions:

- MA Extension
- FS Separate Determination

**WCTOUW - Case/Reg Number List Inquiry**

The WCTOUW - Case/Reg. Number List Inquiry screen displays a list of applications and cases with unresolved RFI which match the selection criteria entered on WCTMNU as explained in the following table:

CRITERIA SELECTED ON WCTMNU			APPLICATIONS AND CASES LISTED ON WCTOUW
OFFICE	UNIT	WORKER	
X			All with an exact match on OFFICE
X	X		All with an exact match on OFFICE and UNIT
X	X	X	All with an exact match on OFFICE, UNIT, and WORKER
X		X	All with a blank UNIT and exact match on OFFICE and WORKER
	X		All with a blank OFFICE and blank WORKER and exact match on UNIT
	X	X	All with a blank OFFICE and exact match on UNIT and WORKER
		X	All with a blank OFFICE and blank UNIT and exact match on WORKER

Applications and cases for which RFI data is resolved are deleted from the WCTOUW screen the next day.

**# of Individuals - # of Days**

Two types of data separated by a hyphen are displayed in the columns labeled WRS, BDX, UIB, FRM, and NHR on the WCTOUW screen. The first field in each column is the number of individuals on the application or case who have WRS and/or BDX and/or UIB and/or FRM and/or NHR data. The second field of data is the aging indicator. Possible values for this field are described in the following table.

**Table of Values for Aging Indicator**

Aging Indicator	Definition
*	The <u>application</u> record was flagged during the last daily match. The asterisk will be removed after one day and replaced with the actual number of work days that the data could have been viewed (Monday - Friday). An asterisk is used only for applications.
W	The <u>case</u> was added to the list during the last WRS quarterly match. This indicator will remain for 2 days after which it is replaced with the actual number of work days that the data could have been viewed (Monday - Friday). Not used for applications.
B	The <u>case</u> was added to the list during the last monthly BDX Match. This indicator will remain for 2 days and then replaced with the actual number of work days that the data could have been viewed (Monday - Friday). Not used for applications.
N	The <u>case</u> was added to the list during the last NHR monthly match. This indicator will remain for 2 days and then replaced with the actual number of work days that the data could have been viewed (Monday - Friday). Not used for applications.
U	The <u>case</u> was added to the list during the last UIB monthly match. This indicator will remain for 2 days and then replaced with the actual number of work days that the data could have been viewed (Monday - Friday). Not used for applications.
F	The <u>case</u> was added to the list during the last FIRM Monthly match. This indicator will remain for 2 days and then replaced with the actual number of work days that the data could have been viewed (Monday - Friday). Not used for applications.
V	The <u>case</u> was added to the list during the last VED Bi-Weekly match. This indicator will remain for 2 days and then replaced with the actual number of work days that the data could have been viewed (Monday - Friday). VED does not do matching on applicants.

**High Risk Cases**

For cases a dollar sign may precede the first group of characters in the WRS column. This dollar sign indicates a High Risk case. The criteria for a High Risk case are as follows:

- If one or more members in a case earn more than \$3,000 for PA cases, **or**
- if one or more members in a case earn more than \$5,000 for MA and/or FS

**WCTDLI - District List Inquiry**

The WCTDLI - District List Inquiry screen displays a list of all applications and cases in the district which have unresolved RFI data. The registry numbers/case numbers and case names are listed in order by Office/Unit/Worker.

The Age columns under the AGE heading on the WCTDLI screen display the Aging Indicator for unresolved data from WRS (W), BDX (B), NHR (N), UIB (U), FRM (F), VED (V). See the **Table of Values for Aging Indicator** above.

The next day those applications and cases for which RFI data was resolved are deleted from the WCTDLI screen.



### WCTSTT - Resource File Integration (Statistics)

The Resource File Integration Screen (WCTSTT) displays dates and statistics resulting from the posting of RFI data received from the various State and Federal files. This posting updates the database with RFI information including the flagging of applications and cases.

The data displayed includes the day and time of the Last Update, the Resource Type, the last three daily Posting Dates with the associated Extract Dates and the resulting number of individuals with RFI data.

More detailed explanation of the screen fields can be found on the page containing the WCTSTT screen at the end of this section.

### RFI Functions

The RFI Menu screen, WCTMNU, is selection 14 on the WMS Menu. The following functions can be accessed from the RFI Menu:

#### 1 - Case Resolution

Entering Function 1 with a case or registry number will retrieve one or more of the RFI screens (WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED) displaying the results of RFI matching. RFI matching can be resolved on these screens with the entry of an ACTION code.

#### 2 - Office Unit Worker Inquiry

Entering Function 2 with an Office, Unit, or Worker code, or any combination of these, will return the WCTOUW screen with a list of applications and cases for the Office and/or Unit and/or Worker entered that have unresolved RFI data. For each case/application listed information on the number of days RFI data has not been resolved and the number of individuals in the case that have unresolved data is displayed.

#### 3 - District List

Entering Function 3 will return the WCTDLI screen displaying all applications and cases that unresolved data in the district under which the worker has logged-on. Aging data for each RFI match type is also displayed.

#### 4 - Statistics

Entering Function 4 will return the WCTSTT screen displaying dates files were received, dates matches were received from interfaces, and the number of individuals matched for each interface type.

#### 5 - High Risk Cases

Function 5 operates like function 2 in that the WCTOUW screen is returned. However, for function 5 only high risk cases will be listed.

#### 6 - New Records Inquiry

Function 6 operates like Function 3 in that the WCTDLI screen is returned. However, only applications and cases from the latest file matching will be listed.

#### 7 – New Office Unit Worker Records Inquiry

Function 7 operates like Function 2 in that the WCTOUW screen is returned listing application and cases for the Office and/or Unit and/or Worker entered. However, only applications and cases from the latest file matching will be listed.

#### 8 – Case Resolution History

Function 8 displays the history of all the resource hit resolutions for a given case. History is displayed in the same format as the original data prior to resolution. It uses the same screens as the resolution data (WCTWRS, WCTBDX, WCTUIB, WCTACT, WCTNHR, and WCTVED). The resolution history is retained and for 7 years. To distinguish history data from unresolved data, the screens display 'HISTORY' at the top next to the screen title as well as displaying the userid and resolution date of the response at the bottom near the resolution code.

#### 9 – Individual Case Summary

Function 9 will, for a given case number in RFI, list the individuals in the case as well as the resource hits and resource age for each individual. From this point the eligibility worker can resolve this case, or go to a career that will display case information for a particular individual on the current case.

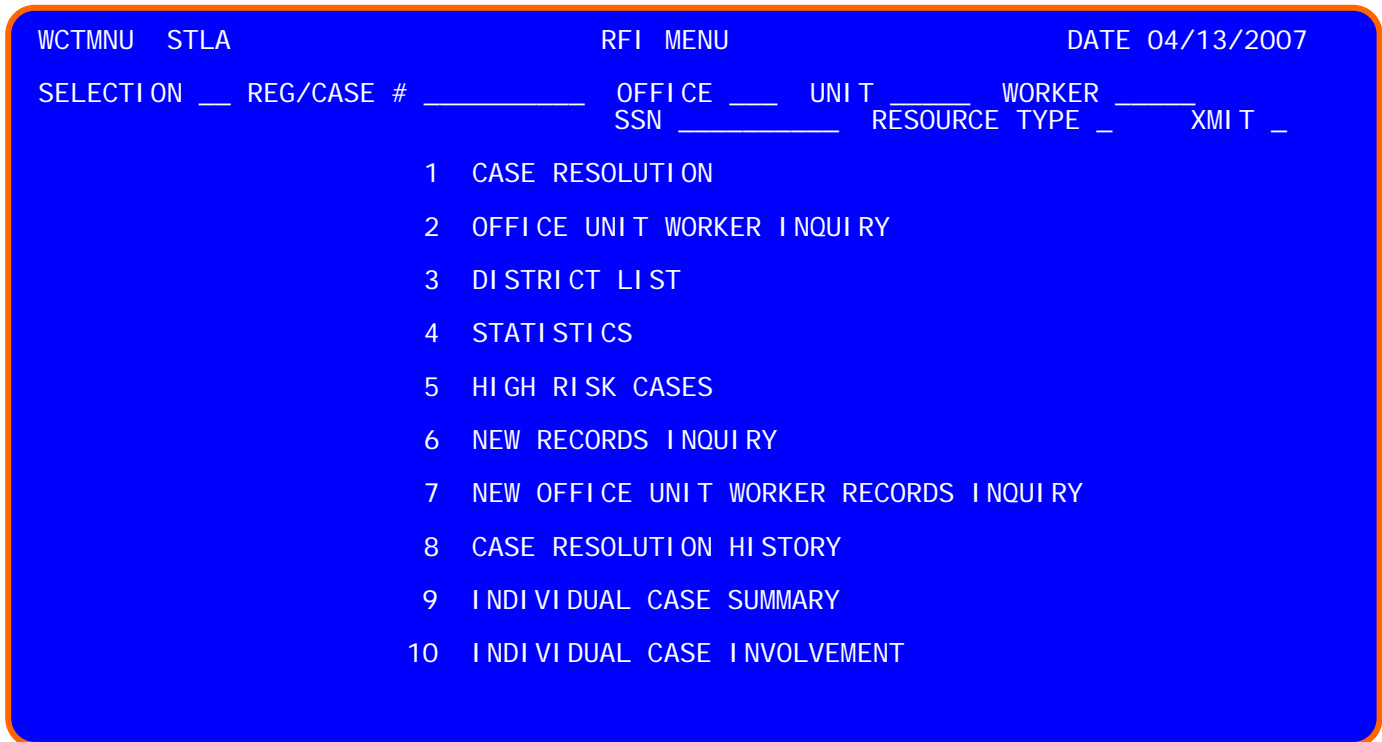
#### 10 – Individual Case Involvement

Function 10 displays a list of active cases for an individual that have unresolved resource hits.

#### 11 – RFI Quick Print Menu

Function 11 lists all the available reports for the entered Office, Unit and/or Worker. In the future, the list of available reports will be expanded that utilize other entered and/or default parameters.

WCTMNU – RFI Menu



```
WCTMNU  STLA                RFI MENU                DATE 04/13/2007
SELECTION  __ REG/CASE #  _____ OFFICE  __  UNIT  _____ WORKER  _____
                SSN  _____  RESOURCE TYPE  _  XMIT  _

          1  CASE RESOLUTION
          2  OFFICE UNIT WORKER INQUIRY
          3  DISTRICT LIST
          4  STATISTICS
          5  HIGH RISK CASES
          6  NEW RECORDS INQUIRY
          7  NEW OFFICE UNIT WORKER RECORDS INQUIRY
          8  CASE RESOLUTION HISTORY
          9  INDIVIDUAL CASE SUMMARY
         10  INDIVIDUAL CASE INVOLVEMENT
```

Figure 1 – RFI Menu (WCTMNU)

Purpose

This screen is used to select the desired RFI function.

Access

- Entering 14 on WMSMNU – WMS Menu, **or**
- Ctrl+F6 from any RFI screen, **or**
- Transmitting last Individual Information and Resolution screen with data WSEMNU – Services Full Data Entry

Screen Response

Positive

- WCTWRS - Wage Reporting Individual Information or WCTBDX - Bendex Reporting Individual Information or WCTNHR - New Hire Individual Information or WCTUIB - UIB Reporting Individual Information or WCTACT - FIRM - Match/Balance Individual Information or WCTVED - Verified Employment Data if entering 1 in Selection and Case Number or Registry Number entered.

- WCTOUW - Case/Reg Number List Inquiry by Office/Unit/Worker if entering 2, 5, or 7 in Selection and OFFICE and/or UNIT and/or WORKER entered
- WCTDLI - District List Inquiry if entering 3 or 6 in Selection
- WCTSTT - Resource File Integration (Statistics) if entering 4 in Selection
- Verified Employment Data History screen if entering Selection 10 and a Case Number

#### Negative

- Fields in error return highlighted. One or more of the messages on line 24:
  - CASE OR REGISTRY NUMBER IS REQUIRED
  - CASE/REG NO. XXXXXX \*\*NOT RESOLVED\*\* FLAG REMAINS
  - ENTER CASE OR REGISTRY NUMBER ONLY
  - ENTER OFFICE/UNIT/WORKER ONLY
  - ENTER SELECTION NUMBER ONLY
  - INVALID SELECTION
  - MAKE A SELECTION FOR OFFICE/UNIT/WORKER
  - NO APPLICATIONS WITH UNRESOLVED CINTRAK (RFI) DATA IN THIS DISTRICT
  - NO CASE/REG FOUND FOR DISTRICT
  - NO CASES FOR OFFICE-UNIT-WORKER ENTRY
  - NO CASES WITH UNRESOLVED CINTRAK (RFI) DATA IN THIS DISTRICT
  - NO CINTRAK DATA FOUND FOR CASE/REG NUMBER
  - NO HIGH RISK CASES FOUND
  - NO OFFICE/UNIT/WORKER IN THIS DISTRICT
  - NO RFI DATA FOUND FOR CASE NUMBER
  - NO RFI DATA FOUND FOR REGISTRY NUMBER
  - REGISTRY NUMBER IS INVALID
  - SELECTION REQUIRED
  - SERVICES CASE NOT ALLOWED
  - SF99 NOT SUPPORTED-REXMT (99 = 1-5, 7-15, 17-22)
  - Any Universal Screen Message – see **SRM Access and Exit Procedures**

#### Printed Response

None

Function Keys

Key	Description
F6	Renders Workstation Inactive
F7	Return to previous resolution screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI Menu

Screen Field Description – WCTMNU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SELECTION	NONE	Functions 1- 6
REG/CASE NUM	01046 - REGISTRY NUMBER (6) or 01050 - CASE NUMBER (10)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
SSN	03201 - SOCIAL SECURITY NUMBER (9)	
RESOURCE TYPE	00172 - RESOURCE TYPE (1)	Resource Type points to DE 00172, but not directly

For the “RESOURCE TYPE” field, the following table illustrates the available options and how they correspond to the data element:

Screen Value	DE Value	Resource Type
W	A	WRS
B	B	BDX
U	D	UIB
N	N	NHR
F	F	FIRM
V	V	VED

Free form messages pertaining to the RFI System may be displayed on this screen to alert users if there is a problem with one of the RFI files.

WCTWRS – Wage Reporting Individual Information

WCTWRS WAGE REPORTING INDIVIDUAL INFORMATION							PAGE 001 OF 002
CASE NAME	TYPE	CASE/REG #	OFF	UNIT	WORKER	DISTRICT DSS	
CORTLAND CATHERINE	20	892742	MED	MAAMC	44474	DATE 06/25/2007	
CLIENT NAME	SSN	DOB	SEX	CIN		FILE DATE	
CORTLAND CATHERINE	087727865	05/30/71	F			03/23/07	
NEW YORK STATE WAGE MATCH							
EMPLOYEE NAME	QTR	YEAR	WAGES	EMPLOYER/ADDRESS		EMP. NO.	
CORTLAND CATHERINE	4	06	\$ 1675.00	FRIENDLY ICE CREAM CORP. 1855 BOSTON RD WILBRAHAM MA 01095		046753130	
CORTLAND CATHERINE	4	06	\$ .00	CORNER RESTAURANT 910 CENTRAL AVE ALBANY NY 12205		9999078187	
CORTLAND CATHERINE	2	06	\$ 1545.00	JON SMITH & WILLIAM SMITH 44 PETUNIA CT COHOES NY 12047		8205333333	
CORTLAND CATHERINE	2	06	\$ 600.00	CARDINAL CAFE 1610 MADISON AVE ALBANY NY 12205		201074444	
_ ACTION		_ HISTORY			XMIT _		

Figure 2 – Wage Reporting Individual information (WCTWRS)

Purpose

This screen displays up to four occurrences of NYS Wage Reporting Information per individual. Data is displayed in order by quarter, with the most recent quarter first, and wage amount. A resource resolution code can be entered in the ACTION field. All other fields on this screen are protected.

Access

- Entering 1 in Selection and a valid Case Number or Registry Number on WCTMNU - RFI Menu, or
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED (See [Function Keys for Paging](#)).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED (Refer to the topic **Screen Sequence**.)

- WCTMNU with message (Refer to the topic **RFI Menu Messages**.)

#### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

None

#### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu
“X” - XMIT	From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)

'XMIT' Accept resolution/Next page. "VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION" will display on all resolution screens. A second "XMIT" must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description - WCTWRS

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 - CASE NAME (28)	
CTYPE	01060 - CASE TYPE (2)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
EMPLOYEE NAME	09430 - CINTRAK RESOURCE EMPLOYEE NAME (28)	
<b>EMPLOYER ADDRESS</b>		
NONE	09470 - CINTRAK RESOURCE EMPLOYER NAME (28)	
NONE	09480 - CINTRAK RESOURCE EMPLOYER STREET (35)	
NONE	09482 - CINTRAK RESOURCE EMPLOYER CITY (15)	
NONE	09483 - CINTRAK RESOURCE EMPLOYER STATE (2)	
NONE	09484 - CINTRAK RESOURCE EMPLOYER ZIP (5)	
EMP NUM	09471 - CINTRAK RESOURCE EMPLOYER NUMBER (9)	
QTR	09494 - CINTRAK RESOURCE WAGE QUARTER (1)	
YEAR	09493 - CINTRAK RESOURCE WAGE YEAR (2)	
WAGES	09490 - CINTRAK RESOURCE QUARTERLY WAGE AMT (5)	
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
HISTORY		If displayed, indicates presence of history. "X" required to access details.



WCTBDX – Bendex Reporting Individual Information

WCTBDX BENDEX REPORTING INDIVIDUAL INFORMATION					PAGE 02 OF 06					
CASE NAME	HELIOS	TYPE	16	CASE/REG #	CTKTRN9011	OFF UNIT	WORKER	RFI01	DISTRICT	OTSE
CLIENT NAME	JOHNSON	SSN	666327732	DOB	12/04/40	SEX	M	CIN	AB21381W	FILE-DATE
SOCIAL SECURITY MATCH MONTHLY							01/14/91		DATE 03/20/91	
CLAIM NUMBER	666-32-7732W1	SSA MESSAGE	POSSIBLE CONFLICT - DECEASED				ENTITLEMENT	NET BENEFIT \$		
HEALTH INS-PART A	ENT DATE	HEALTH INS-PART B	ENT DATE	PART B PAYOR	SSA	SSA	SSA START DATE			
PREMIUM \$	TERM DATE	PREMIUM \$	TERM DATE	DISABILITY			ADDITIONAL ENTITLEMENT		DATE OF DEATH	
BLACK LUNG IND:				RAILROAD IND:		PAY STATUS:		01/14/07		
_ ACTION		_ HISTORY				XMIT _				

Figure 3 – BENDEX Reporting Individual Info (WAPREG)

Purpose

This screen displays Retirement, Survivors or Disability Insurance data from the Social Security Administration for each individual. A resource resolution code can be entered in the ACTION field. All other fields on this screen are protected.

Access

- Entering 1 in Selection and a valid Registry Number or Case Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (Refer to the topic **RFI Menu Messages.**)

### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

#### Negative

None

### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu

- “X” - XMIT From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)
- ‘XMIT’ Accept resolution/Next page. “VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION” will display on all resolution screens. A second “XMIT” must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTBDX

If there is no D.E. Number listed, the data element is read directly from a file.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
CTYPE	01060 – CASE TYPE (2)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
<b>Social Security Match</b>		
CLAIM NUMBER	TITLE-2-CLAIM NO. (12)	
SSA MESSAGE	SSA MESSAGE (30)	Refer to the topic <b>Data Reported to WMS From BDx</b>
ENTITLEMENT	ENTITLEMENT DATE (4)	
NET BENEFIT	BENEFIT RATE (7)	
<b>Health Ins - Part A</b>		
ENT DATE	HI-INS-EFF-DATE (4)	
PREMIUM \$	HI-INS-PREMIUM (6)	
TERM DATE	HI-INS-TERM-DATE (4)	
<b>Health Ins - Part B</b>		
ENT DATE	SMI-INS-EFF-DATE (4)	
PREMIUM \$	SMI-INS-PREMIUM (6)	
TERM DATE	SMI-INS-TERM-DATE (4)	
PART B PAYOR	SMI-INS-PREMIUM-PAYER (14)	For recipients only
SSI	SSI DATA (3)	For recipients only
SSI START/END DATE	SSI-START-TERM-DATE (4)	For recipients only
VERIFIED SSN	VERIFIED SSN (9)	
DISABILITY	DATE-OF-DISABILITY (6)	
ADDITIONAL	ADDITIONAL-ENTITL-2 (12)	
ENTITLEMENT	ADDITIONAL-ENTITL-3 (12)	
DATE OF DEATH	DATE OF DEATH (6)	
BLACK LUNG IND:	BLACK-LUNG-INVOLVED (3)	'YES' is displayed if benefit is being received
RAILROAD IND:	RR-BOARD-INVOLVED (3)	'YES' is displayed if benefit is being received
PAY STATUS:	PAYMENT-STATUS (20)	Refer to the topic <b>Data Reported to WMS From BDx</b>
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
HISTORY		If displayed, indicates presence of history. "X" required to access details.

WCTNHR – New Hire Individual Information

```

WCTNHR                NEW HI RE I NDI VI DUAL I NFORMATION                PAGE 002 OF 002
CASE NAME              TYPE CASE/REG #  OFF  UNIT  WORKER  DI STRI CT DSS
KENNEDY KEVIN         20  844742      MED  MAAMC  44474  DATE 06/25/2007
CLIENT NAME           SSN          DOB      SEX    CIN    FILE DATE
KENNEDY KEVIN        222222865    05/30/77  F      C1N    03/23/07

EMPLOYEE NAME & ADDRESS  NEW YORK STATE NEW HI RE MATCH  EMP. I D.
KENNEDY, KEVIN        EMPLOYER/ADDRESS
97 ELM ST             CAPITAL DINER INC                141588925
ALBANY                NY 12208                        231 MADISON AVE
W4 DATE: 01/02/2007  ALBANY                NY 122060000

KENNEDY, KEVIN A     CARDINAL CAFE                    900078187
51 STATE ST          445 CENTRAL AVE
SCHENECTADY         ALBANY                NY 12205
W4 DATE: 05/31/2006

_ ACTI ON                _ HI STORY                XMI T _
  
```

Figure 4 – New Hire Individual Information (WCTNHR)

Purpose

This screen displays the New York State New Hire Information for an individual. A resource resolution code can be entered in the ACTION field. All other fields on this screen are protected.

Access

- Entering 1 in Selection and a valid Case Number or Registry Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED (See the topic **Function Keys for Paging**).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (See the topic **RFI Menu Messages**.)

### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

#### Negative

None

### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu

- “X” - XMIT From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)
- ‘XMIT’ Accept resolution/Next page. “VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION” will display on all resolution screens. A second “XMIT” must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTNHR

If there is no D.E. Number listed, the data element is read directly from a file.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
CTYPE	01060 – CASE TYPE (2)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
<b>EMPLOYEE NAME &amp; ADDRESS</b>		
NONE	NH-EMPLOYEE-NAME (28)	
NONE	NH-EMPLOYEE-STREET (35)	
NONE	NH-EMPLOYEE-CITY (15)	
NONE	NH-EMPLOYEE-STATE (2)	
NONE	NH-EMPLOYEE-ZIP (9)	
<b>EMPLOYER NAME/ADDRESS</b>		
NONE	NH-EMPLOYER-NAME (28)	
NONE	NH-EMPLOYER-STREET (32)	
NONE	NH-EMPLOYER-CITY (15)	
NONE	NH-EMPLOYER-STATE (2)	
NONE	NH-EMPLOYER-ZIP (9)	
EMP. ID.	NH-EMPLOYER-ID-NO (10)	
W4 DATE	NH-W4-DATE (8)	
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
HISTORY		If displayed, indicates presence of history. “X” required to access details.

WCTUIB – UIB Reporting Individual Information

WCTUIB						UIB REPORTING INDIVIDUAL INFORMATION			PAGE 03 OF 06	
CASE NAME			TYPE CASE/REG #	OFF	UNIT	WORKER	DISTRICT OTSE			
HELIOS			16 CTKTRN9011			RFI01	DATE 03/20/07			
CLIENT NAME			SSN	DOB	SEX	CIN	FILE-DATE			
JOHNSON	JANE		555327732	12/04/43	F	AB21344W	02/04/07			
EMPLOYEE NAME/ADDRESS			NEW YORK STATE UIB MATCH			PROGRAM CODE U				
JANE JOHNSON			BENEFIT RATE \$090			EMPLOYER NAME/ADDRESS				
23 ERIC ST			EXPIRATION WK/YR 28/91			MOHAWK GIFT SHOP				
PORT			BENEFIT DAYS USED 012			207 MAIN STREET				
PAYMENTS			BENEFIT DAYS LEFT 092			SCHENECTADY NY				
01/14/91	\$ 90	01/21/91	\$ 90	01/28/91	\$90	12309				
_ ACTION			_ HISTORY			XMIT _				

Figure 5 – UIB Reporting Individual Information (WCTUIB)

Purpose

This screen displays the UIB Reporting Individual Information per individual. A resource resolution code can be entered in the ACTION field. All other fields on this screen are protected.

Access

- Entering 1 in Selection and a valid Case Number or Registry Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED (See the topic **Function Keys for Paging**).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (See the topic **RFI Menu Messages**.)



### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

#### Negative

None

### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu

- “X” - XMIT From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)
- ‘XMIT’ Accept resolution/Next page. “VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION” will display on all resolution screens. A second “XMIT” must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTUIB

If there is no D.E. Number listed, the data element is read directly from a file.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
CTYPE	01060 – CASE TYPE (2)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
<b>NEW YORK STATE UIB MATCH</b>		
PROGRAM CODE	09521 - UIB SPECIAL PROGRAM CODE (1)	
<b>EMPLOYEE NAME/ADDRESS</b>		
NONE	09500 - UIB CLAIMANT FIRST NAME (5)	
NONE	09501 - UIB CLAIMANT MIDDLE NAME (1)	
NONE	09502 - UIB CLAIMANT LAST NAME (13)	
NONE	09503 - UIB CLAIMANT STREET ADDRESS (25)	
NONE	09504 - UIB CLAIMANT ADDRESS - CITY (18)	
NONE	09505 - UIB CLAIMANT ADDRESS - STATE (2)	
NONE	09506 - UIB CLAIMANT ADDRESS - ZIP (9)	
BENEFIT RATE	BENEFIT-RATE (3)	
EXPIRATION WK/YR	09508 - UIB EXPIRATION DATE (4)	
BENEFIT DAYS USED	09509 - UIB BENEFIT DAYS USED COUNT (3)	
BENEFIT DAYS LEFT	09510 - UIB BENEFIT DAYS LEFT COUNT (3)	
DISQUALIFICATION CODE	DISQ-CODE (2)	
DATE	09523 - UIB DISQUALIFICATION DATE (4)	
<b>EMPLOYER NAME/ADDRESS</b>		
NONE	09511 - UIB EMPLOYER ADDRESS - LINE 1TEXT (30)	
NONE	09512 - UIB EMPLOYER ADDRESS - LINE 2 TEXT (30)	
NONE	09513 - UIB EMPLOYER ADDRESS - LINE 3 TEXT (30)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
NONE	09514 - UIB EMPLOYER ADDRESS - LINE 4 TEXT (30)	
<b>PAYMENTS</b>		
NONE	09519 - UIB PAY DATE (6)	
NONE	09520 - UIB PAY DOLLARS AMOUNT (5)	
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
HISTORY		If displayed, indicates presence of history. "X" required to access details.

WCTACT – FIRM - Match/Balance Individual Information

WCTACT FIRM - MATCH/BALANCE INDIVIDUAL INFORMATION PAGE 001 OF 001									
CASE NAME	TYPE	CASE/REG #	OFF	UNIT	WORKER	DISTRICT	DSS	DATE	FILE DATE
LANDRY LOIS	20	M051952	2ED	TEAM2	44406			07/02/2007	
CLIENT NAME		SSN	DOB	SEX	CIN				FILE DATE
LANDRY LOIS M		114344407	02/14/43	F	BD39916M				06/18/07
PAYEE INFORMATION			PAYER INFORMATION (BANK)			ACCOUNT NUMBER			
LANDRY LOIS					STATE EMPLOYEES FCU				436099S9
480 MADISON AVENUE APT 12					1239 WASHINGTON AVENUE				TRUST FUND I O
ALBANY NY 12206					ALBANY N				ACCOUNT TYPE
BANK	MATCH	POSTED			RESOLUTION				CHECKING
BALANCE	DATE		CODE	DATE	WORKER				
366.00	05/25/07	06/18/07							
271.00	02/27/07	03/19/07	2	03/21/07	01D7781				
203.00	08/30/06	09/18/06	2	01/08/07	01D7732				
174.00	04/04/06	04/24/06	R						
221.00	09/01/05	09/18/05	R						
_ ACTION			_ HISTORY			XMIT _			

Figure 6 – FIRM - Match/Balance Individual Information (WCTACT)

Purpose

Access

- Entering 1 in Selection and a valid Case Number or Registry Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED (See the topic **Function Keys for Paging**).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (See the topic **RFI Menu Messages**.)

Negative

- One of the following messages displayed on line 24:

- ACTION CODE IS INVALID
- ACTION CODE IS INVALID FOR APPLICATION
- ACTION CODE IS INVALID FOR CASE
- CURRENT SCREEN DISPLAYED IS HIGHEST PAGE
- CURRENT PAGE DISPLAYED IS LOWEST PAGE
- FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
- PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
- SECURITY VIOLATION/XMT NOT ALLOWED
- FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

#### Printed Response

##### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

##### Negative

None

#### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu
“X” - XMIT	From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)

'XMIT' Accept resolution/Next page. "VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION" will display on all resolution screens. A second "XMIT" must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTACT

If there is no D.E. Number listed, the data element is read directly from a file.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
CTYPE	01060 – CASE TYPE (2)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DIST	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
<b>PAYEE INFORMATION</b>		
NONE	INS-ACCOUNT-NAME (40)	
NONE	INS-ACCOUNT-ADDR (40)	
NINE	INS-ACCOUNT-CITY (29)	
NONE	INS-ACCOUNT-STATE (2)	
NONE	INS-ACCOUNT-ZIP (9)	
<b>PAYER INFORMATION (BANK)</b>		
NONE	INS-INST-NAME (40)	
NONE	INS-INST-ADDR (40)	
NONE	INS-CITY (29)	
NONE	INS-STATE (2)	
NONE	INS-ZIP (9)	
ACCOUNT NUMBER	INS-ASSET-ID (20)	
TRUST FUND I	INS-TRUST-FUND-IND (1)	
ACCOUNT TYPE	INS-ACCOUNT-BALANCE-TYPE (2)	
BANK BALANCE	INS-ACCOUNT-BALANCE (7)	5 occurrences
MATCH DATE	09014 - CINTRAK MATCH DATE (6)	5 occurrences; previous match dates
POSTED	09006 - DATE AGENCIES WERE FIRST ABLE TO SEE DATA (80)	5 occurrences; previous post dates
<b>RESOLUTION</b>		
CODE	09021 - CINTRAK RESPONSE ACTION (1)	5 occurrences; previous action codes
DATE	09024 - CINTRAK RESPONSE DATE (5)	5 occurrences; previous response dates
WORKER	01040 - WORKER IDENTIFIER (5)	5 occurrences; worker who entered the Action code

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
HISTORY		If displayed, indicates presence of history. "X" required to access details.

WCTVED – Verified Employment Data (VED) (information verified by TALX)

```

WCTVED                VERIFIED EMPLOYMENT DATA (VED)                PAGE 001 OF 001
CASE NAME              TYPE CASE/REG #  OFC  UNIT  WORKER  DISTRICT  ALBA
ANDERSON, NATHAN      02  PF32145  05X   TURNC  DATE 12/12/2007
CLIENT NAME           SSN      DOB   SEX   CIN   SRCE  FILE DATE
ANDERSON NATHAN Q    100-44-6677 11/27/82 M   TA44433R T    12/01/07
EMPLOYEE NAME/ADDRESS EMPLOYER/ADDRESS      EMP. NO.  554433221
NATHAN QUINCY ANDERSON  DUNKIN DONUTS
442 ELM STREET, APT. 4A  DUNKIN DONUTS, INC.
NEW PALTZ NY 12544      MOHONK PLAZA
INS AVAIL N          INS ENRLLED N         788 MAIN STREET
STATUS 1             NEW PALTZ NY 12544
W4 DATE: 09/01/2007   Annual Ttl Inc YTD: 4095.44 Annual Year Inc:
EMPLOYEE TITLE: CLERK POST DATE: 12/02/2007

PayReleaseDt  Peri odFrm  Peri odTo  GrssPay  Actl Hrs
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____

_ ACTION _ SUPPLEMENT _ HISTORY XMIT _
    
```

Figure 7 – Verified Employment Data (WCTVED) (Information verified by TALX)

Purpose

This screen displays wage information for an individual that was verified by TALX. A resource resolution code can be entered in the ACTION field, and a supplemental resource code can be entered in the Supplemental field. All other fields on this screen are protected

Access

- Entering 1 in Selection and a valid Case Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED (See the topic **Function Keys for Paging**).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (See the topic **RFI Menu Messages**.)



### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

#### Negative

None

### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu

- “X” - XMIT From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)
- ‘XMIT’ Accept resolution/Next page. “VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION” will display on all resolution screens. A second “XMIT” must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTVED (Information received via TALX)

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
TYPE	01060 – CASE TYPE (2)	
CASE/REG #	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6) and 01045 - LINE NUMBER (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
CLIENT NAME	03030 - NAME (28)	
SSN	03201 - SOCIAL SECURITY ACCOUNT NUMBER (9)	
DOB	03060 - DATE OF BIRTH (8)	
SEX	03050 - SEX (1)	
CIN	03010 - RECIPIENT ID (8)	
SRCE	NONE	T displayed if data is verified by TALX; M displayed if data is MEV verified
FILE DATE	09014 - CINTRAK MATCH DATE (6)	
EMPLOYEE NAME/ADDRESS	09430 - EMPLOYEE NAME (28)	
	22206 - EMPLOYEE STREET (35)	
	22207 - EMPLOYEE CITY (15)	
	22208 - EMPLOYEE STATE (2)	
	22209 - EMPLOYEE ZIP (9)	
EMPLOYER/ADDRESS	05500 - EMPLOYER NAME (39)	
	09027 - EMPLOYER NAME2 (25)	
	09480 - WRS EMPLOYER STREET (35)	
	09485 - WRS EMPLOYER STREET2 (30)	
	09482 - WRS EMPLOYER CITY (30)	
	09483 - WRS EMPLOYER STATE (2)	
	09484 - WRS EMPLOYER ZIP (5)	
EMP. NO.	05215 - EMPLOYER ID (9)	
W4 DATE	22201 - W4 DATE (8)	
ANNUAL TTL INC YTD	09806 - ANNUAL TOTAL COMPENSION (9)	
ANNUAL YEAR INC	NONE	To be determined
EMPLOYEE TITLE	09803 - EMPLOYEE TITLE (25)	
POST DATE	09006 - CINTRAK POST DATE (8)	
PAYRELEASEDT	09807 - PAYMENT RELEASE DATE (8)	7 occurrences
PERIODFRM	09808 - WORK PERIOD FROM DATE (8)	7 occurrences

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PERIODTO	09809 - WORK PERIOD TO DATE (8)	7 occurrences
GRSSPAY	09810 - PAY FOR WORK PERIOD (8)	7 occurrences
ACTL HRS	09811 - HOURS FOR WORK PERIOD (4)	7 occurrences
ACTION	09021 - CINTRAK RESPONSE ACTION (1)	Data entry allowed
SUPPLEMENTAL	09034 - RESOLUTION SUPPLEMENTAL CODE	Data entry allowed
HISTORY		If displayed, indicates presence of history. "X" required to access details.

WCTVED – Verified Employment Data (VED) (Information verified by MEV)

```

WCTVED                VERIFIED EMPLOYMENT DATA (VED)                PAGE 001 OF 001
CASE NAME              TYPE CASE/REG #  OFC  UNIT  WORKER  DISTRICT  ALBA
ANDERSON, NATHAN      02  PF32145  05X   TURNC  DATE 12/12/2007
CLIENT NAME           SSN      DOB  SEX   CIN   SRCE  FILE DATE
ANDERSON NATHAN Q    100-44-6677 11/27/82 M  TA44433R  T    12/01/07
EMPLOYEE NAME/ADDRESS  EMPLOYER/ADDRESS  EMP. NO.  554433221
NATHAN QUINCY ANDERSON  DUNKIN DONUTS
442 ELM STREET, APT. 4A  DUNKIN DONUTS, INC.
NEW PALTZ NY 12544      MOHONK PLAZA
INS AVAIL N          INS ENRLLD N      788 MAIN STREET
STATUS 1              NEW PALTZ NY 12544
W4 DATE: 09/01/2007   Annual Ttl Inc YTD: 4095.44 Annual Year Inc:
PRINTED NAME:
RESPONDER TITLE:     POST DATE:
RESPONDER PHONE: 518-55-3434 8877

PayReleaseDt  Peri odFrm  Peri odTo  GrssPay  Actl Hrs
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____
// //        // //      // //      _____

_ ACTI ON _ SUPPLEMENT _ HI STORY XMI T _
    
```

Figure 8 – Verified Employment Data (WCTVED) (Information verified by MEV)

Purpose

This screen displays wage information for an individual that was verified via MEV. With the exception of lines 13 and 14, the fields on this screen are the same as those on WCTVED when the information displayed has been verified by TALX.

Access

- Entering 1 in Selection and a valid Case Number on WCTMNU - RFI Menu, **or**
- F1, F2 or F3 or transmitting from WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, WCTVED (See the topic **Function Keys for Paging**).
- Pressing F7 from any screen that supports screen history when there is a previous resolution screen location to return to.

Screen Response

Positive

- WCTWRS, WCTBDX, WCTUIB, WCTNHR, WCTACT, or WCTVED
- WCTMNU with message (See the topic **RFI Menu Messages**.)

### Negative

- One of the following messages displayed on line 24:
  - ACTION CODE IS INVALID
  - ACTION CODE IS INVALID FOR APPLICATION
  - ACTION CODE IS INVALID FOR CASE
  - CURRENT SCREEN DISPLAYED IS HIGHEST PAGE
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE
  - FLAG PREVIOUSLY REMOVED - ACTION CODE CANNOT BE CHANGED TO BLANK
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
  - SECURITY VIOLATION/XMT NOT ALLOWED
  - FUNCION KEY NOT SUPPORTED (4-5, 7-12, 14-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

### Printed Response

#### Positive

- If all the RFI data is resolved and there is a Pending Record, then Authorization (depending on District option), otherwise NONE.

#### Negative

None

### Function Keys

Key	Description
F1	First Page
F2	Next Page if multiple pages
F3	Previous Page if multiple pages
F5	Return to previous screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI menu

- “X” - XMIT From the input field position immediately before the “HISTORY” image will transfer to the History screen (“HISTORY” will display when history is present)
- ‘XMIT’ Accept resolution/Next page. “VERIFY RESOLUTIONS AND RE-XMIT TO STORE RESOLUTION” will display on all resolution screens. A second “XMIT” must be performed in order to leave the screen and immediately store the resolution.

Screen Field Description – WCTVED (Information verified by MEV)

Only fields for lines 13 and 14 are described here. See Screen Field Description - WCTVED (Information received via TALX) for description of the other fields on this screen.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
PRINTED NAME	09801 - EMPLOYER PRINTED NAME (35)	
POST DATE	09006 - CINTRAK POST DATE (8)	
RESPONDER TITLE	09803 - EMPLOYEE TITLE (25)	
RESPONDER PHONE	01085 - PHONE (10)	
	09805 - TELEPHONE EXTENSION (4)	



Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:
  - PAGE 1 IS THE CURRENTLY DISPLAYED PAGE.
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - CURRENT PAGE DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-15)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	First Page of data
F2	Next Page of data
F3	Previous Page of data
F4	Change sort order (case/reg or case name)
F5	Return to previous screen
F7	Return to previous resolution screen
F9	Return to previous District List (WCTDLI), includes Option 6 – New Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFT menu

Screen Field Description – WCTOUW

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	



SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
CASE NAME	01070 - CASE NAME (28)	
<b>RESOURCE - AGE</b>		
WRS	NONE	High Risk Indicator - a \$ will be displayed if this is a high risk case.
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	WRS Aging Indicator
BDX	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	BDX Aging Indicator
UIB	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	UIB Aging Indicator
NHR	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	NHR Aging Indicator
FRM	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	FRM Aging Indicator
VED	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	VED Aging Indicator
QUICK QUERY	NONE	See Column 80 "Quick Query" field for choices

WCTDLI – District List Inquiry

WCTDLI						DI STRI CT LI ST I NQUI RY				PAGE 001 OF 001			
DI STRI CT DSS												DATE 06/25/2007	
SORT ORDER		OUW				CASE/REG #		CASE NAME		OFFICE	UNIT	WORKER	
AGE													
W	B	N	U	F	V								
*		*				892742	KENNEDY	LAUREL	MED	MAAMC	44474	—	
*		*				892724	PETERKIN	PATRICIA	MED	TEAM2	44417	—	
04			*			892788	GARBA	ADRIENNE S	MED	TEAM3	44405	—	
04	*	02				892797	ALMANZAR	DIGNA Y	MED	TEAM3	44423	—	
W		N				M54677	SWEENEY	SHANNON	MED	TEAM5	44443	—	
03			*			892813	HOANG	DAC	MEN	MENMA	44451	—	
04		04	*			892804	BUCKLEY	KARA	MEN	MENMA	44453	—	

Figure 10 – District List Inquiry (WCTDLI)

Purpose

This screen is used to display a list of all district applications and cases which have unresolved RFI data of any type along with aging data for each RFI match type. Up to 14 cases/applications are listed per page. All fields on this screen are protected.

Access

- Entering 3 in Selection on WCTMNU - RFI Menu, **or**
- Entering 6 in Selection on WCTMNU - RFI Menu; only cases/applications from the latest RFI file matching will be displayed.
- Pressing F9 from any screen that supports screen history when there is a previous DLI screen location to return to.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:
- CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
- CURRENT PAGE DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
- SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	First Page of data
F2	Next Page of data
F3	Previous Page of data
F4	Change sort order (sort order is displayed on the screen)
F5	Return to previous screen
F7	Return to previous resolution screen
F8	Return to previous Office Unit Worker (WCTOUW) screen. Includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI Menu

Screen Field Description – WCTDLI

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
SORT ORDER	NONE	Display's the field that the data is sorted by
<b>AGE</b>		
W	NONE	WRS Aging Indicator
B	NONE	BDX Aging Indicator
N	NONE	NHR Aging Indicator
U	NONE	UIB Aging Indicator
F	NONE	FRM Aging Indicator
V	NONE	VED Aging Indicator
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
QUICK QUERY	NONE	See Column 80 "Quick Query" field for choices

WCTSTT – Resource File Integration

WCTSTT	DSS	RESOURCE FILE INTEGRATION		07/02/2007
LAST UPDATE	11/02/04	10: 56		
RESOURCE	LAST DAILY	INDIVIDUALS	EXTRACT DATE	
WRS				
WTPY	06/11/07	00025	06/07/07	
	06/10/07	00012	06/06/07	
	06/07/07	00029	06/05/07	
UI B	06/10/07	00015	06/06/07	
	06/07/07	00027	06/05/07	
	06/06/07	00013	06/04/07	
NHR				
	LAST MONTHLY			
WRS				
BDX				
FRM				

Figure 11– Resource File Integration (WCTSTT)

Purpose

This screen is used to display the date and time that the application/case information was sent to files for matching, the date the application/case was flagged, the type of Resource and Number of individuals. All fields on this screen are protected.

Access

- Entering 4 in Selection on WCTMNU - RFI Menu, **or**
- Entering X before Resource File Integration selection on WGIMNU - General Information System Menu.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:
- SF99 NOT SUPPORTED - REXMT (99 = 1-3, 5, 7-15, 17-22)

- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F4	WCTSTT - Statewide Resource File Integration, toggles between district and STAT
F6	<i>Renders Workstation Inactive</i>

Screen Field Description – WCTSTT

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
LAST UPDATE	09006 - DATE AGENCIES WERE FIRST ALBLE TO SEE DATA (8)	Displays date and time of the last update of the RFI data received from the State and Federal files.
RESOURCE	NONE	Type of Resource.
LAST DAILY	09006 - DATE AGENCIES WERE FIRST ALBLE TO SEE DATA (8)	For Applicants only, the dates displayed include the dates for the last three times RFI information was received from WRS, WTPY and UIB and then posted. This information resulted from the comparison of the files with the application data sent on three separate dates as shown under the Extract Date column. If the information received covered more than these three days, then the message "OVER THREE DAYS POSTED" is displayed under the last date listed under the Last Daily column for the appropriate Resource. The number of individuals is also displayed.
INDIVIDUALS	NONE	Number of individuals with RFI data.
EXTRACT DATE	09014 - CINTRAK MATCH DATE (6)	This is the date the application data was sent to the various state and federal agencies.
LAST MONTHLY	09006 - DATE AGENCIES WERE FIRST ALBLE TO SEE DATA (8)	For Recipients only, the dates displayed indicate the dates of the posting of the RFI information received monthly from BDx, NHR, UIB, FRM and quarterly from WRS.

WCTSUM – Individual Case/Reg Summary Screen

WCTSUM INDIVIDUAL CASE/REG SUMMARY SCREEN										DATE 07/28/2008
DISTRICT: DSS		CASE/REG NUMBER: ARD1			CASE NAME: ARDAA, LILLY					
CASE FLAG		STATUS: LOCKED			RESOURCE - AGE					
ACCT NO.	INDIVIDUAL NAME		WRS	BDX	UIB	NHR	FRM	VED		
047780505	ARDAA LILLY							28	C	
057000074	ARDAA MEL				28		28	28	—	
									—	
									—	

Figure 12 – Individual Case/Reg Summary Screen (WCTSUM)

Purpose

This screen is used to list individuals and resource summary for a case or registration number. All fields on this screen are protected.

Access

- Entering 9 in Selection and CASE/REG on WCTMNU - RFI Menu, or

Screen Response

Positive

See Function Keys.

