

-----  
WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
-----

EIS 1060 - WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
REVISED 07/01/06 - CHANGE NO. 01-07

I. GENERAL INFORMATION

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

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

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

The Quarterly Reporting Screens are updated again the night the Work First/Transitional Quarterly Reporting Case Transfer Cycle is run.

II. LOGON PROCEDURES

Use the following instructions to access the Work First/Transitional Quarterly Reporting Screens.

- A. Refer to [EIS 4900, Appendix A](#), for instructions to logon to IMS.
- B. On the EIS Menu screen, key "QR" for Work First/Transitional Quarterly Reporting in the SELECTION field.
- C. Press ENTER. The Work First/Transitional Quarterly Reporting screen is displayed.

*** WORK FIRST/TRANSITIONAL QUARTERLY REPORTING ***										APRIL
04/26/06										
COUNTY:	DISTRICT:			CASE ID:			LAST NAME:		TYPE:	
STATUS	RPT	CASE ID	DIST	CO	CASE	LAST NAME	FIRST NAME	MI	FSIS	QR TYPE
ENTER = UPDATE SELECTION			PF7/19 KEY = PAGE BACK KEY				PF8/20 KEY = PAGE FORWARD			

-----  
WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
-----

REVISED 07/01/06 - CHANGE NO. 01/07

II. (CONTD)

- D. You can also access the Work First/Transitional Quarterly Reporting Screens from any other inquiry screen in IMS. Key "QR" in SELECTION. Press ENTER. The Work First/Transitional Quarterly Reporting Screen is displayed.

III. VIEWING THE QUARTERLY REPORTING DATABASE

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

You may access quarterly reporting information statewide using any of the following selections.

A. CASE ID

1. Enter the eight-digit CASE ID number. Press ENTER.
2. If the case was not selected for quarterly reporting, the CASE ID you entered is highlighted and the following message is displayed at the bottom of the screen: CASE-ID NOT FOUND.
3. If the case was selected for quarterly reporting, this selection returns the information for the single CASE ID you requested.  
  
"INQUIRY COMPLETE" is printed at the bottom of the screen.
4. A sample of the CASE ID format is displayed below.

04/26/06										*** WORK FIRST/TRANSITIONAL QUARTERLY REPORTING ***	APRIL
COUNTY:		DISTRICT:		CASE ID: 12345678			LAST NAME:		TYPE:		
STATUS	RPT	CASE ID	DIST	CO CASE	LAST NAME	FIRST	MI	FSIS	QR	TYPE	
S	1	12345678	001	123456	Jones	Bill	I	123		1	
ENTER = UPDATE SELECTION			PF7/19 KEY = PAGE BACK KEY			PF8/20 KEY = PAGE FORWARD					
INQUIRY COMPLETE											

---

WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY

---

REVISED 07/01/06 - CHANGE NO. 01/07

III. (CONT'D)

B. COUNTY NUMBER

1. Enter the two-digit COUNTY NUMBER.
  - a. **To view Work First quarterly reporting cases**, enter "A" in the TYPE field. The Work First quarterly reporting cases for the specified county number will be displayed alphabetically by payee name.
  - b. **To view transitional benefit reporting cases**, enter "T" in the TYPE field. The transitional benefit reporting cases for the specified county number will be displayed alphabetically by payee name.
  - c. **To view Work First quarterly reporting and transitional benefit reporting cases**, leave the TYPE field blank. The Work First and transitional benefit reporting cases for the specified county number will be displayed alphabetically by payee name.

Press ENTER.

2. If no quarterly reporting cases were selected for the specified county, the COUNTY NUMBER is highlighted and the following message is displayed: COUNTY NOT FOUND.
3. If cases are found, EIS returns the first 75 quarterly reporting cases for the county keyed in last name, first name, sequence.
4. Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.
5. Press the **PF8/20** key to **move forward** one screen at a time through the 75 selected cases. When the first 75 have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the specified county is displayed.
6. Press the **PF7/19** key to **move back** one screen at a time. When you have moved backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.

When you PF8/20 to a second group of 75 cases, you cannot PF7/19 back to the original group of 75. You must enter "QR" in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting Screen is returned. Rekey the COUNTY NUMBER and the

---

WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY

---

TYPE entry (if necessary) at the top of the screen and  
press ENTER to display the original group of 75.