Negative

One of the following messages displayed on line 24:

- SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-15)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F5	Return to previous screen
F7	Return to previous resolution screen
F8	Return to previous Office Unit Worker (WCTOUW) screen, includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Records Inquiry
F11	Return to previous Individual Case Involvement (WCTINV) screen
F16	Main RFI Menu

Screen Field Description - WCTSUM

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	
CASE NAME	01070 – CASE NAME (28)	
<b>RESOURCE - AGE</b>		
WRS	NONE	High Risk Indicator - a \$ will be displayed if this is a high risk case.
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
BDX	NONE	WRS Aging Indicator
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
UIB	NONE	BDX Aging Indicator
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
NHR	NONE	UIB Aging Indicator
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
FRM	NONE	NHR Aging Indicator
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
VED	NONE	FRM Aging Indicator
	09041 - NUMBER OF INDIVIDUALS WITH CINTRAK RESOURCES	
	NONE	VED Aging Indicator

As cases and resources are resolved in RFI, the data displayed will change dynamically to indicate that resources have been resolved. When individual resources are resolved, the aging indicator fields in the resource columns will appear as a “.”.



WCTINV – Individual Case/Reg Involvement

WCTINV										INDIVIDUAL CASE/REG INVOLVEMENT		PAGE 001 OF 001				
DISTRICT DSS			SSN 123040507			NAME STI PE, RON				DATE 06/25/2007						
SORT ORDER RESOURCE										CASE/REG #	CASE NAME		OFFICE	UNIT	WORKER	
AGE	W	B	N	U	F	V										
.							BAMB92		STI PE,	ANN				HS		.
28							CANC03		STI PE,	ANN				HS		—
28							CT4		CLAFF,	FRANK				HS		—
28							CT46		CLAFF,	FRANK				HS		—
28							CT4A		CLAFF,	FRANK				HS		—
28							CT4T		CLAFF,	FRANK				HS		—
.							BAMB92		STI PE,	ANN				HS		.
28							CANC03		STI PE,	ANN				HS		—

Figure 13 – Individual Case/Reg Involvement (WCTINV)

Purpose

This screen is used to display a list of active cases for an individual that have unresolved resource hits. All fields on this screen are protected.

Access

- Entering 10 in Selection on WCTMNU - RFI Menu, **or**
- Pressing F11 from any screen that supports screen history when there is a previous WCTINV screen location to return to.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:
- CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF02 IGNORED

- CURRENT PAGE DISPLAYED IS LOWEST PAGE - SF03 IGNORED
- PAGE 1 IS THE CURRENTLY DISPLAYED PAGE
- SF99 NOT SUPPORTED - REXMT (99 = 4-5, 7-15, 17-22)
- Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	First Page of data
F2	Next Page of data
F3	Previous Page of data
F4	Change sort order (sort order is displayed on the screen)
F5	Return to previous screen (this will allow eligibility worker to return to last position in RFI, which will enable more rapid resolution of common data)
F7	Return to previous resolution screen
F8	Return to previous Office Unit Worker (WCTOUW) screen. Includes Option 5 – High Risk Cases and Option 7 – New Office Unit Worker Records Inquiry
F9	Return to previous District List (WCTDLI) screen, includes Option 6 – New Record Inquiry
F10	Return to previous Individual Case Summary (WCTSUM) screen
F16	Main RFI Menu

Screen Field Description – WCTDLI

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DISTRICT	01010 - TRANSACTION DISTRICT (2)	Mnemonic - first 4 letters of district name
SSN	03201 – ACCT NO	
NAME	03030 - NAME	
SORT ORDER	NONE	Display's the field that the data is sorted by
<b>AGE</b>		
W	NONE	WRS Aging Indicator
B	NONE	BDX Aging Indicator
N	NONE	NHR Aging Indicator
U	NONE	UIB Aging Indicator
F	NONE	FRM Aging Indicator
V	NONE	VED Aging Indicator
CASE/REG#	01050 - CASE NUMBER (10) or 01046 - REGISTRY NUMBER (6)	

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NAME	01070 – CASE NAME (28)	
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	
QUICK QUERY	NONE	See Column 80 "Quick Query" field for choices

As cases and resources are resolved in RFI, the data displayed will change dynamically to indicate that resources have been resolved. When individual resources are resolved, the aging indicator fields in the resource columns will appear as a ".".

WCTPRT – RFI Quick Print Menu

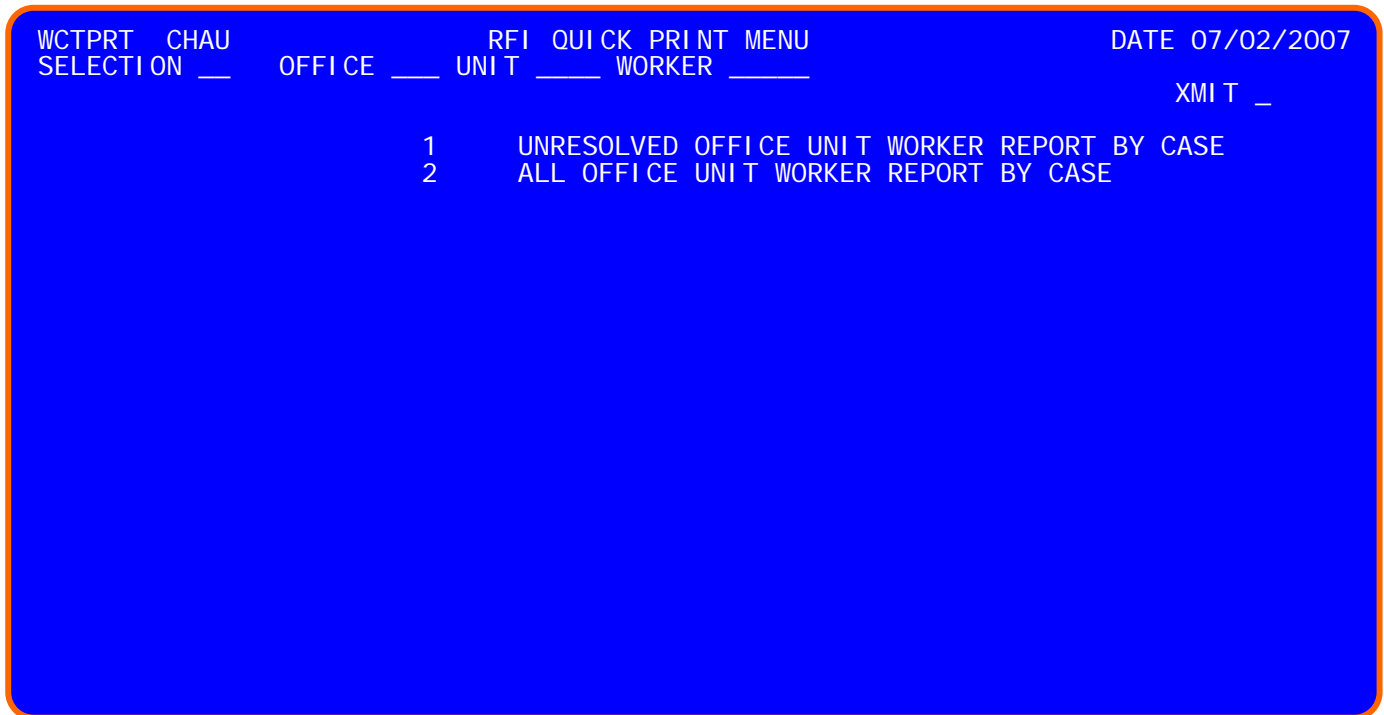


Figure 14– RFI Quick Print Menu (WCTPRT)

Purpose

This screen list's reports available for immediate printing. All fields on this screen are protected.

Access

- Entering 11 in Selection on WCTMNU - RFI Menu

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages displayed on line 24:
  - SF99 NOT SUPPORTED - REXMT (99 = 1-3, 5, 7-15, 17-22)
  - Any Universal Screen Message – See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F16	Main RFI menu

Screen Field Description - WCTPRT

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
SELECTION	NONE	1-2
OFFICE	01020 - LOCAL OFFICE NUMBER (3)	
UNIT	01030 - UNIT IDENTIFIER (5)	
WORKER	01040 - WORKER IDENTIFIER (5)	

## Subsystem Processing

### Reports

Title	Freq	Description/Processing
Monthly Statistical Report on Resource File Integration	On Request	<p>This report assists supervisors and district managers in monitoring the proper use of RFI data in their district. It also aids in determining the timeliness of district resolutions of RFI data and the impact this data has on the district caseload.</p> <p>This report consists of two types of summaries:</p> <ol style="list-style-type: none"> <li>1. <u>Resolutions This Period Applications and Undercare</u> - shows the number of times each Resolution Action code was used to resolve resource file data during the report period</li> <li>2. <u>Match Summary</u> - Statistics show how many applications and cases have unresolved RFI data and how long they have been "flagged". They also show the number of applications and cases that were resolved during this report period.</li> </ol>
RFI High Risk Listing for Resource: XXXX Unresolved for Over 45 Days	Monthly	<p>This report lists cases needing immediate attention to avoid possible overpayment or incorrect eligibility. Unresolved high risk RFI hits increase the possibility of Quality Control errors. Federal Regulations require the resolution of hits within 45 days</p>

# Income and Resource Collection System

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## Overview

### Introduction

The WMS Income and Resource Collection System is a WMS subsystem which provides a means for collecting and storing information about "collectible" income and resources. The matrices for **Collectible Resources**, **Collectible Earned Income**, **Collectible Unearned Income**, **Liquid Resources**, and **Non-Liquid Resources** contain the complete lists of the types of resources and income which can be included in IRCS.

Certain types of earned income (e.g. salary) and unearned income (e.g. Social Security, Unemployment Benefits) are the subject of automated matches through the Resource File Integration (RFI) system (Resources are not the subject of automated matches through RFI). Income and resource types which are the subject of existing or potential matches through RFI are designated as "collectible" for purposes of the Income and Resource Collection System (hereafter abbreviated as IRCS).

Earned and Unearned Income data is automatically collected from budget information. When a calculated ABEL or MBL Budget (not Bottom Line) is stored for an application or case, any collectible Earned/Unearned Income data used in the budget calculation is automatically transferred from the Budget Record to the IRCS record.

MA Resource data is also automatically transferred to IRCS whenever a calculated MBL budget is stored. ABEL budgets for PA and FS cases do not include Resource Data. To enable IRCS to collect and store Resource data for PA and FS cases, an IRCS "update" data entry screen allows manual entry of new Resource data and changes to previously manually entered Resource data. This screen can also be used to manually enter or change Resource data for MA cases. It *cannot* be used to enter Earned/Unearned Income data.

IRCS establishes one owner record for each application or case. This record contains all Income and Resource data records that have been stored, as described above, for all members of the application or case. Each Income or Resource item is linked to the Line Number and CIN (or Application Register/Line Number) of an individual in the case or application. The complete IRCS record for an application or case is displayed on the IRCS "inquiry/history" screen.

The IRCS system consists of three screens: WIRCMU - Menu, WIRCUP - Update and WIRCIQ - Inquiry/History.

For more information on the IRCS system, the reviewer is directed to the **ABEL Manual, Section K**.

### IRCS Menu

The WIRCMU - WMS Income and Resource System Menu is obtained by entering 32 on the WMSMNU - WMS Menu screen and transmitting.

On the WIRCMU screen, entering Function 1 and either a Registry Number (for an application or a case which has completed Full Data Entry but not Batch Update) or a Case Number and transmitting returns the WIRCUP - WMS Income/Resource Record screen. This is the "update" screen.

Entering Function 2 with either a Registry Number (for an application or a case which has completed Full Data Entry but not Batch Update) or Case Number returns the WIRCIQ - WMS Income /Resource Record screen. This is the "inquiry/history" screen.

## Update Screen and Manual Entry of Resource Data

The WIRCUP - WMS Income/Resource Record screen can be obtained from the WIRCMU menu or by pressing F5 from any calculated budget screen (except Bottom Line) or from WIRCIQ - IRCS Inquiry/History screen.

The upper portion of the WIRCUP screen contains basic case or application data plus additional information depending on the Case Type. See the heading entitled **Screen Field Descriptions - WIRCUP** on the pages which describe the WIRCUP screen for detailed descriptions of the screen headings and the relationship to Case Type.

The lower portion of the WIRCUP screen displays only Resource data. (Earned/Unearned Income data is displayed only on the WIRCIQ "inquiry/history" screen described later on in this section). Certain Resource data displayed has been automatically transferred from the most recently stored calculated MBL budget. Also displayed is any Resource data that has been entered manually after the last budget store date. Resource data for PA and FS cases, depending on county option, is always entered manually because the ABEL budgets do not record Resource data and therefore it cannot be automatically transferred to IRCS. Up to 15 Resources per page are displayed. The last line on the first page is always returned blank to allow a new Resource line to be manually entered.

On this screen, any existing line(s) of Resource data may be changed and new lines may be entered.

### Edits on Update Screen

After data has been entered or changed on the WIRCUP screen and transmit is pressed, only the lines that were added or changed are edited. See **Action Codes** below. If errors are detected, the fields in error are highlighted, an asterisk is placed in the first position of the field, and the message EXAMINE BLINKING FIELDS is displayed. The screen cannot be transmitted therefore the data cannot be stored. No error numbers or error messages are displayed.

The edits that are applied to each data entry field are listed in the Remarks column under the heading entitled DATA ELEMENT FIELDS on the pages that describe the WIRCUP screen.

### Action Codes

Whenever an existing Resource line is changed or a new line is entered, an Action Code of N (New) or C (Change) must be entered. Code N is used for all new lines and should also be used when modifying an existing line. Code C can be used only for additions and changes to Account/Policy Number, and in PA and FS cases, to enter the TO Date. (See **Current Resources**) When adding an individual to a case, C can be used to pull down the CIN after Batch Update (See **CIN Field, Adding an Individual**).

When Action Code N is used to add or change a Resource line and the screen is transmitted, the new or revised line is moved to the first line of the screen and the current month/year is displayed as the STORED date. When Action Code C is used, the changed line remains in the same location on the update screen and the existing STORED date is *not* changed. If Action Code C and a TO Date is entered for a PA/FS Resource, the line is no longer current so it is removed from the Update screen. This line is then displayed only on the Inquiry/History screen. Only Current Resource data is displayed on the Update screen.

The use of Action Codes N and C has impact on the historical sequence of the resource lines as they are displayed on the IRCS "inquiry/history" screen WIRCIQ, which is described below. If data on a Resource line is changed using the Action Code N, then the line as it was prior to the change *and* the new line are *both* retained on the Inquiry/History screen. The use of Action Code N therefore maintains a history of each Resource line as it is entered or changed. The use of Action Code C retains only the changed line on WIRCIQ.

## Current Resources

A Resource is considered to be "current" when it is available and is being used to determine eligibility. Only one Resource of each type can be current (for a specific individual line number) unless it is a Resource that requires a policy/account number and the numbers are different such as two bank accounts.

In PA and FS, a current Resource is any Resource on the update screen with the TO Date blank. Current Resources are also displayed on the Inquiry/History screen. An X in the first column designates the resource as current. If the TO Date is entered, or new data updating the same Resource is entered, then the previous Resource line is no longer current and is removed from the "update" screen. The line is retained in the IRCS record and will be displayed on the WIRCIQ "inquiry/history" screen. See **Action Codes**.

In MA, a current Resource is any Resource that was transferred from the most current stored calculated MBL budget and any resource entered manually after the most recent budget store date. If a new MA budget is stored with different Resources or no Resources, then the previous Resources (whether automatically transferred or manually entered) are considered no longer current and are removed from the "update" screen. The previous line(s) is retained in the IRCS record and will be displayed on the WIRCIQ "inquiry/history" screen.

## Inquiry/History Screen

The WIRCIQ - WMS Income/Resource Record screen is the "inquiry/history" screen for IRCS. This screen displays all the IRCS data for an application or a case even if the data is no longer current and therefore is no longer displayed on the WIRCUP "update" screen. Thus the WIRCIQ screen serves as both an "inquiry" screen and a "history" screen.

The WIRCIQ "inquiry/history" screen is obtained by entering Function 2 and either a Registry Number or Case Number on the WIRCMU Menu screen and transmitting. This screen also can be obtained by pressing F-5 from the WIRCUP screen or entering Function 8 on the WBPAFS - PA/FS Budget Calculation menu when an IRCS Record has been established. If the application or case is in another district, then the first four letters of that district must be entered in the DIST field.

Up to 15 occurrences of income and resource data are displayed in the following sequence:

- Resources - indicated by the code R
- Earned Income - indicated by the code E.
- Unearned Income - indicated by the code U.

Within each of the above groupings, the data is presented with the most recent store dates listed first in each group.

The screen format and data of the WIRCIQ "inquiry/history" screen is identical to the WIRCUP "update" screen, with the following exceptions:

- the data displayed includes Earned Income, Unearned Income as well as Resources,
- there is no XMT position because the "inquiry/history" screen cannot be used to enter new or changed data,

- for PA and FS cases only, the Action Code column (ACT) is replaced by a currency column (CUR). An X in this column in front of a Resource line indicates that the Resource is current and that the amount on this line has been used to calculate the PA or FS Total Resource Amount which appears on both the WIRCUP Update screen and WIRCIQ Inquiry/History screen. For MA, the Action Code column is blank.

## CIN Field

Income or Resource lines of data are added or changed on the IRCS record by:

- Automatic transfer when a calculated budget is stored, or
- Manual entry of a new Resource line on "update" screen using Action Code N, or
- Manual changes to an existing Resource line on "update" screen using Action Code N or C.

Whenever a line is added to or changed on the IRCS record by any of the above methods, the line is processed and edited before being added to the IRCS record. In this processing, the Line Number of the recipient is used to obtain the CIN of the individual and add it to that line in the IRCS record.

For individuals in an application or a new case prior to Batch Update, the Application Register/Line Number (AR/LN) is used in place of the CIN. After Batch Update, the individual's CIN replaces the AR/LN.

If an incorrect Line Number is used on the budget or for manual entry, then the system will not be able to locate a CIN or correct AR/LN for that individual and the CIN field will be blank or incorrect.

## Adding an Individual

When an individual is added to a case, and that individual has Income or Resources that are used in a stored calculated budget or Resources that are manually entered, then that individual's CIN will not appear on the IRCS screens until one of the following activities takes place *after* Batch Update of the Pending Record on which the individual was added:

- Another calculated budget using the Line Number of the added individual is stored, or
- the added individual's Resource line, if any, on the "update" screen is marked with a C in the Action Code column (ACT) and the screen transmitted.

## FS Separate Determination

When a FS case is opened by the Separate Determination process (See **SRM Denials and Closings**), any appropriate IRCS data from the closed PA case will be linked with the new FS case after Batch Update.

## MA Extension

If an MA Extension case is opened, any IRCS data from the PA case is *not* linked to the new MA case.

## IRCS and RFI

IRCS collects and stores data from the stored budget about Wages, Unemployment Insurance Benefits and IRS Pension Income of Recipients. This process makes the RFI matches more efficient. If RFI finds a Wage (if amount budgeted is within 20% for MA, 10% for PA) or UIB match (any budgeted amount) or Pension match (over \$100 and up to \$5.00 over the reported amount) for a Recipient and that Wage, UIB or Pension is in the IRCS record, then the case will not be flagged by RFI. The reason for not flagging the case is that the eligibility determination for the case has already included consideration of the resources.

## Function Keys

The Function Key F5 is used in IRCS in two ways:

- To obtain the WIRCUP "update" screen from any PA, FS or MA Calculated budget screen, and
- To go back and forth between the WIRCUP "update" screen and the WIRCIQ "inquiry/history" screen.

## Collectible Resources

The following matrix indicates which types of Resources are considered collectible for each Program Area. The Resource Codes followed by an asterisk (\*) require an Account/Policy Number. The Resources for MA can be transferred from a stored Budget. The Resources for PA and FS must be data entered.

RESOURCE		PROGRAM AREA		
CODE	NAME	PA	FS	MA
01	Cash on Hand	X	X	X
02*	Bank Accounts	X	X	
03*	Stocks, Bonds, Securities			
04	Promissory Notes	X		
05	Mortgages	X		
06*	Trust Funds	X	X	X
07*	PIA - Savings Accounts			X
08	Lump Sum Payments			X (Note 1)
09	Burial Reserve	X		

RESOURCE		PROGRAM AREA		
CODE	NAME	PA	FS	MA
22*	Vehicle	X	X	
86	Income Tax Refund	X		
87	Non Exempt Real Property	X	X	
88*	Cash Value of Life Insurance	X		
99	Other Resources	X	X	

**Note: 1.** Includes tax refunds, insurance settlements, inheritances, etc.

### Collectible Earned Income

The following matrix indicates what Earned Income is considered collectible for each program area and is transferred from a stored budget.

EARNED INCOME		PROGRAM AREA		
CODE	NAME	PA	FS	MA
01	Salaries, Wages	X	X	X
05	Irregular or Infrequent Income			
06	Other Earnings			
07	VISTA (Volunteers in Service to America)		X	
08	Severance Pay			
20	Net Business Income/Income from Self-Employment	X	X	X
31	Earnings from Subsidized Privet or Public Sector Employment	X	X	X
35	School to Work Employment Program	X	X	X
40	Earnings from JTPA	X	X	X

EARNED INCOME		PROGRAM AREA		
44	Office for Vocational and Education Service for Individuals with Disabilities (VESID)	X	X	X

### Collectible Unearned Income

The following matrix indicates what Unearned Income is considered collectible for each program area and is transferred from a stored budget.

UNEARNED INCOME		PROGRAM AREA		
CODE	NAME	PA	FS	MA
03	Any Dividends, Interest or Periodic Receipts from Stocks, Bonds, Mortgages, Bank Interest, Trust Funds, Annuities, Credit Unions, Estates, etc.			
07	Disabled Veteran's Benefits (Non-Service Connected)			X
11	Disabled Veteran's Benefits (Service Connected)			X
33	NYS Disability Insurance			
35	Railroad Retirement Benefit - Dependent	X	X	X
38	Railroad Retirement Benefit	X	X	X
39	Retirement Benefits (Pension)	X	X	X
42	Social Security Disability Benefit	X	X	X
43	Social Security Survivor's Benefit	X	X	X
44	Social Security Retirement Benefit	X	X	X
45	SSI Benefit			
46	Social Security Benefit - Dependent	X	X	X
49	Unemployment Insurance Benefit Compensation	X	X	X
50	Union Benefits	X	X	X
55	Veteran's Pensions or Benefits			X
59	Workmen's Compensation			
73	Earnings of a Dependent Child Who is a Full or Part-Time Student Who is Not Employed Full-Time	X		X
79	Income from Trust Fund of an Infant			

### Liquid Resources

The following matrix indicates liquid resources (non-exempt resources that are readily available to the applicant/recipient). Resources are NOT captured on the PA and FS Budget screens so no resources are transferred from ABEL to IRCS. Users can go directly into IRCS and enter resource information for PA and FS cases.

LIQUID RESOURCES		PROGRAM AREA		
CODE	NAME	PA	FS	MA
01	Cash on Hand	X	X	X
02	Bank Accounts	X	X	X
03	Stocks, Bonds, Securities	X	X	X
04	Promissory Notes	X		X
05	Mortgages, Conditional Sales Contracts	X		X
06	Trust Funds	X	X	X
07	PIA Savings Accounts (MA Only)			X
08	Lump Sum Payments (Includes tax refunds, insurance settlements, inheritances, etc.)			X
10	Reparation Payments			X
98	Other Liquid Resource	X		

### Non-Liquid Resources

The following matrix indicates non-liquid resources (non-exempt resources that are not readily available to the applicant/recipient). Resources are NOT captured on the PA and FS Budget screens so no resources are transferred from ABEL to IRCS. Users can go directly into IRCS and enter resource information for PA and FS cases.

NON-LIQUID RESOURCES		PROGRAM AREA		
CODE	NAME	PA	FS	MA
22	Vehicle	X	X	X
87	Non-Exempt Real Property	X	X	
88	Cash Value of Life Insurance	X	X	
99	Other Resources	X		



WIRCMU - WMS Income and Resource Collection System Menu

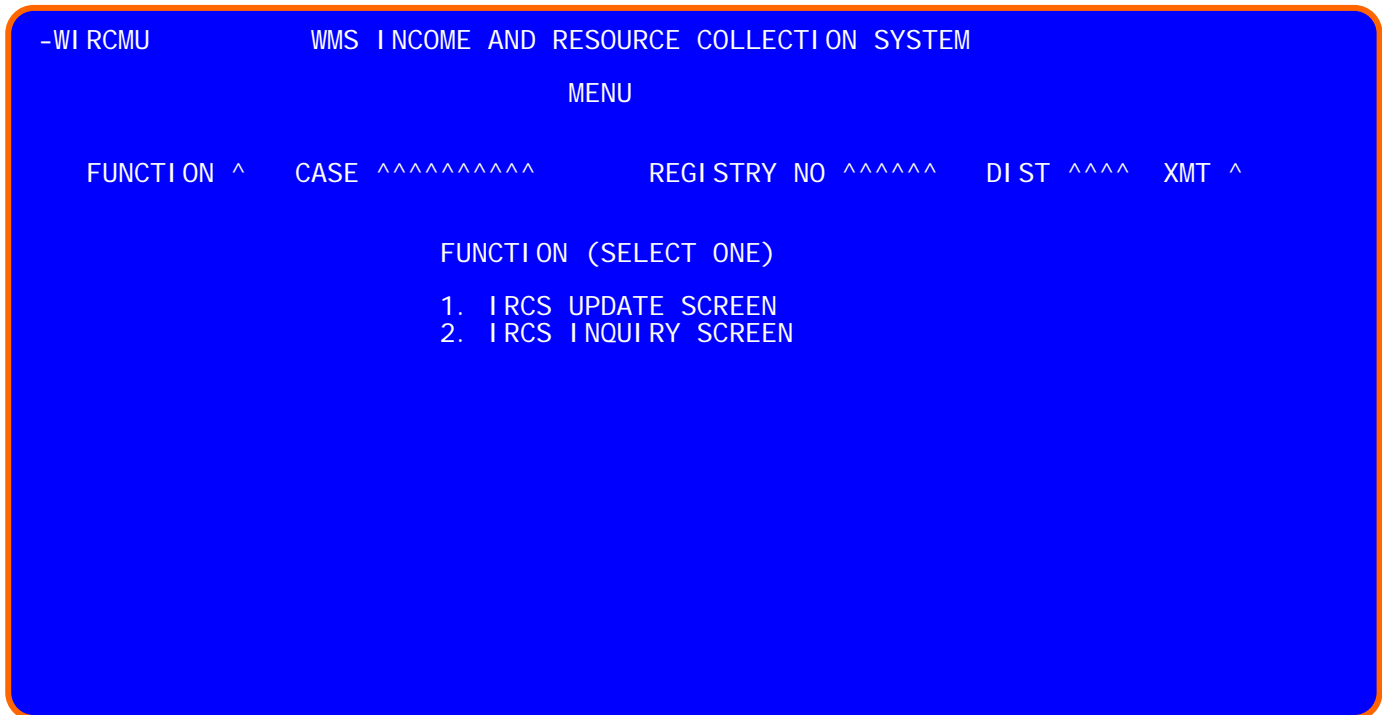


Figure 1 - WMS Income and Resource Collection System Menu (WIRCMU)

Purpose

This screen is used to select either the Income and Resource Collection System Update screen(s) for entry or changes or the Inquiry screen(s) (including other districts) for viewing data.

Access

- Entering 32 on the WMSMNU - WMS Menu, or
- Pressing Ctrl+F6 from **WIRCUP - WMS Income/Resource Record**.

Screen Response

Positive

- WIRCUP - WMS Income/Resource Record is Function 1 and Case Number or Registry Number entered, or
- WIRCIQ - WMS Income/Resource Record if Function 2 and Case Number or Registry Number entered or Case Number or Registry Number and District entered.

### Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks) as shown on the Error Message and Edits pages in the Subsystem Processing area, or
- SF-99 KEY NOT SUPPORTED (99 = 8, 13), or
- Any Universal Screen Message - See **SRM Access and Exit Procedures**

### Printed Response

None

### Function Keys

Key	Description
F1	WBPAFS - Budget Calculation Menu
F2	WBMAMU - MA Budget Calculation Menu
F3	WST001 - Statistics Menu
F4	WAR001 - Application Register Menu
F5	WDENIL - Application/Services Denial Menu
F6	<i>Renders Workstation Inactive</i>
F7	WDXMNU - Non-Services Data Entry Menu
F9	WSEMNU - Services Full Date Entry Menu
F10	WSUMNU - Services/Undercare Maintenance Menu
F11 or Ctrl+F1	WCN000 - WMS/Client Notice Subsystem Menu
F12 or Ctrl+F2	WINQ01/WINQ02 - Case/Individual Inquiry Menu
Ctrl+F4	WCTMNU - RFI Menu
Ctrl+F5	LDMENU - LDMIP Menu
Ctrl+F6	WMSMNU - WMS Menu
Ctrl+F7	WTRK00 - Time Limit Tracking Inquiry
Ctrl+F8	WASI01 - Auto SDX/WMS Interface Menu
Ctrl+F9	CCXMNU - Child Care Review Service
Ctrl+F10	WMEEMN - EEDSS Host System Menu
Ctrl+F11	W4139R - Auto Closings/Case Conflicts Initiator
Ctrl+F12	WDV000 - Domestic Violence Data Collection Menu

Screen Field Description - WIRCMU

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
FUNCTION	NONE	Must be entered and must be 1 or 2
CASE	01050 - CASE NUMBER (10)	Must be entered for cases that have completed the Batch Update Process
REGISTRY NO	01046 - REGISTRY NUMBER (6)	Must be entered for applications or cases which have completed Full Data Entry but have not completed the Batch Update process
DIST	95908 - DISTRICT MNEMONIC (4)	Case Number or Registry Number and first four letters of District name must be entered for Cross District Inquiry/History screen. Update Function not allowed in districts other than transaction district.



Negative

- Field(s) in error return highlighted (missing entries display highlighted asterisks). The message EXAMINE BLINKING FIELDS on Line 24, or
- One of the following messages on Line 24:
  - CURRENT SCREEN IS PAGE ONE - SF01 IGNORED
  - DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - **\*\*ERROR - NO DATA CHANGE - USE SF KEYS\*\*** (This messages occurs if no Resource data has been added or modified and XMT pressed.)
  - F99 NOT SUPPORTED - REXMT (99 = 4, 7-15, 17-22)
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WIRCIQ - WMS Income/Resource Record. If there is no IRCS record, the following message will be displayed: NO IRCS DATA EXISTS FIR THIS CASE APPLICATION
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIRCMU - WMS Income and Resource Collection System Menu

Screen Field Description - WIRCUP

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
DIST	01010 - TRANSACTION DISTRICT (2)	System generated.
OFC	01020 - LOCAL OFFICE NUMBER (3)	System generated.
UNIT	01030 - UNIT IDENTIFIER (5)	System generated.
WRKR	01040 - WORKER IDENTIFIER (5)	System generated.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CASE NO	01050 - CASE NUMBER (10)	System generated. Returned from entry of Case Number, or from entry of Registry Number if Case Number was entered on the application
CASE TYPE or BDGT TYPE	01060 - CASE TYPE (2)	System generated. From PA or FS Application/Case Record.
	01062 - MA BUDGET TYPE CODE (2)	System generated. From stored MA Budget
CASE NAME	01070 - CASE NAME (28)	System generated. From Case Record, or from Application Record if Case Name was entered on the application.
STATUS	24020 - APP RECORD INTERNAL STATUS (1) or	System generated. From Application Record. IRCS records allowed for any status except <i>Withdrawn</i> .
	02090 - CASE STATUS (2)	System generated. From case Record. IRCS records allowed for any status.
A/D	17020 - AGED/DISABLED INDICATOR (1)	System generated. From FS Stored Budget
CAT	11320 - FS CATEGORICAL ELIG. IND(1)	System generated. From FS Stored Budget
PA/FS	01130 - PA FOOD STAMP CODE (2)	System generated. From PA/FS Case Rec.
REUSE IND	01051 - CASE NUMBER REUSE IND. (1)	System generated. From Case Record. IRCS records allowed for any status.
TOTAL RESOURCES PA or TOTAL RESOURCES FS	09120 - TOTAL RESOURCE VALUE AMT (7)	System calculated from all current Resource amounts entered for PA or PA/FS applications/cases.
	09120 - TOTAL RESOURCE VALUE AMT (7)	System calculated from all current Resource amounts entered for NPA PA or FS MIX applications/cases.
<b>RESOURCE INFORMATION</b>		
ACT	NONE	ACTION CODE. Required entry for a new resource line or modification of existing resources. Must be N (New) or C (Change). N is used to add a new line or resource data for MA/PA/FS, or used to generate new line of Resource data after changing an existing line for MA/PA/FS. C is used to enter or correct policy/account number for MA/PA/FS, or to enter TO Dates for PA/FS, or used to pull down CIN after Batch Update processing if adding an individual and no new budget is stored.
LN	03045 - LINE NO OF HOUSEHOLD MEMBER (2)	15 occurrences per page. System generated if Resource came from stored MA Budget, or required entry: Line Number of owner of resource. <b>Note:</b> Future development of RFI MATCH process with IRCS is directly tied to entry of correct line number as line number is connected to the Social Security Number used to identify the individual to be matched.
TR	09410 - IRCS RESOURCE TYPE CODE (3)	15 occurrences per page. System generated if Resource came from stored MA Budget, or required entry: First position of 3 position field. Only R is allowed.
CD	09410 - IRCS RESOURCE TYPE CODE (3)	15 occurrences per page. System generated if Resource came from stored MA Budget, or required entry: Source code of collectible resource. See Collectible Resources 2nd and 3 <sup>rd</sup> positions of 3 field positions.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
AMOUNT	09412 - IRCS RESOURCE AMOUNT (7)	15 occurrences per page. System generated if Resource came from stored MA Budget, or required entry: field accepts Resource value up to \$99,999.00.
FROM	09413 - IRCS RESOURCE FROM DATE (4)	15 occurrences per page. MM/YY - System generated if Resource came from stored MA Budget (MA Budget Effective FROM Date) or required entry: FROM Date must be valid and is usually the Budget Effective FROM Date
TO	09414 - IRCS RESOURCE TO DATE	15 occurrences per page. MM/YY - System generated if Resource came from stored MA Budget (MA Budget Effective TO Date) or if the record is created manually for MA the TO date must be valid and is usually the Budget Effective TO date. For PA/FS the TO Date must be blank for current resources. <b>Note:</b> For PA/FS, if TO Data is entered, the Resource is no longer considered current and is removed from the WIRCUP screen but is displayed on WIRCIQ - Inquiry/History screen.
ACCOUNT/POLICY NO.	09417 - IRCS RESOURCE ACCT/POLICY NO (20)	15 occurrences per page. Required entry for certain types of Resources if these Resources are manually entered or if an existing line for these Resources are modified and the Account/Policy number field is blank. See Collectible Resources for Resources that are followed by an asterisk. If Resource requiring an Account/Policy Number is system generated from MA Budget, the Account/Policy Number will be blank.
STORED	09415 - IRCS RESOURCE STORE DATE (8)	MM/DD/YY - System generated if Resource came from Stored MA Budget, the IRCS stored date is the Budget Stored Date, or if manually entered, stored date is the date Resource Line was entered and transmitted.
CIN	03010 - CLIENT IDENTIFICATION NUMBER (8) or	System generated after transmitting WIRCUP - CIN associated with the Line Number that was entered for case members
	01046 - REGISTRY NUMBER (6) and 03045 - LINE NO OF HOUSEHOLD MEMBER (2)	System generated after transmitting WIRCUP. The Application Register/Line Number associated with the Line Number that was entered is displayed for Applications or Cases which have completed Full Data Entry but <b>not</b> Batch Update. CIN will overlay Application Register/Line Number after the Batch Update Process. <b>Note:</b> If an IRCS Record is established while adding an individual, the CIN for the added individual will not be displayed. To pull down the CIN after Batch Update processing, either the Budget must be stored again or an entry of C in the Action Column with no other entry must be made and the screen transmitted.





WIRCIQ - WMS Income/Resource Record - PA/FS Case

-WIRCIQ WMS INCOME/RESOURCE RECORD DATE 04/30/07 PAGE 01 OF 01										
DIST STLA		OFC	010	UNIT	WRTS	WRKR	JJK	CASE NO	HOWARD0001	CASE TYPE 12
CASE NAME LISA A HOWARD				STATUS ACTIVE		A/D	CAT	PA/FS 01		
REUSE IND		TOTAL RESOURCES PA 0001000								
CUR LN	T	CD	AMOUNT	FROM	TO	ACCOUNT/POLI	CY NO.	STORED	CIN	
X 01	R	01	0001000	0407				043007	AX830970	
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Figure 4 - WMS Income/Resource Record - PA/FS Case (WIRCIQ)

Purpose

This screen is used to display Resources, Earned Income and Unearned Income, in that order, based upon Resources Stored Date (the most recent displayed first). (Stored date for system generated data from the Budget is the data the Budget is stored using F-13. Stored date for manually entered Resource data is the date the Resource line is entered and the screen transmitted.) This screen can consist of multiple pages with 15 records on each page.

Access

- Entering 2 in Function and either Case Number or Registry Number on **WIRCMU - WMS Income and Resource Collection System Menu**, or
- Entering 2 in Function and either Case Number or Registry Number and DIST on **WIRCMU - WMS Income and Resource Collection System Menu**, or
- F5 from **WIRCUP - WMS Income/Resource Record**, or
- Entering Function 8 on **WBPAFS - PA/FS Budget Calculation Menu**.

Screen Response

Positive

- See **Function Keys**.

Negative

- One of the following messages on Line 24:
  - CURRENT PAGE DISPLAYED IS HIGHEST PAGE - SF02 IGNORED
  - DISPLAYED IS LOWEST PAGE - SF03 IGNORED
  - DISPLAYED IS PAGE ONE - SF01 IGNORED
  - SF99 NOT SUPPORTED - REXMT (99 = 4, 7-15, 17-22)
  - XMT INVALID HIT SF KEY
  - Any Universal Screen Message - See **SRM Access and Exit Procedures**.

Printed Response

None

Function Keys

Key	Description
F1	Page 01
F2	Next Page if there are multiple pages.
F3	Previous Page if there are multiple pages.
F5	WIRCUP - WMS Income/Resource Record
F6	<i>Renders Workstation Inactive</i>
Ctrl+F6	WIRCMU - WMS Income and Resource Collection System Menu

Screen Field Description - WIRCIQ - Data elements are identical to WIRCUP with the following exceptions.

SCREEN CAPTION	D.E. NUMBER - NAME (SIZE)	REMARKS
CUR	NONE	Replaces ACTN Column for PA/FS. An X is displayed to indicate which resources are current and are therefore included in the TOTAL RESOURCE amount. For MA this column is blank.

WIRCIQ - WMS Income/Resource Record - MA Case

-WIRCIQ			WMS	INCOME/RESOURCE RECORD			DATE	PAGE	
DIST	STLA	OFC	UNIT	001	WRKR	04/30/07	CASE NO	CBI	JHF005
CASE NAME			JONES				STATUS	ACTIVE	BDGT TYPE
REUSE	IND								
LN	T	CD	AMOUNT	FROM	TO	ACCOUNT/POLICY NO.	STORED	CIN	
01	R	06	0001000	0407	1007	123456789	043007	AX19990R	
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Figure 5 - WMS Income/Resource Record - MA Case (WIRCIQ)

For more information, see WIRCIQ - Income/Resource Record - PA/FS Case screen description for a discussion of the screen functionality.

## Subsystem Processing

### Error Messages and Edits

#### Errors for Which Full Messages are Displayed

(Listing is alphabetical by Message)

##### **CASE UNDERGOING FULL DATA ENTRY - USE REGISTRY NO.**

Update and Inquiry functions cannot be accessed by the Case Number until the case has completed Batch Update Processing.

##### **CASE NUMBER NOT FOUND**

Case Number is not known to the system.

##### **CROSS DISTRICT UPDATING IS NOT ALLOWED**

The Update Function is only allowed in the Transaction District.

##### **ENTER A VALID FUNCTION NUMBER**

Function must be 1 or 2.

##### **FULL DATA ENTRY COMPLETED - USE CASE NUMBER**

Update and Inquiry Functions must be accessed with a Case Number after Batch Update Processing.

##### **INVALID CASE TYPE**

Case Type is not 11-14, 16, 17, 20, 31 or 32.

##### **INVALID DISTRICT NAME**

A valid District mnemonic must be entered for the Cross District Function.

##### **INVALID REGISTRY NUMBER - APPLICATION WITHDRAWN**

Registry Number cannot be entered for a manual or system withdrawn application.

##### **NO IRCS DATA EXISTS FOR THIS CASE/APPLICATION**

Inquiry cannot be accessed if there is no IRCS record.

##### **REGISTRY NUMBER NOT FOUND**

Registry Number not known to the system.

##### **SECURITY VIOLATION - CANNOT PRESENT UPDATE SCREEN**

Worker not authorized for update.

**SELECT CASE OR REGISTRY NUMBER**

Either the Case Number or the Registry Number must be entered for Update, Inquiry or Cross District Functions.

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## Data Elements

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DATA ELEMENTS.....	19

## OVERVIEW

Data elements refer to the pieces of information that are either entered by the user or system generated and stored in a database. This section of the SRM lists the data elements for the Upstate Welfare Management System. In order to facilitate the ease of locating specific data elements, two listings of the same data elements are provided. Both lists contain the data element name and number.

The first list is alphabetical based on the name of the data element as found in the on-line WMS Data Element Dictionary. It is presented in table format with the first column containing the data element name and the second column containing the data element number.

The second listing is based on the numerical order of the data element number. Each data element is presented in the following format:

Data Element #	Data Element Name	Size	Data Type
<b>01060</b>	<b>CASE TYPE</b>	<b>2</b>	<b>N</b>

Size refers to the number of alpha or numeric characters in the data element. Data Type is either **N**, indicating the data element type is numeric, or **AN**, indicating the data element type is alpha-numeric (text).

The second list can have up to three (3) columns of datum following the data element and name. These columns are the code, mnemonic (optional), and the description. As noted, the mnemonic values are optional and used in WMS programs to describe a code without taking too much screen territory (as would be needed if the full code description were used).

### Example with Mnemonic:

#### 01510 REPORT COMPLETE/INCOMPLETE 1 AN

C	COMPL	COMPLETE
I	INCOMP	INCOMPLETE
N	NOT-AP	NOT APPLICABLE/WRONG ADDRESS
<b>(code)</b>	<b>(mnemonic)</b>	<b>(description)</b>

Also, in the second list, if a data element has associated codes and the codes are not maintained in the WMS Code Cards, a listing of codes will follow the data element. If the associated codes are maintained in the WMS Code Cards, a link to the WMS Code Cards on the OTDA Intranet is provided following the data element. Be aware that the name of the data element in the WMS Code Cards may not match exactly the name of the listed data element in this document.

**ALPHABETIC INDEX**

DATA ELEMENT NAME	NUMBER
\$20 Disregard Code	07139
30 + 1/3/\$30 Exemption	07370
30 + 1/3/\$30 Indicator	07373
30 + 1/3/\$30 Last Month Indicator	07374
40 Quarter Request Submission Date	12253
Abel Store Code	24024
Active Restriction/Exception Code	24002
Activity Enrollment Flag	09003
Activity Enrollment Flag Line Number	24008
Actual Heating Fuel Cost	11245
ADC Application Count	24420
ADC Case Involvement Indicator	24220
ADC-FC Application Count	24440
ADC-U Application Count	24430
Additional Needs Restricted Indicator	11098
Additional Needs Type	11080
Address Changed Indicator Flag	12105
Administrative Notice Flag	24720
Advocate Address - City	04031
Advocate Address - Line 1	04029
Advocate Address - Line 2	04030
Advocate Address - State	04032
Advocate Address - Zip	04033
Advocate Area Code	04034
Advocate Group Name	04027
Advocate Group Number	04026
Advocate Name	04035
AFIS Exemption Indicator	03047
Aid Status	57014
Alien Number	03171
Alternate Adjustment Amount (Bottom-Line)	17031
American Indian or Alaska Native	03054
Amount of Family Planning Net Income	07067
Amount of MA Months Excess	11430
Amount of Total Monthly Gross Income	07068
Anticipated Future Action Code	01140
Anticipated Future Action Date	01141
Applicable Standard Code	11401
Applicable Standard for MA Budget	11400
Applicant Individual Key Indicator	24033
Applicant Key Group	16683
Application Date	01090

DATA ELEMENT NAME	NUMBER
Application Record Internal Status	24020
Application Register Line Number	01045
Application Registration Date	01048
Application Source Code	01066
Application Turnaround Cycle Number	24751
Application Withdrawal Date	01921
Appointment Type Code	08013
Archive Bit	24905
Archive Date	24900
Archive Date - Century	12092
Archive Date - Day	12095
Archive Date - Month	12094
Archive Date - Year	12093
Archive Flag	24904
Archive Indicator	24901
Area Update Key From Date	24876
Asian	03055
Associated Address Zip Code Suffix	05051
Associated Address Zip Plus	05052
Associated City/Town	05030
Associated Client Identification Number	21006
Associated Display Line Address	23233
Associated Display Screen Address	23232
Associated Name	05011
Associated Name and Address Code	05010
Associated Name and Address Location Identifier	24940
Associated Name Indicator	95556
Associated Name Number	05015
Associated Notice Code	05002
Associated Primary Line Number	23060
Associated State	05040
Associated Street	05020
Associated Zip	05050
ASWI Assigned Case Number	24841
ASWI Spawn Count	24842
Audit Date	24070
Authorization Cycle Number	24750
Authorization Number	02040
Authorization Payment Data Flag	24100
Authorization Period	01100
Authorization To Date	01014



DATA ELEMENT NAME	NUMBER
Authorized Representative First Name	03018
Authorized Representative Last Name	03019
Authorized Representative Middle Initial	03024
Authorized Representative Name	96562
Available Amount	21600
Available Amount Effective From Date	21610
AWSI Age Counter	24840
- B -	
Basic Allowance	11010
Batch Notice Processing Date Day	00043
Batch Notice Processing Date Month	00042
Batch Notice Processing Date Year	00033
Batch Notice Variable Text	04121
Batch Update Processing Code	24011
Bendex Match Counter	25845
Benefit Category Code	28003
Benefit Plan Number	16611
Benefit Program Area Code	28018
BL Budget Version Number	24738
Black or African American	03056
Bottom Line Conversion Flag	24387
Bottom Line History Version Number	24737
Bottom Line Resource Child Number	09103
Budget BL Flag	24748
Budget Data Extractor Code	24034
Budget FS Indicator	24744
Budget HEAP Indicator Code	24021
Budget Indicator	24380
Budget PA Indicator	24742
Budget Screen Indicator	07603
Buy-In Code	07001
Buy-In Net Income Amount	07073
- C -	
Calculation District Code	01009
Canadian Postal Code	05004
CAP Clearance Flag	12080
CAP Indicator	01421
Card Code	21620
Card Delivery Code	03016
Card Fingerprint Indicator Flag	12172
Card Photo Indicator Code	03017
Card Replacement Flag	00165

DATA ELEMENT NAME	NUMBER
Card Request Immediate Count	00126
Card Request Secondary Count	00127
Card Signature Indicator Flag	12171
Case Action Effective Date	01012
Case Action Effective Date - Century	12097
Case Action Effective Date - Day	12100
Case Action Effective Date - Month	12099
Case Action Effective Date - Year	12098
Case Action Process Code	12101
Case Conflict Action Code	00133
Case Environment Control Key	00101
Case Identifier	20487
Case Inactive Date	24902
Case Involvement Status Flag	24140
Case Key Control	12010
Case Key Redefinition	00507
Case Link ODO 0	00131
Case Link Variable Text	00132
Case Local Data	24760
Case Name	01070
Case Note Text	01023
Case Number	01050
Case Number	15928
Case Number Reuse Indicator	01051
Case Status	02090
Case Type	01060
Cash Resource Amount	07048
Categorical Indicator – Resources	09105
CBIC Card Creation Reason Code	02009
CCRS Indicator	23490
CCRS Individual Status	23420
Century Dates Group Level 1	13032
Century of EMEV Create Date	16528
Century Portion Employment Entry Date	12054
Century Portion of Employment WGS Batch Processing Date	12051
Certification Date	01910
Certification Date Group Level	00009
Chafee Indicator	03076
Change Buy In A Count	16694
Change Buy In B Count	16699
Change QMB Count	16704
Checkpoint Date	12073
Checkpoint Date - Century	12074
Checkpoint Date - Day	12077
Checkpoint Date - Month	12076

DATA ELEMENT NAME	NUMBER
Checkpoint Date - Year	12075
Checkpoint Date/Time Group	12072
Checkpoint Information Text	12083
Checkpoint Key	00011
Checkpoint Time	12078
Checkpoint Time - Hour	12079
Checkpoint Time - Minute	12081
Checkpoint Time - Second	12082
Child Care – Month/Year of Date of Birth	07006
Child Care Amount Area Group	00012
Child Care Code	09002
Child Care Code Line Number	24007
Child Care Restricted Indicator	07403
Child Care Type code	07024
Child Earned Income Code	07020
Child Protective Services Referral Date	03032
Child Support Disregard	07129
Child Total Net Income Code	07152
Child Unearned Income Code	07120
Chronic Care \$20 Disregard Code	07604
Chronic Care ½ Remainder	07385
Chronic Care 65 Deduction Amount	07383
Chronic Care Buy-In Code	07005
Chronic Care Community Contribution Code	07606
Chronic Care Community ½ Remainder	07384
Chronic Care Community 150% of State Standard	11102
Chronic Care Community Contribution Amount	07655
Chronic Care Community Earned Income Deduction	07202
Chronic Care Community Excess Resource Amount	09142
Chronic Care Community Excess Resource Code	09132
Chronic Care Community MA Level	11413
Chronic Care Community Net Income Amount	07032
Chronic Care Community PA Standard	11101
Chronic Care Community State Standard	11103
Chronic Care Community Taxes – 65 Deduction Amount	07382
Chronic Care Community Total Income Amt.	07149
Chronic Care Community Total Surplus Amt.	11466
Chronic Care Community Total Surplus Code	11467
Chronic Care Community Work Expense Deduction	07321
Chronic Care Contribution from Community	07657
Chronic Care Contribution to Cost-of-Care	07654

DATA ELEMENT NAME	NUMBER
Chronic Care Contribution to the Community	07656
Chronic Care Earned Income Deduction	07203
Chronic Care Earned Income Indicator	07600
Chronic Care Excess Resource Amount	09143
Chronic Care Excess Resource Code	09133
Chronic Care MA – Budget Effective Period	01306
Chronic Care MA Level	11414
Chronic Care Phase Three Effective Period	01305
Chronic Care Phase Two Effective Period	01304
Chronic Care Resource Date	09102
Chronic Care Resource Indicator	09106
Chronic Care Total Income Amount	07148
Chronic Care Total to Cost	07660
Chronic Care Unearned Income Indicator	07601
Chronic Care Work Related Expense	07319
Chronic Net Income Amount	07033
CIN Count	24820
CIN Type	24150
Citizenship Indicator	03180
City of Client/Absent Parent Marriage	20009
Claiming Category	23051
Client Active Date	03119
Client Branch of Service Code	20445
Client Identification Number	03010
Client Status Effective Date	03118
Clockdown Status Code	02004
Code Indicating Payment Requires Special BICS Processing	96613
Code To Hold Medicare Part D Contract Number	00182
Code To Identify Medicare Part D Providers	00181
Com 30 & 1/3 Exemption Amount	07371
Combined Income for Taxes Code	07070
Common Benefit ID Card Flag	03002
Community \$20 Disregard CD	07605
Community 150% IND	07154
Community Applicable Standard Code	11402
Community Buy-In Code	07004
Community Child Care	07401
Community Court Support	07281
Community Health Insurance	07251
Community Support Disregard	07128
Comm Address for Vendor Name	00095
Concurrent Application Indicator	01095
Consolidation Date	03021
Cooperative Case Number	01110

DATA ELEMENT NAME	NUMBER
Count of Employment Hours Per Week	09322
Count of ID Card History Records	12004
Count of New QI1's	16982
Count of New QI2's	16987
Count of QI1's Extended	16984
Count of QI1's Negated	16985
Count of QI1's Who Have Had Their Coverage Changed	16986
Count of QI2's That Have Been Negated	16990
Count of QI2's That Have Had Their Coverage Extended	16989
Count of QI2's Who Have Had Their Coverage Changed	16991
Count of QI2's With Their Coverage Ended	16988
Count Out Ended QI1's	16983
Court Ordered Support	07280
CPS Services Indicator	24790
Creation Time	16529
Current Income	23445
Current Marital Status	03070
Current Prepaid Capitation Plan Status Code	24003
- D -	
Daily Change Buy In A Count	16709
Daily Change Buy In B Count	16714
Daily Change QMB Count	16719
Daily End Buy In A Count	16706
Daily End Buy In B Count	16711
Daily End Buy In B Count	16712
Daily End QMB Count	16716
Daily Extend Buy In A Count	16708
Daily Extend Buy In B Count	16713
Daily Extend QMB Count	16718
Daily Negate Buy In A Count	16707
Daily Negate QMB Count	16717
Daily New Buy In A Count	16705
Daily New Buy In B Count	16710
Daily New QMB Count	16715
Data Element Number	08027
Date Last Contact	20991
Date of Birth	03060
Date of Birth	23460
Date of Client/Absent Parent Marriage	20007
Date of Status	03172
Date of Institutionalization	01302
Date of Last Extract	12050

DATA ELEMENT NAME	NUMBER
Date of Last Known Employed	20996
Date of Last Prepaid Capitation Plan (PCP) Update	24953
Date of Last Provider/Name Update	24862
Date of Last Restriction Update	24856
Date of Last Update BIA Group	16651
Date of Last Update BIB Group	16652
Date of Last Update Ins Group	16644
Date of Last Update MCA Group	16649
Date of Last Update MCB Group	16650
Date of Last Update QMB Group	16653
Date of Last Update Wd	21024
Date of Marriage	20007
Date of Provider Update	24866
Date Respondent Departed	20896
Date of Service	21008
Date To Hold Ext-Period For Auto Recerts Upstate	01042
Day Care Data Array	00371
Day Care Family Size Percent	24806
Day Care Fee Percent	24001
Days Permanent Void-Date Count	12168
Days Referral Void-Date Count	12173
Days Temp – Only Count	12166
Days Temporary Void-Date Count	12167
Days Wait for Photo Count	12169
Deemed Amount	07500
Deeming Code	07490
Department Identification Number	00184
Deprivation Factor Date	20992
Dictionary of Occupational Titles Code	09305
Direct Service Time Report Date	23419
Direct Service Time Reported (HRS)	23435
Direct Service Time Reported (MINS)	23436
Disposition Date	02115
Disposition Time	02002
Disposition Type	02110
District Address 1	95901
District Address 2	95902
District City	95903
District Involvement Flag	24155
District Mnemonic	95908
District Name	95907
District Phone Number	04076
District Zip	95904
DL Change Part A Count	16593

DATA ELEMENT NAME	NUMBER
DL Change Part B Count	16600
DL End Ins Count	16605
DL End Part A Count	16590
DL End Part B Count	16597
DL Extend Ins Count	16607
DL Extend Part A Count	16592
DL Extend Part B Count	16599
DL Inc Ins Cov Count	16608
DL Negate Ins Count	16606
DL Negate Part A Count	16591
DL Negate Part B Count	16598
DL New Ins Cd Count	16604
DL New Ins Count	16603
DL New Part A Count	16589
DL New Part B Count	16596
DL Other Ins Count	16609
DL Rec In Ins Count 10 N	16601
DL Rec In Part A Count	16587
DL Rec In Part B Count	16594
DL Skipped Ins Count	16602
DL Skipped Part A Count	16588
DL Skipped Part B Count	16595
Domestic Violence Approval ID Text	02017
Domestic Violence Assessment Code	03038
Domestic Violence Liaison ID Text	03031
Domestic Violence Reassessment Code	03034
Domestic Violence Shelter Address Zip Code	05008
Domestic Violence Shelter City Address	05006
Domestic Violence Shelter State Address	05007
Domestic Violence Shelter Street Address	05005
Domestic Violence Waiver End Date	03037
Domestic Violence Waiver Reason Code	03035
Domestic Violence Waiver Start Date	03036
Domestic Violence Waiver Status Code	03033
Domestic Violence Waiver Type Code	12296
Discharge Resource Person CIN Number	95557
- E -	
EAA Application Count	24480
EAA Case Involvement Indicator	24280
EAF Application Count	24490
EAF Case Involvement Flag	24290
Earned Categorical Indicator	07037
Earned Income Credit Advance Amount	07300
Earned Income Credit Indicator	07303

DATA ELEMENT NAME	NUMBER
Earned Income Credit Indicator For Previous Budget	24844
Earned Income Sources	07010
Edit Error Number	01210
Educational Level	09304
Effective Date Group	04042
Electronic Document Indicator	24025
Eligibility Category Authorized Date	23413
Emancipated Minor	23100
Emergency indicator	01061
EMEVs Change Indicator	24375
Employability Code	03190
Employer Identification	05215
Employer's Name	05500
Employment Activity Code	09308
Employment Agency City	09317
Employment Agency Source	09320
Employment Agency State	09318
Employment Agency Street	09316
Employment Agency Zip	09319
Employment Anticipated Completion Date	09311
Employment Change/Delete Flag	12052
Employment District Involvement Array	00220
Employment District Involvement Bit	12053
Employment Effective Date	09310
Employment Line Number	09307
Employment Local Data	09340
Employment Local Data Indicator	12055
Employment Participating Agency	09315
Employment Record Indicator	09300
Employment Sanctioned Savings Amount	11034
Employment Status	09309
Employment Storage Date	12056
Employment Title	09312
Employment Update Code	12058
Employment Version Number	12059
Employment WGS File Date	09330
Employment Worker	09301
Employer Contact Name	16613
Encoded Value of First Name	24060
Encoded Value of Surname	24050
End Buy In A Count	16691
End Buy In B Count	16696
End Century Date	16632
End Dy Date	16635
End Month Date	16634

DATA ELEMENT NAME	NUMBER
End QMB Count	16701
End Run Time - Minute	12090
End Yr Date	16633
Ending Date	08018
Ending Date - Century	08099
Ending Date - Day	08102
Ending Date - Month	08101
Ending Date - Year	08100
Ending Date And Time Group	08017
Ending Time	08019
Ending Time - Hour	08103
Ending Time - Minute	08104
Ending Time - Second	08105
Energy Restriction Amount	11019
Energy Restriction Payment Amount	14006
Energy Restriction Payment Line Number	14005
Entry Date	21500
Entry Time	24850
EPI Indicator	03073
Even Year Earned Income Flag	24730
Excess Income Amount	21013
Excess Income Bills Incurred Amount	21007
Excess Income Bills Paid Amount	21012
Excess Income Bill Amount	21009
Excess Income Bill Type Code	21011
Excess Income Date – Year/Month	21014
Excess Income Family Flag	21015
Excess Resource Amount	09140
Expanded Eligibility Amount	11022
Expanded Eligibility Code	07022
Expanded Eligibility Level Code	07021
Expanded Eligibility Net Income Amount	07046
Expected Date of Confinement	03512
Extend Buy In A Count	16693
Extend Buy In B Count	16698
Extend QMB Count	16703
- F -	
Fair Hearing Number	57000
Fair Hearing Reprint Request Flag	04057
Family Health Plus Level Code	07065
Fetch Count	00014
FHP Eligible Amount	11069
FHP Excess Resource Amount	09033
FHP Resource Limit Amount	09031

DATA ELEMENT NAME	NUMBER
FHP Total Resource Amount	09032
First Event Sequence Number	08108
Fiscal District	01011
Flag to Indicate Exemption From 24 Mo. SNNC or 60 Mo. TANF Limit	03048
Flag To Indicate Whether To Recalc Continuous Save Date	03069
Flag To Note Reason A Case Is Receiving SNNC (Case Type 17)	01026
Food Assistance Program Code	03028
Food Stamp (See also FS)	
Food Stamp Allotment Value	17050
Food Stamp Case Involvement Indicator	24320
Food Stamp Claim Amount Fourth Occurrence	11024
Food Stamp Employment Indicator	07326
Food Stamp First Month Allotment Amount	17052
Food Stamp First Month Coupon Mix	17152
Food Stamp Grant Savings Amount	11054
Food Stamp History Allotment Amount	17053
Food Stamp History Effective Dates	01360
Food Stamp History Record Allotment	17059
Food Stamp History Version Number	24736
Food Stamp Income Area Group	00019
Food Stamp Medicare Count	07023
Food Stamp Percentage Exemption	07050
Food Stamp Quarterly Allotment Amount	17080
Food Stamp Quarterly Coupon Mix	17180
Food Stamp Total Shelter Expense	11300
Food Stamps – Mixed Case Involvement Flag	24340
Food Stamps Card Holder Flag	01001
Food Stamps Coupon Mix	17150
Food Stamps Disposal Amount	11250
Food Stamps Shelter Amount	11220
Food Stamps SUA Eligibility End Date - Century	12242
Food Stamps SUA Eligibility End Date - Month	12244
Food Stamps SUA Eligibility End Date - Year	12243
Former State of Residence Address	01008
FS (See also Food Stamps)	
FS Actual Child Support Amount	07041
FS Actual Disposal Cost	11255
FS Actual Needs Amount	11295
FS Actual Shelter Amount	11225
FS Actual Telephone Cost	11275
FS Actual Utility Cost	11265
FS Actual Water Amount	11235
FS Additional Allowance	11290
FS Additional Needs Type	11087

DATA ELEMENT NAME	NUMBER
FS Adjusted Allotment Value	17100
FS Aged Disabled Indicator	17020
FS Allotment Adjustment	17101
FS Allowed Child Support Amount	07042
FS Applicable Unearned Income	07140
FS Application Count	24520
FS Authorization Period	17051
FS Boarder Ledger Exclusion Amount	07430
FS Budget Effective Dates	01310
FS Budget Version Number	24734
FS Case Applicable Earned Income	07040
FS Case Number	01056
FS Categorical Eligibility Indicator	11320
FS Claim Amount	11376
FS Claim Balance Amount	11371
FS Claim Months	11374
FS Claim Number of Persons Disqualified	11378
FS Claim Remainder Amount	11377
FS Dependent/Child Care Amount	07410
FS Dependent/Child Care Frequency	07412
FS Earned Income Amount	07045
FS Earned Income Frequency Code	07026
FS Earned Income Source	07017
FS Excess Income Amount	07165
FS Excess Shelter Adjustment	11310
FS Financial Tracking Flag	24745
FS Group Home Exclusion Allowed Amount	07441
FS Group Home Exclusion Amount Input	07440
FS Heat Allowance	11240
FS Heat Expense Indicator	17040
FS Income Exclusion Amount	07470
FS Income Indicator	07163
FS Income Limit Amount	07038
FS Individual Ineligibility Code	03014
FS Individual Reason Code Effective Date	03049
FS Interview Code	02022
FS Medical Deduction Amount	07420
FS Med Prescription Drug Card Count	07074
FS Negative Farm Income Exclusion	07750
FS Net Income	07060
FS Reduction Amount	17055
FS Shelter Type	11121
FS Standard Deduction	17010
FS Standard Utility Allowance (SUA) End Date	17001
FS Standard Utility Allowance (SUA) End Date Code	17002

DATA ELEMENT NAME	NUMBER
FS Telephone Allowance	11270
FS Telephone Expense Indicator	17070
FS Total Claim Amount	11375
FS Total Deductions Amount	07460
FS Total Income	07160
FS Total Shelter Related Expense Amount	11011
FS Unearned Income Amount	07145
FS Unearned Income Frequency Code	07126
FS Unearned Income Source	07107
FS Utility Allowance	11260
FS Utility Expense Indicator	17060
FS Water Amount	11230
FS-M Application Count	24540
Fuel for Heating Amount	11040
Fuel for Heating Period	11132
Fuel for Heating Type	11130
Fuel for Heating Type Previous Budget	24838
Fuel Restricted Indicator	11048
Function Code	00118
Furnace Propane Amount	11070
Future Pending Data Status	24041
Future Recoupment Balance Amount	11005
Future Recoupment Claim Type Code	11004
- G -	
Given Name	24120
Goal Achievement Status (Title XX)	23015
Goal Achievement Status Date	23416
Good Cause Indicator	20959
Gross Annual Income (Services)	07170
Gross Wages	07190
Group Home Type	07445
- H -	
Hawaiian or Pacific Islander	03057
HCFA Buy-In Eligibility Cod	16627
HCFA Tape Date	16618
HCFA Tape Date Century Date	16675
HCFA Tape Date Day	16678
HCFA Tape Date Month	16677
HCFA Tape Date Year Date	16676
HCFA Trans Code	16622
Health Insurance Deduction	07250
Health Insurance Indicator Code	01044

DATA ELEMENT NAME	NUMBER
Health Insurance Policyholder Relationship To Case Member	15844
Health Insurance Policyholder Social Security Number	15843
Health Insurance Policyholder-Name	15842
Health Insurance Source of Data	15790
Health Insurance Source-City	15848
Health Insurance Source-State	15849
Health Insurance Source-Street Address	15847
Health Insurance-Zip Code	15850
HEAP Benefit Totals And Area Group	00153
HEAP Budget Version Number	24019
HEAP Case Involvement Flag	24365
HEAP Customer Account Number	14025
HEAP Income Level Code	01018
HEAP Income Source Code	07059
HEAP Payment Type Code	24366
HEAP Season End Date	01064
HEAP Shelter Type Code	11074
HEAP Total Needs Area Group	00152
HEAP Vendor ID	14024
Help Line Number	08068
Help Line Text	08069
HICFA Status Code	16617
Highest Education Degree Attained Code	03029
History Monthly Grant Amount	11108
Highest POS Unique Identifier on Case	24794
Hispanic Or Latin	03059
Historical Claim Total Amount	11023
Historical Energy Restriction Amount	11018
Historical Public Assistance Non-Cash Grant Amount	11032
History – PA Additional Amount	11092
History – Semimonthly Grant Amount	11109
History – Shelter Restricted Amount	11021
History – Transaction Date	02025
History – Utility Restricted Amount	11065
HMO Indicator	16508
Home Energy Allowance	11050
Hour of Last Update PCP	24951
Hours Worked Per Month	07044
Household's Calculated Annual Income Amount	07058
Housing Advantage Indicator Code	22222
HP Actual Energy Cost Amount	11056
HP Benefit Type	11051
HP Categorical Eligibility Indicator	11055
HP Emergency Type Code	01036

DATA ELEMENT NAME	NUMBER
HP HEAP Emergency Benefit Amount	11064
HP HEAP Emergency Bill Submitted Amount	11058
HP HEAP Regular Benefit Amount	11059
HP Household Excess Income Amount	07063
HP Household Resource Available Amount	09005
HP Income Frequency	07061
HP Income Indicator	07057
HP Income Tier	07056
HP Monthly Income Amount	07054
HP Monthly Income Limit Amount	07062
HP PA Total Monthly Income	07055
HP Project Annual Energy Cost Amount	11057
HP Vulnerability Indicator	11053
HR Application Count	24460
HR Case Involvement Flag	24260
HUD Child Count	01006
- 1 -	
ID Card Benefit End Date	03008
ID Card First Use Date	12016
ID Card First Use Time	12144
ID Card Issue Date	03009
ID Card Issue Time	12135
ID Card Number	03005
ID Card Program Area	12009
ID Card Record Control Key	00002
ID Card Transaction Date	12013
ID Card Transaction Time	12015
ID Card Type Code	03006
ID Card Update Control Key	00048
ID Card Vendor Flag	12008
ID Card Void Date	03007
In Care of Name	05110
Income Authorization Date	23417
Income Average Indicator	07036
Individual Categorical Code	03110
Individual Key Group	16684
Individual Local Data	24770
Individual MA Restriction/Exception Type	19050
Individual Notice Effective Date	04148
Individual Race/Ethnic Affiliation	09303
Individual SERMA Reason Code	23250
Individual Status	03120
Ineligible Remainder Amount	07180
Initial Appointment Date	08006

DATA ELEMENT NAME	NUMBER
Initial Appointment Date - Century	08081
Initial Appointment Date - Day	08084
Initial Appointment Date - Month	08083
Initial Appointment Date - Year	08082
Initial Appointment Date Group	08112
Initial Appointment Time	08007
Initial Appointment Time - Hour	08085
Initial Appointment Time - Minute	08086
Initial Appointment Time - Second	08087
Initial Appointment Time Group	08113
Insurance Company Name	16612
Insurance Group Number	16621
Interview Identification Number	08001
Interview Type Code	08003
IRCS Account/Policy Number	09417
IRCS Control Key - Application 12 An	00231
IRCS Control Key - Case 12 An	00232
IRCS Control Key 12 An	00230
IRCS Food Stamp Flag Group	00233
IRCS Ma Budget Type Code	00234
IRCS Resource Amount	09412
IRCS Resource From Date	09413
IRCS Resource Store Date	09415
IRCS Resource To Date	09414
IRCS Resource Type Code	09410
IV-D Child Support Non-Compliance Code	07043
IV-D Domestic Violence Waiver Status Code	03039
IV-D Indicator	01440
- J -	
JD/PINS Code	03152
JD/PINS Code	23452
- L -	
Language of Notice Flag	04002
Last Active Line Number Last	12060
Last Date Any Transaction Updated Record	96569
Last Event Sequence Number	08109
Last Individual Status	03117
Last Principal Provider Code	21551
Last Run Entry Group	12096
Last Time Any Transaction Updated Record	96574
Last Transmission Date	96566
Last Transmission Time	96567

DATA ELEMENT NAME	NUMBER
Last Update	23410
Last Update Century BIA Date	16663
Last Update Century BIB Date	16667
Last Update Century Date	16645
Last Update Century MCA Date	16655
Last Update Century MCB Date	16659
Last Update Century QMB Date	16671
Last Update Date MCB Date	16662
Last Update Day BIA Date	16666
Last Update Day BIB Date	16670
Last Update Day Date	16648
Last Update Day MCA Date	16658
Last Update Day QMB Date	16674
Last Update Month BIA Date	16665
Last Update Month BIB Date	16669
Last Update Month Date	16647
Last Update Month MCA Date	16657
Last Update Month MCB Date	16661
Last Update Month QMB Date	16673
Last Update Year BIA Date	16664
Last Update Year BIB Date	16668
Last Update Year Date	16646
Last Update Year MCA Date	16656
Last Update Year MCB Date	16660
Last Update Year QMB Date	16672
Last Wd Code	21025
LEARNFARE Delinquent Count	01015
Life Line Participation	01063
Level of Difficulty Code	95548
Line Number of Household Member	03045
Line Number of Individual with an AFA Code/Date	01142
Living Arrangement	23090
Living Arrangement Code	07496
Local Action Code	14009
Local Authorization Number	02041
Local Data Feedback Days Outstanding	24778
Local Data Feedback Disposition Indicator	24777
Local Data Feedback Extract Date	24776
Local Data Feedback Transmission	24775
Local Data Flag	24759
Local Data Flag – Services	24757
Local Office Number	01020
Low Income Family Excess Income Amount	07047
Low Income Family Excess Resources Amount	09004
Low Order Digit of Encoded Value of Surname	24051



DATA ELEMENT NAME	NUMBER
- M -	
MA Application Count	24500
MA BL Budget Indicator	24749
MA BL Budget Version Number	24739
MA Bottom Line Century Dates	13033
MA Bottom Line Reason Code	07008
MA Budget Indicator	24743
MA Budget Type Code	01062
MA Budget Version Number	24733
MA Case Closed Code	01530
MA Case Involvement Flag	24300
MA Continuous Coverage Date	03043
MA Conversion Flag	24388
MA Eligibility Code	11014
MA Extension Local Office Number	01002
MA Extension Unit ID Number	01003
MA Extension Worker ID Number	01004
MA Individual Reason Code	03015
MA Level Amount	11410
MA No Change Flag	01520
MA Rebudget Flag	24382
MA SSI Application Count	24310
MA SSI Effective Period	01301
MA SSI Total Surplus Code	11463
MA SSI Total Surplus Code	11463
MA Unearned Exemption Code	07138
MABEL Store Code	24023
Mailer From Date	01038
Mailing Apartment Number	98236
Mailing City/Town	05130
Mailing In Care of Name/Address	15007
Mailing State	05140
Mailing Street	05120
Mailing Zip	05150
Manual Issue Check/ATP Voucher Number	14013
Manual Voucher Spawn Number	96475
Master Regional Flag	16619
Match Bit	24830
Maximum Time Units Per Frequency Interval	23111
Median Create Date	23006
Median Create Userid	23005
Median End Year	23004
Median Inc Level	23011
Median Inc Table	23009

DATA ELEMENT NAME	NUMBER
Median Last Update Userid	23007
Median Last Updte Date	23008
Median Start Year	23003
Medicaid ID card – Issuance Indicator	19021
Medical Insurance Company	20994
Medical Insurance Coverage Code	21061
Medical Insurance Group Number	20261
Medical Insurance Indicator	20366
Medical Insurance Indicator Code	20993
Medical Insurance Number	20995
Medicare Claim Number	21226
Medicare Flag Set By RFI Subsystem	03064
Method of Payment Code	14022
Method of Payment Indicator	14020
Middle Initial	24130
Migration Control Status Code	42008
MMIS Control Date	24852
MMIS Data Indicator	24090
MMIS Interface Data Change Flag	24370
MOAS EMEVS Sequence Number	16401
Modified Flag	08026
Monthly Reporting Code	01350
Monthly/Gross Earned Income Amount	07027
Months for Excess	11420
Mothers Line Number	03044
Multiple Choice Value Number	08024
M178 City	20976
M178 State	20977
M178 Street	20975
M178 Zip	20978
- N -	
Name	03030
National Origin Code	03173
Negate Buy In A Count	16692
Negate Buy In B Count	16697
Negate QMB Count	16702
Net Case Income Amount	07064
New Buy In A Count	16690
New Buy In B Count	16695
New QMB Count	16700
New Resident Reduction Amount	11017
New Residents Count	01007
Next Acceptance Number/Authorization	24080
No Field Name Available	09113

DATA ELEMENT NAME	NUMBER
No Insurance Ind Flag	16620
Non Personal Work Deduction	07220
Non-Applicant Earned Income Amount	07052
Non-Applicant Line Number	07053
Non-Applicant Unearned Income Amount	07051
Non-Applicant Unearned Income Source Code	07049
Non-SSI Child Income	07191
Notice Text Control Action Code	28006
Notice Batch Number	04117
Notice Identifier Number	04097
Notice Mailing Date Group	04049
Notice Originating Office Number	04016
Notice Originating Unit Identifier	04114
Notice Originating Worker identifier	04116
NPA Food Stamp Case Involvement Flag	24330
NPA-FS Application Count	24530
Number of Children Allocated	07492
Number of Children Deemed	09115
Number of Dependent Persons in Case	01156
Number of Dependent Persons in Household	01155
Number of Employment Activities	12061
Number of Employment Participation Sites	12062
Number of Employment Wgs	12063
Number of Food Stamp Claim First Date	24013
Number of Last FS Claim Date	24014
Number of Parents In Household	01024
Number of Persons in a Sponsor's Household	01158
Number of Persons in FS Case	01154
Number of Persons In HEAP Household Count	01034
Number of Persons in Household	01150
Number of Persons in PA Case	01152
Number of Tax Exemptions	07090
NYS Disability Deduction	07210
- O -	
Obligation Frequency	20792
Occurrence Count	08023
Odd Year Earned Income Flag	24731
OL Change Part A Count	16575
OL Change Part B Count	16580
OL End Ins Count	16582
OL End Part A Count	16572
OL End Part B Count	16577
OL Extend Ins Count	16584
OL Extend Part A Count	16574

DATA ELEMENT NAME	NUMBER
OL Extend Part B Count	16579
OL Inc Ins Cov Count	16585
OL Negate Ins Count	16583
OL Negate Part A Count	16573
OL Negate Part B Count	16578
OL New Ins Count	16581
OL New Part A Count	16571
OL New Part B Count	16576
OL Other Ins Count	16586
OMH OMRDD LC Code	16755
One-half of the Remainder Amount	07381
Origin Code	07700
Original Load Indicator	01200
Other Name	03041
Other Name Code	03040
Other Name Identifier Number	98335
Other Than Grantee Indicator Code	20957
Other Unavailable Income	07290
Override Error Indicator	02131
Override Reason Code	02060
Override User Identifier	02130
- P -	
PA Actual Additional Needs Amount	11095
PA Actual Restricted Utility Cost	11062
PA Actual Water Amount	11035
PA Additional Allowances	11090
PA Additional Needs Type	11086
PA Auto WGS Line Number	12064
PA Automatic Welfare Grant Savings (WGS)	09332
PA Automatic WGS Origin Code	09331
PA Automatic WGS Storage Date	09333
PA Budget Effective Dates	01300
PA Budget Version Number	24732
PA Child Care Deduction	07400
PA Earned Income Deduction Amount	07200
PA Earned Income Exemption Amount	07270
PA Earned Income Frequency Code	07025
PA Earned Income Period	07018
PA Earned Income Source	07016
PA Earned Income Source Previous Budget	24839
PA Employment Indicator	07325
PA Financial Tracking Flag	24740
PA First Month Deficit Amount	11115
PA First Month Indicator	11118

DATA ELEMENT NAME	NUMBER
PA Food Stamp Code	01130
PA Grant Adjustment	11190
PA Grant Savings Amount	11119
PA HEAP Indicator	24890
PA History Effective Dates	01340
PA History Surplus Deficit Code	11165
PA History Version Number	24735
PA Income Indicator	07153
PA Income Limit Amount	07029
PA Individual Net Unearned Income Amount	07028
PA Manual Welfare Grant Savings (WGS)	09337
PA Manual WGS Line Number	09335
PA Manual WGS Origin Code	09336
PA Manual WGS Storage Date	09338
PA Needs Area Group	00018
PA Net Applicable Earned Income	07030
PA Net Available Income	07150
PA Net Unearned Income	07130
PA Recoupment Amounts	11176
PA Recoupment Number of Months	11174
PA Recoupment Open Balance	11171
PA Recoupment Percentage	11172
PA Recoupment Remainder	11177
PA Recoupment Total Amount	11175
PA Reduction Amount For Failure To Comply With LEARNFARE	11012
PA Reduction Date	11013
PA Sanction Version Number	24722
PA Semi-Monthly Cash Grant	11111
PA Semi-Monthly Non-Cash Grant	11112
PA Shelter Restricted Amount	11026
PA Total Actual Income Amount	07039
PA Unearned Income Amount	07135
PA Unearned Income Deduction Amount	07136
PA Unearned Income Frequency Code	07125
PA Unearned Income Period	07108
PA Unearned Income Source	07106
PA Unearned Income Source Previous Budget	24843
PA Water Amount	11030
PA Water Amount Previous Budget	24837
PA/FS Reason Code	02006
PA/MA Budget Code	01017
PA/MA Individual Reason Code	03121
PA/MA Reason Code	02005
PA-FS Employability Code	03011
Paid Shelter Amount	11008

DATA ELEMENT NAME	NUMBER
Participant Status Code	09001
Partner RLU Name	00121
Paternity Court	20961
Payment Amount	14011
Payment Issue Code	14045
Payment Period	14012
Payment Schedule	14040
Payment Type	14010
Payment Type Line Number	24945
Payor of Part B Code	11003
Pay-In/Excess Income Fiscal Agent Status Code	21017
Pay-In/Excess Income Transaction Type Code	21018
Pay-In Amount	21016
PCP Enhanced Fee Flag	21004
PCP Enroll/Disenroll Reason Code	21003
Pending Data Status	24040
Pending Separate Determination Case Number	24395
Pending Separate Determination Case Type	24346
Pending Transaction Date	24410
Pending Transaction Date - Day	04129
Pending Transaction Date - Month	04128
Pending Transaction Date - Year	04127
Pending Transaction Type	24390
Percentage of Median Gross Income for Family Size (Day Care Services)	07172
Percentage of Median Gross Income or Family Size(Income Eligible)	07174
Period Ending Date	16184
Personal Finance Record Indicator	24045
Personal Incidental Allow Code	07602
Personal Income Allow Amount	07652
Personal Identification Number (PIN)	03003
Personal identification Number (PIN) Offset	03004
Personal Identification Number (PIN) Update Date	12001
Personal Identification Number (PIN) Update Time	12003
PG-ADC Application Count	24450
PG-ADC Case Involvement Indicator	24250
Phone Extension Number	00044
Physical Identifier	25015
Pick-up Code	14030
Plan Year	24805
Policy Source Code	16616
POS Authorization Period	23110
POS Display Line Number	23231

DATA ELEMENT NAME	NUMBER
POS Display Screen Number	23230
POS Provider Payment Period	23119
Possible Count	24824
Pregnancy/Parenthood Identifier	03514
Premium Cost Family Amount	16615
Prepaid Capitation Plan (PCP) Record Flag	21705
Prepaid Capitation Plan Benefits Package	21700
Prepaid Capitation Plan Capitation Code	21701
Prepaid Capitation Plan From Date	21703
Prepaid Capitation Plan Guarantee Date	21704
Primary and Non-Primary Services Recipient Code	23065
Primary or Non-Primary Status Date	23411
Principal Provider Code	21550
Principal Provider Exception From Date	21590
Principal Provider From Date of Service	21560
Principal Provider Indicator	16099
Principal Provider Payment Exception Type	21580
Principal Provider Thru Date of Service	21570
Prior Recipient Identification Number	15002
Prison Code	00183
Program Type Code	08004
Prorata Sanction Amount	11015
Prorata Sanction Count - PA And FS	01019
Provider Identification Number	21068
Provider Type Code	15049
Public Assistance Cash Grant	11110
Public Assistance Non-Cash Grant Amount	11022
Purchase of Services Status	23105
Purchase of Services Unique Identifier	24792
Purchase of Services-Only-Indicator	23106
- Q -	
QI1 Buy-In Income Limit Amount	07076
Quarterly Selection Reason	01580
Question Set Version Number	08002
- R -	
Race/Ethnic Affiliation	03170
Rate Amount	23115
Rate Period	23114
Reason Code	02050
Rebudget (Abel Mass Rebudgeting) Flag	24386
Rebudget Code 1	24385

DATA ELEMENT NAME	NUMBER
Recalculation Indicator	11370
Recent Work History Date	24785
Recipient Aid Category Code	21010
Recipient Aid Category/Money Payment Type	15015
Recipient Buy-In Eligibility Status Code (1)	15021
Recipient Card Indicator	15035
Recipient Date of Birth	15010
Recipient Eligibility Begin/End Date	15016
Recipient Fee Portion	23112
Recipient Fee Portion - Full Time Day Care	23310
Recipient Fee Portion - Part Time Day Care	23300
Recipient Local Office Number	15014
Recipient Mailing Address - City/Town	15883
Recipient Mailing Address - Street	15008
Recipient Mailing Address - Zip Code	15009
Recipient Medicaid Coverage	21090
Recipient Medicaid Coverage Code	15027
Recipient Medicaid Coverage Dates	21110
Recipient Open/Close Date	15038
Recipient Other Insurance Code	15018
Recipient Other Insurance Policy Number	15020
Recipient PCP Indicator Flag	16144
Recipient Personal Income	23425
Recipient Sex	15012
Recipient Social Security/Railroad Retirement Account Number	15031
Recipient System ID	15036
Record Name	25516
Recoupment/Claim Types	11170
Recoupment Payment Line Number	14003
Recoupment Pay Line Amount	14004
Referral Number	12106
Referral Void Date	03027
Registry Number	01046
Related Services Case Number(s)	01055
Relationship Code	03090
Renters Benefit Received Indicator Code	11072
Replaced Check/ATP Number	14001
Replacement Payment Line Number	14002
Report Complete/Incomplete	01510
Report Returned Date	01500
Resettlement Agency Code	03174
Request Result Date	12254
Residence City/Town	01082
Residence State	01083
Residence Street	01080

DATA ELEMENT NAME	NUMBER
Residence Zip	01084
Resource Child Number	09104
Resource Type	09100
Resource Value	09110
Resource Verify	01043
Respondent Address City	20473
Respondent Address Source Date	20479
Respondent Address State	20474
Respondent Address Zip Code	20475
Respondent and Street Address	20472
Respondent Arrest Record Indicator	20447
Respondent Court Indicator	20449
Respondent Date of Birth	20980
Respondent Employer Address City	20461
Respondent Employer Address State	20462
Respondent Employer Address Street	20460
Respondent Employer Address Zip Code	20463
Respondent Employer Name	20459
Respondent Employer Phone	20468
Respondent Ethnic Code	20384
Respondent Height	20446
Respondent Name	20971
Respondent Occupation	20444
Respondent Paternity Indicator	20830
Respondent Phone Number	20382
Respondent Public Assistance Indicator	20963
Respondent SSN Number	20972
Respondent Unemployment Insurance Benefit Indicator	20962
Respondent Weight	20448
Respondent's Case Identification Number	20985
Respondent's Mothers Maiden Name	20436
Response Length Count	08029
Response Sequence Number	08028
Response Text	08032
Response Text Character	08106
Restricted Amount	11060
Restricted Grant Amount	11180
Restricted Recipient Indicator	16100
Restricted Recipient Weekly Begin Date	21001
Restriction Record Change Type	24854
Restriction/Exception Effective From Date	21510
Restriction/Exception From Date	21520
Restriction/Exception Indicator	19051
Restriction/Exception Record Source	21540
Restriction/Exception Thru Date	21530

DATA ELEMENT NAME	NUMBER
Restaurant Indicator	95133
Resume Record Key	95011
Run Date	24903
Run End Date - Century	12085
Run End Date - Day	12088
Run End Date - Month	12087
Run End Date - Year	12086
Run End Date/Time Group	12084
Run End Time - Hour	12089
Run End Time - Second	12091
Run Identification Name of the Tarus Save	25694
Run Restart Date	12048
Run Restart Date - Century	12049
Run Restart Date - Day	12067
Run Restart Date - Month	12066
Run Restart Date - Year	12065
Run Restart Date/Time Group	12047
Run Restart Time	12068
Run Restart Time - Hour	12069
Run Restart Time - Minute	12070
Run Restart Time - Second	12071
Run Start Date	95015
Run Start Date - Century	12034
Run Start Date - Day	12043
Run Start Date - Month	12042
Run Start Date - Year	12041
Run Start Date/Time Group	12018
Run Start Time	95016
Run Start Time - Hour	12044
Run Start Time - Minute	12045
Run Start Time - Second	12046
- S -	
Sanction Amount	11016
Separate Determination Budget Indicator	02070
Separate Determination Case Number	01610
Separate Determination Case Type	01615
Separate Determination Indicator	01600
Separate Determination PA Flag	24412
Separate Determination Reason Code	01605
Separate Household Income Test Indicator	07110
Service Adult/Child Identifier	23082
Service Goal (Title XX)	23010
Service Report Source	23440
Service Type	23020

DATA ELEMENT NAME	NUMBER
Service Type Qualifier	23430
Service Type Suffix Code	23021
Services Application Count	24550
Services Array	0370
Services Case Involvement Indicator	24350
Services Eligibility Process Code	23055
Services Family Unit Identifier	23080
Services Family Unit Size	23081
Services Family Unit Status Date	23414
Services Goal Date	23415
Services Income Amount	23127
Services Income Period Code	23128
Services Income Source	23126
Services Multiple Birth Indicator	23085
Services Provider Vendor Address	23116
Services Recipient Eligibility Category	23050
Services Retroactive Eligibility Category	23022
Services Retroactive Eligibility Period	23023
Services Transacting Unit	23122
Services Transacting Worker	23121
Services Vendor Provider ID Number	11140
Session Number	08110
Sex	03050
Sex	23450
Share Living Count	01016
Shelter Allowance	11020
Shelter Frequency Code	11007
Shelter Input Amount	11006
Shelter Proration Indicator	11029
Shelter Resource Code	11009
Shelter Restricted Indicator	11028
Shelter Type	11120
SIS Code	95135
Size of Vendor RU Name	00096
Social Security Acct. No.	03201
Social Security No. Code	03200
Special Area Dates	23418
Special Areas	23400
Special Claiming Category	14035
Special Needs Exception Indicator Code	21005
Special Notice Code	03025
Special Program Code	01420
Sponsor Exclusion Indicator	07453
Sponsors Income Exclusion Amount	07450
SSA Deduction Amount	24847
SSA Payment Amount	24846

DATA ELEMENT NAME	NUMBER
SSA Verified Social Security Number	09704
SSI Application Count	24560
SSI Buy-In Code	07002
SSI Case Involvement Flag	24360
SSI Child Buy-In Code	07003
SSI Child Total Surplus Amount	11465
SSI Child Total Surplus Code	11464
SSI Earned Income Deduction Amount	07201
SSI Excess Resource Amount	09141
SSI Excess Resource Code	09131
SSI Income After Allocation	07510
SSI MA Level	11412
SSI MA Level Child Amount	11411
SSI Net Earned Income Amount	07031
SSI Net Unearned Income Amount	07131
SSI PA Standard	11104
SSI Pass Amount	07072
SSI Resources Deemed Amount	09117
SSI Status	03145
SSI Total Net Income Amount	07151
SSI Variable Month Excess Amount	11431
SSN Application Date	03001
SSN Count	24822
SSN Record Type Flag	24135
SSRR Reporting Control Number	23123
Start Century Date	16628
Start Date	08015
Start Date	16610
Start Date And Time Group	08014
Start Day Date	16631
Start Month Date	16630
Start Time	08016
Start Year Date	16629
Starting Date - Century	08092
Starting Date - Day	08095
Starting Date - Month	08094
Starting Date - Year	08093
Starting Time - Hour	08096
Starting Time - Minute	08097
Starting Time - Second	08098
State Charge/Federal Charge Indicator	03150
State Charge/Federal Charge Indicator	23455
State Tax Deduction	07340
Statistics Group 800	16623
Store Count	00015
Student Identifier	03185

DATA ELEMENT NAME	NUMBER
Suffix identifier	01904
Summary Area SSI Child Code	07121
Supervisor Sign-Off Effective Date	24030
Supervisor's Identifier	02125
Supervisory Review Date	8007
Supervisory Review Date - Century	08088
Supervisory Review Date - Day	08091
Supervisory Review Date - Month	08090
Supervisory Review Date - Year	08089
Supervisory Review Date Group	08114
Supplemental Child Care Amount	24009
Supplemental Home Energy Allowance	11052
Support Court	20960
Support Indicator Code	20989
Surname	24110
- T -	
Table of Support Amount	07650
Target Group Code	22022
Target Group Code Line Number	24006
Tax Withholding Status	07080
Taxes 65 Disregard Amount	07380
Telephone Number	01085
Temporary Assistance/Food Stamp Version Number	24022
Temporary Number Spawn	12161
Third Party Health Insurance Code	03067
Timely or Adequate Notice Indicator Code	04001
Tip Transaction Code	25036
Title XIX Flag	24200
Title XX Eligibility Category	24801
Title XX Goal	24780
Title XX Income Percentage	24802
Title XX Method of Provision (Table)	24800
Top Indicator	01041
Total Actual Child Care Amount	07034
Total Actual Shelter Cost	11025
Total Amount Remaining of Premium Cap For Q1 And Q12	16992
Total Available Income Amount	07009
Total Budget Surplus or Deficit Amount	11161
Total Budget Surplus or Deficit Code	11160
Total Child Care Disregard Deduction Amount	07035
Total MA Budget Surplus Amount	11461
Total MA Budget Surplus Code	11460

DATA ELEMENT NAME	NUMBER
Total Match	24826
Total Needs	11100
Total Number Active in Case	01148
Total Number In Case	01149
Total Reference Number	24828
Total Resource Value Amount	09120
Total Shelter in One Check Indicator	14070
Total SSI Excess Amount	11462
Transaction Century Date	16636
Transaction Date Time	16624
Transaction Day Date	16639
Transaction District	01010
Transaction District	15927
Transaction Hour Time	16640
Transaction Input Date	02020
Transaction Minute Time	16641
Transaction Month Date	16638
Transaction Office Number	02014
Transaction Second Time	16642
Transaction Sequence Number	16643
Transaction Type	02010
Transaction Unit Number	02015
Transaction Worker Number	02016
Transaction Year Date	16637
Transfer PIN Code	95286
Transmit Count	12151
Trust Indicator	01067
TX Date Time 1	16680
TX Date Time 2	16681
TX Date Time Group	16679
TX Date Time Redef Group	16682
- U -	
Unduplicated Recipient	24860
Unduplication Flag	24861
Unearned Categorical Indicator	07137
Unearned Income Source	07100
Unique Population Code	00163
Unique Question Number	08022
Unit Identifier	01030
Unit/Worker Name	04079
Unit/Worker Phone Number	04080
Update Count	08009
Update Indicator	20967
Userid	25001