-----  
 WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
 -----

REVISED 07/01/06 - CHANGE NO. 01-07

III. B. (CONT'D)

7. When all the quarterly reporting cases for the specified county have been displayed, the following message is printed at the bottom of the screen:  
 INQUIRY COMPLETE.
8. A sample of the COUNTY NUMBER format is displayed below.

*** WORK FIRST/TRANSITIONAL QUARTERLY REPORTING ***									
04/26/06	COUNTY: 01	DISTRICT:		CASE ID:	LAST NAME:			APRIL TYPE:	
STATUS	RPT	CASE ID	DIST	CO CASE	LAST NAME	FIRST	MI	FSIS	QR TYPE
S	1	12345678	001	123456	Jones	Bill	I	123	1
S	1	89302929	004	834939	Jones	Bob	M	834	2
S	1	03888883	010	228499	Moon	Jane		900	S

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

C. COUNTY NUMBER and DISTRICT NUMBER

1. Enter the two-digit COUNTY NUMBER and the three-digit DISTRICT NUMBER.
  - a. **To view Work First Quarterly reporting cases**, enter **"A"** in the TYPE field. The Work First quarterly reporting cases for the specified county and district number will be displayed alphabetically by payee name.
  - b. **To view transitional benefit reporting cases**, enter **"T"** in the TYPE field. The transitional benefit cases for the specified county and district number will be displayed alphabetically by payee name.
  - c. **To view Work First and transitional reporting cases**, leave the TYPE field **blank**. The Work First and transitional reporting cases for the specified county and district number will be displayed alphabetically by payee name.

Press ENTER.

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

-----  
 WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
 -----

REVISED 07/01/06 - CHANGE NO. 01-07

III. C. (CONT'D)

3. If quarterly reporting cases are found, EIS returns the first 75 quarterly reporting cases for the county and district keyed in last name, first name, sequence.
4. Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.
5. Press the **PF8/20** key to **move forward** one screen at a time through the 75 selected cases. When the first 75 have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the 75 specified county and district is displayed.
6. Press the **PF7/19** key to **move back** one screen at a time. When you have moved backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.

When you PF8/20 to a second group of 75 cases, you cannot PF7/19 back to the original group of 75. You must enter "QR" in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting Screen is returned. Rekey the COUNTY NUMBER, DISTRICT NUMBER, and the TYPE entry (if necessary) at the top of the screen and press ENTER to display the original group of 75.

7. When all the quarterly reporting cases for the specified county and district have been displayed, the following message is printed at the bottom of the screen: INQUIRY COMPLETE
8. A sample of the COUNTY and DISTRICT NUMBER format is displayed below.

*** WORK FIRST/TRANSITIONAL QUARTERLY REPORTING *** APRIL 04/26/06										
COUNTY: 01		DISTRICT: 001		CASE ID:		LAST NAME:			TYPE:	
STATUS	RPT	CASE ID	DIST	CO CASE	LAST NAME	FIRST	MI	FSIS	QR	TYPE
S	1	12345678	001	123456	Jones	Bill	I	123	1	
S	1	39039932	001	594939	Nance	Sue		222	2	
S	1	11390455	001	386611	Paul	John		567	S	

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

---

WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY

---

REISSUED 07/01/06 - CHANGE NO. 01-07

III. (CONT'D)

D. COUNTY NUMBER, DISTRICT NUMBER, and LAST NAME

1. Enter the two-digit COUNTY NUMBER, the three-digit DISTRICT NUMBER, and up to fifteen characters of the payee LAST NAME. **ENSURE THAT THE LAST NAME IS SPELLED CORRECTLY.**
  - a. **To view Work First Quarterly reporting cases**, enter **"A"** in the TYPE field. The Work First quarterly reporting cases for the specified county, district, and last name will be displayed alphabetically by payee name.
  - b. **To view transitional benefit reporting cases**, enter **"T"** in the TYPE field. The transitional cases for the specified county, district, and last name will be displayed by payee name.
  - c. **To view Work First and transitional reporting cases**, leave the TYPE field **blank**. The Work First and transitional reporting cases will be displayed alphabetically by payee name.