DATA ELEMENT NAME	NUMBER
- V -	
VA Application Count	24470
VA Application Count	24470
VA Case Involvement Status Flag	24270
VA Case Involvement Status Flag	24270
Validity Flag	08025
Value-Match	24836
Vendor Identification	14023
Vendor Description	00055
Vendor Password Text	12202
Vendor Post Status Code	12103
Vendor Spawn Number	12198
Vendor Synchronize Level Number	12203
Vendor System Available Flag	00102
Vendor Transaction Immediate Count	00124
Vendor Transaction Program Name	12200
Vendor Transaction Secondary Count	00125
Vendor Transmission Sequence Number	12199
Vendor Userid Text	12201
Version Number	01047
Veteran Status	09302
Volunteer Status	09306
- W -	
Water Restricted Indicator	11038
WD Buy-In Dos From Date	21019
WD Buy-In Dos Thru Date	21020
WD Buy-In Premium Amount	21021
WD Buy-In Premium From Date	21022
WD Buy-In WD Code	21023
Welfare-to-Work Target Group Code	03042
White or Caucasian	03058
White Or Caucasian	03058
Work Deductions Indicator Codes	07322
Work Expenses Disregard Amount	07320
Work Related Expenses Amount	07015
Worker Identifier	01040
- Y -	
Y2K Employment Update Date	12057
Year 2000 Record Compliance Flag	13390



**DATA ELEMENTS**

- 00002 ID CARD RECORD CONTROL KEY 10 AN
- 00009 CERTIFICATION DATE GROUP LEVEL 3 AN
- 00011 CHECKPOINT KEY 30 AN
- 00012 CHILD CARE AMOUNT AREA GROUP 56 N
- 00014 FETCH COUNT 10 N
- 00015 STORE COUNT 10 N
- 00018 PA NEEDS AREA GROUP 13 N
- 00019 FOOD STAMP INCOME AREA GROUP 70 AN
- 00033 BATCH NOTICE PROCESSING DATE YEAR 2 AN
- 00042 BATCH NOTICE PROCESSING DATE MONTH 2 AN
- 00043 BATCH NOTICE PROCESSING DATE DAY 2 AN
- 00044 PHONE EXTENSION NUMBER 5 AN
- 00048 ID CARD UPDATE CONTROL KEY 14 AN
- 00055 VENDOR DESCRIPTION 25 AN
- 00095 COOM ADDRESS FOR VENDOR NAME 8 AN
- 00096 SIZE OF VENDOR RU NAME 8 AN
- 00101 CASE ENVIRONMENT CONTROL KEY 14 AN
- 00102 VENDOR SYSTEM AVAILABLE FLAG 1 N
  - N NO
  - Y YES
- 00107 STORE DATE 6 N
- 00113 STORE TIME 6 N

**00118 FUNCTION CODE 2 AN**

A ADD PIN FOR CIN  
B UPDATE PIN FOR CIN  
C DELETE PIN FOR CIN  
D ADD CARD FOR CIN  
E UPDATE CARD FOR CIN  
F DELETE CARD FOR CIN  
G DELETE ALL CARDS FOR CIN  
H ADD CASE FOR CIN  
I UPDATE CASE FOR CIN  
J DELETE CASE FOR CIN  
K DELETE ALL CINS FOR CASE  
L INQUIRE ON CARDS  
M TRANSFER PHOTO TO PERM CIN  
N SEND NEXT SEQUENCE NUMBER  
O PHOTO INDICATION  
P ZEROS PHOTOS ON FILE  
Q CARD PRODUCED  
S VENDOR VOID  
T FIRST USE  
U REFERRAL  
V REVERSAL

**00121 PARTNER RLU NAME 8 AN**

**00122 PARTNER RLU NET NAME 17 AN**

**00123 LOG NUMBER 6 N**

**00124 VENDOR TRANSACTION IMMEDIATE COUNT 10 N**

**00125 VENDOR TRANSACTION SECONDARY COUNT 10 N**

**00126 CARD REQUEST IMMEDIATE COUNT 10 N**

**00127 CARD REQUEST SECONDARY COUNT 10 N**

**00131 CASE LINK ODO 0 2 N**

**00132 CASE LINK VARIABLE TEXT 4 AN**

**00133 CASE CONFLICT ACTION CODE 2 AN**

1	CASE CLOSED	CONFLICTING CASE FORCED CLOSE
2	INDIV DELETED	INDIVIDUAL(S) WERE DELETED FROM THE CASE
3	IND CONF SSI	SSI INDIVIDUAL(S) IN CONFLICTING CASE
4	DIST NOT AVAIL	POSSIBLE CONFLICT - DISTRICT NOT AVAILABLE FOR PROCESSING
5	ACTION PEND	INDIVIDUAL IN A CONFLICTING CASE – ACTION IS PENDING
6	IND IN CONF	INDIVIDUAL(S) IN CONFLICTING CASE
7	IND IN CONF OTH	INDIVIDUAL IN CONFLICTING CASE IN ANOTHER DISTRICT
8	IND CONF DEC	DECEASED INDIVIDUAL WITH ACTIVE STATUS IN ANOTHER CASE
9	CONF CLOCKDN	INDIVIDUAL(S) IN A CONFLICTING CASE WHICH IS CLOCKING DOWN

**00152 HEAP TOTAL NEEDS AREA GROUP 35 N**

**00153 HEAP BENEFIT TOTALS AND AREA GROUP 105 N**

**00163 UNIQUE POPULATION CODE 1 AN**

D	DAC	DISABLED ADULT CHILD
E	DUAL ELIG	DUAL ELIGIBLE (DAC)
P	PICKEL	PICKEL
W	WIDOWER	WIDOWER
Z	ZEBLEY	ZEBLEY

**00165 CARD REPLACEMENT FLAG 1**

**00181 CODE TO IDENTIFY MEDICARE PART D PROVIDERS 3 AN**

**00182 CODE TO HOLD MEDICARE PART D CONTRACT NUMBER 5 AN**

**00183 PRISON CODE 1 AN**

1	DOCS
2	RIKERS
3	DCJS

**00184 DEPARTMENT IDENTIFICATION NUMBER 10 AN**

**00220 EMPLOYMENT DISTRICT INVOLVEMENT ARRAY 12 AN**

**00230 IRCS CONTROL KEY 12 AN**

**00231 IRCS CONTROL KEY - APPLICATION 12 AN**

**00232 IRCS CONTROL KEY - CASE 12 AN**

**00233 IRCS FOOD STAMP FLAG GROUP 2 AN**

**00234 IRCS MA BUDGET TYPE CODE 2 AN**

**00370 SERVICES ARRAY 1 N**

**00371 DAY CARE DATA ARRAY 12 N**

**00507 CASE KEY REDEFINITION 12 AN**

**01001 FOOD STAMPS CARD HOLDER FLAG CODE 1 AN**

**01002 MA EXTENSION LOCAL OFFICE NUMBER 3 N**

**01003 MA EXTENSION UNIT ID NUMBER 5 AN**

**01004 MA EXTENSION WORKER ID NUMBER 5 AN**

**01006 HUD CHILD COUNT 3 N**

**01007 NEW RESIDENTS COUNT 2 N**

**01008 FORMER STATE OF RESIDENCE ADDRESS 2 AN**

AL	ALABAMA	FL	FLORIDA
AK	ALASKA	GA	GEORGIA
AS	AMERICAN SAMOA	GU	GUAM
AZ	ARIZONA	HI	HAWAII
AR	ARKANSAS	ID	IDAHO
CA	CALIFORNIA	IL	ILLINOIS
CZ	CANAL ZONE	IN	INDIANA
CI	CAROLINE ISLANDS	IA	IOWA
CO	COLORADO	KS	KANSAS
CT	CONNECTICUT	KY	KENTUCKY
DE	DELAWARE	LA	LOUISIANA
DC	DIST OF COLUMBIA	ME	MAINE

MR	MARIANA ISLANDS	OH	OHIO
ML	MARSHALL ISLANDS	OK	OKLAHOMA
MD	MARYLAND	OR	OREGON
MA	MASSACHUSETTS	PA	PENNSYLVANIA
MI	MICHIGAN	PR	PUERTO RICO
MY	MIDWAY ISLANDS	RI	RHODE ISLAND
MN	MINNESOTA	SC	SOUTH CAROLINA
MS	MISSISSIPPI	SD	SOUTH DAKOTA
MO	MISSOURI	TN	TENNESSEE
MT	MONTANA	TX	TEXAS
NC	NORTH CAROLINA	UT	UTAH
ND	NORTH DAKOTA	VT	VERMONT
NE	NEBRASKA	VA	VIRGINIA
NV	NEVADA	VI	VIRGIN ISLANDS
NH	NEW HAMPSHIRE	WA	WASHINGTON
NJ	NEW JERSEY	WV	WEST VIRGINIA
NM	NEW MEXICO	WI	WISCONSIN
NY	NEW YORK	WY	WYOMING

**01009 CALCULATION DISTRICT CODE 2 N**

SAME AS TRANSACTION DISTRICT CODES (01010) MINUS CODES 70 THRU 99

**01010 TRANSACTION DISTRICT 2 N**

01	ALBA	ALBANY	11	CORT	CORTLAND
02	ALLE	ALLEGANY	12	DELA	DELAWARE
03	BROO	BROOME	13	DUTC	DUTCHESS
04	CATT	CATTARAUGUS	14	ERIE	ERIE
05	CAYU	CAYUGA	15	ESSE	ESSEX
06	CHAU	CHAUTAUQUA	16	FRAN	FRANKLIN
07	CHEM	CHEMUNG	17	FULT	FULTON
08	CHEN	CHENANGO	18	GENE	GENESEE
09	CLIN	CLINTON	19	GREE	GREENE
10	COLU	COLUMBIA	20	HAMI	HAMILTON

21	HERK	HERKIMER	49	TIOG	TIOGA
22	JEFF	JEFFERSON	50	TOMP	TOMPLINS
23	LEWI	LEWIS	51	ULST	ULSTER
24	LIVI	LIVINGSTON	52	WARR	WARREN
25	MADI	MADISON	53	WASH	WASHINGTON
26	MONR	MONROE	54	WAYN	WAYNE
27	MONT	MONTGOMERY	55	WEST	WESTCHESTER
28	NASS	NASSAU	56	WYOM	WYOMING
29	NIAG	NIAGARA	57	YATES	YATES
30	ONEI	ONEIDA	58	STRE	STREGIS MOHAWK TRIBE
31	ONON	ONONDAGA	59	ONIN	ONEIDA INDIAN NATION
32	ONTA	ONTARIO	60	SENA	SENECA NATION OF INDIANS
33	ORAN	ORANGE	61	SHIN	SHINNECOCK TRIBE
34	ORLE	ORLEANS	62	TUSC	TUSCARORA NATION
35	OSWE	OSWEGO	63	TONA	TONAWANDA-SENECA NATION
36	OTSE	OTSEGO	64	ONNA	ONONDAGA NATION
37	PUTN	PUTNAM	65	UNKE	UNKECHAUGE NATION
38	RENS	RENSSELAER	66	NYC	NEW YORK CITY
39	ROCK	ROCKLAND	70	BRON	BRONX
40	STLA	ST. LAWRENCE	71	BKLN	BROOKLYN
41	SARA	SARATOGA	72	MANH	MANHATTAN
42	SCHE	SCHENETADY	73	QUEE	QUEENS
43	SCHO	SCHOHARIE	74	RICH	RICHMOND
44	SCHU	SCHUYLER	97	OMH	OFFICE OF MENTAL HEALTH
45	SENE	SENECA	98	OMR	OFFICE OF MENTAL RETARDATION AND DEVELOPMENT DISABILITIES
46	STEU	STEUBEN	99	NYS	NEW YORK STATE
47	SUFF	SUFFOLK			
48	SULL	SULLIVAN			

**01010 TRANSACTION DISTRICT 2 N (cont.)**

**REGION 1**

02 – ALLEGANY  
04 – CATTARAUGUS  
06 – CHAUTAUQUA  
14 – ERIE  
18 – GENESEE  
29 – NIAGARA  
34 – ORLEANS  
56 – WYOMING

**REGION 3**

03 – BROOME  
05 – CAYUGA  
08 – CHENANGO  
11 – CORTLAND  
21 – HERKIMER  
22 – JEFFERSON  
23 – LEWIS  
25 – MADISON  
30 – ONEIDA  
31 - ONONDAGA  
35 – OSWEGO  
40 - ST LAWRENCE  
49 – TIOGA  
50 – TOMPKINS

**REGION 5**

13 – DUTCHESS  
28 – NASSAU  
33 – ORANGE  
37 – PUTNAM  
39 – ROCKLAND  
47 – SUFFOLK  
48 – SULLIVAN  
51 – ULSTER  
55 – WESTCHESTER

**REGION 2**

07 - CHEMUNG  
24 - LIVINGSTON  
26 - MONROE  
32 - ONTARIO  
44 - SCHUYLER  
45 - SENECA  
46 - STEUBEN  
54 - WAYNE  
57 - YATES

**REGION 4**

01 - ALBANY  
09 - CLINTON  
10 - COLUMBIA  
12 - DELAWARE  
15 - ESSEX  
16 - FRANKLIN  
17 - FULTON  
19 - GREENE  
20 - HAMILTON  
27 - MONTGOMERY  
36 - OTSEGO  
38 - RENSSELAER  
41 - SARATOGA  
42 - SCHENECTADY  
43 - SCHOHARIE  
52 - WARREN  
53 - WASHINGTON

**REGION 6**

66 - NEW YORK CITY  
70-74 - (5 BOROUGHES)

**01011 FISCAL DISTRICT 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01012 CASE ACTION EFFECTIVE DATE 6 N**

**01014 AUTHORIZATION TO DATE 6 AN**

**01015 LEARNFARE DELINQUENT COUNT 1 AN**

**01016 SHARE LIVING COUNT 1 AN**

**01017 PA/MA BUDGET CODE 1 AN**

**01018 HEAP INCOME LEVEL CODE 1 AN**

**01019 PRORATA SANCTION COUNT - PA AND FS 1 AN**

**01020 LOCAL OFFICE NUMBER 3 AN**

**01023 CASE NOTE TEXT 80 AN**

**01024 NUMBER OF PARENTS IN HOUSEHOLD 1 AN**

**01026 FLAG TO NOTE REASON A CASE IS RECEIVING SNNC (CASE TYPE 17) 1 AN**

**01030 UNIT IDENTIFIER 5 AN**

**01034 NUMBER OF PERSONS IN HEAP HOUSEHOLD COUNT 2 N**

**01036 HP EMERGENCY TYPE CODE 1 AN**

**01038 MAILER FROM DATE 6 AN**

**01040 WORKER IDENTIFIER 5 AN**

**01041 TOP INDICATOR 1 AN**

**01042 DATE TO HOLD EXT-PERIOD FOR AUTO RECERTS UPSTATE 6 N**

**01043 RESOURCE VERIFY 1 AN**

**01044 HEALTH INSURANCE INDICATOR CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01045 APPLICATION REGISTER LINE NUMBER 2 N**

**01046 REGISTRY NUMBER 6 N**



**01047 VERSION NUMBER 2 N**

**01048 APPLICATION REGISTRATION DATE 6 N**

**01050 CASE NUMBER 10 AN**

**01051 CASE NUMBER RE-USE INDICATOR 1 AN**

**01055 RELATED SERVICES CASE NUMBER 10 AN**

**01056 FS CASE NUMBER 10 AN**

**01060 CASE TYPE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01061 EMERGENCY INDICATOR 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01062 MA BUDGET TYPE CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01063 LIFE LINE PARTICIPATION 1 AN**

**01064 HEAP SEASON END DATE 8 AN**

**01066 APPLICATION SOURCE CODE 1 AN**

BLANK BLANK

A AUTO\_APP

E FS\_E\_APP

B AUTOEAPP

**01067 TRUST INDICATOR 1A**

**01070 CASE NAME 28 AN**

**01080 RESIDENCE STREET 35 AN**

**01082 RESIDENCE CITY/TOWN 15 AN**

**01083 RESIDENCE STATE 2A**

Same as FORMER STATE OF RESIDENCE code

**01084 RESIDENCE ZIP 5N**

- 01085 TELEPHONE NUMBER 10 N
- 01090 APPLICATION DATE 6 N
- 01095 CONCURRENT APPLICATION INDICATOR 1 AN
- 01100 AUTHORIZATION PERIOD 12 N
- 01110 COOPERATIVE CASE NUMBER 10 AN
- 01130 PA FOOD STAMP CODE 2 N
- 01140 ANTICIPATED FUTURE ACTION CODE 3 N

See [WMS Card Code Index](#) for a list of code descriptions/values.

- 01141 ANTICIPATED FUTURE ACTION DATE 6 N
- 01142 LINE NUMBER OF INDIVIDUAL WITH AN ANTICIPATED FUTURE ACTION CODE/DATE 2 N
- 01148 TOTAL NUMBER ACTIVE IN CASE 2 N
- 01149 TOTAL NUMBER IN CASE 2 N
- 01150 NUMBER OF PERSONS IN HOUSEHOLD 2 N
- 01152 NUMBER OF PERSONS IN PA CASE 2 N
- 01154 NUMBER OF PERSONS IN FS CASE 2 N
- 01155 NUMBER OF DEPENDENT PERSONS IN HOUSEHOLD 2 N
- 01156 NUMBER OF DEPENDENT PERSONS IN CASE 2 N
- 01158 NUMBER OF PERSONS IN A SPONSOR'S HOUSEHOLD 2 N
- 01200 ORIGINAL LOAD INDICATOR 1 N
  - 0 N-ORG-LD NOT ORIGINAL
  - 1 ORG-LOD ORIGINAL LOAD
- 01210 EDIT ERROR NUMBER 5 N
- 01300 PA BUDGET EFFECTIVE DATES 12 AN
- 01301 MA SSI EFFECTIVE PERIOD 12 AN
- 01302 DATE OF INSTITUTIONALIZATION 6 N

**01304 CHRONIC CARE PHASE TWO EFFECTIVE PERIOD 12 N**

**01305 CHRONIC CARE PHASE THREE EFFECTIVE PERIOD 12 N**

**01306 CHRONIC CARE MA-BUDGET EFFECTIVE PERIOD 12 N**

**01310 FS BUDGET EFFECTIVE DATES 12 AN**

**01340 PA HISTORY EFFECTIVE DATES 12 AN**

**01350 MONTHLY REPORTING CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01360 FOOD STAMP HISTORY EFFECTIVE DATES 12 AN**

**01420 SPECIAL PROGRAM CODE 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01421 CAP INDICATOR 2 N**

**01440 IV-D INDICATOR 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01500 QUARTERLY REPORT RETURNED DATE 6 N**

**01510 REPORT COMPLETE/INCOMPLETE 1 AN**

C	COMPL	COMPLETE
I	INCMP	INCOMPLETE
N	NOT-AP	NOT APPLICABLE/WRONG ADDRESS

**01520 MR NO CHANGE FLAG 1 AN**

X	NO CHANGE
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**01530 MR CASE CLOSED CODE 1 AN**

C	C	CASE CLOSED
S	S	CASE SUSPENDED

**01580 QUARTERLY SELECTION REASON 1 AN**

2	EARN-INC	EARNED INCOME
3	PA-FS-MS	EARNED INCOME (PA/FS MIX)
A	RALF	RECENT ATTACHMENT TO THE LABOR FORCE
B	NCAB	NOCALCULATED ABEL BUDGET
C	STEP-INC	STEPPARENT INCOME
E	VAR-INC	VARIABLE INCOME

**01600 SEPARATE DETERMINATION INDICATOR 1 AN**

A	OP-MA	OPEN MA
B	CL-MA	CLOSE MA

**01605 SEPARATE DETERMINATION REASON CODE 3 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**01610 SEPARATE DETERMINATION CASE NUMBER 10 AN**

**01615 SEPARATE DETERMINATION CASE TYPE 2 N**

20	MA
22	MA-SSI
31	NPA-FS
32	FS-MIX

**01904 SUFFIX IDENTIFIER 2 N**

**01910 CERTIFICATION DATE 6 N**

**01921 APPLICATION WITHDRAWAL DATE 6 N**

**02002 DISPOSITION TIME 6 AN**

**02004 CLOCKDOWN STATUS CODE 1 AN**

BLANK	BLANK	CASE IS NOT IN A CLOCKDOWN STATUS
C	CLOCK	CASE IS CLOCKING DOWN (AWAITING FINAL CLOSING)
L		CASE CLOCKDOWN HAS BEEN STOPPED
S	STPCLK	CASE CLOCKDOWN HAS BEEN STOPPED – ACTION REQUIRED

**02005 PA/MA REASON CODE 3 AN**

**02006 PA/FS REASON CODE 3 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02009 CBIC CARD CREATION REASON CODE 2 AN**

01		PREVIOUS PERMANENT CARD WAS LOST OR STOLEN
02		PREVIOUS CARD WAS NEVER RECEIVED
03		PREVIOUS CARD WAS NEVER RECEIVED
04		PREVIOUS CARD ILLEGIBLE, CREASED, DEFACED, OR BROKEN
06		PREVIOUS CARD DESTROYED OR SURRENDERED DUE TO LOSS OF ELIGIBILITY
07		PREVIOUS TEMPORARY CARD LOST OR STOLEN
09		OTHER REASON
D	DEMO	ID CARD GENERATED AS A RESULT OF A WMS DATA ENTRY CHANGE TO AN INDIVIDUAL'S DEMOGRAPHICS OR CARD CODE
F	FS	ID CARD NUMBER GENERATED AS THE RESULT OF FOOD STAMP ELIGIBILITY ESTABLISHED VIA WMS DATA ENTRY
M	MEDI	ID CARD GENERATED AS THE RESULT OF MEDICAID ELIGIBILITY (OR PUBLIC ASSISTANCE) ESTABLISHED VIA WMS DATA ENTRY
O	OTH	ID CARD GENERATED FOR A REASON OTHER THAN THOSE SPECIFICALLY DEFINED
R	RFSH	ID CARD GENERATED AS THE RESULT OF A WMS REFRESH OF THE ID CARD VENDOR'S
S	SYST	ID CARD GENERATED PER THE COMMON BENEFIT ID CARD CONVERSION, OR ANOTHER SPECIAL WMS PROCESS

**02010 TRANSACTION TYPE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02014 TRANSACTION OFFICE NUMBER 3 N**

**02015 TRANSACTION UNIT NUMBER 5 N**

**02016 TRANSACTION WORKER NUMBER 5 N**

**02017 DOMESTIC VIOLENCE APPROVAL ID TEXT 6 AN**

**02020 TRANSACTION INPUT DATE 6 N**

**02022 FS INTERVIEW CODE 1 AN**

**02025 HISTORY TRANSACTION DATE 6 N**

**02040 AUTHORIZATION NUMBER 8 N**

**02041 LOCAL AUTHORIZATION NUMBER 8 N**

**02050 REASON CODE 3 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02060 OVERRIDE REASON CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02070 SEPARATE DETERMINATION BUDGET INDICATOR 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02090 CASE STATUS 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**02110 DISPOSITION TYPE 1 N**

1	SUP-SIG	SUPERVISOR'S SIGNAL
2	CANCEL	CANCEL PENDING TRANSACTION
4	OVERRIDE	OVERRIDE
5	SY-GEN	SYSTEM GENERATED
6	STRT-CLK	CLOCKDOWN CLOSING STARTED
7	STOP-CLK	CLOCKDOWN CLOSING STOPPED
8	CLK-CLOS	CLOCKDOWN CLOSING COMPLETED (CASE CLOSED)
9	STRTCLOV	CLOCKDOWN CLOSING STARTED - OVERRIDE
A	STOPCLOV	CLOCKDOWN CLOSING STOPPED – OVERRIDE

**02115 DISPOSITION DATE 6 N**

**02125 SUPERVISOR'S IDENTIFIER 8 AN**

**02130 OVERRIDE USER IDENTIFIER 6 AN**

**02131 OVERRIDE ERROR INDICATOR 1 N**

0	NO-OV	ERROR CANNOT BE OVERRIDDEN
1	OVRD	ERROR CAN BE OVERRIDDEN

**03001 SSN APPLICATION DATE 6 N**

**03002 COMMON BENEFIT ID CARD FLAG 1 AN**

BLANK	CLIENT HAS NOT BEEN ISSUED A COMMON BENEFIT ID CARD
X	CLIENT HAS BEEN ISSUED A COMMON BENEFIT ID CARD

**03003 PERSONAL IDENTIFICATION NUMBER (PIN) 4 N**

**03004 PERSONAL IDENTIFICATION NUMBER (PIN) OFFSET 4 N**

**03005 ID CARD NUMBER 19 N**

**03006 ID CARD TYPE CODE 1 AN**

1	P-EM	PERMANENT PLASTIC PHOTO ID CARD ASSIGNED AND ISSUED BY CARD CONTRACTOR
2	N-EM	PERMANENT PLASTIC NON-PHOTO ID CARD ASSIGNED AND ISSUED BY CARD CONTRACTOR
3	R-EM	REPLACEMENT PLASTIC CARD ASSIGNED BY CARD CONTRACTOR AND ISSUED BY LDSS VIA AN MET TERMINAL
N	N-CB	PERMANENT PLASTIC NON-PHOTO COMMON BENEFIT ID CARD ASSIGN AND ISSUED BY CARD CONTRACTOR
P	P-CB	PERMANENT PLASTIC PHOTO COMMON BENEFIT ID CARD ASSIGNED AND ISSUED BY CARD CONTRACTOR
R	R-CB	REPLACEMENT PLASTIC COMMON BENEFIT ID CARD ASSIGNBY CARD CONTRACTOR AND ISSUED BY LDSS VIA AN MET TERMINAL
T	T-CB	TEMPORARY PLASTIC COMMON BENEFIT ID CARD ASSIGNED BY THE CARD CONTRACTOR AND ISSUED BY THE LDSS VIA AN MET TERMINAL

**03007 ID CARD VOID DATE**

**03008 ID CARD BENEFIT END DATE 6 N**

**03009 ID CARD ISSUE DATE 6 N**

**03010 CLIENT IDENTIFICATION NUMBER 8 AN**

**03011 PA-FS EMPLOYABILITY CODE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03014 FS INDIVIDUAL REASON CODE 3 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03015 MA INDIVIDUAL REASON CODE 3 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03016 CARD DELIVERY CODE 1 AN**

A	A	AGENCY PICK-UP
M	M	MAIL

**03017 CARD PHOTO INDICATOR CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03018 AUTHORIZED REPRESENTATIVE FIRST NAME 10 AN**

**03019 AUTHORIZED REPRESENTATIVE LAST NAME 17 AN**

**03024 AUTHORIZED REPRESENTATIVE MIDDLE INITIAL 1 AN**

**03025 SPECIAL NOTICE CODE 2 AN**

**03026 ID CARD SEQUENCE NUMBER 2 N**

**03027 REFERRAL VOID DATE 8 N**

**03028 FOOD ASSISTANCE PROGRAM CODE 1 AN**

**03029 HIGHEST EDUCATION DEGREE ATTAINED CODE 1 AN**

**03030 NAME 28 AN**

**03031 DOMESTIC VIOLENCE LIAISON ID TEXT 6 AN**

**03032 CHILD PROTECTIVE SERVICES REFERRAL DATE 8 N**

**03033 DOMESTIC VIOLENCE WAIVER STATUS CODE 1 AN**

C	FRAUDULENT CLAIM
D	FAILURE TO PROVIDE DOCUMENTATION
F	FAILURE TO SHOW
N	NOT CREDIBLE
O	OTHER
P	NO PROGRAM REQUIREMENT



R CLIENT REQUEST  
T NO THREAT OF DANGER

**03034 DOMESTIC VIOLENCE REASSESSMENT CODE 1 AN**

Blank INITIAL ASSESSMENT  
X REASSESSMENT

**03035 DOMESTIC VIOLENCE WAIVER REASON CODE 3 AN**

**03036 DOMESTIC VIOLENCE WAIVER START DATE 8 N**

**03037 DOMESTIC VIOLENCE WAIVER END DATE 8 N**

**03038 DOMESTIC VIOLENCE ASSESSMENT CODE 2 AN**

C CREDIBLE  
D DECLINED  
F FAILURE TO SHOW  
N NOT CREDIBLE  
P PENDING

**03039 IV-D DOMESTIC VIOLENCE WAIVER STATUS CODE 1 AN**

A APPROVED  
D DENIED  
P PARTIALLY APPROVED  
R REQUESTED

**03040 OTHER NAME CODE 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03041 OTHER NAME 28 AN**

**03042 WELFARE-TO-WORK TARGET GROUP CODE 1 AN**

1 WTWBG 70% FUNDED CATEGORY  
2 WTWBG NON-CUSTODIAL PARENT IN 70% FUNDED CATEGORY  
3 WTWBG 30% FUNDED CATEGORY  
4 WTWBG NON-CUSTODIAL PARENT IN 30% FUNDED CATEGORY  
5 NON-CUSTODIAL PARENT (NON-WTWBG)

**03043 MA CONTINUOUS COVERAGE DATE 8 AN**

**03044 MOTHERS LINE NUMBER 2 N**

**03045 LINE NUMBER OF HOUSEHOLD MEMBER 2 N**

**03047 AFIS EXEMPTION INDICATOR 1 AN**

**03048 FLAG TO INDICATE EXEMPTION FROM 24 MO. SNNC OR 60 MO. TANF LIMIT 1 AN**

**03049 FS INDIVIDUAL REASON CODE EFFECTIVE DATE 8 AN**

**03050 SEX 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03054 AMERICAN INDIAN OR ALASKA NATIVE 1 AN**

**03055 ASIAN 1 AN**

**03056 BLACK OR AFRICAN AMERICAN 1 AN**

**03057 HAWAIIAN OR PACIFIC ISLANDER 1 AN**

**03058 WHITE OR CAUCASIAN 1 AN**

**03059 HISPANIC OR LATIN 1 AN**

**03060 DATE OF BIRTH 8 N**

**03064 MEDICARE FLAG SET BY RFI SUBSYSTEM 1 AN**

**03067 THIRD PARTY HEALTH INSURANCE CODE 1 AN**

**03069 FLAG TO INDICATE WHETHER TO RECALC CONTINUOUS SAVE DATE 1 AN**

**03070 CURRENT MARITAL STATUS 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03073 EPI INDICATOR 1 AN**

- 0 Not a member of EPI (system generated).
- 1 Client has Employer Purchased FHP (system generated).
- 2 Client no longer eligible for Employer Purchased FHP.
- 3 Employer withdrew from plan (system generated).
- 4 Not a member of EPI (entered by worker).
- 5 Client has Employer Purchased FHP (entered by worker).

- 6 Client no longer eligible for Employer Purchased FHP (entered by worker).
- 7 Employer withdrew from plan (entered by worker).

**03076 CHAFEE INDICATOR 1 AN**

**03090 RELATIONSHIP CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03110 INDIVIDUAL CATEGORICAL CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03117 LAST INDIVIDUAL STATUS 2 N**

**03118 CLIENT STATUS EFFECTIVE DATE 6 N**

**03119 CLIENT ACTIVE DATE 6 N**

**03120 INDIVIDUAL STATUS 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03121 PA/MA INDIVIDUAL REASON CODE 3 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03145 SSI STATUS 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03150 STATE CHARGE/FEDERAL CHARGE INDICATOR 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03152 JD/PINS CODE 1 A**

J	JD	JUVENILE DELINQUENT
P	PINS	PERSONS IN NEED OF SUPERVISION

**03170 RACE/ETHNIC AFFILIATION 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03171 ALIEN NUMBER 9 AN**

**03172 DATE OF STATUS 6 N**

With the 2007.3 migration this field has a screen name of DOS – Date of Status.

**03173 NATIONAL ORIGIN CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03174 RESETTLEMENT AGENCY CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03180 CITIZENSHIP INDICATOR 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03185 STUDENT IDENTIFIER 2 N**

01	S-UNEMP	STUDENT NOT EMPLOYED
02	S-EMP-FT	STUDENT EMPLOYED FULL TIME
03	S-EMP-PT	STUDENT EMPLOYED PART TIME (INCLUDES FULL TIME VACATION EMPLOYMENT)
04	NT-S	NOT A STUDENT
05	STU-SEC	STUDENT ENROLLED IN SECONDARY SCHOOL OR APPROVED EQUIVALENT

**03190 EMPLOYABILITY CODE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03200 SOCIAL SECURITY NUMBER CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**03201 SOCIAL SECURITY ACCOUNT NUMBER 9 N**

**03500 NUMBER OF PREGNANCIES 2 N**

**03512 EXPECTED DATE OF CONFINEMENT 6 N**

**03514 PREGNANCY/PARENTHOOD IDENTIFIER 6 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**04001 TIMELY OR ADEQUATE NOTICE CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**04002 LANGUAGE OF NOTICE FLAG 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**04016 NOTICE ORIGINATING OFFICE NUMBER 3 N**

**04020 NOTICE PROCESSING STATUS CODE 1 N**

- 0 NOTICE INCOMPLETE
- 1 NOTICE IN ERROR
- 2 AWAITING USER INPUT
- 3 AWAITING AUTHORIZATION
- 4 AWAITING SYSTEM VARIABLES

**04023 INDIVIDUAL LINE NUMBER FLAG ARRAY 36 N**

**04026 ADVOCATE GROUP NUMBER 5 AN**

**04027 ADVOCATE GROUP NAME 60 AN**

**04029 ADVOCATE ADDRESS LINE 1 35 AN**

**04030 ADVOCATE ADDRESS LINE 2 35 AN**

**04031 ADVOCATE CITY 24 AN**

**04032 ADVOCATE STATE 2 AN**

**04033 ADVOCATE ZIP 11 AN**

**04034 ADVOCATE AREA CODE 3 AN**

**04035 ADVOCATE PHONE 7 AN**

**04042 EFFECTIVE DATE GROUP 8 AN**

**04049 NOTICE MAILING DATE GROUP 8 AN**

**04057 FAIR HEARING REPRINT REQUEST FLAG 1 N**

**04076 DISTRICT PHONE NUMBER 10 AN**

**04079 UNIT/WORKER NAME 28 AN**

**04080 UNIT/WORKER PHONE NUMBER 10 AN**

- 04097 NOTICE IDENTIFIER NUMBER 10 AN**
- 04112 NOTICE ORIGINATING WORKER IDENTIFIER 5 N**
- 04114 NOTICE ORIGINATING UNIT IDENTIFIER 5 N**
- 04117 NOTICE BATCH NUMBER 5N**
- 04121 BATCH NOTICE VARIABLE TEXT 20 AN**
- 04127 PENDING TRANSACTION DATE - YEAR 2 AN**
- 04128 PENDING TRANSACTION DATE - MONTH 2 AN**
- 04129 PENDING TRANSACTION DATE - DAY 2 AN**
- 04148 INDIVIDUAL NOTICE EFFECTIVE DATE 12 AN**
- 04155 CONTACT DATA MASS CHANGE DISTRICT/CENTER NUMBER 4 AN**
- 05002 ASSOCIATED NOTICE CODE 1 AN**  
  
See [WMS Card Code Index](#) for a list of code descriptions/values.
- 05004 CANADIAN POSTAL CODE 6 AN**
- 05005 DOMESTIC VIOLENCE SHELTER STREET ADDRESS 35 AN**
- 05006 DOMESTIC VIOLENCE SHELTER CITY ADDRESS 15 AN**
- 05007 DOMESTIC VIOLENCE SHELTER STATE ADDRESS 2 AN**
- 05010 ASSOCIATED NAME AND ADDRESS CODE 2 N**  
  
See [WMS Card Code Index](#) for a list of code descriptions/values.
- 05011 ASSOCIATED NAME 28 N**
- 05015 ASSOCIATED NAME NUMBER 2 N**
- 05020 ASSOCIATED STREET 35 AN**
- 05030 ASSOCIATED CITY/TOWN 15 AN**
- 05040 ASSOCIATED STATE 2 A**  
  
Refer to RESIDENCE STATE CODES (01083)
- 05050 ASSOCIATED ZIP 5 N**

**05051 ASSOCIATED ADDRESS ZIP CODE SUFFIX 4 AN**

**05052 ASSOCIATED ADDRESS ZIP PLUS 4 9 AN**

**05110 IN CARE OF NAME 28 AN**

**05120 MAILING STREET 35 AN**

**05130 MAILING CITY/TOWN 15 AN**

**05140 MAILING STATE 2 AN**

**05150 MAILING ZIP 5 N**

**05215 EMPLOYER IDENTIFICATION 9 AN**

**05500 EMPLOYER'S NAME 39 AN**

**06036 DAY OF DEATH DATE 2 AN**

**07001 BUY-IN CODE 1 A**

A	BUYIN-A	CALCULATE BUY-IN ELIGIBILITY FOR ADULT(S) IN THE CASE
B	BUYIN-AC	CALCULATE BUY-IN ELIGIBILITY FOR ADULT(S) AND CHILD(REN) IN THE CASE
C	BUYIN-C	CALCULATE BUY-IN ELIGIBILITY FOR CHILD(REN) IN THE CASE
S	BUYIN-S	CALCULATE BUY-IN ELIGIBILITY FOR SLMB

**07002 SSI BUY-IN CODE 1 A**

1	INELIG-EX-INC	INELIGIBLE FOR BUY-IN/COBRA INS. PAYMENT DUE TO EXCESS INCOME-100%
2	INELIG-EX-RES	INELIGIBLE FOR BUY-IN/COBRA INS. PAYMENT DUE TO EXCESS RESOURCES
3	INELIG-EX-INC-RES	INELIGIBLE FOR BUY-IN/COBRA INS. PAYMENT DUE TO EXCESS INCOME AND RESOURCES
4	INELIG-EX-INC	INELIGIBLE FOR AIDS INSURANCE-185%
5	ELIG	ELIGIBLE FOR SLMB-110%
6	INELIG-EX-INC	INELIGIBLE FOR SLMB DUE TO EXCESS INCOME
7	INELIG-EX-RES	INELIGIBLE FOR SLMB DUE TO EXCESS RESOURCES
8	INELIG-EX-INC-R	INELIGIBLE FOR SLMB DUE TO EXCESS INCOME AND RESOURCES
9	ELIG	ELIGIBLE FOR BUY-IN/COBRA/AIDS INS. PAYMENT

**07003 SSI CHILD BUY-IN CODE 1 A**

1	ELIG	ELIGIBLE FOR BUY-IN
2	INELIG	INELIGIBLE FOR BUY-IN

**07004 COMMUNITY BUY-IN CODE 1 A**

1	INELIG-EX-INC	INELIGIBLE FOR BUY-IN DUE TO EXCESS INCOME
2	INELIG-EX-RES	INELIGIBLE FOR BUY-IN DUE TO EXCESS RESOURCES
3	INELIG-EX-INC-RES	INELIGIBLE FOR BUY-IN DUE TO EXCESS INCOME AND RESOURCES
9	ELIG	ELIGIBLE FOR BUY-IN

**07005 CHRONIC CARE BUY-IN CODE 1 A**

1	INELIG-EX-INC	INELIGIBLE FOR BUY-IN DUE TO EXCESS INCOME
2	INELIG-EX-RES	INELIGIBLE FOR BUY-IN DUE TO EXCESS RESOURCES
3	INELIG-EX-INC-RES	INELIGIBLE FOR BUY-IN DUE TO EXCESS INCOME AND RESOURCES
9	ELIG	ELIGIBLE FOR BUY-IN

**07006 CHILD CARE-MONTH/YEAR OF DATE OF BIRTH 4 N**

**07008 MA BOTTOM-LINE REASON CODE 3 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07009 TOTAL AVAILABLE INCOME AMOUNT 7 N**

**07010 EARNED INCOME SOURCES 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07011 EARNED INCOME GROSS AMOUNT 7 N**

**07013 EARNED TAXABLE INCOME INDICATOR 1 AN**

1	NON-TAX	NON-TAXABLE BY ANY GOVERNMENT IN U.S.
2	TX-FD	FEDERAL TAX
3	TX-FD-ST	NY STATE TAX, FEDERAL TAX
4	TXRESNYC	RESIDENT NEW YORK CITY TAX, NEW YORK STATE TAX, FEDERAL TAX



5 TXNRNYC NON-RESIDENT NEW YORK CITY TAX, NEW YORK STATE TAX, FEDERAL TAX

**07015 WORK RELATED EXPENSES AMOUNT 7 N**

**07016 PA EARNED INCOME SOURCE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07017 FS EARNED INCOME SOURCE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07018 PA EARNED INCOME PERIOD 2 AN**

**07020 CHILD EARNED INCOME CODE 1 N**

**07021 EXPANDED ELIGIBILITY LEVEL CODE 9 N**

0	INELIG	INELIGIBLE EXCESS INCOME - DAC
1	100%	LESS THAN OR EQUAL TO 100% OF POVERTY - FULLY ELIGIBLE
2	185%	LESS THAN OR EQUAL TO 185% OF POVERTY
3	INELIG	INELIGIBLE FOR COVERAGE-185%
4	ELIG	LESS THAN OR EQUAL TO 133% OF POVERTY
5	INELIG	INELIGIBLE FOR COVERAGE - 133%
6	INELIG	INELIGIBLE FOR COVERAGE - 100%
7	INELIG	INELIGIBLE - EXCESS RESOURCES - DAC
8	INELIG	INELIGIBLE - EXCESS INCOME AND RESOURCES - DAC
9	ELIG	LESS THAN OR EQUAL TO MA LEVEL/SSI LEVEL

**07022 EXPANDED ELIGIBILITY CODE 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07023 FOOD STAMP MEDICARE COUNT 1 N**

**07024 CHILD CARE TYPE CODE 1 AN**

A	DC-HOME-NR-FT	DAY CARE - IN HOME - NON-RELATIVE - FULL TIME
B	DC-HOME-NR-PT	DAY CARE - IN HOME - NON-RELATIVE - PART TIME
C	DC-FAM-HOME-FT	DAY CARE - FAMILY HOME - FULL TIME
D	DC-FAM-HOME-PT	DAY CARE - FAMILY HOME - PART TIME
E	DC-GRP-FAM-FT	DAY CARE - GROUP FAMILY - FULL TIME

F	DC-GRP-FAM-PT	DAY CARE - GROUP FAMILY - PART TIME
G	DC-CENTER-FT	DAY CARE - CENTER - FULL TIME
H	DC-CENTER-PT	DAY CARE - CENTER - PART TIME
I	DC-IN-HOME-R-FT	DAY CARE - IN HOME - RELATIVE - FULL TIME
J	DC-IN-HOME-R-PT	DAY CARE - IN HOME - RELATIVE - PART TIME
K	INF-CC-R-FT	INFORMAL CHILD CARE – RELATIVE - FULL TIME
L	INF-CC-R-PT	INFORMAL CHILD CARE – RELATIVE - PART TIME
M	INF-CC-NR-FT	INFORMAL CHILD CARE - NON-RELATIVE - FULL TIME
N	INF-CC-NR-PT	INFORMAL CHILD CARE - NON-RELATIVE - PART TIME
O	SCH-AGE-PROG-FT	SCHOOL AGE CHILD CARE PROGRAM - FULL TIME
P	SCH-AGE-PROG-PT	SCHOOL AGE CHILD CARE PROGRAM - PART TIME
Q	NO-DC-SUPPLMNT	DAY CARE SUPPLEMENT NOT ALLOWED

**07025 PA EARNED INCOME FREQUENCY CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07026 FS EARNED INCOME FREQUENCY CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07027 MONTHLY GROSS EARNED INCOME AMOUNT 7 N**

**07028 PA INDIVIDUAL NET UNEARNED INCOME AMOUNT 7 N**

**07029 PA INCOME LIMIT AMOUNT 7 N**

**07030 PA NET APPLICABLE EARNED INCOME 7 N**

**07031 SSI NET EARNED INCOME AMOUNT 7 N**

**07032 CHRONIC CARE COMMUNITY NET INCOME AMOUNT 7 N**

**07033 CHRONIC CARE NET INCOME AMOUNT 7 N**

**07034 TOTAL ACTUAL CHILD CARE AMOUNT 7 N**

**07035 TOTAL CHILD CARE DISREGARD DEDUCTION AMOUNT 7 N**

**07036 INCOME AVERAGE INDICATOR 1 A**

**07037 EARNED CATEGORICAL INDICATOR 1 N**

1	SSI RELATED SPOUSE/PARENT/INDIVIDUAL - AGED
2	SSI RELATED SPOUSE/PARENT/INDIVIDUAL - BLIND

- 3 SSI RELATED SPOUSE/PARENT/INDIVIDUAL - DISABLED
- 4 NON-SSI RELATED SPOUSE/PARENT (FP)
- 5 NON-SSI RELATED SPOUSE/PARENT (FNP)
- 6 SSI RELATED CHILD - BLIND
- 7 SSI RELATED CHILD - DISABLED
- 8 NON-SSI RELATED CHILD
- 9 SSI RELATED SPOUSE – NOT APPLYING (BT08 ONLY)

- 07038 FS INCOME LIMIT AMOUNT 7 N**
- 07039 PA TOTAL ACTUAL INCOME AMOUNT 7 N**
- 07040 FS CASE APPLICABLE EARNED INCOME 7 N**
- 07041 FS ACTUAL CHILD SUPPORT AMOUNT 7 N**
- 07042 FS ALLOWED CHILD SUPPORT AMOUNT 7 N**
- 07043 IV-D CHILD SUPPORT NON-COMPLIANCE CODE 1 AN**
- 07044 HOURS WORKED PER MONTH 3 N**
- 07045 FS EARNED INCOME AMOUNT 7 N**
- 07046 EXPANDED ELIGIBILITY NET INCOME AMOUNT 7 N**
- 07047 LOW INCOME FAMILY EXCESS INCOME AMOUNT 7 N**
- 07048 CASH RESOURCE AMOUNT 7 N**
- 07049 NON-APPLICANT UNEARNED INCOME SOURCE CODE 6 AN**
- 07050 FOOD STAMP PERCENTAGE EXEMPTION 7 N**
- 07051 NON-APPLICANT UNEARNED INCOME AMOUNT 21 N**
- 07052 NON-APPLICANT EARNED INCOME AMOUNT 14 N**
- 07053 NON-APPLICANT LINE NUMBER 10 N**
- 07054 HP MONTHLY INCOME AMOUNT 7 N**
- 07055 HP PA TOTAL MONTHLY INCOME 7 N**
- 07056 HP INCOME TIER 2 AN**

- 07057 HP INCOME INDICATOR 1 AN**
- 07058 HOUSEHOLD'S CALCULATED ANNUAL INCOME AMOUNT 7 N**
- 07059 HEAP INCOME SOURCE CODE 14 AN**
- 07060 FS NET INCOME 7 N**
- 07061 HP INCOME FREQUENCY 1 AN**
- 07062 HP MONTHLY INCOME LIMIT AMOUNT 7 N**
- 07063 HP HOUSEHOLD EXCESS INCOME AMOUNT 7 N**
- 07064 NET CASE INCOME AMOUNT 7 N**
- 07065 FAMILY HEALTH PLUS LEVEL CODE 8 N**
- 07067 AMOUNT OF FAMILY PLANNING NET INCOME 7 N**
- 07068 AMOUNT OF TOTAL MONTHLY GROSS INCOME 7 N**
- 07070 COMBINED INCOME FOR TAXES CODE 1 N**
- |   |          |   |
|---|----------|---|
| 1 | INC-C-FL | INCOME COMBINED FOR FEDERAL TAX                                   |
| 2 | IN-C-F-S | INCOME COMBINED FOR FEDERAL & STATE TAX (AND NYC WHEN APPLICABLE) |
- 07072 SSI PASS AMOUNT 7 N**
- 07073 BUY-IN NET INCOME AMOUNT 7 N**
- 07074 FS MED PRESCRIPTION DRUG CARD COUNT 1 N**
- 07076 QI1 BUY-IN INCOME LIMIT AMOUNT 7 N**
- 07080 TAX WITHHOLDING STATUS 1 A**
- |   |         |
|---|---------|
| M | MARRIED |
| S | SINGLE  |
- 07090 NUMBER OF TAX EXEMPTION 2 N**
- 07100 UNEARNED INCOME SOURCE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07106 PA UNEARNED INCOME SOURCE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07107 FS UNEARNED INCOME SOURCE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07108 PA UNEARNED INCOME PERIOD 1 AN**

**07110 SEPARATE HOUSEHOLD INCOME TEST INDICATOR 1 A**

**07120 CHILD UNEARNED INCOME CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07121 SUMMARY AREA SSI CHILD CODE 1 N**

**07125 PA UNEARNED INCOME FREQUENCY CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07126 FS UNEARNED INCOME FREQUENCY CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07218 UNITY SUPPORT DISREGARD 7 N**

**07129 CHILD SUPPORT DISREGARD 7 N**

**07130 PA NET UNEARNED INCOME 7 N**

**07131 SSI NET UNEARNED INCOME AMOUNT 7 N**

**07135 PA UNEARNED INCOME AMOUNT 7 N**

**07136 PA UNEARNED INCOME DEDUCTION AMOUNT 7 N**

**07137 UNEARNED CATEGORICAL INDICATOR 1 N**

- 1 SSI RELATED SPOUSE/PARENT/INDIVIDUAL - AGED
- 2 SSI RELATED SPOUSE/PARENT/INDIVIDUAL - BLIND
- 3 SSI RELATED SPOUSE/PARENT/INDIVIDUAL - DISABLED
- 4 NON-SSI RELATED SPOUSE/PARENT (FP)
- 5 NON-SSI RELATED SPOUSE/PARENT (FNP)
- 6 SSI RELATED CHILD - BLIND
- 7 SSI RELATED CHILD - DISABLED

- 8 NON-SSI RELATED CHILD
- 9 SSI RELATED SPOUSE – NOT APPLYING (BT08 ONLY)

**07138 MA UNEARNED EXEMPTION CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07139 \$20 DISREGARD CODE 1 AN**

- U U \$20 DISREGARD DEDUCTED FROM UNEARNED INCOME
- E E \$20 DISREGARD DEDUCTED FROM EARNED INCOME
- B B \$20 DISREGARD DEDUCTED FROM BOTH EARNED AND UNEARNED INCOME

**07140 FS APPLICABLE UNEARNED INCOME 7 N**

**07145 FS UNEARNED INCOME AMOUNT 7 N**

**07148 CHRONIC CARE TOTAL INCOME AMOUNT 7 N**

**07149 CHRONIC CARE COMMUNITY TOTAL INCOME-AMT 7 N**

**07150 PA NET AVAILABLE INCOME 7 N**

**07151 SSI TOTAL NET INCOME AMOUNT 7 N**

**07152 CHILD TOTAL NET INCOME AMT 7 N**

**07153 PA INCOME INDICATOR 1 AN**

- F 150%-NID LUMP SUM INCOME EXCEEDS 150% OF THE STATE STANDARD, BUT CALCULATES A NET INCOME DEFICIT
- G 185%-NID LUMP SUM INCOME EXCEEDS 185% OF THE STATE STANDARD, BUT CALCULATES A NET INCOME DEFICIT
- L LS-NIS LUMP SUM INCOME CALCULATES A NET INCOME SURPLUS
- S M-CCSUPP BUDGET CIRCUMSTANCES PREVENT AUTOMATED CALCULATION OF JOBS CHILD CARE SUPPLEMENTS
- X IN-150% INCOME EXCEEDS 150% OF THE STATE STANDARD
- Y IN-185% INCOME EXCEEDS 185% OF THE STATE STANDARD

**07154 COMMUNITY 150% INC 1 AN**

**07160 FS TOTAL INCOME 7 N**

**07163 FS INCOME INDICATOR 1 AN**

N	IEFCPL	INCOME EXCEEDS THE FEDERAL CALCULATED POVERTY LEVEL
S	IBSHIL	INCOME IS BELOW THE SEPARATE HOUSEHOLD INCOME LIMIT
T	IESHIL	INCOME EXCEEDS THE SEPARATE HOUSEHOLD INCOME LIMIT
V	FS-TRN-BEN-GF	FS TRANSITIONAL BENEFIT GROSS FAILURE
W	FS-TRN-BEN-NF	FS TRANSITIONAL BENEFIT NET FAILURE
X	IE130%	INCOME EXCEEDS 130% OF THE FEDERAL CALCULATED POVERTY LEVEL
Z	FS-TRN-BEN	FS TRANSITIONAL BENEFIT

**07165 EXCESS INCOME AMOUNT 7 N**

**07170 GROSS ANNUAL INCOME (SERVICES) 7 N**

**07172 PERCENTAGE OF MEDIAN GROSS INCOME FOR FAMILY SIZE (DAYCARE SERVICES) 5 N**

**07174 PERCENTAGE OF MEDIAN GROSS INCOME FOR FAMILY SIZE (INCOME ELIGIBLE) 5 N**

**07180 INELIGIBLE REMAINDER AMOUNT 7 N**

**07190 GROSS WAGES 7 N**

**07191 NON-SSI CHILD INCOME 7 N**

**07200 PA EARNED INCOME DEDUCTION AMOUNT 7 N**

**07201 SSI EARNED INCOME DEDUCTION AMOUNT 7 N**

**07202 CHRONIC CARE COMMUNITY EARNED INCOME DEDUCTION 7 N**

**07203 CHRONIC CARE EARNED INCOME DEDUCTION 7 N**

**07210 NYS DISABILITY DEDUCTION 7 N**

**07220 NON-PERSONAL WORK DEDUCTION 7 N**

**07250 HEALTH INSURANCE DEDUCTION 7 N**

**07251 COMMUNITY HEALTH INSURANCE 7 N**

**07270 PA EARNED INCOME EXEMPTION AMOUNT 7 N**

**07280 COURT ORDERED SUPPORT 7 N**

**07281 COMMUNITY COURT SUPPORT 7 N**

**07290 OTHER UNAVAILABLE INCOME 7 N**

**07300 EARNED INCOME CREDIT ADVANCE AMOUNT 7 N**

**07303 EARNED INCOME CREDIT INDICATOR 1 AN**

0	INELIG	INELIGIBLE FOR EIC
1	RECEIV	RECEIVING ADVANCE EIC PAYMENTS
2	SINGLE	SINGLE
3	MAR-W-S	MARRIED, WITHOUT SPOUSE FILING CERTIFICATE
4	MAR-B-S	MARRIED, BOTH SPOUSES FILING CERTIFICATE
5	LUMP-SUM	LUMP SUM EIC
6	L-S-C-WE	LUMP SUM EIC (RECEIVED BY CURRENT WAGE EARNER)
7	ES-PRO	LUMP SUM EIC TO BE PRORATED

**07319 CHRONIC CARE WORK RELATED EXPENSE 7 N**

**07320 WORK EXPENSES DISREGARD AMOUNT 7 N**

**07325 PA EMPLOYMENT INDICATOR 1 AN**

**07326 FOOD STAMP EMPLOYMENT INDICATOR 1 AN**

**07321 CHRONIC CARE COMMUNITY WORK EXPENSE DEDUCTION 7 N**

**07322 WORK DEDUCTIONS INDICATOR CODES 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07340 STATE TAX DEDUCTION 7 N**

**07370 30 & 1/3/\$30 EXEMPTION 7 N**

**07371 COM 30 & 1/3 EXEMPTION AMOUNT 7 N**

**07373 30 & 1/3/\$30 INDICATOR 1 N**

1	IF ELIGIBLE, GIVE \$30 + 1/3
2	CALCULATE WITH \$30 + 1/3
3	CALCULATE WITH \$30
6	EFFECTIVE 3/1/2002 FOR WMSU AND LDMP – MEANS NO DISREGARD

**07374 30 & 1/3/\$30 LAST MONTH INDICATOR 2 AN**



**07380 TAXES 65 DISREGARD AMOUNT 7 N**

**07381 ONE-HALF OF THE REMAINDER AMOUNT 7 N**

**07382 CHRONIC CARE COMMUNITY TAXES - 65 DEDUCTION AMOUNT 7 N**

**07383 CHRONIC CARE 65 DEDUCTION AMOUNT 7 N**

**07384 CHRONIC CARE COMMUNITY 1/2 REMAINDER 7 N**

**07385 CHRONIC CARE 1/2 REMAINDER 7 N**

**07400 PA CHILD CARE DEDUCTION 7 N**

**07401 COMMUNITY CHILD CARE 7 N**

**07403 CHILD CARE RESTRICTED INDICATOR 1 AN**

E	RST-CC-ACT	RESTRICT THE ENTIRE CHILD CARE COST
S	RST-CC-SUP	RESTRICT CHILD CARE SUPPLEMENT ONLY
X	RST-CC-A-S	RESTRICT THE CHILD CARE ALLOWANCE AND SUPPLEMENT

**07410 FS DEPENDENT/CHILD CARE AMOUNT 7 N**

**07412 FS DEPENDENT/CHILD CARE FREQUENCY 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07420 FS MEDICAL DEDUCTION AMOUNT 7 N**

**07430 FS BOARDER LODGER EXCLUSION AMOUNT 7 N**

**07440 FS GROUP HOME EXCLUSION AMOUNT - INPUT 7 N**

**07441 FS GROUP HOME EXCLUSION ALLOWED AMOUNT 7 N**

**07445 GROUP HOME TYPE 1 AN**

1	RES-FC-1	RESIDENTIAL/FAMILY CARE-LEVEL I
2	RES-FC-2	RESIDENTIAL/FAMILY CARE-LEVEL II
3	ST-OP-CR	STATE OPERATED COMMUNITY RESIDENCE
4	SS-APT-EH	OMH/OMRDD SUPERVISED/SUPPORTIVE APARTMENT OR ENRICHED HOUSING (LEVEL II)

**07450 SPONSORS INCOME EXCLUSION AMOUNT 7 N**

**07453 SPONSOR EXCLUSION INDICATOR 1 AN**

**07460 FS TOTAL DEDUCTIONS AMOUNT 7 N**

**07470 FS INCOME EXCLUSION AMOUNT 7 N**

**07490 DEEMING CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07492 NUMBER OF CHILDREN ALLOCATED 2 N**

**07496 LIVING ARRANGEMENT CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**07500 DEEMED AMOUNT 7 N**

**07510 SSI INCOME AFTER ALLOCATION 7 N**

**07600 CHRONIC CARE EARNED INCOME INDICATOR 1 A**

**07601 CHRONIC CARE UNEARNED INCOME INDICATOR 1 A**

**07602 PERSONAL INCIDENTAL ALLOW CODE 1 N**

- |   |     |  |
|---|-----|--|
| 1 | PIA | PIA FOR ARTICLE 31 (\$35.00)             |
| 2 | PIA | PIA FOR ARTICLE 28 (\$50.00)             |
| 3 | PIA | HOME & COMMUNITY BASES WAIVERED SERVICES |
| 4 | PIA | PIA FOR VETERAN                          |

**07603 BUDGET SCREEN INDICATOR 1 N**

- |   |     |                                    |
|---|-----|------------------------------------|
| 0 | ALL | ALL PHASES                         |
| 1 | CCC | CHRONIC CARE AND COMMUNITY SCREENS |

**07604 CHRONIC CARE \$20 DISREGARD CD 1 AN**

- |   |  |
|---|--|
| B | \$20 DISREGARD DEDUCTED FROM BOTH EARNED AND UNEARNED INCOME |
| E | \$20 DISREGARD DEDUCTED FROM EARNED INCOME                   |
| U | \$20 DISREGARD DEDUCTED FROM UNEARNED INCOME                 |

**07605 COMMUNITY \$20 DISREGARD CD 1 AN**

- B \$20 DISREGARD DEDUCTED FROM BOTH EARNED AND UNEARNED INCOME
- E \$20 DISREGARD DEDUCTED FROM EARNED INCOME
- U \$20 DISREGARD DEDUCTED FROM UNEARNED INCOME

**07606 CHRONIC CARE COM CONTRIBUTION CODE 1 N**

- 1 SUP-AMT CONTRIBUTING TABLE OF SUPPORT AMOUNT
- 2 MOR-SUP CONTRIBUTING MORE THAN TABLE OF SUPPORT AMOUNT
- 3 LES-S-A CONTRIBUTING LESS THAN TABLE OF SUPPORT - ADJUDICATED
- 4 LES-S-NA CONTRIBUTING LESS THAN TABLE OF SUPPORT - NOT ADJUDICATED
- 5 REF-CON REFUSES TO CONTRIBUTE

**07650 TABLE OF SUPPORT AMOUNT 7 N**

**07652 PERSONAL INCOME ALLOW AMOUNT 7 N**

**07654 CHRONIC CARE CONTRIBUTION TO COST OF CARE 7 N**

**07655 CHRONIC CARE COMMUNITY CONTRIBUTION AMOUNT 7 N**

**07656 CHRONIC CARE CONTRIBUTION TO THE COMMUNITY 7 N**

**07657 CHRONIC CARE CONTRIBUTION FROM COMMUNITY 7 N**

**07660 CHRONIC CARE TOTAL TO COST 7 N**

**07700 ORIGIN CODE 1 N**

- 1 MAN-EMP MANUAL EMPLOYMENT
- 2 AUTO-EMP AUTO EMPLOYMENT
- 3 MAN-SANC MANUAL SANCTION
- 4 AUTO-SAN AUTO SANCTION
- 5 MAN-TEAP MANUAL TEAP
- 6 AUTO-TEAP AUTO TEAP

**07750 FS NEGATIVE FARM INCOME EXCLUSION 7 N**

**07805 INCOME AMOUNT 7 N**

**08001 INTERVIEW IDENTIFICATION NUMBER 3 N**

**08002 QUESTION SET VERSION NUMBER 6 AN**

**08003 INTERVIEW TYPE CODE 2 AN**

- 01 INITIAL INTERVIEW
- 02 RECERTIFICATION INTERVIEW
- 03 UNDERCARE INTERVIEW

**08004 PROGRAM TYPE CODE 2 AN**

- FS FOOD STAMPS
- MA MEDICAL ASSISTANCE
- PA PUBLIC ASSISTANCE

**08006 INITIAL APPOINTMENT DATE 8 N**

**08007 INITIAL APPOINTMENT TIME 6 N**

**08008 SUPERVISORY REVIEW DATE 8 N**

**08009 UPDATE COUNT 2 N**

**08013 APPOINTMENT TYPE CODE 1 AN**

- D DEFERRED
- F FOLLOW-UP
- R RESCHEDULED - DEFERRED
- S RESCHEDULED

**08014 START DATE AND TIME GROUP 14 AN**

**0801 START DATE 8 N**

**08016 START TIME 6 N**

**08017 ENDING DATE AND TIME GROUP 14 N**

**08018 ENDING DATE 8 N**

**08019 ENDING TIME 6 N**

**08022 UNIQUE QUESTION NUMBER 5 N**

**08023 OCCURRENCE COUNT 2 N**

**08024 MULTIPLE CHOICE VALUE NUMBER 1 AN**

- 08025 VALIDITY FLAG 1 AN
- 08026 MODIFIED FLAG 1 AN
- 08027 DATA ELEMENT NUMBER 5 N
- 08028 RESPONSE SEQUENCE NUMBER 5 N
- 08029 RESPONSE LENGTH COUNT 5 N
- 08030 RESPONSE TEXT 1 AN
- 08042 QUESTION NARRATIVE TEXT 140 AN
- 08045 QUESTION INDIVIDUAL INDICATOR CODE 1 AN
  - N CASE LEVEL
  - S SINGLE INDIVIDUAL
  - Y SELECT ALL INDIVIDUALS
- 08068 HELP LINE NUMBER 1 N
- 08069 HELP LINE TEXT 1 AN
- 08081 INITIAL APPOINTMENT DATE - CENTURY 2 N
- 08082 INITIAL APPOINTMENT DATE - YEAR 2 N
- 08083 INITIAL APPOINTMENT DATE - MONTH 2 N
- 08084 INITIAL APPOINTMENT DATE - DAY 2 N
- 08085 INITIAL APPOINTMENT TIME - HOUR 2 N
- 08086 INITIAL APPOINTMENT TIME - MINUTE 2 N
- 08087 INITIAL APPOINTMENT TIME - SECOND 2 N
- 08088 SUPERVISORY REVIEW DATE - CENTURY 2 N
- 08089 SUPERVISORY REVIEW DATE - YEAR 2 N
- 08090 SUPERVISORY REVIEW DATE - MONTH 2 N
- 08091 SUPERVISORY REVIEW DATE - DAY 2 N
- 08092 STARTING DATE - CENTURY 2 N
- 08092 STARTING DATE - CENTURY 2 N

- 08093 STARTING DATE - YEAR 2 N**
- 08094 STARTING DATE - MONTH 2 N**
- 08095 STARTING DATE - DAY 2 N**
- 08096 STARTING TIME - HOUR 2 N**
- 08097 STARTING TIME - MINUTE 2 N**
- 08098 STARTING TIME - SECOND 2 N**
- 08099 ENDING DATE - CENTURY 2 N**
- 08100 ENDING DATE - YEAR 2 N**
- 08101 ENDING DATE - MONTH 2 N**
- 08102 ENDING DATE - DAY 2 N**
- 08103 ENDING TIME - HOUR 2 N**
- 08104 ENDING TIME - MINUTE 2 N**
- 08105 ENDING TIME - SECOND 2 N**
- 08106 RESPONSE TEXT CHARACTER 1 AN**
- 08108 FIRST EVENT SEQUENCE NUMBER 5 N**
- 08109 LAST EVENT SEQUENCE NUMBER 5**
- 08110 SESSION NUMBER 5 N**
- 08112 INITIAL APPOINTMENT DATE GROUP 8 N**
- 08113 INITIAL APPOINTMENT TIME GROUP 6 N**
- 08114 SUPERVISORY REVIEW DATE GROUP 8 N**
- 09001 PARTICIPANT STATUS CODE 1 N**
  - 1 MAND-PART MANDATORY PARTICIPATION
  - 2 VOL-PART VOLUNTARY PARTICIPATION
- 09002 CHILD CARE CODE 1 AN**
  - 1 IN-RE-CC IN RECEIPT OF CHILD CARE
  - 2 CC-UNAVL CHILD CARE UNAVAILABLE

3 CC-NT-RE CHILD CARE NOT REQUIRED  
INITIALIZED TO BLANK, NEVER VALUED

**09003 ACTIVITY ENROLLMENT FLAG 1 AN**

0 INACT INACTIVE  
1 ACTIVE ACTIVE  
INITIALIZED TO BLANK, NEVER VALUED

**09004 LOW INCOME FAMILY EXCESS RESOURCES AMOUNT 7 N**

**09005 HP HOUSEHOLD RESOURCE AVAILABLE AMOUNT 7 N**

**09031 FHP RESOURCE LIMIT AMOUNT 7 N**

**09032 FHP TOTAL RESOURCE AMOUNT 7 N**

**09033 FHP EXCESS RESOURCE AMOUNT 7 N**

**09100 RESOURCE TYPE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**09102 CHRONIC CARE RESOURCE DATE 6 N**

**09103 BOTTOM LINE RESOURCE CHILD NUMBER 1 N**

**09104 RESOURCE CHILD NUMBER 2 N**

**09105 CATEGORICAL INDICATOR - RESOURCES 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**09106 CHRONIC CARE RESOURCE INDICATOR 1 AN**

**09110 RESOURCE VALUE 7 N**

**09113 NO FIELD NAME AVAILABLE 1 N**

**09115 NUMBER CHILDREN DEEMED 1 N**

**09117 SSI RESOURCES DEEMED AMOUNT 7 N**

**09120 TOTAL RESOURCE VALUE AMOUNT 7 N**

**09130 EXCESS RESOURCE CODE 1 AN**

L LIQUID  
X EXCESS

**09131 SSI EXCESS RESOURCE CODE 1 AN**

**09132 CHRONIC CARE COMMUNITY EXCESS RESOURCE CODE 1 AN**

**09133 CHRONIC CARE EXC RES CD 1 AN**

**09140 EXCESS RESOURCE AMOUNT 7 N**

**09141 SSI EXCESS RESOURCE AMOUNT 7 N**

**09142 CHRONIC CARE COMMUNITY EXCESS RESOURCE AMOUNT 7 N**

**09143 CHRONIC CARE EXCESS RESOURCE AMOUNT 7 NJ**

**09300 EMPLOYMENT RECORD INDICATOR 1 AN**

BLANK	NO-E-REC	NO EMPLOYMENT RECORD
X	EMP-REC	AN EMPLOYMENT RECORD EXISTS

**09301 EMPLOYMENT WORKER 5 AN**

**09302 VETERAN STATUS 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**09303 INDIVIDUAL RACE/ETHNIC AFFILIATION 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**09304 EDUCATION LEVEL 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**09305 DICTIONARY OF OCCUPATIONAL TITLES CODE 10 AN**

**Valid codes for the first digit, which are also used in the title code, are:**

0	P-TECH-M	PROFESSIONAL, TECHNICAL AND MANAGERIAL
1	P-TECH-M	PROFESSIONAL, TECHNICAL AND MANAGERIAL
2	CLER-SAL	CLERICAL AND SALES
3	SERVICE	SERVICE
4	AG-FSH-F	AGRICULTURAL, FISHING AND FORESTRY
5	PROCESS	PROCESSING
6	MACH-TR	MACHINE TRADES
7	BENCH-WK	BENCH WORK



8	STRUC-WK	STRUCTURAL WORK
9	MISC	MISCELLANEOUS

**The tenth character will denote the amount of experience a client has. Valid codes for this character are:**

X	NO-EXPER	NO EXPERIENCE
0	LESS-1YR	LESS THAN ONE YEAR OF EXPERIENCE
1	1YR-MORE	ONE YEAR OF EXPERIENCE OR MORE
2	2YR-MORE	TWO YEARS OF EXPERIENCE OR MORE
3	3YR-MORE	THREE YEARS OF EXPERIENCE OR MORE
4	4YR-MORE	FOUR YEARS OF EXPERIENCE OR MORE
5	5YR-MORE	FIVE YEARS OF EXPERIENCE OR MORE
6	6YR-MORE	SIX YEARS OF EXPERIENCE OR MORE

**09305 DICTIONARY OF OCCUPATIONAL TITLES CODE 10 AN (con.t)**

7	7YR-MORE	SEVEN YEARS OF EXPERIENCE OR MORE
8	8YR-MORE	EIGHT YEARS OF EXPERIENCE OR MORE

**09306 VOLUNTEER STATUS 2 AN**

24	PREG-4MO	PREGNANT - 4 MONTHS OR BEYOND
26	REMOTE	RE MOTENESS
27	EM-FL-TM	EMPLOYED FULL TIME - 30 HOURS PER WEEK OR MORE
30	CHD-U-16	CHILD UNDER 16 YEARS
31	CT-CHILD	CARETAKER OF CHILD UNDER 3 (ADC; 6-HR) ON SAME PA CASE
32	AGED	ADVANCED AGE
34	C-CH-NPA	CARETAKER OF CHILD UNDER 3 (ADC; 6-HR) NOT ON SAME PA CASE
35	PS-SC-FT	IN SCHOOL FULL-TIME; AGE 16-19
36	INCAP	INCAPACITATED
38	ND-IN-HM	NEEDED IN HOME TO CARE FOR INCAPACITATED HOUSEHOLD MEMBER
41	TM-IL3M	TEMPORARY ILLNESS - 3 MONTH EXEMPTION
42	TM-IL6M	TEMPORARY INCAPACITY - 6 MONTH EXEMPTION
43	INCP-SSI	INCAPACITATED - SSI APPLICATION FILED
44	REC-SSI	IN RECEIPT OF SSI
64	SA-A-RE	SUBSTANCE ABUSE - WAITING FOR REHABILITATION
70	CON-EMPL	CONTESTING EMPLOYABILITY DETERMINATION
WE	NPA-FS-E	NPA FS WORK REGISTRATION EXEMPT
WR	NPS-FS-R	NPS FS WORK REGISTRATION REQUIRED

**09307 EMPLOYMENT LINE NUMBER 2 N**

**09308 EMPLOYMENT ACTIVITY CODE 2 N**

01	IN-ASSMT	INDIVIDUAL ASSESSMENT
02	EDP	EMPLOYABILITY DEVELOPMENT PLAN
03	WK-EXP	WORK EXPERIENCE
05	SJS-PA	SUPERVISED JOB SEARCH (PA)
06	--	RESERVED FOR FUTURE USE
08	JS-TR	JOB SKILL TRAINING
09	ED-TR-PA	EDUCATIONAL TRAINING (PA)
10	JOB-R-TR	JOB READINESS TRAINING
11	TEAP	TEAP

**09308 EMPLOYMENT ACTIVITY CODE 2 N (cont.)**

12	OVESID	OVESID
13	TR-REHAB	ALCOHOL AND SUBSTANCE ABUSE TREATMENT/REHABILITATION
14	--	RESERVED FOR FUTURE USE
19	JOB-OPP	JOB OPPORTUNITY
20	JR-TR-FS	JOB READINESS TRAINING (FS)
21	IJS-FS	INDEPENDENT JOB SEARCH (FS)
23	JS-TR-FS	JOB SKILLS TRAINING (FS)
24	ED-TR-FS	EDUCATIONAL TRAINING (FS)
25	--	RESERVED FOR FUTURE USE
26	--	RESERVED FOR FUTURE USE
27	--	RESERVED FOR FUTURE USE
28	--	RESERVED FOR FUTURE USE
29	PRE-IN-A	PRE-INDIVIDUAL ASSESSMENT
30	OPP-CON	OPPORTUNITY CONTRACT
31	P-S-ED	POST-SECONDARY EDUCATION
32	JOB-PL	JOB PLACEMENT/DEVELOPMENT
33	OJT	ON-THE-JOB-TRAINING

**09309 EMPLOYMENT STATUS 2 N**

01	REF-CC	REFERRED FOR CHILD CARE
02	PEND-MED	PARTICIPATION PENDING MEDICAL EXAMINATION
03	P-NOMED	PENDING PARTICIPATION FOR ALL NON-MEDICAL RESOURCES

04	ENRLD	ENROLLED
05	EXT-ENRL	EXTENDED ENROLLMENT
06	RE-ENRL	RE-ENROLLED
07	COMPLD	COMPLETED (FULFILLED ALL REQUIREMENTS)
08	PT-EMP	ENTERED EMPLOYMENT - PART TIME
09	FT-EMP	ENTERED EMPLOYMENT - FULL TIME OR EMPLOYED TO CAPACITY
10	PT-TO-FT	PART-TIME EMPLOYMENT INCREASED TO FULL TIME
11	FT-TO-PT	FULL-TIME EMPLOYMENT DECREASED TO PART TIME
13	60-DA-PA	PA SANCTION - 60 DAYS
14	75-DA-PA	PA SANCTION - 75 DAYS
15	90-DA-PA	PA SANCTION - 90 DAYS

**09309 EMPLOYMENT STATUS 2 N (cont.)**

16	180-DA-PA	PA SANCTION - 180 DAYS
17	150-DA-PA	PA SANCTION - 150 DAYS
18	EMP-TERM	EMPLOYMENT TERMINATED
19	TERM	ALL OTHER TERMINATIONS OF PARTICIPATION IN ACTIVITY COMPONENT
20	FS-EX-CC	FS EXEMPT - LACK OF CHILD CARE
21	FS-EX-BE	FS EXEMPT - BARRIERS TO EMPLOYMENT
22	FS-EX-JA	FS EXEMPT - JOB ATTACHED PERSON
23	FS-EX-MF	FS EXEMPT - MIGRANT AND SEASONAL FARMWORKER
24	NOAA	NOTICE OF ADVERSE ACTION MAILED
25	2-MO-FS	FS SANCTION - 2 MONTHS
26	3-MO-FS	FS SANCTION - 3 MONTHS
27	--	RESERVED FOR FUTURE USE
28	--	RESERVED FOR FUTURE USE
29	--	RESERVED FOR FUTURE USE
30	REASSESS	REASSESSED
31	MR-EMP	MEDICAL RETURNED - EMPLOYABLE
32	MR-NOEMP	MEDICAL RETURNED - NOT EMPLOYABLE
33	REF-AE	REFERRED FOR ACTIVITY ENROLLMENT
34	REF-NC	REFERRED FOR NON-COMPLIANCE
35	REF-EMP	REFERRED FOR EMPLOYMENT
36	--	RESERVED FOR FUTURE USE
37	--	RESERVED FOR FUTURE USE

38	--	RESERVED FOR FUTURE USE
39	--	RESERVED FOR FUTURE USE
40	F-SAT-PR	TERMINATED DUE TO FAILURE TO MAKE SATISFACTORY PROGRESS
42	120-DA-PA	PA SANCTION - 120 DAYS
43	IN-SANC	INITIAL SANCTION
44	SANC-CON	SANCTION CONCLUDED
46	3-MO-NOT	3 MONTH NOTICE DUE
47	CC	IN RECEIPT OF CHILD CARE
48	NO-CC	CHILD CARE UNAVAILABLE
49	CC-NREQ	CHILD CARE NOT REQUIRED
50	CONCIL	CONCILIATION

**09309 EMPLOYMENT STATUS 2 N (cont.)**

51	CHD-AGE	YOUNGEST CHILD AGING OUT OF ADC
52	U24-ND-W	UNDER 24 AND EITHER NO HS DIPLOMA OR NO RECENT WORK EXPERIENCE
53	LT-RECPT	LONG TERM RECIPIENT
54	NON-TRTG	NON TARGET GROUP MEMBER

**09310 EMPLOYMENT EFFECTIVE DATE 6 N**

**09311 EMPLOYMENT ANTICIPATED COMPLETION DATE 6 N**

**09312 EMPLOYMENT TITLE 9 AN**

**09315 EMPLOYMENT PARTICIPATING AGENCY 28 AN**

**09316 EMPLOYMENT AGENCY STREET 35 AN**

**09317 EMPLOYMENT AGENCY CITY 15 AN**

**09318 EMPLOYMENT AGENCY STATE 2 AN**

**09319 EMPLOYMENT AGENCY ZIP 5 N**

**09320 EMPLOYMENT AGENCY SOURCE 1 N**

1	TRANS	TRANSITION TO SAME EMPLOYER/WORK SITE
2	SELF	SELF (FOUND OWN JOB NOT RELATED TO INVOLVEMENT IN ACTIVITY)
3	DSS	DSS STAFF
4	JTPA	JTPA

5	DOL	DOL
6	OTHER	OTHER

**09321 EMPLOYMENT HOURLY RATE 4 N**

**09322 COUNT OF EMPLOYMENT HOURS PER WEEK 3 AN**

**09330 EMPLOYMENT WGS FILE DATE 6 N**

**09331 PA AUTOMATIC WGS ORIGIN CODE 1 N**

2	AUTO-EMP	AUTO EMPLOYMENT - SYSTEM GENERATED
4	AUTO-SAN	AUTO SANCTION - SYSTEM GENERATED
6	AUT-TEAP	AUTO-TEAP - SYSTEM GENERATED

**09332 PA AUTOMATIC WELFARE GRANT SAVINGS (WGS) 6 N**

**09333 PA AUTOMATIC WGS STORAGE DATE 6 N**

**09335 PA MANUAL WGS LINE NUMBER 2 AN**

**09336 PA MANUAL WGS ORIGIN CODE 1 N**

1	MAN-EMP	MANUAL EMPLOYMENT
3	MAN-SANC	MANUAL SANCTION
5	MAN-TEAP	MANUAL TEAP

**09337 PA MANUAL WELFARE GRANT SAVINGS (WGS) 6 N**

**09338 PA MANUAL WGS STORAGE DATE 6 N**

**09340 EMPLOYMENT LOCAL DATA 89 AN**

**09410 IRCS RESOURCE TYPE CODE 3 AN**

EO1	SAL-WGE	SALARIES, WAGES
E05	IRE-IF	IRREGULAR OR INFREQUENT INCOME
E06	OT	OTHER EARNINGS
E07	VISTA	VOLUNTEERS IN SERVICE TO AMERICA (FS ONLY)
E08	SV-P	SEVERANCE PAY
E09	FDE-INC	FAMILY DAY CARE PROVIDER INCOME
E18	EAR-IN-C	EARNED INCOME CREDIT (FS ONLY)

E20	BUS	NET BUSINESS INCOME
E31	TEAP	EARNING FROM TEAP
E35	STEP	SCHOOL TO WORK EMPLOYMENT PROGRAM (FS ONLY)
E40	ERN-JTPA	EARNINGS FROM JTPA
E44	OVR	OFFICE VOCATIONAL REHABILITATION
R22	VEH	VEHICLES
R26	BUR-PLT	BURIAL PLOTS
R86	INC-T-REF	INCOME TAX REFUND
R87	NXRPROP	NON-EXEMPT REAL PROPERTY
R88	LIFE-INS	CASH VALUE OF LIFE INSURANCE
R98	OTH-LIQ	OTHER LIQUID RESOURCE
R99	OTH-NON	OTHER NON-LIQUID RESOURCE

**09410 IRCS RESOURCE TYPE CODE 3 AN (cont.)**

U03	D-SBM-IM	ANY DIVIDENDS, INTEREST OR PERIODIC RECEIPTS FROM STOCKS, BONDS, MORTGAGES, BANK INTEREST, TRUST FUNDS, ANNUITIES, CREDIT UNIONS, ESTATES, ETC.
U07	DI-VET-B	DISABLED VETERAN'S BENEFITS (NON-SERVICE CONNECTED)
U11	DI-VET-S	DISABLED VETERAN'S BENEFITS (SERVICE CONNECTED)
U33	NYS-DI-I	NYS DISABILITY INSURANCE
U35	RR-BEN-D	RAILROAD RETIREMENT BENEFIT - DEPENDENT
U38	RR-BEN	RAILROAD RETIREMENT BENEFIT
U39	RET-BEN	RETIREMENT BENEFITS (PENSION)
U42	SSI-DI-B	SOCIAL SECURITY DISABILITY BENEFIT
U43	SS-SUR-B	SOCIAL SECURITY SURVIVOR'S BENEFIT
U44	SS-RET-B	SOCIAL SECURITY RETIREMENT BENEFIT
U45	SSI	SSI BENEFIT
U46	SS-BEN-D	SOCIAL SECURITY BENEFIT - DEPENDENT
U49	UIB	UNEMPLOYMENT INSURANCE BENEFIT COMPENSATION
U50	UNION-B	UNION BENEFITS
U55	VET-B	VETERAN'S PENSIONS OR BENEFIT
U59	WKMN-CMP	WORKMEN'S COMPENSATION
U73	STU-ERN	EARNINGS OF A CHILD OR MINOR WHO IS A FULL OR PART-TIME STUDENT WHO IS NOT EMPLOYED FULL-TIME (PA ONLY)
U74	EAR-JTPA	EARNINGS OF A CHILD FROM JTPA (PA ONLY)
U79	INC-T-IN	INCOME FROM TRUST FUND OF AN INFANT

**Liquid Resources**

R01	CSH-HND	CASH ON HAND
R02	BANK-CC	BANK ACCOUNTS
R03	SECURIT	STOCKS, BONDS, SECURITIES
R04	PRMSNOT	PROMISSORY NOTES
R05	MORTGAG	MORTGAGES, CONDITIONAL SALES, CONTRACTS
R06	TRST-FND	TRUST FUNDS
R07	PIA	PIA SAVINGS ACCOUNTS (MA ONLY)
R08	LSP	LUMP SUM PAYMENTS (MA ONLY)
R09	BUR-RES	BURIAL RESERVE
R98	OTH-LIQ	OTHER LIQUID RESOURCE

**09410 IRCS RESOURCE TYPE CODE 3 AN (cont.)**

**Non-Liquid Resources**

R22	VEH	VEHICLES
R26	BUR-PLT	BURIAL PLOTS
R87	NXRPROP	NON-EXEMPT REAL PROPERTY
R88	LIFE-INS	CASH VALUE OF LIFE INSURANCE
R99	OTH-NON	OTHER NON-LIQUID RESOURCES

**09412 IRCS RESOURCE AMOUNT 7 N**

**09413 IRCS RESOURCE FROM DATE 4 N**

**09414 IRCS RESOURCE TO DATE 4 N**

**09415 IRCS RESOURCE STORE DATE 6 N**

**09417 IRCS ACCOUNT/POLICY NUMBER 20 AN**

**09704 SSA VERIFIED SOCIAL SECURITY NUMBER 9 N**

**11002 EXPANDED ELIGIBILITY AMOUNT 7 N**

**11003 PAYOR OF PART B CODE 1 N**

1	PAID BY APPLICANT/RECIPIENT
2	PAID BY NEW YORK STATE

- 3 PAID BY RAILROAD RETIREMENT BOARD
- 4 OTHER

**11004 FUTURE RECOUPMENT CLAIM TYPE CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**11005 FUTURE RECOUPMENT BALANCE AMOUNT 5 N**

**11006 SHELTER INPUT AMOUNT 7 N**

**11007 SHELTER FREQUENCY CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**11008 PAID SHELTER AMOUNT 7 N**

**11009 SHELTER RESOURCE CODE 1 AN**

- I INCOME SHELTER PAID FROM INCOME
- R RESOURCE SHELTER PAID FROM RESOURCES

**11010 BASIC ALLOWANCE 7 N**

**11011 FS TOTAL SHELTER RELATED EXPENSE AMOUNT 7 N**

**11012 PA REDUCTION AMOUNT FOR FAILURE TO COMPLY WITH LEARNFARE 7 N**

**11013 PA REDUCTION DATE 8 AN**

**11014 MA ELIGIBILITY CODE 1 AN**

**11015 PRORATA SANCTION AMOUNT 7 N**

**11016 SANCTION AMOUNT 7 N**

**11017 NEW RESIDENT REDUCTION AMOUNT 7 N**

**11018 HISTORICAL ENERGY RESTRICTION AMOUNT 7 N**

**11019 ENERGY RESTRICTION AMOUNT 7 N**

**11020 SHELTER ALLOWANCE 7 N**

**11021 HISTORY SHELTER RESTRICTED AMOUNT 7 N**

**11022 PUBLIC ASSISTANCE NON-CASH GRANT AMOUNT 7 N**



- 11023 HISTORICAL CLAIM TOTAL AMOUNT 7 N
- 11024 FOOD STAMP CLAIM AMOUNT FOURTH OCCURRENCE 7 N
- 11025 TOTAL ACTUAL SHELTER COST 7 N
- 11026 PA SHELTER RESTRICTED AMOUNT 7 N
- 11028 SHELTER RESTRICTED INDICATOR 1 N

See [WMS Card Code Index](#) for a list of code descriptions/values.

- 11029 SHELTER PRORATION INDICATOR 1 A

See [WMS Card Code Index](#) for a list of code descriptions/values.

- 11030 PA WATER AMOUNT 7 N
- 11032 HISTORICAL PUBLIC ASSISTANCE NON-CASH GRANT AMOUNT 7 N
- 11034 EMPLOYMENT SANCTIONED SAVINGS AMOUNT 7 N
- 11035 PA ACTUAL WATER AMOUNT 7 N
- 11038 WATER RESTRICTED INDICATOR 1 AN

X RESTRICTED SEPARATE CHECK

- 11040 FUEL FOR HEATING AMOUNT 7 N
- 11048 FUEL RESTRICTED INDICATOR 1 AN

X RESTRICTED

- 11050 HOME ENERGY ALLOWANCE 7 N
- 11051 HP BENEFIT TYPE 1 AN
- 11052 SUPPLEMENTAL HOME ENERGY ALLOWANCE 7 N
- 11053 HP VULNERABILITY INDICATOR 1 AN
- 11054 FOOD STAMP GRANT SAVINGS AMOUNT 7 N
- 11055 HP CATEGORICAL ELIGIBILITY INDICATOR 1 AN
- 11056 HP ACTUAL ENERGY COST AMOUNT 7 N
- 11057 HP PROJECT ANNUAL ENERGY COST AMOUNT 7 N
- 11058 HP HEAP EMERGENCY BILL SUBMITTED AMOUNT 7 N

**11059 HP HEAP REGULAR BENEFIT AMOUNT 7 N**

**11060 RESTRICTED AMOUNT 7 N**

**11062 PA ACTUAL RESTRICTED UTILITY COST 7 N**

**11064 HP HEAP EMERGENCY BENEFIT AMOUNT 7 N**

**11065 HISTORY UTILITY RESTRICTED AMOUNT 7 N**

**11069 FHP ELIGIBLE AMOUNT 7 N**

**11070 FURNACE PROPANE AMOUNT 7 N**

**11072 RENTERS BENEFIT RECEIVED INDICATOR CODE 1 AN**

**11074 HEAP SHELTER TYPE CODE 2 AN**

01	RNT-PRIV	RENT PRIVATE
02	RNT-PUBL	RENT PUBLIC
03	OWN-HOME	OWN HOME
07	ML-CAMPE	MIGRANT LABOR CAMP
10	DR-AL-TR	CONGREGATE CARE LEVEL II – DRUG/ALCOHOL TREATMENT
12	ALC-TRMT	NON-LEVEL II ALCOHOL TREATMENT FACILITY
13	ST-OP-C-R	STATE OPERATED COMMUNITY RESIDENCE
15	C-CARE-IR	CONGREGATE CARE LEVEL I – FAMILY CARE
16	C-CARE-II	CONGREGATE CARE LEVEL II – NOT DRUG/ALCOHOL TREAT

**11080 ADDITIONAL NEEDS TYPE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**11086 PA ADDITIONAL NEEDS TYPE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**11087 FS ADDITIONAL NEEDS TYPE 2 AN**

15	FS-1-TM	FS INSTALLATION FEE
16	FS-EX-P	PRORATED FS INSTALLATION FEE

**11090 PA ADDITIONAL ALLOWANCES 7 N**

- 11092 HISTORY PA ADDITIONAL AMOUNT 7 N**
- 11095 PA ACTUAL ADDITIONAL NEEDS AMOUNT 7 N**
- 11098 ADDITIONAL NEEDS RESTRICTED INDICATOR 1 AN**
  - X RESTRICTED
- 11100 TOTAL NEEDS 7 N**
- 11101 CHRONIC CARE COMMUNITY PA STANDARD 7 N**
- 11102 CHRONIC CARE COMMUNITY 150% OF STATE-STANDARD 7 N**
- 11103 CHRONIC CARE COMMUNITY STATE STANDARD 7 N**
- 11104 SSI PA STANDARD 7 N**
- 11108 HISTORY MONTHLY GRANT AMOUNT 7 N**
- 11109 HISTORY SEMI-MONTHLY GRANT AMOUNT 7 N**
- 11110 PUBLIC ASSISTANCE CASH GRANT 7 N**
- 11111 PA SEMI-MONTHLY CASH GRANT 7 N**
- 11112 PA SEMI-MONTHLY NON-CASH GRANT 7 N**
- 11115 PA FIRST MONTH DEFICIT AMOUNT 7 N**
- 11118 PA FIRST MONTH INDICATOR 1 AN**
- 11120 SHELTER TYPE 2 N**
  - See [WMS Card Code Index](#) for a list of code descriptions/values.
- 11121 FS SHELTER TYPE 2 N**
  - See [WMS Card Code Index](#) for a list of code descriptions/values.
- 11130 FUEL FOR HEATING TYPE 1 AN**
  - See [WMS Card Code Index](#) for a list of code descriptions/values.
- 11132 FUEL FOR HEATING PERIOD 2 N**
  - 08 EIGHT MONTH PERIOD
  - 12 TWELVE MONTH PERIOD
- 11133 FUEL 8 MONTH INDICATOR 1 AN**

Y FUEL INCLUDED IN BUDGET  
N FUEL NOT INCLUDED IN BUDGET

**11140 SERVICES VENDOR PROVIDER ID NUMBER 8 AN**

**11160 TOTAL BUDGET SURPLUS OR DEFICIT CODE 1 AN**

D DEFICIT DEFICIT  
S SURPLUS SURPLUS  
W WARNING WARNING

**11161 TOTAL BUDGET SURPLUS OR DEFICIT AMOUNT 7 N**

**11165 PA HISTORY SUPRLUS DEFICIT CODE 1 AN**

**11170 RECOUPMENT/CLAIM TYPES 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**11171 PA RECOUPMENT OPEN BALANCE 7 N**

**11172 PA RECOUPMENT PERCENTAGE 4 AN**

**11174 PA RECOUPMENT NUMBER OF MONTHS 3 AN**

**11175 PA RECOUPMENT TOTAL AMOUNT 7 N**

**11176 PA RECOUPMENT AMOUNTS 7 N**

**11177 PA RECOUPMENT REMAINDER 7 N**

**11180 RESTRICTED GRANT AMOUNT 7 N**

**11190 PA GRANT ADJUSTMENT 7 N**

**11220 FOOD STAMPS SHELTER AMOUNT 7 N**

**11225 FS ACTUAL SHELTER AMOUNT 7 N**

**11230 FS WATER AMOUNT 7 N**

**11235 FS ACTUAL WATER AMOUNT 7 N**

**11240 FS HEAT ALLOWANCE 7 N**

**11245 ACTUAL HEATING FUEL COST 7 N**

**11250 FOOD STAMPS DISPOSAL AMOUNT 7 N**

- 11255 FS ACTUAL DISPOSAL COST 7 N
- 11260 FS UTILITY ALLOWANCE 7 N
- 11265 FS ACTUAL UTILITY COST 7 N
- 11270 FS TELEPHONE ALLOWANCE 7 N
- 11275 FS ACTUAL TELEPHONE COST 7 N
- 11290 FS ADDITIONAL ALLOWANCE 7 N
- 11295 FS ACTUAL NEEDS AMOUNT 7 N
- 11300 FOOD STAMP TOTAL SHELTER EXPENSE 7 N
- 11310 FS EXCESS SHELTER ADJUSTMENT 7 N
- 11320 FS CATEGORICAL ELIGIBILITY INDICATOR 1 A

See [WMS Card Code Index](#) for a list of code descriptions/values.