Press ENTER.

2. If no quarterly reporting cases were selected for the specified county, district, and last name, those fields are highlighted at the top of the screen and the following message is displayed: NAME NOT FOUND.
3. If cases are found, EIS returns the first 75 quarterly reporting cases for the county, district, and last name keyed, in last name, first name, sequence.
4. Fifteen cases are displayed on each consecutive screen. If more than 15 cases are found, the following message is displayed at the bottom of the screen: MORE DATA AVAILABLE.
5. Press the **PF8/20** key to **move forward** one screen at a time through the 75 selected cases. When the first 75 have been displayed, press PF8/20 to display the first screen of the next 75 cases, and so on, until all case information for the specified county, district, and name is displayed.
6. Press the **PF7/19** key to **move back** one screen at a time. When you have moved backwards through the 75 cases, the following message is displayed: INQUIRY COMPLETE.

-----  
**WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY**  
 -----

REVISED 07/01/06 - CHANGE NO. 01-07

III. D. (CONT'D)

7. When you **PF8/20** to a second group of 75 cases, you cannot **PF7/19** back to the original group of 75. You must enter "QR" in SELECTION at the bottom of the screen and press ENTER. A blank Quarterly Reporting Screen is returned. Rekey the COUNTY NUMBER, DISTRICT NUMBER, LAST NAME, and the TYPE entry (if necessary) at the top of the screen and press ENTER to display the original group of 75.
8. When all the quarterly reporting cases for the specified county, district, and name have been displayed, the following message is printed at the bottom of the screen: INQUIRY COMPLETE.
9. A sample of the COUNTY NUMBER, DISTRICT NUMBER, and LAST NAME format is displayed below.

*** WORK FIRST/TRANSITIONAL QUARTERLY REPORTING ***										APRIL 04/26/06
COUNTY: 01		DISTRICT: 001		CASE ID:		LAST NAME: JONES		TYPE:		
STATUS	RPT	CASE ID	DIST	CO CASE	LAST NAME	FIRST	MI	FSIS	QR TYPE	
S	1	12345678	001	123456	Jones	Bill	I		1	
S	1	19947622	001	594939	Jones	Billy		849	2	
S	1	83499392	001	225838	Jones	Bob		901	S	
ENTER = UPDATE			PF7/19 KEY = PAGE BACK			PF8/20 KEY = PAGE FORWARD				
SELECTION			KEY							
INQUIRY COMPLETE										

**Refer to EIS 3600 for information on how to update a quarterly reporting STATUS CODE.**

IV. STATUS CODES DEFINED

- A. C = Complete. The payee returns a complete Work First quarterly report or transitional benefit report form.
- B. I = Incomplete. The payee returns an incomplete Work First quarterly report or transitional benefit report form.
- C. G = Good Cause. The payee does not return a transitional benefit report but has established good cause.
- B. M = Aid Program/Category or Benefit Transfer Pending the Ten Workday Notice Period.
  1. The Work First payee is issued a timely notice indicating the Work First case will be transferred to Medicaid effective the first day of the next month.

-----  
WORK FIRST/TRANSITIONAL QUARTERLY REPORTING INQUIRY  
-----

REVISED 07/01/06 - CHANGE NO. 01-07

IV. D (CONT'D)

- 2. The transfer may be from Work First to Medicaid (MAF, MIC, or MPW) or to Continuation Benefits (AAF - Payment Type 4).
- E. S = System Selected. EIS selected this Work First or transitional case for quarterly reporting.
- F. T = Terminated. The Work First or transitional case was terminated by the caseworker.
- G. X = Transferred. The Work First case has transferred to another aid program/category or to continuation benefits. The transitional case has transferred to another aid program/category or to continuation benefits or has been reapproved for Work First (Payment Type 1 or 2).

V. REPORT NUMBERS DEFINED

- A. 1 = A first quarterly report or transitional benefit report form was mailed to the payee.
- B. 2 = A second quarterly report or transitional benefit report form was mailed to the payee.

VI. QR TYPE DEFINED

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

VII. MOVING TO OTHER IMS FUNCTIONS

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

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

VIII. LOGOFF PROCEDURES

Refer to [EIS 4900, Appendix A](#), for instructions to logoff IMS.