- 11370 RECALCULATION INDICATOR 1 N
- 11371 FS CLAIM BALANCE AMOUNT 7 N
- 11374 FS CLAIM MONTHS 2 AN
- 11375 FS TOTAL CLAIM AMOUNT 7 AN
- 11376 FS CLAIM AMOUNT 7 N
- 11377 FS CLAIM REMAINDER AMOUNT 7 N
- 11378 FS CLAIM NUMBER OF PERSONS DISQUALIFIED 1 N
- 11400 APPLICABLE STANDARD FOR MA BUDGET 1 AN
  - \* STANDARD USED
- 11401 APPLICABLE STANDARD CODE 1 AN
  - \* STANDARD USED
- 11402 COMMUNITY APPLICABLE STANDARD CODE 1 AN
  - \* STANDARD USED
- 11410 MA LEVEL AMOUNT 7 N

- 11411 SSI MA LEVEL CHILD AMT 7 N**
- 11412 SSI MA LEVEL 7 N**
- 11413 CHRONIC CARE COMMUNITY MA LEVEL 7 N**
- 11414 CHRONIC CARE MA LEVEL 7 N**
- 11420 MONTHS FOR EXCESS 1 N**
  - 2 EXC-2 TWO MONTHS
  - 3 EXC-3 THREE MONTHS
  - 4 EXC-4 FOUR MONTHS
  - 5 EXC-5 FIVE MONTHS
  - 6 EXC-6 SIX MONTHS
- 11430 AMOUNT OF MA MONTHS EXCESS 7 N**
- 11431 SSI VARIABLE MONTHS EXCESS AMOUNT 7 N**
- 11460 TOTAL MA BUDGET SURPLUS CODE 7 N**
  - X SURPLUS
  - E ERROR
- 11461 TOTAL MA BUDGET SURPLUS AMOUNT 7 N**
- 11462 TOTAL SSI EXCESS AMOUNT 7 N**
- 11463 MA SSI TOTAL SURPLUS CODE 1 AN**
  - X SURPLUS
- 11464 SSI-CHILD TOTAL SURPLUS CODE 1 AN**
  - X SURPLUS
- 11465 SSI-CHILD TOTAL SURPLUS AMOUNT 7 N**
- 11466 CHRONIC CARE COMMUNITY TOTAL SURPLUS AMT 7 N**
- 11467 CHRONIC CARE COMMUNITY TOTAL SURPLUS CODE 1 AN**
- 12001 PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE DATE 8 N**
- 12003 PERSONAL IDENTIFICATION NUMBER (PIN) UPDATE TIME 8 N**
- 12004 COUNT OF ID CARD HISTORY RECORDS 5 N**
- 12008 ID CARD VENDOR FLAG 1 AN**

BLANK CASE / CARD NUMBER HAS NOT BEEN POSTED  
D CARD NUMBER INACTIVATED FOR VENDOR INTERFACE VIA WMS ID CARD ENTRY SCREEN, DO NOT SEND TO VENDOR  
X CASE / CARD NUMBER HAS BEEN POSTED

**12009 ID CARD PROGRAM AREA 1 AN**

F FOOD STAMPS

**12010 CASE KEY-CONTROL 12 N**

**12013 ID CARD TRANSACTION DATE 8 N**

**12014 ID CARD TRANSACTION TYPE CODE 1 AN**

A ADD ID CARD NUMBER ACTIVATED VIA WMS ID CARD ENTRY SCREEN  
C CHNG UPSTATE ID CARD VOID DATE VIA WMS ID CARD ENTRY SCREEN (FOR NYSDSS TEMPORARY PAPER COMMON ID CARD)  
D DEMO ID CARD NUMBER GENERATED AS A RESULT OF A WMS DATA ENTRY CHANGE TO AN INDIVIDUAL'S DEMOGRAPHICS OR CARD CODE  
E COND ID CARD NUMBER GENERATED PER THE ID CARD VENDOR'S RECEIPT OF DATA FROM WMS DATA ENTRY WHICH COMPLETES A LDSS F-3 CONDITIONAL EMBOSS MET TRANSACTION  
F FS ID CARD NUMBER GENERATED AS THE RESULT OF FOOD STAMP ELIGIBILITY ESTABLISHED VIA WMS DATA ENTRY  
L F-3 ID CARD NUMBER REPLACEMENT GENERATED BY A LDSS REQUEST USING THE ID CARD VENDOR MET TERMINAL F-3 TRANSACTION  
M MEDI ID CARD NUMBER GENERATED AS THE RESULT OF MEDICAID ELIGIBILITY ESTABLISHED VIA WMS DATA ENTRY

**12014 ID CARD TRANSACTION TYPE CODE 1 AN (cont.)**

O OTH ID CARD NUMBER GENERATED FOR A REASON OTHER THAN THOSE SPECIFICALLY DEFINED  
P PHOT ID CARD GENERATED AS THE RESULT OF THE ID CARD VENDOR'S RECEIPT OF AN ID CARD PHOTO FROM THE LDSS  
R RFSH ID CARD NUMBER GENERATED AS A RESULT OF A WMS REFRESH OF THE ID CARD VENDOR'S DATABASE  
S SYST ID CARD NUMBER GENERATED PER THE COMMON BENEFIT ID CARD CONVERSION, OR ANOTHER SPECIAL WMS PROCESS  
W WMS ID CARD NUMBER GENERATED BY THE ID CARD VENDOR, PER WMS NON-SERVICES DATA ENTRY EMBOSS REQUEST, FDR CONDITIONAL EMBOSS, RECEIPT OF PHOTO, ETC.

**12015 ID CARD TRANSACTION TIME 8 N**

**12016 ID CARD FIRST USE DATE 8 N**

**12017 ID CARD FOOD STAMPS VENDOR DATE OF CONFIRMATION 6 N**

**12018 RUN START DATE/TIME GROUP 14 N**

**12019 ID CARD PIN UPDATE CODE 1 AN**

- 0 DO NOT UPDATE PIN INFORMATION
- 1 UPDATE PIN INFORMATION
- R REMOVE PIN INFORMATION AND ENTIRE RECORD FOR CLIENT KEY FROM VENDOR DATABASE (INCLUDING ALL CASE NUMBER ALL ID CARD NUMBER INFORMATION)

**12026 ID CARD CASE UPDATE CODE 1 AN**

- 0 DO NOT UPDATE CASE INFORMATION
- 1 ADD/UPDATE CASE NUMBER AND CASE'S INFORMATION FOR CLIENT'S RECORD
- 2 DELETE CASE NUMBER AND GET CASE'S INFORMATION FROM CLIENT'S RECORD

**12034 RUN START DATE - CENTURY 2 N**

**12041 RUN START DATE - YEAR 2 N**

**12042 RUN START DATE - MONTH 2 N**

**12043 RUN START DATE - DAY 2 N**

**12044 RUN START TIME - HOUR 2 N**

**12045 RUN START TIME - MINUTE 2 N**

**12046 RUN START TIME - SECOND 2 N**

**12047 RUN RESTART DATE/TIME GROUP 14 N**

**12048 RUN RESTART DATE 8 N**

**12049 RUN RESTART DATE - CENTURY 2 N**

**12050 DATE OF LAST EXTRACT 8 N**

**12051 CENTURY PORTION OF EMPLOYMENT WGS BATCH PROCESSING DATE 8 AN**

**12052 EMPLOYMENT CHANGE/DELETE FLAG 1 A**

- BLANK NO CHANGE (AS ORIGINALLY STORED)



C CHANGE  
D DELETE

**12053 EMPLOYMENT DISTRICT INVOLVEMENT BIT 1 N**

0 NO  
1 YES

**12054 CENTURY PORTION EMPLOYMENT ENTRY DATE 8 AN**

**12055 EMPLOYMENT LOCAL DATA INDICATOR 2 N**

**12056 EMPLOYMENT STORAGE DATE 8 N**

**12057 Y2K EMPLOYMENT UPDATE DATE 8 N**

**12058 EMPLOYMENT UPDATE CODE 1 AN**

**12059 EMPLOYMENT VERSION NUMBER 5 N**

**12060 LAST ACTIVE LINE NUMBER LAST 2 N**

**12061 NUMBER OF EMPLOYMENT ACTIVITIES 5 N**

**12062 NUMBER OF EMPLOYMENT PARTICIPATION SITES 5 N**

**12063 NUMBER OF EMPLOYMENT WGS 5 N**

**12064 PA AUTO WGS LINE NUMBER 2 AN**

**12065 RUN RESTART DATE - YEAR 2 N**

**12066 RUN RESTART DATE - MONTH 2 N**

**12067 RUN RESTART DATE - DAY 2 N**

**12068 RUN RESTART TIME 6 N**

**12069 RUN RESTART TIME - HOUR 2 N**

**12070 RUN RESTART TIME - MINUTE 2 N**

**12071 RUN RESTART TIME - SECOND 2 N**

**12072 CHECKPOINT DATE/TIME GROUP 14 N**

**12073 CHECKPOINT DATE 8 N**

**12074 CHECKPOINT DATE - CENTURY 2 N**

**12075 CHECKPOINT DATE - YEAR 2 N**

**12076 CHECKPOINT DATE - MONTH 2 N**

**12077 CHECKPOINT DATE - DAY 2 N**

**12078 CHECKPOINT TIME 6 N**

**12079 CHECKPOINT TIME - HOUR 2 N**

**12080 CAP CLEARANCE FLAG 1 AN**

- \* A ADC CASE WAS PARTICIPATING IN CAP WITH A SPECIAL PROGRAM CODE (01-420) OF A.
- # B ADC CASE WAS PARTICIPATING IN CAP WITH A SPECIAL PROGRAM CODE (01-420) OF B
- ? C ADC CASE WAS PARTICIPATING IN CAP WITH A SPECIAL PROGRAM CODE (01-420) OF C

**12081 CHECKPOINT TIME - MINUTE 2 N**

**12082 CHECKPOINT TIME - SECOND 2 N**

**12083 CHECKPOINT INFORMATION TEXT 6500 AN**

**12084 RUN END DATE/TIME GROUP 14 N**

**12085 RUN END DATE - CENTURY 2 N**

**12086 RUN END DATE - YEAR 2 N**

**12087 RUN END DATE - MONTH 2 N**

**12088 RUN END DATE - DAY 2 N**

**12089 RUN END TIME - HOUR 2 N**

**12090 END RUN TIME - MINUTE 2 N**

**12091 RUN END TIME - SECOND 2 N**

**12092 ARCHIVE DATE - CENTURY 2 N**

**12093 ARCHIVE DATE - YEAR 2 N**

**12094 ARCHIVE DATE - MONTH 2 N**

**12095 ARCHIVE DATE - DAY 2 N**

**12096 LAST RUN ENTRY GROUP 3 N**

**12097 CASE ACTION EFFECTIVE DATE - CENTURY 2 N**

**12098 CASE ACTION EFFECTIVE DATE - YEAR 2 N**

**12099 CASE ACTION EFFECTIVE DATE - MONTH 2 N**

**12100 CASE ACTION EFFECTIVE DATE - DAY 2 N**

**12101 CASE ACTION PROCESS CODE 2 N**

**12103 VENDOR POST STATUS CODE 1 AN**

1	REQ	CARD REQUESTED – INFORMATION TRANSMITTED
2	REQ-ACK	CARD REQUESTED – VENDOR TRANSMISSION ACKNOWLEDGED
3	PROD	CARD PRODUCED

**12105 ADDRESS CHANGED INDICATOR FLAG 1 AN**

N	N	NO ADDRESS CHANGE
Y	Y	ADDRESS CHANGE

**12106 REFERRAL NUMBER 5 N**

**12135 ID CARD ISSUE TIME 8 N**

**12144 ID CARD FIRST USE TIME 8 N**

**12149 ID CARD VENDOR ID CODE 2 AN**

DB	DN-PAFS	DOWNSTATE PA/FS BENEFITS VENDOR
DC	DN-CRD	DOWNSTATE CARD VENDOR
DM	DN-MA	DOWNSTATE MA VENDOR
UB	UP-PAFS	UPSTATE PA/FS BENEFITS VENDOR
UC	UP-CRD	UPSTATE CARD VENDOR
UM	UP-MA	UPSTATE MA VENDOR

**12151 TRANSMIT COUNT 5 N**

**12161 TEMPORARY NUMBER SPAWN 9 N**

- 12166 DAYS TEMP – ONLY COUNT 5 N**
- 12167 DAYS TEMPORARY VOID-DATE COUNT 5 N**
- 12168 DAYS PERMANENT VOID-DATE COUNT 5 N**
- 12169 DAYS WAIT FOR PHOTO COUNT 5 N**
- 12171 CARD SIGNATURE INDICATOR FLAG 1 AN**
- |   |   |              |
|---|---|--------------|
| N | N | NO SIGNATURE |
| Y | Y | SIGNATURE    |
- 12172 CARD FINGERPRINT INDICATOR FLAG 1 AN**
- |   |   |                |
|---|---|----------------|
| N | N | NO FINGERPRINT |
| Y | Y | FINGERPRINT    |
- 12173 DAYS REFERRAL VOID-DATE COUNT 5 N**
- 12185 HR PAYMENT OVERRIDE CODE 2 AN**
- 12198 VENDOR SPAWN NUMBER 5 N**
- 12199 VENDOR TRANSMISSION SEQUENCE NUMBER 5 N**
- 12200 VENDOR TRANSACTION PROGRAM NAME 12 AN**
- 12201 VENDOR USERID TEXT 8 AN**
- 12202 VENDOR PASSWORD TEXT 8 AN**
- 12203 VENDOR SYNCHRONIZE LEVEL NUMBER 1 N**
- 12242 FOOD STAMPS SUA ELIGIBILITY END DATE - CENTURY 2 N**
- 12243 FOOD STAMPS SUA ELIGIBILITY END DATE - YEAR 2 N**
- 12244 FOOD STAMPS SUA ELIGIBILITY END DATE - MONTH 2 N**
- 12253 40 QUARTER REQUEST SUBMISSION DATE 8 AN**
- 12254 REQUEST RESULT DATE**
- 12296 DOMESTIC VIOLENCE WAIVER TYPE CODE 1 AN**
- 13032 CENTURY DATES GROUP LEVEL 128 AN**

**13033 MA BOTTOM LINE CENTURY DATES 58 AN**

**13390 YEAR 2000 RECORD COMPLIANCE FLAG 1 N**

**14001 REPLACED CHECK/ATP NUMBER 12 N**

**14002 REPLACEMENT PAYMENT LINE NUMBER 2 N**

**14003 RECOUPMENT PAYMENT LINE NUMBER 2 N**

**14004 RECOUPMENT PAY LINE AMOUNT 6 N**

**14005 ENERGY RESTRICTION PAYMENT LINE NUMBER 2 N**

**14006 ENERGY RESTRICTION PAYMENT AMOUNT 6 N**

**14009 LOCAL ACTION CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14010 PAYMENT TYPE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14011 PAYMENT AMOUNT 6 N**

**14012 PAYMENT PERIOD 12 N**

**14013 MANUAL ISSUE CHECK/ATP/VOUCHER NUMBER 12 AN**

**14020 METHOD OF PAYMENT INDICATOR 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14022 METHOD OF PAYMENT CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14023 VENDOR IDENTIFICATION 8 AN**

**14024 HEAP VENDOR ID 8 N**

**14025 HEAP CUSTOMER ACCOUNT NUMBER 20 N**

**14030 PICK-UP CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14035 SPECIAL CLAIMING CATEGORY 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14040 PAYMENT SCHEDULE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14045 PAYMENT ISSUE CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**14070 TOTAL SHELTER IN ONE CHECK INDICATOR 1 A**

- T RESTRICTED SHELTER TO BE PAID IN A TWO-PARTY CHECK
- V RESTRICTED SHELTER TO BE PAID BY VOUCHER TO THE LANDLORD

**15002 PRIOR RECEIPT IDENTIFICATION NUMBER 11 N**

**15007 MAILING IN CARE OF NAME/ADDRESS 16 AN**

**15008 RECIPIENT MAILING ADDRESS - STREET 35 AN**

**15009 RECIPIENT MAILING ADDRESS - ZIP CODE 5 AN**

**15010 RECIPIENT DATE OF BIRTH 7 AN**

**15012 RECIPIENT SEX 1 AN**

**15014 RECIPIENT LOCAL OFFICE NUMBER 3 AN**

**15015 RECIPIENT AID CATEGORY/MONEY PAYMENT TYPE 2 AN**

**15016 RECIPIENT ELIGIBILITY BEGIN/END DATE 12 AN**

**15027 RECIPIENT MEDICAID COVERAGE CODE 1 AN**

**15031 RECIPIENT SOCIAL SECURITY/RAILROAD RETIREMENT ACCOUNT NUMBER 9 AN**

**15035 RECIPIENT CARD INDICATOR 1 AN**

**15036 RECIPIENT SYSTEM ID 1 AN**

**15038 RECIPIENT OPEN/CLOSE DATE 6 AN**

**15018 RECIPIENT OTHER INSURANCE CODE 6 AN**

**15020 RECIPIENT OTHER INSURANCE POLICY NUMBER 15 AN**

**15021 RECIPIENT BUY-IN ELIGIBILITY STATUS CODE 1 AN**

**15049 PROVIDER TYPE CODE 3 AN**

000 CHAIN GROUP  
001 SHARED HEALTH FACILITY  
002 DENTAL GROUPS  
003 BILLING SERVICE GROUP/EMEVS  
004 PHYSICIAN GROUP  
005 PODIATRIST GROUP  
006 THERAPY GROUP  
007 PREPAYMENT CAPITATION PLAN GROUP  
009 MULTI-TYPE GROUP  
012 CHILD HEALTH CARE INSTITUTION  
014 CHIROPRACTOR/PORT-XRAY-SVC, QUALIFIED MEDICARE BENEFICIARY SERVICES  
016 DIAGNOSTIC AND TREATMENT CENTER  
018 DENTAL SCHOOL CLINIC  
020 DENTIST  
022 CAPITATION PROVIDER  
026 HOME CARE AGENCY  
028 HOSPITAL  
032 MEDICAL APPLIANCE DEALER  
038 LONG TERM CARE FACILITY  
040 OPTICIAN  
042 OPTOMETRIST  
044 PHARMACY

**15049 PROVIDER TYPE CODE 3 AN (cont.)**

046 PHYSICIAN  
048 PERSONAL CARE AIDE  
050 PODIATRIST  
052 NURSE  
058 CLINICAL PSYCHOLOGIST  
060 TRANSPORTATION  
062 THERAPIST  
064 INSURANCE CARRIER  
066 SOCIAL SECURITY ADMINISTRATION  
100 LABORATORY

- 888 UNENROLLED PROVIDER, NOT ON PROVIDER FILE
- 916 OUT OF STATE DIAGNOSTIC AND TREATMENT CENTER
- 928 OUT OF STATE HOSPITAL
- 15790 HEALTH INSURANCE SOURCE OF DATA 1 AN**
- 15842 HEALTH INSURANCE POLICYHOLDER-NAME 21 AN**
- 15843 HEALTH INSURANCE POLICYHOLDER SOCIAL SECURITY NUMBER 9 AN**
- 15844 HEALTH INSURANCE POLICYHOLDER RELATIONSHIP TO CASE MEMBER 1 N**
- 15847 HEALTH INSURANCE SOURCE-STREET ADDRESS 35 AN**
- 15848 HEALTH INSURANCE SOURCE-CITY 15 AN**
- 15849 HEALTH INSURANCE SOURCE-STATE 2 AN**
- 15850 HEALTH INSURANCE-ZIP CODE 9 AN**
- 15883 RECIPIENT MAILING ADDRESS - CITY/TOWN 15 AN**
- 15927 TRANSACTION DISTRICT 2 AN**
- 15928 CASE NUMBER 10 AN**
- 16099 PRINCIPLE PROVIDER INDICATOR 1 AN**
- 16100 RESTRICTED RECIPIENT INDICATOR 1 AN**
- 16144 RECIPIENT PCP INDICATOR FLAG 1 AN**
- 16184 PERIOD ENDING DATE 8 N**
- 16508 HMO INDICATOR 1 AN**
- 16528 CENTURY OF EMEV CREATE DATE 8 AN**
- 16529 CREATION TIME 6 N**
- 16401 MOAS EMEVS SEQUENCE NUMBER 3 N**
- 16571 OL NEW PART A COUNT 10 N**
- 16572 OL END PART A COUNT 10 N**
- 16573 OL NEGATE PART A COUNT 10 N**
- 16574 OL EXTEND PART A COUNT 10 N**



16575 OL CHANGE PART A COUNT 10 N  
16576 OL NEW PART B COUNT 10 N  
16577 OL END PART B COUNT 10 N  
16578 OL NEGATE PART B COUNT 10 N  
16579 OL EXTEND PART B COUNT 10 N  
16580 OL CHANGE PART B COUNT 10 N  
16581 OL NEW INS COUNT 10 N  
16582 OL END INS COUNT 10 N  
16583 OL NEGATE INS COUNT 10 N  
16584 OL EXTEND INS COUNT 10 N  
16585 OL INC INS COV COUNT 10 N  
16586 OL OTHER INS COUNT 10 N  
16587 DL REC IN PART A COUNT 10 N  
16588 DL SKIPPED PART A COUNT 10 N  
16589 DL NEW PART A COUNT 10 N  
16590 DL END PART A COUNT 10 N  
16591 DL NEGATE PART A COUNT 10 N  
16592 DL EXTEND PART A COUNT 10 N  
16593 DL CHANGE PART A COUNT 10 N  
16594 DL REC IN PART B COUNT 10 N  
16595 DL SKIPPED PART B COUNT 10 N  
16596 DL NEW PART B COUNT 10 N  
16597 DL END PART B COUNT 10 N  
16598 DL NEGATE PART B COUNT 10 N  
16599 DL EXTEND PART B COUNT 10 N

16600 DL CHANGE PART B COUNT 10 N  
16601 DL REC IN INS COUNT 10 N  
16602 DL SKIPPED INS COUNT 10 N  
16603 DL NEW INS COUNT 10 N  
16604 DL NEW INS CD COUNT 10 N  
16605 DL END INS COUNT 10 N  
16606 DL NEGATE INS COUNT 10 N  
16607 DL EXTEND INS COUNT 10 N  
16608 DL INC INS COV COUNT  
16609 DL OTHER INS COUNT 10 N  
16610 START DATE 8 N  
16611 BENEFIT PLAN NUMBER 2 N  
16612 INSURANCE COMPANY NAME 35 AN  
16613 EMPLR CONTACT NAME 30 AN  
16615 PREMIUM COST FAMILY AMOUNT 5 N  
16616 POLICY SOURCE CODE 1 AN  
16617 HICFA STATUS CODE 5 AN  
16618 HCFA TAPE DATE 8 N  
16619 MASTER REGIONAL FLAG 1 AN  
16620 NO INSURANCE IND FLAG 1 AN  
16621 INSURANCE GROUP NUMBER 15 AN  
16622 HCFA TRANS CODE 2 AN  
16623 STATISTICS GROUP 800 N  
16624 TRANSACTION DATE TIME 16 N  
16627 HCFA BUY-IN ELIGIBILITY CODE 1 AN

- 16628 START CENTURY DATE 2 N
- 16629 START YEAR DATE 2 N
- 16630 START MONTH DATE 2 N
- 16631 START DAY DATE 2 N
- 16632 END CENTURY DATE 2 N
- 16633 END YR DATE 2 N
- 16634 END MONTH DATE 2 N
- 16635 END DY DATE 2 N
- 16636 TRANSACTION CENTURY DATE 2 N
- 16637 TRANSACTION YEAR DATE 2 N
- 16638 TRANSACTION MONTH DATE 2 N
- 16639 TRANSACTION DAY DATE 2 N
- 16640 TRANSACTION HOUR TIME 2 N
- 16641 TRANSACTION MINUTE TIME 2 N
- 16642 TRANSACTION SECOND TIME 2 N
- 16643 TRANSACTION SEQUENCE NUMBER 2 N
- 16644 DATE OF LAST UPDATE INS GROUP 8 N
- 16645 LAST UPDATE CENTURY DATE 2 N
- 16646 LAST UPDATE YEAR DATE 2 N
- 16647 LAST UPDATE MONTH DATE 2 N
- 16648 LAST UPDATE DAY DATE 2 N
- 16649 DATE OF LAST UPDATE MCA GROUP 8 N
- 16650 DATE OF LAST UPDATE MCB GROUP 8 N
- 16651 DATE OF LAST UPDATE BIA GROUP 8 N
- 16652 DATE OF LAST UPDATE BIB GROUP 8 N

16653 DATE OF LAST UPDATE QMB GROUP 8 N  
16655 LAST UPDATE CENTURY MCA DATE 2 N  
16656 LAST UPDATE YEAR MCA DATE 2 N  
16657 LAST UPDATE MONTH MCA DATE 2 N  
16658 LAST UPDATE DAY MCA DATE 2 N  
16659 LAST UPDATECENTURY MCB DATE 2 N  
16660 LAST UPDATE YEAR MCB DATE 2 N  
16661 LAST UPDATE MONTH MCB DATE 2 N  
16662 LAST UPDATE DATE MCB DATE 2 N  
16663 LAST UPDATE CENTURY BIA DATE 2 N  
16664 LAST UPDATE YEAR BIA DATE 2 N  
16665 LAST UPDATE MONTH BIA DATE 2 N  
16666 LAST UPDATE DAY BIA DATE 2 N  
16667 LAST UPDATE CENTURY BIB DATE 2 N  
16668 LAST UPDATE YEAR BIB DATE 2 N  
16669 LAST UPDATE MONTH BIB DATE 2 N  
16670 LAST UPDATE DAY BIB DATE 2 N  
16671 LAST UPDATE CENTURY QMB DATE 2 N  
16672 LAST UPDATE YEAR QMB DATE 2 N  
16673 LAST UPDATE MONTH QMB DATE 2 N  
16674 LAST UPDATE DAY QMB DATE 2 N  
16675 HCFA TAPE DATE CENTURY DATE 2 N  
16676 HCFA TAPE DATE YEAR DATE 2 N  
16677 HCFA TAPE DATE MONTH 2 N  
16678 HCFA TAPE DATE DAY 2 N

16679 TX DATE TIME GROUP 32 N  
16680 TX DATE TIME 1 72 N  
16681 TX DATE TIME 2 72 N  
16682 TX DATE TIME REDEF GROUP 36 N  
16683 APPLICANT KEY GROUP 10 N  
16684 INDIVIDUAL KEY GROUP 10 AN  
16690 NEW BUY IN A COUNT 10 N  
16691 END BUY IN A COUNT 10 N  
16692 NEGATE BUY IN A COUNT 10 N  
16693 EXTEND BUY IN A COUNT 10 N  
16694 CHANGE BUY IN A COUNT 10 N  
16695 NEW BUY IN B COUNT 10 N  
16696 END BUY IN B COUNT 10 N  
16697 NEGATE BUY IN B COUNT 10 N  
16698 EXTEND BUY IN B COUNT 10 N  
16699 CHANGE BUY IN B COUNT 10 N  
16700 NEW QMB COUNT 10 N  
16701 END QMB COUNT 10 N  
16702 NEGATE QMB COUNT  
16703 EXTEND QMB COUNT 10 N  
16704 CHANGE QMB COUNT 10 N  
16705 DAILY NEW BUY IN A COUNT 10 N  
16706 DAILY END BUY IN A COUNT 10 N  
16707 DAILY NEGATE BUY IN A COUNT 10 N  
16708 DAILY EXTEND BUY IN A COUNT10 N

- 16709 DAILY CHANGE BUY IN A COUNT 10 N
- 16710 DAILY NEW BUY IN B COUNT 10 N
- 16711 DAILY END BUY IN B COUNT 10 N
- 16712 DAILY END BUY IN B COUNT 10 N
- 16713 DAILY EXTEND BUY IN B COUNT 10 N
- 16714 DAILY CHANGE BUY IN B COUNT 10 N
- 16715 DAILY NEW QMB COUNT 10 N
- 16716 DAILY END QMB COUNT 10 N
- 16717 DAILY NEGATE QMB COUNT 10 N
- 16718 DAILY EXTEND QMB COUNT 10 N
- 16719 DAILY CHANGE QMB COUNT 10 N
- 16755 OMH OMRDD LC CODE 3 AN
- 16982 COUNT OF NEW QI1'S 10 N
- 16983 COUNT OUT ENDED QI1'S 10 N
- 16984 COUNT OF QI1'S EXTENDED 10 N
- 16985 COUNT OF QI1'S NEGATED 10 N
- 16986 COUNT OF QI1'S WHO HAVE HAD THEIR COVERAGE CHANGED 10 N
- 16987 COUNT OF NEW QI2'S 10 N
- 16988 COUNT OF QI2'S WITH THIER COVERAGE ENDED 10 N
- 16989 COUNT OF QI2'S THAT HAVE HAD THEIR COVERAGE EXTENDED 10 N
- 16990 COUNT OF QI2'S THAT HAVE BEEN NEGATED 10 N
- 16991 COUNT OF QI2'S WHO HAVE HAD THEIR COVERAGE CHANGED 10 N
- 16992 TOTAL AMOUNT REMAINING OF PREMIUM CAP FOR QI1 AND QI2 10 N
- 17001 FS STANDARD UTILITY ALLOWANCE (SUA) END DATE 6 N
- 17002 FS STANDARD UTILITY ALLOWANCE (SUA) END DATE CODE 1 AN

**17010 FS STANDARD DEDUCTION AMOUNT 7 N**

**17020 FS AGED DISABLED INDICATOR 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**17031 ALTERNATE ADJUSTMENT AMOUNT (BOTTOM-LINE) 7 N**

**17040 FS HEAT EXPENSE INDICATOR 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**17050 FOODSTAMP ALLOTMENT VALUE 7 N**

**17051 FS AUTHORIZATION PERIOD 12 N**

**17052 FOOD STAMP FIRST MONTH ALLOTMENT AMOUNT 7 N**

**17053 FOOD STAMP HISTORY ALLOTMENT AMOUNT 7 N**

**17055 FS REDUCTION AMOUNT 7 AN**

**17059 FOOD STAMP HISTORY RECORD ALLOTMENT 7 N**

**17060 FS UTILITY-EXPENSE INDICATOR 1 A**

X	STD-AMT	GREATER OF THE STANDARD OR ACTUAL AMOUNT
A	ACT-AMT	ACTUAL AMOUNT
N	NO-EXP	NO EXPENSES
2-9	STD-FAC	STANDARD PRORATE FACTOR

**17070 FS TELEPHONE EXPENSE INDICATOR 1 AN**

X	STD-AMT	GREAT OF THE STANDARD OR ACTUAL AMOUNT
N	NO-EXP	NO EXPENSES
2-9	STD-FAC	STANDARD PRORATE FACTOR

**17080 FOOD STAMP QUARTERLY ALLOTMENT AMOUNT 7 N**

**17100 FS ADJUSTED ALLOTMENT VALUE 7 N**

**17101 FS ALLOTMENT ADJUSTMENT 7 N**

**17150 FOOD STAMPS COUPON MIX 12 N**

**17152 FOOD STAMP FIRST MONTH COUPON MIX 12 N**

**17180 FOOD STAMP QUARTERLY COUPON MIX 12 N**

**19021 MEDICAID ID CARD-ISSUE INDICATOR 2 N**

X NO NO ISSUE

**19050 INDIVIDUAL MA RESTRICTION/EXCEPTION TYPE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**19051 RESTRICTION/EXCEPTION/INDICATOR 1 AN**

C ACTIVE PCP RECORD EXISTS

D PCP AND CONNECT

E R/E, PCP AND CONNECT

O CONNECT

X RESTRICTION EXISTS

Y ACTIVE PCP RECORD EXISTS AND RESTRICTION EXISTS

Z R/E AND CONNECT

**20007 DATE OF CLIENT/ABSENT PARENT MARRIAGE 6 N**

**20009 CITY OF CLIENT/ABSENT PARENT MARRIAGE 15 AN**

**20261 MEDICAL INSURANCE GROUP NUMBER 9 N**

**20366 MEDICAL INSURANCE INDICATOR 1 AN**

**20382 RESPONDENT PHONE NUMBER 10 N**

**20384 RESPONDENT ETHNIC CODE 1 AN**

**20436 RESPONDENT'S MOTHERS MAIDEN NAME 28 AN**

**20444 RESPONDENT OCCUPATION 15 AN**

**20445 CLIENT BRANCH OF SERVICE CODE 1 AN**

1 ARMY

2 NAVY

3 AIR FORCE

4 COAST GUARD

5 MARINES



- 6 NATIONAL GUARD
- 9 NOT IN SERVICE
- 20446 RESPONDENT HEIGHT 3 N**
- 20447 RESPONDENT ARREST RECORD INDICATOR 1 AN**
  - 0 NO
  - 1 YES
  - BLANK NOT SET
- 20448 RESPONDENT WEIGHT 3 N**
- 20449 RESPONDENT COURT INDICATOR 1 AN**
  - 0 NO
  - 1 YES
  - BLANK NOT SET
- 20459 RESPONDENT EMPLOYER NAME 28 AN**
- 20460 RESPONDENT EMPLOYER ADDRESS STREET 35 AN**
- 20461 RESPONDENT EMPLOYER ADDRESS CITY 15 AN**
- 20462 RESPONDENT EMPLOYER ADDRESS STATE 2 AN**
- 20463 RESPONDENT EMPLOYER ADDRESS ZIP CODE 9 N**
- 20468 RESPONDENT EMPLOYER PHONE 10 N**
- 20472 RESPONDENT AND STREET ADDRESS 35 AN**
- 20473 RESPONDENT ADDRESS CITY 15 AN**
- 20474 RESPONDENT ADDRESS STATE 2 AN**
- 20475 RESPONDENT ADDRESS ZIP CODE 9 N**
- 20479 RESPONDENT ADDRESS SOURCE DATE 6 N**
- 20487 CASE IDENTIFIER 9 AN**
- 20792 OBLIGATION FREQUENCY 3 AN**
  - A PAYMENTS DUE ANNUALLY
  - B PAYMENTS DUE TWICE A MONTH

D99            PAYMENTS DUE A CONSTANT NUMBER OF DAYS APART  
M99            PAYMENTS DUE ON SPECIFIED DAY OF MONTH  
Q              PAYMENTS DUE QUARTERLY  
S              PAYMENTS DUE SEMI-ANNUALLY  
W              PAYMENTS DUE WEEKLY

**20830    RESPONDENT PATERNITY INDICATOR 1 AN**

0              NOT ESTABLISHED  
1              ESTABLISHED OR IN WEDLOCK

**20896    DATE RESPONDENT DEPARTED 6 N**

**20957    OTHER THAN GRANTEE INDICATOR CODE 1 AN**

**20959    GOOD CAUSE INDICATOR 1 AN**

BLANK        NO  
Y              YES

**20960    SUPPORT COURT 28 AN**

**20962    RESPONDENT UNEMPLOYMENT INSURANCE BENEFIT INDICATOR 1 N**

BLANK        UNKNOWN  
N              NO  
Y              YES

**20963    RESPONDENT PUBLIC ASSISTANCE INDICATOR 1 AN**

BLANK        UNKNOWN  
N              NO  
Y              YES

**20967    UPDATE INDICATOR 1 AN**

**20971    RESPONDENT NAME 28 AN**

**20972    RESPONDENT SSN NUMBER 9 N**

**20975    M178 STREET 35 AN**

**20976    M178 CITY 15 AN**

**20977 M178 STATE 2 AN**

**20978 M178 ZIP 9 N**

**20980 RESPONDENT DATE OF BIRTH 6 N**

**20985 RESPONDENT'S CASE IDENTIFICATION NUMBER 13 N**

**20988 SUPPORT COURT ORDERED CODE 1 AN**

**20989 SUPPORT INDICATOR CODE 1 AN**

**20990 SUPPORT AMOUNT 7 N**

**20991 DATE LAST CONTECT 6 N**

**20992 DEPRIVATION FACTOR DATE 6 N**

**20993 MEDICAL INSURANCE INDICATOR CODE 2 N**

**20994 MEDICAL INSURANCE COMPANY 35 AN**

**20995 MEDICAL INSURANCE NUMBER 15 N**

**20996 DATE OF LAST KNOWN EMPLOYED 6 N**

**21001 RESTRICTED RECIPIENT WEEKLY BEGIN DATE 6 N**

**21003 PCP ENROLL/DISENROLL REASON CODE**

01		VOLUNTARY DISENROLLENT (RECIPIENT)
02		NON-VOLUNATRY DISENROLLMENT (PLAN)
50		VOLUNTARY ENROLLMENT
51		AUTO/ASSIGN ENROLLMENT
85	DISENR DEATH	DISENROLLMENT - CLIENT DECEASED
86	DISENR CL REQ	DISENROLLMENT - VOLUNTARY CLIENT REQUEST

**21004 PCP ENHANCED FEE FLAG 1 AN**

BLANK	NO
Y	YES

**21005 SPECIAL NEEDS EXCEPTION INDICATOR CODE 2 AN**

**21006 ASSOCIATED CLIENT IDENTIFICATION NUMBER 8 AN**

**21007 EXCESS INCOME BILLS INCURRED AMOUNT 7 N**

**21008 DATE OF SERVICE 6 AN**

**21009 EXCESS INCOME BILL AMOUNT 7 N**

**21010 RECIPIENT AID CATEGORY CODE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21011 EXCESS INCOME BILL TYPE CODE 1 AN**

C	C	PAID CREDIT
I	I	INCURRED
K	K	INCURRED CREDIT
P	P	PAID
R	R	REFUND

**21012 EXCESS INCOME BILLS PAID AMOUNT 7 N**

**21013 EXCESS INCOME AMOUNT 7 N**

**21014 EXCESS INCOME DATE – YEAR/MONTH 6 N**

**21015 EXCESS INCOME FAMILY FLAG 1 AN**

BLANK	NOT APPLICABLE
Y	YES

**21016 PAY-IN AMOUNT 7 N**

**21017 PAY-IN/EXCESS INCOME FISCAL AGENT STATUS CODE 1 AN**

H	HOLD - NOT YET SENT TO FISCAL AGENT
N	DO NOT SEND – TRANSACTION WILL NEVER BE SENT TO FISCAL AGENT
S	SENT TO FISCAL AGENT

**21018 PAY-IN/EXCESS INCOME TRANSACTION TYPE CODE 1 AN**

D	DELETE
P	PAY-IN – ONE MONTH
S	PAY-IN – SIX MONTHS

X EXCESS INCOME

**21060 MEDICAL INSURANCE INSURER CODE 3 AN**

A01	AMLIC	AM LIFE INSURANCE COMPANY
A03	AET-CAS	AETNA CASUALTY AND SURETY COMPANY
A05	AETNA	AETNA INSURANCE COMPANY
A07	AET-LIF	AETNA LIFE INSURANCE COMPANY
A09	AET-VALC	AETNA VARIABLE ANNUITY LIFE INSURANCE COMPANY
A13	AGWAY	AGWAY LIFE INSURANCE & HEALTH
A15	AAL	AID ASSOCIATION FOR LUTHERANS
A17	ALSTAT	ALLSTATE INSURANCE COMPANY
A19	ALST-LIF	ALLSTATE LIFE INSURANCE COMPANY
A21	AMAL-LIF	AMALGAMATED LIFE INSURANCE COMPANY INC.
A22	AMBA	AMERICAN MUNICIPAL BOND ASSURANCE COR. (AMBA)
A23	AAHIC	AMERICAN ACCIDENT AND HEALTH INSURANCE COMPANY
A25	ABIC-FLA	AMERICAN BANKERS INSURANCE COMPANY OF FLORIDA
A27	ACC-RD-P	AMERICAN CASUALTY COMPANY OF READING, PA
A29	AEIC	AMERICAN EMPLOYERS INSURANCE COMPANY
A31	AGLIC	AMERICAN GENERAL LIFE INSURANCE COMPANY OF NY
A33	AHLIC	AMERICAN HEALTH AND LIFE INSURANCE COMPANY OF NY
A35	AHMIC	AMERICAN HARDWARE MUTUAL INSURANCE COMPANY
A37	AIIC	AMERICAN INTEGRITY INSURANCE COMPANY
A39	AILAC	AMERICAN INTERNATIONAL LIFE INSURANCE COMPANY OF NY
A41	ALIC	AMERICAN LIFE INSURANCE COMPANY OF NY

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

A43	AM-LIF	AMERICAN MAYFLOWER LIFE INSURANCE COMPANY
A45	AMIC	AMERICAN MEDICAL INSURANCE COMPANY
A47	AM-MOT	AMERICAN MOTORISTS INSURANCE COMPANY
A49	AMI-BOS	AMERICAN MUTUAL INSURANCE COMPANY OF BOSTON
A51	AMI-LIB	AMERICAN MUTUAL LIABILITY INSURANCE COMPANY
A53	APHIC	AMERICAN PATRIOT HEALTH INSURANCE COMPANY
A55	AMER-PRO	AMERICAN PROGRESSIVE HEALTH INSURANCE COMPANY OF NY
A57	ARLIC	AMERICAN REPUBLIC LIFE INSURANCE COMPANY OF NY
A59	ASCU	AMERICAN SLOVENIAN CATHOLIC UNION
A63	AMICA	AMICA LIFE INSURANCE COMPANY

A65	EMP-BC	EMPIRE BLUE CROSS
A67	ALW	ASSOCIATION OF LITHUANIAN WORKERS
A69	A-SNS-P	ASSOCIATION OF SONS OF POLAND
B01	BANK-LIF	BANKER'S LIFE COMPANY
B02	BCBS-CNY	BC/BS OF BLUE CROSS/BLUE SHIELD OR CENTRLA NEW YORK, INC.
B03	BMLIC	BANKER'S MULTIPLE LIFE INSURANCE COMPANY
B04	BCBS-NNY	BC/BS OF NORTHEASTERN NY, INC.
B05	BSLIS	BANKER'S SECURITY LIFE INSURANCE SOCIETY
B06	BCBS-WNY	BC/BS OF WESTERN NEW YORK, INC.
B07	BAPT-LIF	BAPTIST LIFE ASSOCIATION
B08	BCBS-CON	BC/BS OF CONNECTICUT, INC.
B09	BNLIC	BENEFICIAL NATIONAL LIFE INSURANCE COMPANY
B10	BCBS-FLA	BC/BS OF FLORIDA, INC.
B11	BTLIC	BENEFIT TRUST LIFE INSURANCE COMPANY
B12	BCBS-PEN	BC/BS of PENNSYLVANIA, INC.
B13	BERK-LIF	BERKSHIRE LIFE INSURANCE COMPANY
B14	BCBS-MAS	BC/BS OF MASSACHUSETTS, INC.
B15	EMP-BC-S	EMPIRE BLUE CROSS/BLUE SHIELD
B16	BCBS-NPE	BC/BS OF NORTHERN PENNSYLVANIA, INC.
B17	BC-CNY	BC OF CENTRAL NY, INC.
B18	BC-NJ	BLUE CROSS OF NEW JERSEY
B19	BC-NNY	BC NORTHEASTERN NY, INC.
B20	BC-FLA	BLUE CROSS OF FLORIDA, INC.

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

B21	BC-WNY	BC WESTERN NY, INC.
B23	BS-CNY	BS CENTRAL NY, INC.
B24	BS-NJ	BLUE SHIELD OF NEW JERSEY
B25	BS-NNY	BS OF NORTHEASTERN NY, INC.
B26	BC-NPEN	BLUE CROSS OF NORTHEASTERN PENNSYLVANIA
B27	BS-WNY	BS WESTERN NY, INC.
B28	BC-WPEN	BLUE CROSS OF WESTERN PENNSYLVANIA
B29	B-ZION	B'NAI ZION
B30	BS-FLA	BLUE SHIELD OF FLORIDA, INC.
B31	BOCIC	BOSTON OLD COLONY INSURANCE COMPANY

B32	BS-MASS	BLUE SHIELD OF MASSACHUSETTS, INC.
B33	BSPIC	BSP INSURANCE COMPANY
B35	BUIC	BUCKEYE UNION INSURANCE COMPANY
B36	BC-MASS	BLUE CROSS OF MASSACHUSETTS, INC.
B37	BCBS-TEN	BC/BS OF TENNESSEE
B38	BC-BS-NJ	BLUE CROSS/BLUE SHIELD OF N.J.
B39	BLUE-CH	BLUE CHOICE
B40	BCS-INS	BCS INSURANCE COMPANY
B41	BS-BNO	BLUE CROSS/BLUE SHIELD OF NE OHIO
B42	BLU-CARE	BLUE CARE PLUS
B43	BCBS-VER	BLUE CROSS/BLUE SHIELD OF VERMONT
C01	CUNA	CUNA MUTUAL INSURANCE SOCIETY
C03	CLIC-NY	CANADA LIFE INSURANCE COMPANY OF NY
C04	CAP-BC	CAPITAL BLUE CROSS
C05	CHP-ALB	CAPITAL AREA COMMUNITY HEALTH PLAN, INC. (ALBANY HMO)
C06	CDPHP	CAPITAL DISTRICT PHYSICIANS' HEALTH PLAN (CDPHP)
C07	CIC	CENTENNIAL INSURANCE COMPANY
C09	CHMPS	CIVILIAN HEALTH AND MEDICAL PROGRAM OF THE UNIFORM SERVICES (CHAMPUS)
C10	CHOICE-C	CHOICE CARE (LONG ISLAND)
C11	CHAR-I	CHARTER INDEMNITY COMPANY
C13	CRHSC	CHAUTAUQUA REGION HOSPITAL SERVICE CORP.
C15	CRMS	CHAUTAUQUA REGIONAL MEDICAL SERVICE, INC.

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

C16	CRH-CRMS	CHAUTAUQUA REGIONAL HOSPITAL SERVICES CORP. AND CHAUTAUQUA REGIONAL MEDICAL SERVICES, INC.
C17	CHR-LIF	CHURCH LIFE INSURANCE COMPANY
C18	CIV-CATH	CIVILIAN CATHOLIC UNION
C19	COL	COLONIAL LIFE INSURANCE COMPANY OF AMERICA
C20	COL-PENN	COLONIAL PENN INSURANCE COMPANY
C21	CPFIC	COLONIAL PENN FRANKLIN INSURANCE COMPANY
C23	CMLIC	COLUMBIAN MUTUAL LIFE INSURANCE COMPANY
C25	CLIC-NY	COMBINED LIFE INSURANCE COMPANY OF NY
C26	COMM-BLU	COMMUNITY BLUE (BUFFALO AREA)
C27	CIC-NEWK	COMMERCIAL INSURANCE COMPANY OF NEWARK, NY

C29	COMM-TRV	COMMERCIAL TRAVELERS MUTUAL INSURANCE COMPANY
C30	CHP-SUF	COMMUNITY HEALTH PLAN (SUFFOLK COUNTY HMO)
C31	COMM-UN	COMMERCIAL UNION INSURANCE COMPANY
C32	CHP-NYC	COMMUNITY HEALTH PLAN OF GREATER NY (NYC HMO)
C33	CMP-LIF	COMPANION LIFE INSURANCE COMPANY
C34	CONF-LIF	CONFEDERATION LIFE
C36	CONN-GEN	CONNECTICUT GENERAL/INA (CIGNA) (SIC)
C37	CONMUT-L	CONNECTICUT MUTUAL INSURANCE COMPANY
C39	CMIC	CONSOLIDATED MUTUAL INSURANCE COMPANY
C41	CALIC	CONTINENTAL AMERICAN LIFE INSURANCE COMPANY
C43	CON-ASR	CONTINENTAL ASSURANCE COMPANY
C45	CON-CAS	CONTINENTAL CASUALTY COMPANY
C47	CON-INS	CONTINENTAL INSURANCE COMPANY
C49	COV-MUT	COVENANT MUTUAL INSURANCE COMPANY
C51	CRED-LIF	CREDIT LIFE INSURANCE
C55	CZEC-AM	CZECHOSLOVAK SOCIETY OF AMERICA
D01	DAN-BRTH	DANISH BROTHERHOOD IN AMERICA
D03	DICA	DOMINION INSURANCE COMPANY OF AMERICA
E01	ESMLIC	EMPIRE STATE MUTUAL LIFE INSURANCE COMPANY
E03	EMP-FIR	EMPLOYER'S FIRE INSURANCE COMPANY
E05	EMP-MUT	EMPLOYER'S MUTUAL LIABILITY INSURANCE COMPANY OF WISCONSIN
E07	ELASUS	EQUITABLE LIFE ASSURANCE SOCIETY OF THE US

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

E08	EMP-WAU	EMPLOYER'S OF WAUSAU
E09	ELICI	EQUITABLE LIFE INSURANCE COMPANY OF IOWA
E11	EVLIC	EQUITABLE VARIABLE LIFE INSURANCE COMPANY
E13	ELIC-NY	EXECUTIVE LIFE INSURANCE COMPANY OF NY
E40	ELDR-PLN	ELDERPLAN (BROOKLYN)
E50	EMP-BS	EMPIRE BLUE SHIELD
E55	EMPL-NYS	EMPIRE PLAN (NYS EMPLOYEES)
F01	FFLIC	FARM FAMILY LIFE INSURANCE COMPANY
F03	F&T-LIF	FARMERS & TRADERS LIFE INSURANCE COMPANY
F05	FIC	FEDERAL INSURANCE COMPANY



F07	FL&CC	FEDERAL LIFE & CASUALTY COMPANY
F09	F&CC-NY	FIDELITY AND CASUALTY COMPANY OF NY
F11	FMLIC	FIDELITY MUTUAL LIFE INSURANCE COMPANY
F17	FIC-NEK	FIREMEN'S INSURANCE COMPANY OF NEWARK, NJ
F19	FIR-FUND	FIREMEN'S FUND AMERICAN LIFE INSURANCE
F23	FCSU-NA	FIRST CATHOLIC SLOVAK OF THE USA AND CANADA
F25	FILIC	FIRST INVESTORS LIFE INSURANCE COMPANY
F27	FRICA	FIRST REHABILITATION INSURANCE COMPANY OF AMERICA
F29	FSWFE	FIRST SLOVAK WREATH OF THE FREE EAGLE
F31	FOR-INS	FOREMOST INSURANCE COMPANY
F33	FIO	FORESTERS, INDEPENDENT ORDER
F34	FOUND-HP	FOUNDATION HEALTH PLAN
F35	FULIC	FRANKLIN UNITED LIFE INSURANCE COMPANY
F37	FSI	FREE SONS OF ISRAEL
G03	GRC	GENERAL REASSURANCE CORPORATION
G05	GRLC	GENERAL REINSURANCE LIFE CORPORATION
G06	GVGHA	GENESEE VALLEY GROUP HEALTH ASSOCIATION (ROCHESTER HMO)
G07	GVMC	GENESEE VALLEY MEDICAL CARE, INC.
G08	GVMC-RHS	GENESEE VALLEY MEIDCAL CARE, INC./ROCHESTER HOSPITAL SERVICE CORPORATION
G09	GER-LIF	GERBER LIFE INSURANCE COMPANY
G11	GFIC	GLENS FALLS INSURANCE COMPANY
G13	GEMLIC	GOLDEN EAGLE MUTUAL LIFE INSURANCE CORPORATION

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

G15	GOTH-NY	GOTHAM LIFE INSURANCE COMPANY OF NY
G17	GELIC-NY	GOVERNMENT EMPLOYEE'S LIFE INSURANCE COMPANY OF NY
G19	GBU-PIT	GREATER BENEFICIAL UNION OF PITTSBURGH
G21	GCU-USA	GREEK CATHOLIC UNION OF THE USA
G23	GHI	GROUP HEALTH, INC. (GHI)
G25	GIAC	GUARDIAN INSURANCE AND ANNUITY COMPANY, INC.
G27	GLICA	GUARDIAN LIFE INSURANCE COMPANY OF AMERICA
H01	HE-EC-GR	HEALTH ECONOMICS GROUP
H02	HLTH-NJ	HEALTHWAYS, INC. (NEW JERSEY)
H03	HNIC	HARCO NATIONAL INSURANCE COMPANY

H05	HAIC	HARTFORD ACCIDENT & INDEMNITY COMPANY
H06	HIP-NJ	HIP OF GREATER NEW JERSEY, INC.
H07	HLIC	HARTFORD LIFE INSURANCE COMPANY
H08	HCP-BUF	HEALTH CARE PLAN (BUFFALO HMO)
H09	HIP-NYC	HIP OF GREATER NY
H10	HIP-OLD	HIP-OLD CONTRACT (HMO PLAN FOR RECIPIENT)
H12	HIP-NEW	HIP-NEW CONTRACT (HMO PLAN FOR RECIPIENT)
H13	H&WLIA	HEALTH AND WELFARE LIFE INSURANCE ASSOCIATION
H14	HSMC-SYR	HEALTH SERVICES MEDICAL CORPORATION OF CENTRAL NY (SYRACUSE HMO)
H15	HRTH-STN	HEARTHSTONE
H16	HIGHLND	HIGHLANDS INSURANCE COMPANY
H17	HEART-S	HEARTSTONE
H18	HOL-LIF	HOLIDAY LIFE INSURANCE COMPANY
H19	HOM-INS	HOME INSURANCE COMPANY
H20	HS-CO-HP	HEALTH SHIELD COMMUNITY HEALTH PLAN
H21	HOM-LIF	HOME LIFE INSURANCE COMPANY
H23	HOR-MAN	HORACE MANN INSURANCE COMPANY
H25	HPI	HOSPITAL PLAN INC.
H26	HPI-MSC	HOSPITAL PLAN INC./MEDICAL AND SURGICAL CARE, INC.
H27	HSCJC	HOSPITAL SERVICE CORPORATION OF JEFFERSON COUNTY
H28	HSP-LV	HOSPITAL SERVICE PLAN OF LEHIGH VALLEY
H29	HRF-A	HUNGARIAN REFORMED FEDERATION OF AMERICA

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

H30	HLTH-NET	HEALTHNET
I01	IDS-NY	IDS LIFE INSURANCE COMPANY OF NY
I03	INA-NY	INA LIFE INSURANCE COMPANY OF NY
I05	IC-NA	INSURANCE COMPANY OF NORTH AMERICA
I06	IHA-BUF	INDEPENDENT HEALTH ASSOCIATION, INC. (BUFFALO AREA)
I07	IIC	INTERNATIONAL INSURANCE COMPANY
I08	IND-L-A	INDEPENDENT LIFE AND ACCIDENT INSURANCE COMPANY
I09	ILIC-BUF	INTERNATIONAL LIFE INSURANCE COMPANY OF BUFFALO
I11	ILIC	INTRAMERICA LIFE INSURANCE COMPANY
J01	JCPIC	J.C. PENNY INSURANCE COMPANY

J03	JDIC	JOHN DEERE INSURANCE COMPANY
J05	JHMLIC	JOHN HANCOCK MUTUAL LIFE INSURANCE COMPANY
K01	KOFC	KNIGHTS OF COLUMBUS
K05	KHP-NE	KAISER HEALTH PLAN OF THE NORTHEAST
L01	LZA	LABOR ZIONIST ALLIANCE
L03	LLAC	LIBERTY LIFE ASSURANCE COMPANY
L05	LMI	LIBERTY MUTUAL INSURANCE COMPANY
L07	LNLIC-NY	LINCOLN NATIONAL LIFE INSURANCE COMPANY OF NY
L09	LAA	LITHUANIAN ALLIANCE OF AMERICA
L11	LCBA	LOYAL CHRISTIAN BENEFIT ASSOCIATION
L13	LPLIC	LOYAL PROTECTIVE LIFE INSURANCE COMPANY
L15	LMIC	LUMBERMAN'S MUTUAL INSURANCE COMPANY
L17	LUTH-BHD	LUTHERAN BROTHERHOOD
L19	LUTH-MUT	LUTHERAN MUTUAL LIFE INSURANCE COMPANY
M01	MAD-LIF	MADISON LIFE INSURANCE COMPANY
M02	MHP-NYC	MANHATTAN HEALTH PLAN (NYC HMO)
M03	MAN-LIF	MANHATTAN LIFE INSURANCE COMPANY
M07	MAS-CAS	MASSACHUSETTS CASUALTY INSURANCE COMPANY
M09	MMLI	MASSACHUSETTS MUTUAL LIFE INSURANCE COMPANY
M11	MIA	MEDICAL INDEMNITY OF AMERICA
M13	MSC	MEDICAL AND SURGICAL CARE, INC.
M15	MER-LIF	MERCHANT'S LIFE INSURANCE COMPANY
M17	MER-MUT	MERCHANT'S MUTUAL INSURANCE COMPANY

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

M18	MIAC	METROPOLITAN INSURANCE AND ANNUITY COMPANY
M19	MLI	METROPOLITAN LIFE INSURANCE COMPANY
M22	MHHP	MID-HUDSON HEALTH PLAN
M23	MIC	MIDLAND INSURANCE COMPANY
M24	MPEWTF	MILK PLANT EMPLOYEES WELFARE TRUST FUND
M25	MWFC	MODERN WOODMEN FIRE AND CASUALTY
M27	MON-LIF	MONARCH LIFE INSURANCE COMPANY
M29	MI-NY-FC	MONITOR INSURANCE OF NY FIRE AND CASUALTY
M30	MONT-WRD	MONTGOMERY WARD
M33	MBLIC	MUTUAL BENEFIT LIFE INSURANCE COMPANY

M35	MUT-NY	MUTUAL LIFE INSURANCE COMPANY OF NY
M37	MOI	MUTUAL OF OMAHA INSURANCE COMPANY
M39	MTLIC	MUTUAL TRUST LIFE INSURANCE COMPANY
M40	MQ-MVP	MOHAWK VALLEY PHYSICIANS HEALTH PLAN, INC.
M41	MED-PLAN	MEDI-PLAN
N01	NBFIC	NATIONAL BEN FRANKLIN INSURANCE COMPANY OF ILLINOIS
N03	NBAIC	NATIONAL BONDING AND ACCIDENT INSURANCE COMPANY
N05	NCC	NATIONAL CASUALTY COMPANY
N07	NFSD	NATIONAL FRATERNAL SOCIETY OF THE DEAF
N09	NGIC	NATIONWIDE GENERAL INSURANCE COMPANY
N11	NHHAC	NATIONAL HOME AND HEALTH ASSURANCE COMPANY
N13	NIIC	NATIONAL INDEPENDENCE INSURANCE COMPANY
N15	NLACC	NATIONAL LIFE ASSURANCE COMPANY OF CANADA
N17	NLIC	NATIONAL LIFE INSURANCE COMPANY
N19	NSS-USA	NATIONAL SLOVAK SOCIETY OF THE USA
N21	NAT-LIF	NATIONWIDE LIFE INSURANCE COMPANY
N25	NEMLIC	NEW ENGLAND MUTUAL LIFE INSURANCE COMPANY
N29	NYDSC	NY DENTAL SERVICE CORPORATION
N30	NH-V-HS	NEW HAMPSHIRE - VERMONT HEALTH SERVICE
N31	NYLIC	NEW YORK LIFE INSURANCE COMPANY
N33	NYNIC	NY NATIONAL INSURANCE COMPANY
N35	NYHSAP	NEW YORK STATE HIGH SCHOOL ATHLETIC PROTECTIVE PLAN
N37	NIC	NEWARK INSURANCE COMPANY

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

N39	NABA	NORTH AMERICAN BENEFIT ASSOCIATION
N47	NAFC	NORTH AMERICAN FIRE AND CASUALTY
N49	NACA	NORTHERN ASSURANCE COMPANY OF AMERICA
N53	NNIC	NORTHWESTERN NATIONAL INSURANCE COMPANY
N54	NRTHCARE	NORTHCARE
N55	NISI	NATIONAL INSURANCE SERVICES, INC.
O03	ORLIC	OLD REPUBLIC LIFE INSURANCE COMPANY OF NY
O05	OIC	OMAHA INDEMNITY COMPANY
P01	PHF	PHF LIFE INSURANCE COMPANY
P02	POMCO	POMCO INSURANCE

P03	PRLIC	PAUL REVERE LIFE INSURANCE COMPANY
P05	PML	PENN MUTUAL LIFE
P07	PENN-BS	PENNSYLVANIA BLUE SHIELD
P09	PIC	PEERLESS INSURANCE COMPANY
P11	PAC-NY	PHOENIX ASSURANCE COMPANY OF NY
P13	PMLI	PHOENIX MUTUAL LIFE INSURANCE COMPANY
P14	PIRLS	PIRELIIOUS
P15	PNAB	POLISH NATIONAL ALLIANCE OF BROOKLYN, USA
P19	PNUA	POLISH NATIONAL UNION OF AMERICA
P21	PRCUA	POLISH ROMAN CATHOLIC UNION OF AMERICA
P23	PUA	POLISH UNION OF AMERICA
P24	PUUS-NY	POLISH UNION OF THE US OF NY
P25	PWAA	POLISH WOMEN'S ALLIANCE OF AMERICA
P26	PC-ROCH	PREFERRED CARE (HMO) - ROCHESTER
P27	PLCIC	PROVIDENT LIFE & CASUALTY INSURANCE COMPANY
P29	PLIC	PRESIDENTIAL LIFE INSURANCE COMPANY
P30	PHP-CNY	PREPAID HEALTH PLAN OF CENTRAL NEW YORK (SYRACUSE AREA)
P31	PMLIC	PROVIDENT MUTUAL LIFE INSURANCE COMPANY OF PHILADELPHIA
P33	PICA	RUDENTIAL INSURANCE COMPANY OF AMERICA
P35	PSMIC	PUBLIC SERVICE MUTUAL INSURANCE COMPANY
P37	PBP	PUPIL BENEFITS PLAN
P38	PCS	PCS
P39	PD-PRES	PAID PRESCRIPTIONS

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

QMB	QMB	QUALIFIED MEDICARE BENEFICIARY
R01	REL-INS	RELIANCE INSURANCE COMPANY
R02	RHN-ROC	ROCHESTER HEALTH NETWORK (ROCHESTER HMO)
R03	ROC-HOSP	ROCHESTER HOSPITAL SERVICE CORPORATION
R05	RAIC	ROYAL ARCANUM INSURANCE COMPANY
R07	RGIC	ROYAL GLOBE INSURANCE COMPANY
R11	RBO-USA	RUSSIAN BROTHERHOOD ORGANIZATION OF THE USA
R15	RCHP-NJ	RUTGERS COMMUNITY HEALTH PLAN (NEW JERSEY)
S01	STL-LEW	ST. LAWRENCE AND LEWIS
S03	STPAUL	ST. PAUL MERCURY INSURANCE COMPANY

S04	SANUS-HP	SANUS HEALTH PLAN
S05	SBLI	SAVINGS BANKS LIFE INSURANCE FUND
S07	SIC-HART	SECURITY INSURANCE COMPANY OF HARTFORD
S08	SRC	SEARS, ROEBUCK & COMPANY
S09	SLIC	SECURANCE LIFE INSURANCE COMPANY
S13	SMLIC	SECURITY MUTUAL LIFE INSURANCE COMPANY OF NY
S14	S-65-PLN	SECURITY 65 PLAN
S17	SLIC-NY	SENTRY LIFE INSURANCE COMPANY OF NY
S19	SNF	SERB NATIONAL FEDERATION
S21	SCS	SLOVAK CATHOLIC SOKOL
S23	SGUS-USA	SLOVAK GYMNASTIC UNION SOKOL OF THE USA
S25	SNBS	SLOVENE NATIONAL BENEFIT SOCIETY
S27	SONS-NOR	SONS OF NORWAY
S28	SCCHP	SOUTH CONNECTICUT COMMUNITY HEALTH PLAN
S29	STND-FIR	STANDARD FIRE INSURANCE COMPANY
S31	SSLIC-NY	STANDARD SECURITY LIFE INSURANCE COMPANY OF NY
S33	SFFCC	STATE FARM FIRE & CASUALTY COMPANY
S35	SFLAAC	STATE FARM LIFE AND ACCIDENT ASSURANCE COMPANY
S37	SFMFC	STATE FARM MUTUAL FIRE AND CASUALTY
S39	SMLAC	STATE MUTUAL LIFE ASSURANCE COMPANY OF AMERICA
S41	SMFIC	SUMITOMO MARINE & FIRE INSURANCE COMPANY
S43	SUN-PK	SUNSET PARK
T01	TIAA-AM	TEACHER'S INSURANCE AND ANNUITY ASSOCIATION OF AMERICA

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

T03	TJLIC	THOMAS JEFFERSON LIFE INSURANCE COMPANY
T05	TAIC	TRANSAMERICA INSURANCE COMPANY
T07	TCIC	TRANSCONTINENTAL INSURANCE COMPANY
T09	TRNS-INS	TRANSPORTATION INSURANCE COMPANY
T11	TLIC	TRANS WORLD LIFE INSURANCE COMPANY OF NY
T12	THN	TRAVELERS HEALTH NETWORK
T13	TIC	TRAVELERS INSURANCE COMPANY
U01	UNA	UKRANIAN NATIONAL ASSOCIATION, INC.
U03	UWA	UKRANIAN WORKINGMAN'S ASSOCIATION
U05	UCLIC	UNION CENTRAL LIFE INSURANCE COMPANY

U06	UNF	UNION FIDELITY
U07	ULLIC	UNION LABOR LIFE INSURANCE COMPANY
U11	UMLI	UNION MUTUAL LIFE INSURANCE COMPANY
U13	UMSLIC	UNION MUTUAL STOCK LIFE INSURANCE COMPANY OF NY
U15	UCTA	UNITED COMMERCIAL TRAVELERS OF AMERICA
U17	ULS	UNITED LUTHERAN SOCIETY
U19	UFIC	UNITED FIRE INSURANCE COMPANY
U21	UMS	UNITED MEDICAL SERVICE, INC.
U23	UMLIC	UNITED MUTUAL LIFE INSURANCE COMPANY
U25	UROB	UNITED RUSSIAN ORTHODOX BROTHERHOOD
U27	USFGC	UNITED STATES FIDELITY AND GUARANTEE COMPANY
U28	US-HC	U.S. HEALTH CARE
U29	USFIC	UNITED STATES FIRE INSURANCE COMPANY
U30	USLIC	UNITED STATES LIFE INSURANCE COMPANY
U31	UCLM	UNITY OF CZECH LADIES & MEN
U35	ULRC	URBAINE LIFE REINSURANCE COMPANY
U37	UMIC	UTICA MUTUAL INSURANCE COMPANY
V01	VIC	VIGILANT INSURANCE COMPANY
V03	VIO	VIKINGS, INDEPENDENT ORDER
W01	WNLIC-NY	WASHINGTON NATIONAL LIFE INSURANCE COMPANY OF NY
W02	WC-NY	WELLCARE OF NEW YORK
W03	WES-CHP	WESTCHESTER CHP (WESTCHESTER COUNTY HMO)
W05	WES-FIRE	WESTCHESTER FIRE INSURANCE COMPANY

**21060 MEDICAL INSURANCE INSURER CODE 3 AN (cont.)**

W09	WPLIC	WILLIAM PENN LIFE INSURANCE COMPANY
W11	WLIC	WINDSOR LIFE INSURANCE COMPANY
Z00	MPPC	MULTIPLE POLICY COMPOSITE COVERAGE
Z01	ZBS	ZIVENA BENEFICIAL SOCIETY
Z03	ZIC	ZURICH INSURANCE COMPANY
Z90	AB-PAR-R	ABSENT PARENT RESPONSIBILITY
Z91	IH-IPP	INCOME PROTECTION POLICY
Z92	AC-L-B	ACCIDENT LIABILITY BENEFITS
Z93	FRE-CR	FREE MEDICAL CARE
Z94	TRUST	TRUSTS SET UP AS A RESULT OF AN ACCIDENT, ETC.

Z95	VA-BEN	VETERAN'S BENEFITS
Z96	WKM-COMP	WORKMEN'S COMPENSATION
Z97	UN-COV	UNION MEMBERSHIP COVERAGE
Z98	OTH-INS	OTHER INSURER (IDENTIFIED BY RECIPIENT BUT NOT ON LIST)

**21019 WD BUY-IN DOS FROM DATE 8 AN**

**21020 WD BUY-IN DOS THRU DATE 8 AN**

**21021 WD BUY-IN PREMIUM AMOUNT 7 N**

**21022 WD BUY-IN PREMIUM FROM DATE 8 AN**

**21023 WD BUY-IN WD CODE 2 AN**

**21024 DATE OF LAST UPDATE WD 8 AN**

**21025 LAST WD CODE 2 AN**

**21061 MEDICAL INSURANCE COVERAGE CODE 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21068 PROVIDER IDENTIFICATION NUMBER 8 AN**

**21090 RECIPIENT MEDICAID COVERAGE 2 N**

01	FUL-COVR	FULL COVERAGE
02	OPAT-COV	OUTPATIENT COVERAGE
03	CAT	CATASTROPHIC
04	N-COV	NO COVERAGE - INELIGIBLE
05	SANCT	SANCTIONS
06	PROVSNL	PROVISIONAL ELIGIBILITY - EXCESS INCOME
07	EMER-SER	EMERGENCY SERVICES ONLY (CASE TYPE 20 ONLY)
08	PR-EL-HC	PRESUMPTIVE ELIGIBILITY - HOME CARE (CASE TYPE 20 ONLY)
09	MED-CDO	MEDICARE COINSURANCE AND DEDUCTIBLE ONLY
10	AS-NOLTC	ALL SERVICES EXCEPT LONG TERM CARE



11	PHO	PRIMARY HOSPITAL ONLY
13	PE-PC-A	PRESUMPTIVE ELIGIBILITY - PRENATAL CARE A
14	PE-PC-B	PRESUMPTIVE ELIGIBILITY - PRENATAL CARE B
15	PRNTLCAR	PERINATAL CARE
16	HR-COV	HOME RELIEF COVERAGE
17	HIP-ONLY	HEALTH INSURANCE PREMIUM PAYMENT ONLY
19	CC-LTC	COMMUNITY COVERAGE WITH COMMUNITY-BASED LONG TERM CARE
20	CCNOLTC	COMMUNITY COVERAGE WITHOUT LONG TERM CARE
21	OP-LTC	OUTPATIENT WITH COMMUNITY-BASED LONG TERM CARE
22	OP-NOLTC	OUTPATIENT WITHOUT LONG TERM CARE
23	OP-NONUR	OUTPATIENT COVERAGE WITH NO NURSING FACILITY SERVICES
30	PCP-F-CV	PCP FULL COVERAGE
31	PCP-CV-O	PCP COVERAGE ONLY
32	PCP-HR	PCP/HOME RELIEF COVERAGE
33	PCP-G-HR	PCP GUARANTEE/HOME RELIEF COVERAGE

**21110 RECIPIENT MEDICAID COVERAGE DATES 12 N**

**21221 RECIPIENT MEDICARE PART A DATE 6 AN**

**21226 MEDICARE CLAIM NUMBER 12 AN**

**21500 ENTRY DATE 6 AN**

**21510 RESTRICTION/EXCEPTION EFFECTIVE FROM DATE 6 AN**

**21520 RESTRICTION/EXCEPTION FROM DATE 6 AN**

**21530 RESTRICTION/EXCEPTION THRU DATE 6 AN**

**21540 RESTRICTION/EXCEPTION RECORD SOURCE 1 AN**

E	US-EN-RC	USER ENTERED RECORD
G	SY-GN-REC	SYSTEM-GENERATED RECORD
I	INT-MNT	INTERNAL MAINTENANCE

**21550 PRINCIPAL PROVIDER CODE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21551 LAST PRINCIPAL PROVIDER CODE 2 AN**

**21560 PRINCIPAL PROVIDER FROM DATE OF SERVICE 6 AN**

**21570 PRINCIPAL PROVIDER THRU DATE OF SERVICE 6 AN**

**21580 PRINCIPAL PAYMENT EXCEPTION TYPE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21590 PRINCIPAL PROVIDER EXCEPTION FROM DATE 6 AN**

**21600 AVAILABLE AMOUNT 7 N**

**21610 AVAILABLE AMOUNT EFFECTIVE FROM DATE 6 AN**

**21620 CARD CODE 1 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21700 PREPAID CAPITATION PLAN BENEFITS PACKAGE 2 AN**

01 MED-SVCS ALL MEDICAID COVERED SERVICES EXCEPT:  
- METHADONE MAINTENANCE  
- DENTAL CARE  
- SNF/HRF CARE  
- CHILD CARE MEDICAL PER DIEM  
- OMH/OMR FAMILY CARE

02 MED-SV-B ALL MEDICAID COVERED SERVICES EXCEPT:  
- DENTAL CARE  
- SNF/HRF

**21700 PREPAID CAPITATION PLAN BENEFITS PACKAGE 2 AN (cont.)**

03 MED-SV-C ALL MEDICAID COVERED SERVICES EXCEPT:  
- SNF/HRF  
- CHILD CARE MEDICAL PER DIEM  
- OMH/OMR FAMILY CARE

04 MED-SV-D ALL MEDICAID COVERED SERVICES EXCEPT:  
- DRUGS  
- DENTAL  
- SNF/HRF

		- CHILD CARE MEDICAL PER DIEM
		- OMH/OMR FAMILY CARE
05	ACM-PCMP	(TO BE DEFINED)
06	BCM-PCMP	NO MEDICAID COVERED SERVICES EXCEPT: - PRIMARY CARE - CASE MANAGEMENT
07	HIP-99	HIP-99
08	HIP-02	HIP-02
09	HIP-SUFF	ALL MEDICAID COVERED SERVICES EXCEPT: - DENTAL - MAJOR MEDICAL - MEDICARE COMP

**21701 PREPAID CAPITATION PLAN CAPITATION CODE 1 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**21702 PREPAID CAPITATION PLAN RATE 4 AN**

**21703 PREPAID CAPITATION PLAN FROM DATE 6 AN**

**21704 PREPAID CAPITATION PLAN GUARANTEE DATE 6 AN**

**21705 PREPAID CAPITATION PLAN (PCP) RECORD FLAG 1 AN**

C	CR	THE NEXT RECORD HAS BEEN CORRECTED
D	DL	THE NEXT RECORD HAS BEEN DELETED

**22022 TARGET GROUP CODE 1 AN**

**22222 HOUSING ADV IND CD 1 AN**

**23003 MED START YEAR 4 N**

**23004 MED END YEAR 4 N**

**23005 MED CREATE USERID 6 AN**

**23006 MED CREATE DATE 8 N**

**23007 MED LAST UPDTE USERID 6 AN**

**23008 MED LAST UPDTE DATE 8 N**

**23009 MEDIAN INC TABLE 5 AN**

**23010 SERVICE GOAL (TITLE XX) 2 AN**

01	SLF-SUP	ACHIEVING OR MAINTAINING ECONOMIC SELF-SUPPORT TO PREVENT, REDUCE, OR ELIMINATE DEPENDENCY
1A	S-S-EMP	SELF-SUPPORT - EMPLOYMENT (DAY CARE ONLY)
1B	SS-VTRNG	SELF-SUPPORT - VOCATIONAL TRAINING OR REHABILITATION (DAY CARE ONLY)
1C	SS-SK-FM	SELF-SUPPORT - SEEKING EMPLOYMENT (UP TO 6 MOS) (DAY CARE ONLY)
02	SLF-SUF	ACHIEVING OR MAINTAINING SELF-SUFFICIENCY, INCLUDING REDUCTION OR PREVENTION OF DEPENDENCY
2A	SSUF-ILL	SELF-SUFFICIENCY - ILLNESS (DAY CARE ONLY)
2B	SSUF-INC	SELF-SUFFICIENCY - INCAPACITY (DAY CARE ONLY)
2C	SSUF-NA	SELF-SUFFICIENCY - NECESSARY ABSENCE FOR PART OF DAY (DAY CARE ONLY)
2D	SSUF-OPF	SELF-SUFFICIENCY-CHILD - ONE PERSON FAMILY (DAY CARE ONLY)
03	PRTCT	PREVENTING OR REMEDYING NEGLECT, ABUSE, OR EXPLOITATION OF CHILDREN AND ADULTS UNABLE TO PROTECT THEIR OWN INTERESTS, OR PRESERVING, REHABILITATING OR REUNITING FAMILIES: ( PROTECTIVE)
3A	PRT-PRV	PROTECTIVE - TO PROVIDE PREVENTIVE SERVICES (DAY CARE ONLY)
3B	PRT-PRT	PROTECTIVE - TO PROVIDE PROTECTIVE SERVICES (DAY CARE ONLY)
04	CBC-HBC	PREVENTING OR REDUCING INAPPROPRIATE INSTITUTIONAL CARE BY PROVIDING FOR COMMUNITY-BASED CARE, HOME-BASED CARE, OR OTHER FORMS OF LESS INTENSIVE CARE
4A	CHB-CRIC	COMMUNITY/HOME-BASED CARE - REDUCE INSTITUTIONAL CARE (DAY CARE ONLY)
4B	CHB-CPIC	COMMUNITY/HOME-BASED CARE - PREVENT INSTITUTIONAL CARE (DAY CARE ONLY)
05	INST-CRE	SECURING REFERRAL OR ADMISSION FOR INSTITUTIONAL CARE WHEN OTHER FORMS OF CARE ARE NOT APPROPRIATE, OR PROVIDING SERVICES TO INDIVIDUALS IN INSTITUTIONS

**23011 MED INC LEVEL 5 AN**

**23015 GOAL ACHIEVEMENT STATUS (TITLE XX) 1 N**

1	A	GOAL ACHIEVED/SERVICES NO LONGER NECESSARY
2	A-S	GOAL ACHIEVED/SERVICES CONTINUING
3	A-TR	GOAL ACHIEVED/TRANSFERRED TO A NEW GOAL
4	NA-TR	GOAL NOT ACHIEVED/TRANSFERRED TO A NEW GOAL
5	TERM	GOAL NOT ACHIEVED/CASE TERMINATED

**23020 SERVICE TYPE 2 AN**

00	PRG-FEM	PREGNANT FEMALE
01	ADP-SER	ADOPTION SERVICES
03	DAY-CARE	DAY CARE
04	ED-SER	EDUCATION SERVICES
05	EMP-SER	EMPLOYMENT SERVICES
06	FM-PL	FAMILY PLANNING
07	FC-A	FOSTER CARE FOR ADULTS
08	FC-CH	FOSTER CARE FOR CHILDREN
09	H-R-SER	HEALTH RELATED SERVICES
10	H-M-SER	HOME MANAGEMENT SERVICES
11	HMK-SER	HOMEMAKER SERVICES
12	HSK-CHO	HOUSEKEEPER/CHORE
13	HSG-IMP	HOUSING IMPROVEMENT
14	INFO-REF	INFORMATION AND REFERRAL
15	PREV-SER	PREVENTIVE SERVICES
16	PROT-A	PROTECTIVE SERVICES FOR ADULTS
17	PROT-CH	PROTECTIVE SERVICES FOR CHILDREN
18	SR-CZ-SR	SOCIAL GROUP SERVICES FOR SENIOR CITIZENS
19	WIN-COUN	WIN COUNSELING

**23020 SERVICE TYPE 2 AN (cont.)**

20	TR-SER	TRANSPORTATION SERVICES
21	UP-P-SER	UNMARRIED PARENTS SERVICES
22	PC-SER	PERSONAL CARE SERVICES
23	SVDV	SERVICES TO VICTIMS OF DOMESTIC VIOLENCE
24	CHAP-SER	CHAP SERVICES
25	PVSC-MND	PREVENTIVE SERVICES FOR CHILDREN - MANDATED
26	PVSC-OPT	PREVENTIVE SERVICES FOR CHILDREN - OPTIONAL
27	HSG-SER	HOUSING SERVICES
28	DRUG	DRUG ABUSE TREATMENT SERVICES
29	ALCOHOL	ALCOHOL ABUSE TREATMENT SERVICES
2A	RENT-ARR	RENT ARREARS
2B	RENT-SPC	RENT SPECIALS

30	DC-H-FT	DAY CARE - IN HOME - FULL TIME SERVICES
31	DC-H-PT	DAY CARE - IN HOME - PART TIME SERVICES
32	DC-F-FT	DAY CARE - FAMILY - FULL TIME SERVICES
33	DC-F-PT	DAY CARE - FAMILY - PART TIME SERVICES
34	FG-DC-FT	FAMILY GROUP DAY CARE - FULL TIME
35	FG-DC-PT	FAMILY GROUP DAY CARE - PART TIME
36	DC-C-FT	DAY CARE-CENTER - FULL TIME SERVICES
37	DC-C-PT	DAY CARE-CENTER - PART TIME
39	DC/TRANS	LOW INCOME DAY CARE TRANSPORTATION
3A	SACC	SCHOOL AGE CHILD CARE
3B	ICCFT	INFORMAL CHILD CARE - FULL TIME
3C	ICCPT	INFORMAL CHILD CARE - PART TIME
3D	ICCRFT	INFORMAL CHILD CARE - RELATIVE - FULL TIME
3E	ICCRPT	INFORMAL CHILD CARE - RELATIVE - PART TIME
3F	DCHRFT	DAY CARE - IN HOME - RELATIVE - FULL TIME
3G	DCHRPT	DAY CARE - IN HOME - RELATIVE - PART TIME
40	THER-FC	THERAPEUTIC FOSTER CARE
44	CLINICAL	CLINICAL SERVICES
45	INTSV-HB	INTENSIVE HOME-BASED SERVICES
46	CAMP-FEE	FOSTER CARE CAMP FEES
47	DAMAGES	COMPENSATION TO FOSTER FAMILIES FOR DAMAGES AND LOSSES

**23020 SERVICE TYPE 2 AN (cont.)**

50	ILS-AOR	INDEPENDENT LIVING SERVICES ADD ON RATE
53	ADS-1177	ADOPTION SUBSIDY - PRIOR TO 11/08/77
54	ADS-7780	ADOPTION SUBSIDY - FROM 11/08/77 TO 10/01/80
55	ADS-1080	ADOPTION SUBSIDY - FROM 10/01/80 TO PRESENT
56	TRN-CARE	TRANSITIONAL CARE
57	PRNT-A-T	PARENT AIDE/PARENT TRAINING
58	EMG-CASH	EMERGENCY CASH IN KIND
59	EMG-G-SH	EMERGENCY GOODS AND SHELTER
60	D-SER-CH	DAY SERVICES FOR CHILDREN
61	R-SER-MT	REGULAR SERVICE AND MAINTENANCE
62	E-SER-MT	EMERGENCY SERVICE AND MAINTENANCE
63	ADD-P-DM	ADDITIONAL PER DIEM

64	ER-PC-SA	EDUCATION RATE - PRIVATE ON CAMPUS SCHOOLS OR SPECIAL ACT SCHOOL
65	TUITN-PS	TUITION - PUBLIC SCHOOLS
66	SCH-EXP	SCHOOL EXPENSE
67	INIT-CTH	INITIAL CLOTHING
68	REPL-CTH	REPLACEMENT CLOTHING
69	SPEC-ATT	SPECIAL ATTIRE
70	LESSONS	LESSONS
71	GIFTS	GIFTS
72	TR-RSA	TRANSPORTATION - FOR REGULAR SCHOOL ATTENDANCE WHEN PUBLIC TRANSPORTATION IS NECESSARY
73	TR-UTC	TRANSPORTATION - UNUSUAL TRANSPORTATION COSTS
74	NMH-H-CH	NON-MEDICAL NEEDS OF HANDICAPPED CHILDREN
75	DSCG-GTS	DISCHARGE GRANTS
76	ADP-GTS	ADOPTION GRANTS
77	ADP-S-MO	ADOPTION SUBSIDY - MEDICAL ONLY
78	ADP-S-MT	ADOPTION SUBSIDY - MAINTENANCE
79	DIAPER	DIAPER ALLOWANCE
80	TAS	TRANSITIONAL ADOPTION SUBSIDY
82	FC-AF-CR	FOSTER CARE AFTER CARE
83	FC/DAYCARE	DAY CARE OR BABYSITTING FOR CHILDREN IN FOSTER CARE
84	ILIV-STR	INDEPENDENT LIVING SKILLS TRAINING

**23020 SERVICE TYPE 2 AN (cont.)**

85	VOC-TRNG	VOCATIONAL TRAINING
86	ILIV-SUP	INDEPENDENT LIVING SUPERVISION
87	ACAD-SSV	ACADEMIC SUPPORT SERVICES
89	ILS-STIP	INDEPENDENT LIVING SERVICES STIPEND
8A	PLAN-RSP	PLANNED RESPITE SERVICES FOR FOSTER FAMILIES
8B	CRIS-RSP	CRISIS RESPITE FOR FOSTER FAMILIES
8C	PREV-RSP	CRISIS RESPITE FOR FOSTER FAMILIES – PREVENTATIVE
8D	MI-PC-FC	MINOR PARENT AND CHILD FOSTER CARE
90	ALT-LIV	ALTERNATIVE LIVING ARRANGEMENTS
91	PROV-RMB	PROVIDE ROOM AND BOARD
92	LOC-SERV	LOCATE SERVICES, MEDICAL CARE & RESOURCES IN COMMUNITY

93	ARR-PRPL	ARRANGE GUARDIANSHIP, CONSERVATORSHIP, COMMITMENT OR OTHER PROTECTIVE PLACEMENT
94	ASST-SER	PROVIDE ADVOCACY & ASSISTANCE IN ARRANGING FOR LEGAL SERVICES
95	REP-PAYE	FUNCTION AS CONSERVATOR REPRESENTING PAYEE OR PROTECTIVE PAYEE
96	FAMH-FIN	FINANCIAL MANAGEMENT SERVICES TO RESIDENTS IN FAMILY TYPE HOMES
97	OTH-SS	SUPPORTIVE SERVICES TO ADULT RESIDENTS IN OTHER FACILITIES
99	OTH-FIN	FINANCIAL MANAGEMENT SERVICES TO ADULT RESIDENTS IN OTHER FACILITIES
A1	RES-ACC	CONNECTIONS RESERVED ACCOMMODATION
A2	FINDER-F	CONNECTIONS FINDERS FEE
A3	ADOP-ACC	CONNECTIONS NON-RECURRING ADOPTION SUBSIDY
A4	ADMIN-OT	CONNECTIONS ADMIN OTHER
C1	CSE	COMMITTEE ON SPECIAL EDUCATION

**23021 SERVICE TYPE SUFFIX CODE 1 A**

A	PSA-CABN	PROTECTIVE (ADULTS) - CARETAKER ABUSE/NEGLECT
B	PSA-SNEG	PROTECTIVE (ADULTS) - SELF-NEGLECT
E	EAF	EMERGENCY ASSISTANCE TO FAMILIES
F	FNP	FEDERAL NON-PARTICIPATING
G	GE	GROUP ELIGIBILITY

**23021 SERVICE TYPE SUFFIX CODE 1 A (cont.)**

H	HR-TCC	HR - TRANSITIONAL CHILD CARE
J	WR-TCC	WELFARE REFORM - TRANSITIONAL CHILD CARE
K	TRANS-CC	TRANSITIONAL CHILD CARE
L	EX-EMP-3	EXPANDED FUND EMPLOYMENT PROPOSAL #3
M	EX-EMP-4	EXPANDED FUND EMPLOYMENT PROPOSAL #4
N	NR	NON-REIMBURSABLE
O	EX-EMP-5	EXPANDED FUND EMPLOYMENT PROPOSAL #5
P	PROT	PROTECTIVE
Q	EX-EMP-6	EXPANDED FUND EMPLOYMENT PROPOSAL #6
R	EX-EMP-7	EXPANDED FUND EMPLOYMENT PROPOSAL #7
S	EX-EMP-8	EXPANDED FUND EMPLOYMENT PROPOSAL #8



T	TAP-DC	TEENAGE PARENTS DAY CARE PROGRAM
U	EX-EMP10	EXPANDED FUND EMPLOYMENT PROPOSAL #10
V	EX-EMP11	EXPANDED FUND EMPLOYMENT PROPOSAL #11
W	WR	WITHOUT REGARD
X	LOW-INC	LOW INCOME DAY CARE

**23022 SERVICES RETROACTIVE ELIGIBILITY CATEGORY 2 A**

**23023 SERVICES RETROACTIVE ELIGIBILITY PERIOD 12 A**

**23050 SERVICES RECIPIENT ELIGIBILITY CATEGORY 2 N**

01	AFDC-WIN	AFDC-WIN
02	FCAA	FOSTER CARE AND ADOPTION
03	AFDC	AFDC
04	EAF	EAF
05	SSI-A	SSI-AGED
06	SSI-B	SSI-BLIND
07	SSI-D	SSI-DISABLED
08	MA	MA
09	RAP-URM	REFUGEE ASSISTANCE PROGRAM-UNACCOMPANIED REFUGEE MINOR
10	RAP-UCHM	REFUGEE ASSISTANCE PROGRAM-UNACCOMPANIED CUBAN/HAITIAN MINOR
11	GE	GROUP ELIGIBILITY
13	HR	HR (INCLUDES INTERIM ASSISTANCE - VA) INCOME
14	INC	INCOME
15	WR	WR (WITHOUT REGARD TO INCOME)
17	FNP	FNP (FEDERAL NON-PARTICIPATING)
19	FN-INEL	FINANCIALLY INELIGIBLE
99	NON-CAT	NON-CATEGORICAL

**23051 CLAIMING CATEGORY 2 N**

01	AFDC-WIN	AFDC-WIN
02	FCAA	FOSTER CARE AND ADOPTION
03	AFDC-NWN	AFDC

**23051 CLAIMING CATEGORY 2 N (cont.)**

04	EAF	EAF
05	SSI-A	SSI-AGED
06	SSI-B	SSI-BLIND
07	SSI-D	SSI-DISABLED
08	MA	MA
09	RAP-URM	REFUGEE ASSISTANCE PROGRAM-UNACCOMPANIED REFUGEE MINOR
10	RAP-UCHM	REFUGEE ASSISTANCE PROGRAM-UNACCOMPANIED CUBAN/HAITIAN MINOR
11	GE	GROUP ELIGIBILITY
13	HR	HR (INCLUDES INTERIM ASSISTANCE - VA)
14	INC	NCOME
15	WR	WR (WITHOUT REGARD TO INCOME)
17	FNP	FNP (FEDERAL NON-PARTICIPATING)
18	NR	NR (NON-REIMBURSABLE)
99	NON-CAT	NON-CATEGORICAL

**23055 SERVICES ELIGIBILITY PROCESS CODE 2 N**

01	FIN-ELIG	PROCESS AS FINANCIALLY INELIGIBLE
02	EAF	PROCESS AS EAF
03	INC-ELIG	PROCESS AS INCOME ELIGIBLE IN LIEU OF EAF

**23060 ASSOCIATED PRIMARY LINE NUMBER 2 N**

**23065 PRIMARY AND NON-PRIMARY SERVICE RECIPIENT CODE 1 A**

P	P	PRIMARY
N	N	NON-PRIMARY

**23080 SERVICES FAMILY UNIT IDENTIFIER 1 A**

A	A	FIRST FAMILY UNIT
B	B	SECOND FAMILY UNIT
C	C	THIRD FAMILY UNIT
D	D	FOURTH FAMILY UNIT
E	E	FIFTH FAMILY UNIT
F	F	SIXTH FAMILY UNIT

**23080 SERVICES FAMILY UNIT IDENTIFIER 1 A (cont.)**

G	G	SEVENTH FAMILY UNIT
H	H	EIGHTH FAMILY UNIT
I	I	NINTH FAMILY UNIT
J	J	TENTH FAMILY UNIT
K	K	ELEVENTH FAMILY UNIT
L	L	TWELTH FAMILY UNIT
M	M	THIRTEEN FAMILY UNIT
N	N	FOURTEENTH FAMILY UNIT
O	O	FIFTEENTH FAMILY UNIT
P	P	SIXTEENTH FAMILY UNIT
Q	Q	SEVENTEENTH FAMILY UNIT
R	R	EIGHTEENTH FAMILY UNIT
S	S	NINTEENTH FAMILY UNIT
T	T	TWENTIETH FAMILY UNIT
U	U	TWENTY FIRST FAMILY UNIT
V	V	TWENTY SECOND FAMILY UNIT
W	W	TWENTY THIRD FAMILY UNIT
X	X	TWENTY FOURTH FAMILY UNIT
Y	Y	TWENTY FIFTH FAMILY UNIT
Z	Z	TWENTY SIXTH FAMILY UNIT

**23081 SERVICES FAMILY UNIT SIZE 2 N**

**23082 SERVICES ADULT/CHILD IDENTIFIER 1 A**

A	AD	ADULT
C	CH	CHILD

**23085 SERVICES MULTIPLE BIRTH INDICATOR 1 AN**

**23090 LIVING ARRANGEMENT 2 N**

01	IN-HH	IN HOUSEHOLD
02	FOS-FAM	FOSTER FAMILY CARE
03	ADOP-HM	ADOPTIVE HOME
04	GRP-HOM	GROUP HOME
05	GRP-RES	GROUP RESIDENCE

**23090 LIVING ARRANGEMENT 2 N (cont.)**

06	INST	INSTITUTION
07	COM-B-NF	COMMUNITY BASED CARE (NON-FOSTER CARE)
08	INST-NF	INSTITUTIONALIZED (NON-FOSTER CARE)
09	IHR-NF	IN HOME OF RELATIVE (NON-FOSTER CARE)
10	IHNR-NF	IN HOME OF NON-RELATIVE PERSON (NON-FOSTER CARE)
11	PUB-LOD	PUBLIC LODGING
12	NON-DOM	NON-DOMICILED
13	PADPT-HS	PRE-ADOPTIVE FOSTER HOME (SUBSIDY APPROVED)
14	PADPT-HU	PRE-ADOPTIVE FOSTER HOME (UNSUBSIDIZED)
15	ADPT-FHS	ADOPTIVE FOSTER HOME WITH SUBSIDY
16	ADPT-FHU	ADOPTIVE FOSTER HOME WITHOUT SUBSIDY
17	ADP-NFHS	ADOPTIVE NON-FOSTER HOME WITH SUBSIDY
18	ADP-NFHU	ADOPTIVE NON-FOSTER HOME WITHOUT SUBSIDY
19	EMER-FBH	EMERGENCY FOSTER BOARDING HOME
20	F-FAM-BH	FOSTER FAMILY BOARDING HOME
21	BRDG-SCH	BOARDING SCHOOL
22	GRP-LVG	GROUP LIVING
23	AGNCY-BH	AGENCY BOARDING HOME
24	DTNT-SCR	DETENTION SECURE
25	R-SCH-MR	RESIDENTIAL SCHOOL FOR THE MENTALLY RETARDED
26	SHLTR	SHELTER
27	PV-PRO-H	PRIVATE PROPRIETARY HOME
28	SPEC-HM	SPECIAL HOME
29	RES-DRUG	RESIDENTIAL DRUG TREATMENT FACILITY
30	PVB-DAC	PUBLIC FACILITIES (CAPACITY LESS THAN 16)
31	PVB-HOM	PUBLIC HOME (NON-SSI CONGREGATE SUPPLEMENT)
32	HOM-AGD	HOME FOR THE AGED
33	RES-ADLT	RESIDENCE OF ADULTS
34	FAM-TYP	FAMILY TYPE HOMES (CAPACITY 2-4)
35	ADLT-FCH	ADULT FOSTER CARE HOMES (CAPACITY 1)
36	SHL-NSSI	SHELTER (NON-SSI CONGREGATE SUPPLEMENT) CODES 40-43 WILL BE REPLACING ABOVE CODES IN PART OR WHOLE OVER THE NEXT YEAR:
40	IN-HH	IN HOUSEHOLD

**23090 LIVING ARRANGEMENT 2 N (cont.)**

41	NIN-HH	NOT IN HOUSEHOLD
42	NIN-H-FC	NOT IN HOUSEHOLD (FOSTER CARE)
43	NIN-H-I	NOT IN HOUSEHOLD (INSTITUTION)

**23100 EMANCIPATED MINOR 1 A**

Y	Y	YES
N	N	NO
Z	UNKW	UNKNOWN (NYC - SERVICES ONLY)

**23105 PURCHASE OF SERVICES STATUS 2 AN**

01	POS-ADD	POS SERVICES ADDED TO ACTIVE CASE
02	POS-CHG	EXISTING POS SERVICE CHANGED
03	POS-P-DL	POS SERVICE DELETED, POS AUTHORIZATION PERIOD IN THE PAST
04	POS-DEL	POS SERVICE DELETED, SERVICE NOT PROVIDED
05	POS-A-CH	POS AUTHORIZATION PERIOD CHANGED
06	POS-R-CH	RATE AMOUNT CHANGED
07	POS-P-CH	RATE PERIOD CHANGED
08	POS-MX-T	MAXIMUM TIME UNITS PER FREQUENCY INTERVAL CHANGED
09	POS-C-PR	METHOD OF PROVISION CHANGED
10	POS-C-ID	PROVIDER/VENDOR ID CHANGED
11	POS-C-NM	PROVIDER/VENDOR NAME CHANGED
12	POS-C-AD	PROVIDER/VENDOR ADDRESS CHANGED
13	POS-C-DC	DAY CARE FEE CHANGED

**23106 PURCHASE OF SERVICES-ONLY-INDICATOR 1 AN**

1	POS-ONLY	POS-ONLY
2	SERVICES	NOT POS-ONLY (REGULAR SERVICES CASE)

**23109 POS LINE NUMBER 2 N**

**23110 POS AUTHORIZATION PERIOD 12 N**

**23111 MAXIMUM TIME UNITS PER FREQUENCY INTERVAL 6 AN**

9-9HD	H/D	HOURS PER DAY
9-9HW	H/W	HOURS PER WEEK

**23111 MAXIMUM TIME UNITS PER FREQUENCY INTERVAL 6 AN (cont.)**

9-9HM	H/M	HOURS PER MONTH
9-9HA	H/A	HOURS PER POS AUTHORIZATION PERIOD
9-9DW	D/W	DAYS PER WEEK
9-9DM	D/M	DAYS PER MONTH
9-9DA	D/A	DAYS PER POS AUTHORIZATION PERIOD
9-9WM	W/M	WEEKS PER MONTH
9-9WA	W/A	WEEKS PER POS AUTHORIZATION PERIOD
9-9MA	M/A	MONTHS PER POS AUTHORIZATION PERIOD

**NOTES:**

(1) EXAMPLES OF THIS ELEMENT ARE:

7-0 H/D = 7 HOURS PER DAY

7-2 H/D = 7½ HOURS PER DAY

20-D/M = 20 DAYS PER MONTH

(2) FRACTIONS MAY ONLY BE USED IF THE POS TIME UNITS ARE IN HOURS. THE ALLOWABLE FRACTION UNITS ARE:

- 0 MEANS AN EVEN HOUR

- 1 MEANS ONE QUARTER HOUR

- 2 MEANS ONE HALF HOUR

- 3 MEANS THREE QUARTERS HOUR

THIS ELEMENT MULTIPLIED BY POS RATE (DE 23115/23114) YIELDS MAXIMUM DOLLARS AUTHORIZED PER SPECIFIED FREQUENCYINTERVAL--A FIGURE THAT THE POS PROVIDER/VENDOR'S BILL MAY NOT EXCEED. THIS IS NEEDED IN POST-AUTHORIZATION PROCESSING.

**23112 RECIPIENT FEE PORTION 6 N**

**23113 PROVIDER/VENDOR NAME 28 AN**

**23114 RATE PERIOD 1 A**

H	HR	HOUR
D	DAY	DAY
W	WK	WEEK
M	MO	MONTH
S	SNGL-ISS	SINGLE ISSUE

**23115 RATE AMOUNT 6 AN**

C      CONT-AMT      CONTRACTED AMOUNT

**23116 SERVICES PROVIDER VENDOR ADDRESS 40 AN**

**23119 POS PROVIDER PAYMENT PERIOD 1 A**

D      DAY      DAY  
W      WK      WEEK  
M      MO      MONTH  
H      HR      HOURS

**23121 SERVICES TRANSACTING WORKER 5 AN**

**23122 SERVICES TRANSACTING UNIT 5 AN**

**23123 SSRR REPORTING CONTROL NUMBER 2 AN**

**23126 SERVICES INCOME SOURCE 2 N**

01	SAL-WGE	SALARIES, WAGES (IN "IND PAYMENTS NOT INCLUDED)
02	ALIMONY	ALIMONY/SPOUSAL SUPPORT
03	D-SBM-IN	ANY DIVIDENDS, INTEREST, OR PERIODIC RECEIPTS FROM STOCKS, BONDS, MORTGAGES, BANK INTEREST, TRUST FUNDS, ANNUITIES, CREDIT UNION, ESTATES, ETC.
06	CH-SUP-P	CHILD SUPPORT PAYMENTS
10	GI-DA	GI-DEPENDENCY ALLOTMENT
14	GI-BOR-L	GROSS INCOME FROM EACH BOARDER/LODGER
20	NT-IN-PA	NET BUSINESS INCOME
31	NI-RENT	NET INCOME FROM RENTAL OF HOUSE, STORE, OR OTHER PROPERTY
33	NYS-DI-I	NYS DISABILITY INSURANCE
37	PAG	PUBLIC ASSISTANCE GRANT
38	RR-BEN	RAILROAD RETIREMENT BENEFIT
39	RET-BEN	RETIREMENT BENEFITS (PENSIONS)
42	SS-DI-B	SOCIAL SECURITY DISABILITY BENEFITS
43	SS-SUR-B	SOCIAL SECURITY SURVIVOR'S BENEFIT
44	SSI-RET-B	SOCIAL SECURITY RETIREMENT BENEFIT
45	SSI	SSI BENEFITS
49	UIB	UNEMPLOYMENT INSURANCE BENEFIT COMPENSATION
50	UNION-B	UNION BENEFITS

**23126 SERVICES INCOME SOURCE 2 N (cont.)**

55	VET-B	VETERAN'S PENSIONS OR BENEFIT
59	WKMN-CMP	WORKMEN'S COMPENSATION

**23127 SERVICES INCOME AMOUNT 7 N**

**23128 SERVICES INCOME PERIOD CODE 2 N**

03	WEEKLY	WEEKLY
04	BI-WEEKLY	BI-WEEKLY
05	SE-MN	SEMI-MONTHLY
06	MN	MONTHLY
07	BI-MN	BI-MONTHLY
08	QTRLY	QUARTERLY
09	TRI-ANN	TRI-ANNUALLY
10	SE-ANN	SEMI-ANNUALLY
11	ANN	ANNUALLY
12	OTO	ONE TIME ONLY

**23220 PREVIOUS CPS CASE NUMBER 10 AN**

**23230 POS DISPLAY SCREEN NUMBER 1 N**

1	SCREEN 1
2	SCREEN 2

**23231 POS DISPLAY LINE NUMBER 1 N**

1	LINE NUMBER 1
2	LINE NUMBER 2
3	LINE NUMBER 3
4	LINE NUMBER 4
5	LINE NUMBER 5

**23232 ASSOCIATED DISPLAY SCREEN ADDRESS 1 N**

**23233 ASSOCIATED DISPLAY LINE ADDRESS 1 N**

**23250 INDIVIDUAL SERMA REASON CODE 3 N**



050	SERMA-DEN	SERMA MA DENIAL
060	EXT-ELIG	EXTENDED MA ELIGIBILITY 2 MONTHS
101	DEATH-CL	DEATH OF CLIENT
177	NO-CL-CO	NO CONTACT WITH CLIENT CLOSING
179	OTH-REAS	OTHER REASON FOR CLOSING
195	NO-MA-DT	NO SEPARATE MA DETERMINATION REQUIRED (CLOSING)
222	MA-DATES	MA DATES ACCURATELY ENTERED BY WORKER
233	MA-STAND	MA STANDARDS
244	AC-MA-NS	ACTIVE MA IN A NON-SERVICES CASE

**23300 RECIPIENT FEE PORTION - PART TIME DAY CARE 5 N**

**23310 RECIPIENT FEE PORTION - FULL TIME DAY CARE 5 N**

**23400 SPECIAL AREAS 10 AN**

**23410 LAST UPDATE 5 AN**

**23411 PRIMARY OR NON-PRIMARY STATUS DATE 5 N**

**23413 ELIGIBILITY CATEGORY AUTHORIZED DATE 5 N**

**23414 SERVICES FAMILY UNIT STATUS DATE 5 N**

**23415 SERVICES GOAL DATE 5 N**

**23416 GOAL ACHIEVEMENT STATUS DATE 5 N**

**23417 INCOME AUTHORIZATION DATE 5 N**

**23418 SPECIAL AREAS DATE 5 AN**

**23419 DIRECT SERVICE TIME REPORT DATE 5 N**

**23420 CCRS INDIVIDUAL STATUS 2 N**

01	APLY	APPLYING
02	N-NLR	NOT LEGALLY RESPONSIBLE INDIVIDUAL NOT APPLYING IN THIS CASE
03	N	LEGALLY RESPONSIBLE RELATIVE/INDIVIDUAL NOT APPLYING IN THIS CASE
04	COOP	IN RECEIPT OF OR APPLYING COOPERATIVELY FOR PUBLIC ASSISTANCE

**23420 CCRS INDIVIDUAL STATUS 2 N (cont.)**

05	UNB-CLD	PREGNANT MOTHER APPLYING ON BEHALF OF UNBORN CHILD
06	WITHDRN	WITHDRAWN INDIVIDUAL
07	ACT	ACTIVE
08	INACT-EX	INACTIVE - EXCESS RESTRICTED INCOME (PA ONLY)
09	INACT-NA	INACTIVE - DID NOT APPLY
10	INACT-SAN	INACTIVE - SANCTIONED
11	DEN	DENIED
12	PREG-DEN	DENIED MONTH APPLYING ON BEHALF OF UNBORN CHILD
13	DECEASED	DECEASED
15	DEL	DELETED
20	CAS-CL	CASE CLOSED
25	PRG-NEED	PREGNANT NEEDS MET
26	PRG-SAN	PREGNANT – SANCTION

**23425 RECIPIENT PERSONAL INCOME 5 N**

**23430 SERVICE TYPE QUALIFIER 1 AN**

**23435 DIRECT SERVICE TIME REPORTED (HRS) 2 N**

**23436 DIRECT SERVICE TIME REPORTED (MINS) 2 N**

**23445 CURRENT INCOME 7 N**

**23450 SEX 1 A**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**23452 JD/PINS CODE 1 A**

J	JD	JUVENILE DELINQUENT
P	PINS	PERSON IN NEED OF SUPERVISION

**23455 STATE CHARGE/FEDERAL CHARGE INDICATOR 2 N**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**23460 DATE OF BIRTH 8 N**

**23490 CCRS INDICATOR 1 AN**

C	CCRS-CSE	CCRS INVOLVEMENT IN CASE
D	DATR-SER	DAY TREATMENT SERVICES
E	DIPS-PRG	DIRECT INTENSIVE PREVENTIVE SERVICE PROGRAM (PEG)
F	HA-ECS	HOME AIDE FROM EMERGENCY CHILDRENS SERVICES (ECS)
G	HMK-SER	HOMEMAKER SERVICES
H	PPRV-SER	PURCHASED PREVENTIVE SERVICES
I	FAM-SRV	FAMILY SERVICES (DIRECT)
J	FC-SER	FOSTER CARE SERVICES
K	MAT-SHLT	MATERNITY SHELTER
L	FC-ECS	FOSTER CARE-EMERGENCY CHILDREN SERVICES
M	PINS-WRT	PINS WARRANT
N	JD-RMD	DELINQUENT (JD) REMAND
O	NGT-RMD	NEGLECT REMAND (NON-CPS)
P	PINS-RMD	PINS REMAND
Q	JD-CM-PL	DELINQUENT (JD) COMMITMENT/PLACEMENT
R	PINS-C-P	PINS COMMITMENT/PLACEMENT
S	J-DFY-SC	DELINQUENT (JD) PLACEMENT NYS/DFY FOR REPLACEMENT WITH SSC
T	CO-E-OTN	COURT-ORDERED EVALUATION (DOCKET CODE OTHER THAN "N" NEGLECT)
U	CO-INV	COURT-ORDERED-INVESTIGATION
V	CO-SUPV	COURT-ORDERED-SUPERVISION
W	CC-SER	CLOSED CASE SERVICE
X	HM-EVAL	HOME EVALUATION
Y	SRF-OCSS	REFERRAL FOR SERVICES TO OTHER COMMUNITY OR SOCIAL SERVICE AGENCY

**24001 DAY CARE FEE PERCENT N 3**

**24002 ACTIVE RESTRICTION/EXCEPTION CODE 2 AN**

01	EXCEPTION
02	MULTIPLE EXCEPTIONS
03	EXCEPTION AND CASE MANAGEMENT
04	MULTIPLE EXCEPTIONS AND CASE MANAGEMENT
05	PHARMACY RESTRICTION

**24002 ACTIVE RESTRICTION/EXCEPTION CODE 2 AN (cont.)**

- 06 PHYSICIAN RESTRICTION
- 08 CLINIC RESTRICTION
- 10 CASE MANAGEMENT
- 11 PHARMACY AND PHYSICIAN
- 12 PHARMACY, PHYSICIAN AND CASE MANAGEMENT
- 13 PHARMACY AND CLINIC
- 14 PHARMACY, CLINIC AND CASE MANAGEMENT
- 15 PHARMACY AND CASE MANAGEMENT
- 16 PHYSICIAN AND CASE MANAGEMENT
- 18 CLINIC AND CASE MANAGEMENT

**24003 CURRENT PREPAID CAPITATION PLAN STATUS CODE 2 AN**

- 00 PCP ENROLLMENT ENDED
- 01 ACTIVE PCP ENROLLMENT

**24006 TARGET GROUP CODE LINE NUMBER 1 AN**

**24007 CHILD CARE CODE LINE NUMBER 2 AN**

**24008 ACTIVITY ENROLLMENT FLAG LINE NUMBER 2 AN**

**24009 SUPPLEMENTAL CHILD CARE AMOUNT 7 N**

**24011 BATCH UPDATE PROCESSING CODE 1 AN**

- BLANK NO SPECIAL PROCESSING NECESSARY
- F PRIORITY PROCESSING FOR FOOD STAMPS SINGLE ISSUE PAYMENT(S)

**24013 NUMBER OF FOOD STAMP CLAIM FIRST DATE 2 N**

**24014 NUMBER OF LAST FS CLAIM DATE 2 N**

**24019 HEAP BUDGET VERSION NUMBER 2 AN**

**24020 APPLICATION RECORD INTERNAL STATUS 1 AN**

- 1 AVAIL APPLICATION AVAILABLE
- 2 UN-MAINT APPLICATION UNDERGOING MAINTENANCE
- 3 UN-CLEAR APPLICATION UNDERGOING CLEARANCE
- 4 AP-WTHDR APPLICATION WITHDRAWN

**24020 APPLICATION RECORD INTERNAL STATUS 1 AN (cont.)**

5	UN-FDE	UNDERGOING FULL DATA ENTRY
6	FDE-COMP	FULL DATA ENTRY COMPLETE
7	REGISTRY	REGISTRY
8	SYS-WTHD	SYSTEM WITHDRAWN
9	IL-APP	INITIAL LOAD - COMPLETED APPLICATION
A	IL-FDE	INITIAL LOAD - COMPLETED FULL DATA ENTRY

**24021 BUDGET HEAP INDICATOR CODE 1 AN**

**24022 TEMPORARY ASSISTANCE/FOOD STAMP VERSION NUMBER 2 AN**

**24023 MABEL STORE CODE 1 AN**

**24024 ABEL STORE CODE 1 AN**

**24025 ELECTRONIC DOCUMENT INDICATOR 1 AN**

**24030 SUPERVISOR SIGN-OFF EFFECTIVE DATE 6 N**

**24033 APPLICANT INDIVIDUAL KEY INDICATOR 1 AN**

**24034 BUDGET DATA EXTRACTOR CODE 1 AN**

**24040 PENDING DATA STATUS 2 AN**

00	NO PEND	(CASE-IDLE) - NO PENDING DATA EXISTS
02	FDE/ERR	AWAITING ERROR CORRECTION AFTER FDE
03	FDE/SSG	AWAITING SIGN-OFF AFTER FDE
04	AW/SFED	AWAITING SFED FDE
06	SFED/ERR	AWAITING ERROR CORRECTION AFTER INITIAL SFED ENTRY
07	REAC/SSG	AWAITING SIGN-OFF AFTER CASE REACTIVATION
08	REAC/BUP	SIGNED-OFF AFTER CASE REACTIVATION - AWAITING BATCH UPDATE
09	UM/ERR	AWAITING UNDERCARE MAINTENANCE ERROR CORRECTION
12	FDE/BUP	SIGNED-OFF AFTER FDE - AWAITING BATCH UPDATE
13	UM/BUP	SIGNED-OFF AFTER UNDERCARE MAINTENANCE - AWAITING BATCH UPDATE
15	UM/SSG	AWAITING SIGN-OFF AFTER UNDERCARE MAINTENANCE
17	UM/CL	AWAITING CLEARANCE RESOLUTION
18	UM/CLERR	AWAITING CLEARANCE RESOLUTION AND ERROR CORRECTION

**24040 PENDING DATA STATUS 2 AN (cont.)**

19	A/SFED-M	AWAITING SFED MAINTENANCE
20	DEN/SSG	AWAITING SIGN-OFF AFTER APP DENIAL
21	DEN/BUP	SIGNED-OFF AFTER APP DENIAL - AWAITING BATCH UPDATE
22	PEND/CAN	PENDING DATA CANCELLED
23	FDEOVER	OVERRIDDEN FULL DATA ENTRY
24	UMOVER	OVERRIDDEN UNDERCARE
25	AT/FDE	AWAITING TRANSMISSION AFTER FDE
26	AT/UM	AWAITING TRANSMISSION AFTER UNDERCARE
27	AT/REA	AWAITING TRANSMISSION AFTER REACTIVATION
28	AT/DEN	AWAITING TRANSMISSION AFTER APP DENIAL
29	AT/FDEOV	AWAITING TRANSMISSION AFTER FDE-OVERRIDE
30	AT/UMOV	AWAITING TRANSMISSION AFTER U/M-OVERRIDE
31	AU/FDE	AWAITING LOCAL UPDATE AFTER FDE
32	AU/UM	AWAITING LOCAL UPDATE AFTER UNDERCARE
33	AU/REA	AWAITING LOCAL UPDATE AFTER REACTIVATION
34	AU/DEN	AWAITING LOCAL UPDATE AFTER APP DENIAL
35	AU/FDEOV	AWAITING LOCAL UPDATE AFTER FDE-OVERRIDE
36	AU/UMOV	AWAITING LOCAL UPDATE AFTER U/M-OVERRIDE
37	AT/FCFD	AWAITING TRANSMISSION AFTER FORCED CLOSING
38	AU/FCFD	AWAITING LOCAL UPDATE AFTER FORCED CLOSING
39	FCFD/BUP	SIGNED OFF AWAITING BATCH UPDATE AFTER FORCED CLOSING
40	REAC/UM	AWAITING UNDERCARE MAINTENANCE AFTER CASE REACTIVATION
41	REAC/ERR	AWAITING UNDERCARE MAINTENANCE ERROR CORRECTION AFTER CASE REACTIVATION
42	REAC/OVR	OVERRIDDEN REACTIVATION
43	AT/REAOV	AWAITING TRANSMISSION AFTER REACTIVATION OVERRIDE
44	AU/REAOV	AWAITING LOCAL UPDATE AFTER REACTIVATION OVERRIDE
45	FDE/ALEC	FDE - AWAITING LOCAL ERROR CORRECTION
46	UM-ALEC	UM - AWAITING LOCAL ERROR CORRECTION
50	DBR-SSG	AWAITING SIGN-OFF AFTER DIRECT BUDGET REAUTHORIZATION
51	DBR-BUP	SIGNED OFF AFTER DIRECT BUDGET REAUTHORIZATION - AWAITING BATCH UPDATE
52	AT-DBR	AWAITING TRANSMISSION AFTER DIRECT BUDGET REAUTHORIZATION
53	AU-DBR	AWAITING LOCAL UPDATE AFTER DIRECT BUDGET REAUTHORIZATION

**24040 PENDING DATA STATUS 2 AN (cont.)**

54	AC-DBR	AWAITING DIRECT BUDGET REAUTHORIZATION COMPLETION
60	AT-CUI	AWAITING TRANSMISSION AFTER CIN UNDUP OF INACTIVE CASE
61	AU-CUI	AWAITING LOCAL UPDATE AFTER CIN UNDUP OF INACTIVE CASE
62	CUI-BUP	CIN UNDUPLICATION AWAITING BATCH UPDATE OF INACTIVE CASE
63	NEW-SER	NEW SERVICES PENDING RECORD
64	REU-SER	REUSED SERVICES PENDING RECORD
90	FDE/RFI	AWAITING RFI RESOURCE RESOLUTION AFTER FDE
91	UM/RFI	AWAITING RFI RESOURCE RESOLUTION AFTER U/M

**24041 FUTURE PENDING DATA STATUS 2 AN**

03	FDE-SSG	AWAITING SIGN-OFF AFTER FDE
07	REAC-SSG	AWAITING SIGN-OFF AFTER CASE REACTIVATION
15	UM-SSG	AWAITING SIGN-OFF AFTER UNDERCARE MAINTENANCE
25	AT-FDE	AWAITING TRANSMISSION AFTER FDE
26	AT-UM	AWAITING TRANSMISSION AFTER UNDERCARE
27	AT-REA	AWAITING TRANSMISSION AFTER REACTIVATION

**24045 PERSONAL FINANCE RECORD INDICATOR 1 N**

0	FEWER THAN 5 INCOME SOURCES
1	MORE THAN 4 INCOME SOURCES

**24050 ENCODED VALUE OF SURNAME 6 N**

**24051 LOW ORDER DIGIT OF ENCODED VALUE OF SURNAME 1 N**

**24060 ENCODED VALUE OF FIRST NAME 6 N**

**24070 AUDIT DATE 8 N**

**24080 NEXT ACCEPTANCE NUMBER/AUTHORIZATION NUMBER 8 N**

**24090 MMIS DATA INDICATOR 1 AN**

1	THERE IS MMIS DATA FOR THE CURRENT AUTHORIZATION PERIOD
BLANK	NO MMIS DATA FOR THE CURRENT AUTHORIZATION PERIOD

**24100 AUTHORIZATION PAYMENT DATA FLAG 1 N**

0	THERE ARE NO CURRENT PAYMENTS
1	THERE ARE CURRENT PAYMENTS

**24110 SURNAME 17 N**

**24120 GIVEN NAME 10 AN**

**24130 MIDDLE INITIAL 1 AN**

**24135 SSN RECORD TYPE FLAG 1 AN**

1	APPLNT	POINTS TO APPLICANT
2	RECPT	POINTS TO RECIPIENT

**24140 CASE INVOLVEMENT STATUS FLAG 2 AN**

**24150 CIN TYPE 1 AN**

BLANK	USER	USER-ENTERED
A	SYSTEM	SYSTEM-ASSIGNED
R	SYS-FDE	SYSTEM-ASSIGNED RETRIEVED DURING FULL DATA ENTRY

**24155 DISTRICT INVOLVEMENT FLAG 1 N**

0	NO	NO INVOLVEMENT
1	YES	INVOLVEMENT

**24169 MEDICAL INSURANCE LINE NUMBER 1 N**

**24170 MEDICAL INSURANCE FLAG 2 N**

0	NO MEDICAL INSURANCE INFORMATION FOR THE INDIVIDUAL
1	THERE IS MEDICAL INSURANCE INFORMATION FOR THE INDIVIDUAL

**24180 MEDICARE FLAG 1 N**

1	FLAG ON
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**24190 MEDICARE UPC INDICATOR 1 N**

**24200 TITLE XIX FLAG 1 N**

0	NO TITLE XIX INFORMATION FOR THE INDIVIDUAL
1	THERE IS TITLE XIX INFORMATION FOR THE INDIVIDUAL

**24210 MEDICARE RESTRICTIONS FLAG 1 N**



- 0 NO MEDICAL RESTRICTIONS FOR THE INDIVIDUAL
- 1 THERE IS MEDICAL RESTRICTIONS INFORMATION FOR THE INDIVIDUAL

**24220 ADC CASE INVOLVEMENT INDICATOR 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN ADC CASE
- 1 CURRENTLY ACTIVE IN ONE OR MORE ADC CASES

**24250 PG-ADC CASE INVOLVEMENT INDICATOR 1 N**

- 0 NOT CURRENTLY ACTIVE IN A PG-ADC CASE
- 1 ACTIVE IN ONE OR MORE PG-ADC CASES

**24260 HR CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN HR CASE
- 1 ACTIVE IN ONE OR MORE HR CASES

**24270 VA CASE INVOLVEMENT STATUS FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN A VA CASE
- 1 ACTIVE IN ONE OR MORE VA CASES

**24280 EAA CASE INVOLVEMENT INDICATOR 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN EAA CASE
- 1 ACTIVE IN ONE OR MORE EAA CASES

**24290 EAF CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN EAF CASE
- 1 ACTIVE IN ONE OR MORE EAF CASES

**24300 MA CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN MA CASE
- 1 ACTIVE IN ONE OR MORE MA CASES

**24310 MA-SSI CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN MA-SSI CASE
- 1 ACTIVE IN ONE OR MORE MA-SSI CASES

**24320 FOOD STAMP CASE INVOLVEMENT INDICATOR 1 N**

- 0 NOT CURRENTLY ACTIVE IN A FOOD STAMP CASE
- 1 ACTIVE IN ONE OR MORE FOOD STAMP CASES

**24330 NPA FOOD STAMP CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN A NPA - FOOD STAMPS CASE
- 1 ACTIVE IN ONE OR MORE NPA - FOOD STAMPS CASES

**24340 FOOD STAMPS-MIXED CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN A FOOD STAMPS - MIXED CASE
- 1 ACTIVE IN ONE OR MORE FOOD STAMPS - MIXED CASES

**24346 PENDING SEPERATE DETERMINATION CASE TYPE 2 AN**

**24350 SERVICES CASE INVOLVEMENT INDICATOR 1 N**

- 0 NOT CURRENTLY ACTIVE IN A SERVICES CASE
- 1 ACTIVE IN ONE OR MORE SERVICES CASES

**24360 SSI CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN AN SSI CASE
- 1 ACTIVE IN ONE OR MORE SSI CASES

**24365 HEAP CASE INVOLVEMENT FLAG 1 N**

- 0 NOT CURRENTLY ACTIVE IN A HEAP CASE
- 1 ACTIVE IN ONE OR MORE HEAP CASES

**24366 HEAP PAYMENT TYPE CODE 1 AN**

- A HP-I PAYMENT TYPE H1 (REGULAR HEAP BENEFIT - INCOME TIER 1) EXISTS
- B HP-I-SO PAYMENT TYPE H2 (REGULAR HEAP BENEFIT UTILIZED TO AVERT UTILITIES SHUT-OFF - INCOME TIER 1) EXISTS

- C HP-II PAYMENT TYPE H3 (REGULAR HEAP BENEFIT - INCOME TIER II) EXISTS
- D HP-II-SO PAYMENT TYPE H4 (REGULAR HEAP BENEFIT UTILIZED TO AVERT UTILITY SHUT-OFF - INCOME TIER II) EXISTS

**24370 MMIS INTERFACE DATA CHANGE FLAG 1 AN**

- 1 A CHANGED TO ONE OR MORE DATA ITEMS INVOLVED IN THE MMIS INTERFACE HAS OCCURRED
- BLANK NO CHANGE HAS OCCURRED

**24375 EMEVS CHANGE INDICATOR 1 AN**

- 1 RECORD 1 HAS CHANGED
- 2 RECORD 2 HAS CHANGED
- 3 RECORD 3 HAS CHANGED
- 4 RECORDS 1 AND 2 HAVE CHANGED
- 5 RECORDS 1 AND 3 HAVE CHANGED
- 6 RECORDS 2 AND 3 HAVE CHANGED
- 7 ALL RECORDS HAVE CHANGED

**24380 BUDGET INDICATOR 1 AN**

- 0 NO BUDGET
- 1 MA/PA BUDGET
- 2 FS BUDGET
- 3 PA AND FS BUDGET
- 4 MA/PA BOTTOM LINE (BL) BUDGET
- 5 MA AND BL OR PA AND BL BUDGET
- 6 FS AND BL BUDGET
- 7 PA, FS AND BL BUDGET
- A PA AND HEAP BUDGETS EXIST
- B FS AND HEAP BUDGETS EXIST

**24380 BUDGET INDICATOR 1 AN (cont.)**

- C PA, FS AND HEAP BUDGETS EXIST
- D BOTTOM-LINE AND HEAP BUDGETS EXIST
- E PA, BOTTOM-LINE, AND HEAP BUDGETS EXIST
- F FS, BOTTOM-LINE, AND HEAP BUDGETS EXIST

G PA, FS, BOTTOM-LINE, AND HEAP BUDGETS EXIST  
H HEAP BUDGETS EXIST

**24382 MA REBUDGET INDICATOR 1 AN**

1 HAS GONE THROUGH MA MASS REBUDGETING  
BLANK HAS NOT GONE THROUGH MA MASS REBUDGETING

**24383 MA REBUDGET FLAG 1 AN**

X X REBUDGETING HAS BEEN COMPLETED

**24385 REBUDGET CODE 1 AN**

0 NO BUDGET  
1 RE-PA-BUDGET  
2 RE-FS-BUDGET  
3 RE-PA-BUDGET AND RE-FS-BUDGET

**24386 REBUDGET (ABEL MASS REBUDGETING) FLAG 1 AN**

**24387 BOTTOM LINE CONVERSION FLAG 2 AN**

**24388 MA CONVERSION FLAG 2 AN**

**24390 PENDING TRANSACTION TYPE 2 AN**

See [WMS Card Code Index](#) for a list of code descriptions/values.

**24395 PENDING SEPARATE DETERMINATION CASE NUMBER 10 N**

**24410 PENDING TRANSACTION DATE 6 N**

**24412 SEPARATE DETERMINATION PA FLAG 1 AN**

B FS SEPARATE DETERMINATION AND MA EXTENSION CASES EXIST  
BLANK NO SEPARATE DETERMINATION CASE EXISTS; NO MA EXTENSION CASE EXISTS  
F FS SEPARATE DETERMINATION CASE EXISTS  
M MA EXTENSION CASE EXISTS  
X SEPARATE DETERMINATION CASE(S) EXISTS

**24420 ADC APPLICATION COUNT 5 N**

**24430 ADC-U APPLICATION COUNT 5 N**

**24440 ADC-FC APPLICATION COUNT 5 N**

**24450 PG-ADC APPLICATION COUNT 5 N**

**24460 HR APPLICATION COUNT 5 N**

**24470 VA APPLICATION COUNT 5 N**

**24480 EAA APPLICATION COUNT 5 N**

**24490 EAF APPLICATION COUNT 5 N**

**24500 MA APPLICATION COUNT 5 N**

**24510 MA-SSI APPLICATION COUNT 5 N**

**24520 FS APPLICATION COUNT 5 N**

**24530 NPA-FS APPLICATION COUNT 5 N**

**24540 FS-M APPLICATION COUNT 5 N**

**24550 SERVICES APPLICATION COUNT 5 N**

**24560 SSI APPLICATION COUNT 5 N**

**24600 PG-ADC SIGNOFF COUNT 5 N**

**24670 FS SIGNOFF COUNT 5 N**

**24690 FS-M SIGNOFF COUNT 5 N**

**24720 ADMINISTRATIVE NOTICE FLAG 1 AN**

1	NOTICE NUMBER REQUIRED BUT NOT ENTERED
2	NOTICE NUMBER ENTERED BUT NOT REQUIRED
3	NOTICE NUMBER NOT FOUND ON CNS
4	NOTICE AND CASE NOT IN SYNC
5	NOTICE AND CASE IN SYNC
6	NOTICE NOT NECESSARY
BLANK	NO ADMINISTRATIVE NOTICE SHOULD BE GENERATED

**24722 PA SANCTION VERSION NUMBER 3 AN**

**24730 EVEN YEAR EARNED INCOME FLAG 1 AN**

- 0 NO EARNED INCOME PRESENT
- 1 EARNED INCOME PRESENT
  
- 24731 ODD YEAR EARNED INCOME FLAG 1 AN**
  - 0 NO EARNED INCOME PRESENT
  - 1 EARNED INCOME PRESENT
  
- 24732 PA BUDGET VERSION NUMBER 3 AN**
- 24733 MA BUDGET VERSION NUMBER 2 N**
- 24734 FS BUDGET VERSION NUMBER 3 AN**
- 24735 PA HISTORY VERSION NUMBER 2 AN**
- 24736 FOOD STAMP HISTORY VERSION NUMBER 2 AN**
- 24737 BOTTOM LINE HISTORY VERSION NUMBER 2 AN**
- 24738 BL BUDGET VERSION NUMBER 3 AN**
- 24739 MA BL BUDGET VERSION NUMBER 2 N**
- 24742 BUDGET PA INDICATOR 1 AN**
  - C PENDING PA BUDGET CALCULATED
  - X PA BUDGET EXISTS
- 24743 MA BUDGET INDICATOR 1 AN**
  - C PENDING MA BUDGET CALCULATED
  - D MA BUDGET DELETED
  - X MA BUDGET EXISTS
- 24744 BUDGET FS INDICATOR 1 AN**
  - X FS BUDGET EXISTS
  - Y FS BUDGET NEEDS TO BE RECALCULATED
- 24745 FS FINANCIAL TRACKING FLAG 1 AN**
  - X FIN-INDFS FINANCIAL TRACKING EXISTS
  
- 24748 BUDGET BL FLAG 1 AN**
  - X BL BUDGET EXISTS

**24749 MA BL BUDGET INDICATOR 1 AN**

D MA BL BUDGET DELETED  
X MA BL BUDGET EXISTS

**24750 AUTHORIZATION CYCLE NUMBER 2 N**

**24751 APPLICATION TURNAROUND CYCLE NUMBER 2 N**

**24757 LOCAL-DATA FLAG - SERVICES 1 AN**

1 EXISTENCE OF LOCAL DATA FEEDBACK RECORD  
BLANK NON-EXISTENCE OF LOCAL DATA FEEDBACK RECORD

**24759 LOCAL DATA FLAG 1 AN**

1 EXISTENCE OF LOCAL DATA FEEDBACK RECORD  
BLANK NON-EXISTENCE OF LOCAL DATA FEEDBACK RECORD

**24760 CASE LOCAL DATA 57 N**

**24770 INDIVIDUAL LOCAL DATA 10 N**

**24775 LOCAL DATA FEEDBACK TRANSMISSION DATE 6 N**

**24776 LOCAL DATA FEEDBACK EXTRACT DATE 5 N**

**24777 LOCAL DATA FEEDBACK DISPOSITION INDICATOR 1 AN**

0 SIGNED OFF, AWAITING TRANSMISSION  
1 ON PRIMARY, DATA EXTRACTED BUT HAS NOT BEEN SUCCESSFULLY RECEIVED  
2 DATA EXTRACTED GOING TO BACKUP, ON BACKUP LESS THAN 24 HOURS  
3 DATA ON BACKUP NOT RECEIVED  
4 TRANSMISSION SENT FROM PRIMARY  
5 TRANSMISSION SENT FROM BACKUP  
6 REPLY SENT CASE ACCEPTED  
7 REPLY SENT CASE REJECTED  
8 NO TRANSMISSION, CASE FORCED  
9 NO REPLY, CASE FORCED

**24778 LOCAL DATA FEEDBACK DAYS OUTSTANDING 1 N**

**24780 TITLE XX GOAL 1 N**

**24785 RECENT WORK HISTORY DATE 6 N**

**24790 CPS SERVICES INDICATOR 2 AN**

**24792 PURCHASE OF SERVICES UNIQUE IDENTIFIER 5 N**

**24794 HIGHEST POS UNIQUE IDENTIFIER ON CASE 5 N**

**24800 TITLE XX METHOD OF PROVISION (TABLE) 1 N**

**24801 TITLE XX ELIGIBILITY CATEGORY 1 N**

**24802 TITLE XX INCOME PERCENTAGE 5 N**

**24805 PLAN YEAR 1 N**

1      PREV-YR      PREVIOUS YEAR

2      CUR-YR      CURRENT YEAR

**24806 DAY CARE FAMILY SIZE PERCENT 6 N**

**24820 CIN COUNT 5 N**

**24822 SSN COUNT 5 N**

**24824 POSSIBLE COUNT 5 N**

**24826 TOTAL MATCH 5 N**

**24828 TOTAL REFERENCE NUMBER 5 N**

**24830 MATCH BIT 1 N**

**24836 VALUE-MATCH 2 N**

**24837 PA WATER AMOUNT PREVIOUS BUDGET 7 N**

**24838 FUEL FOR HEATING TYPE PREVIOUS BUDGET 1 AN**

SEE FUEL FOR HEATING TYPE (DE #11130) FOR CURRENT, VALID CODES & VALUES

**24839 PA EARNED INCOME SOURCE PREVIOUS BUDGET 2 AN**

SEE PA UNEARNED INCOME SOURCE (DE #07106) FOR CURRENT, VALID CODES & VALUES

**24840 ASWI AGE COUNTER 1 N**

**24841 ASWI ASSIGNED CASE NUMBER 10 N**

**24842 ASWI SPAWN COUNT 5 N**



**24843 PA UNEARNED INCOME SOURCE PREVIOUS BUDGET 2 AN**

SEE PA UNEARNED INCOME SOURCE (DE #07106) FOR CURRENT, VALID CODES & VALUES

**24844 EARNED INCOME CREDIT INDICATOR FOR PREVIOUS BUDGET 1 AN**

**24845 BENDEX MATCH COUNTER 1 N**

**24846 SSA PAYMENT AMOUNT 5 N**

**24847 SSA DEDUCTION AMOUNT 5 N**

**24850 ENTRY TIME 6 N**

**24852 MMIS CONTROL DATE 6 N**

**24854 RESTRICTION RECORD CHANGE TYPE 1 AN**

B OPEN AFTER  
C CLOSE BEFORE  
E CLOSE AFTER  
I INACTIVATION AFTER  
N NEVER SENT TO FISCAL AGENT

**24854 RESTRICTION RECORD CHANGE TYPE 1 AN (cont.)**

O OPEN BEFORE  
R RETRO BEFORE  
S INACTIVATED BEFORE  
T RETRO AFTER

**24856 DATE OF LAST RESTRICTION UPDATE 6 N**

**24860 UNDUPLICATED RECIPIENT 8 AN**

**24861 UNDUPLICATION FLAG 1 AN**

BLANK RECORD ASSOCIATED WITH ONLY CURRENT CIN  
U RECORD RETAINED FROM A DELETED CIN

**24862 DATE OF LAST PROVIDER/NAME UPDATE 6 N**

**24866 DATE OF PROVIDER UPDATE 6 N**

**24876 AREA UPDATE KEY FROM DATE 6 N**

**24890 PA HEAP INDICATOR 1 AN**

**24900 ARCHIVE DATE 6 N**

**24901 ARCHIVE INDICATOR 1 AN**

A	ARCHIVE	RECORD WRITTEN TO ARCHIVE DURING PASS 1 WILL NOT BE MIGRATED
M	RCD-MIGR	RECORDS POINTED TO OR OWNED BY THIS RECORD HAVE BEEN REMOVED BY THE DATA MIGRATION PROCESS
X	REC-FL-R	RECORD FLAGGED FOR REMOVAL

**24902 CASE INACTIVE DATE 6 N**

**24903 RUN DATE 6 N**

**24904 ARCHIVE FLAG 1 AN**

2	IN-NS-DM	INACTIVE NON-SERVICES DATA MIGRATION
3	IN-SV-DM	INACTIVE SERVICE DATA MIGRATION
6	IN-CCRS	INACTIVE SERVICES DATA MIGRATION WITH INDIVIDUAL TRACKED IN CCRS

**24905 ARCHIVE BIT 1 N**

1	INDICATES RECORD FLAGGED FOR DELETION
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**24940 ASSOCIATED NAME AND ADDRESS LOCATION IDENTIFIER 1 AN**

A	ASSOCIATED NAME & ADDRESS A
B	ASSOCIATED NAME & ADDRESS B

**24945 PAYMENT TYPE LINE NUMBER 1 N**

**24951 HOUR OF LAST UPDATE PCP 2 AN**

**24953 DATE OF LAST PREPAID CAPITATION PLAN (PCP) UPDATE 6 N**

**25001 USERID 6 N**

**25015 PHYSICAL IDENTIFIER 5 N**

**25036 TIP TRANSACTION CODE 6 AN**

**25516 RECORD NAME 30 AN**

**25694 RUN IDENTIFICATION NAME OF THE TARUS SAVE 6 AN**

**28003 BENEFIT CATEGORY CODE 2 AN**

1 PA  
2 FS  
3 MA

**28006 NOTICE TEXT CONTROL ACTION CODE 2 AN**

**28018 BENEFIT PROGRAM AREA CODE 2 AN**

**28070 DATE FIELD TEXT GROUP 300 AN**

**42008 MIGRATION CONTROL STATUS CODE 2 N**

**57000 FAIR HEARING NUMBER 8 AN**

**57014 AID STATUS 1 AN**

**95011 RESUME RECORD KEY 30 AN**

**95015 RUN START DATE 8 N**

**95016 RUN START TIME 8 N**

**95133 RESTAURANT INDICATOR 1 AN**

Y YES RESTAURANT INDICATOR

**95134 RESIDENTIAL TREATMENT CENTER (RTC) CODE 1 AN**

Y YES CLIENT LIVING IN RTC

**95135 SIS CODE**

Y YES

**95286 TRANSFER PIN CODE 1 AN**

N DON'T TRANSFER  
Y TRANSFER

**95287 MAIL PIN CODE 1 AN**

- 0 NO ACTION
- 1 MAIL PIN TO CLIENT
- 2 MAIL PIN TO AUTHORIZED REPRESENTATIVE
- 3 MAIL PIN TO CLIENT AND AUTHORIZED REPRESENTATIVE

**95548 LEVEL OF DIFFICULTY CODE 1 AN**

- 1 NORMAL
- 2 SPECIAL
- 3 EXCEPTIONAL
- A AIDS
- T THERAPEUTIC

**95556 ASSOCIATED NAME INDICATOR 1 AN**

- A ASSOCIATED NAME DATA A
- B ASSOCIATED NAME DATA B
- C ASSOCIATED NAME DATA C
- P PROVIDER DATA (CONVERSION)

**95557 DISCHARGE RESOURCE PERSON CIN NUMBER 8 AN**

**95901 DISTRICT ADDRESS 1 25 AN**

**95902 DISTRICT ADDRESS 2 25 AN**

**95903 DISTRICT CITY 15 AN**

**95904 DISTRICT ZIP 9 AN**

**95907 DISTRICT NAME 28 AN**

**95908 DISTRICT MNEMONIC 4 AN**

**96475 MANUAL VOUCHER SPAWN NUMBER 8 N**

**96562 AUTHORIZED REPRESENTATIVE NAME 28 AN**

**96566 LAST TRANSMISSION DATE 8 N**

**96567 LAST TRANSMISSION TIME 8 N**

**96569 LAST DATE ANY TRANSACTION UPDATED RECORD 8 N**

- 96574 LAST TIME ANY TRANSACTION UPDATE RECORD 8 N**
- 96613 CODE INDICATING PAYMENT REQUIRES SPECIAL BICS PROCESSING 2 AN**
- 98236 MAILING APARTMENT NUMBER 5 AN**
- 98335 OTHER NAME IDENTIFIER NUMBER 9 AN**