
DATA ENTRY APPENDIX E → DSS-8125 (MAKING CHANGES TO A CASE)

EIS 4900 - DATA ENTRY APPENDIX E - DSS-8125 (MAKING CHANGES TO A CASE)
REISSUED 07/01/10 - CHANGE NO. 01-11

PART TWO - MAKING CHANGES TO A CASE

I. GENERAL INFORMATION

The DSS-8125 screen is used to approve pending applications and also to make changes to an existing case. This section explains how to use the 8125 screen to make changes to an existing case. **For instructions on how to approve a pending application, refer to PART ONE of this appendix.**

The information keyed on the 8125 screen(s) is edited primarily on-line but does not process until the nightly update.

II. ACCESS

- A. To access the 8125 screen from the **EIS LOGON PROCEDURE** screen, key "8" in the **FUNCTION** field and press ENTER.

```
          * * E I S * *  
          L O G O N P R O C E D U R E  
    PLEASE ENTER THE FOLLOWING:  
          ENTER A NEW PASSWORD THE FIRST TIME YOU SIGN ON  
          YOU MAY ENTER A NEW PASSWORD AT ANY TIME  
          OPERATOR ID.....  
          PASSWORD.....  
          FUNCTION..... 8  
          NEW PASSWORD.....
```

- B. To access the 8125 screen from the **EIS INQUIRY MENU** or any other EIS screen where the **SELECTION** field is displayed, key "8" in the **SELECTION** field and press ENTER.
- C. The system will display the EIS FORM 8125 screen. A sample of this screen is found on the next page.

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II. (CONT'D)

PAGE NO	** EIS FORM 8125 ** RE ENTRY				FORM ID
CASE ID	WORKER NO				
CO NO	CTY CASE	DIST	CO REASGN	AID PROG/CAT	
CASEHEAD/PAYEE			CASEHEAD PAYEE CHG		
ADDRESS 1		ADDRESS 2		FACILITY	
CITY	STATE	ZIP	PHONE #	VERIFIED	
SUB PAYEE NAME			NEEDS UNIT		
CHANGE CD	NOTICE	ONGOING	RETRO	C/TERM	OLD CASE TERM
APPL NO	DISP				
CTY ISSUED DATE 1	AMOUNT 1	CTY ISSUED DATE 2		AMOUNT 2	
PAY REV	MED	CERT			
PAY	MED CLASS	DB/PML	DB/PML AMT	DED AMT	
RET PAY 1	RETRO MA 1				
RET PAY 2	RETRO MA 2				
GROSS EARNED INC	DISREGARD		SSI AMT	MAINT AMT	
SPEC. REV1	SPEC. REV2		SPEC. REV3	OTH UNEARN	
FOOD STAMP NO	STEPPARENT	WORK EXPENSES		NET EARNED	
RSDI AMT	AMB.CAP.	GRANDFATHER	SSI	VA	EPICS CLM DQ
CHILD/ADULT CARE	TOTAL NET UNEARNED			DOMICILIARY RATE	
JOB/WORK SAV	GRANT RECOUP.			SPEC. USE	
TOTAL MONTHLY INC.	SANC MRA			IVD	
PRESS ENTER TO EDIT THIS SCREEN AND DISPLAY THE NEXT SCREEN					

III. KEYING INSTRUCTIONS - MAKING CHANGES TO A CASE

- A. The following is a list of function keys that are utilized to make changes to an existing case.

The system will often display, at the bottom of the screen, messages regarding these function keys. Read these messages carefully before proceeding to the next screen.

ENTER Press ENTER to tell the system you are finished keying the information for a particular screen. The system will edit the screen for errors.

PF1 Press PF1 to move from the 8125 screen to the 8124 Process Menu and vice versa.

PF2 Press PF2 to move to the EIS INQUIRY MENU.

PF4 Press PF4 to place the form on hold. PF4 is allowed on any screen, but the system will not display the EIS FORM 8125 ERROR screen. When you

NOTE: EIS displays the most current EPICS Claim Indicator in the EPICS CLM field for the casehead/payee of the case. THE CLAIM INDICATOR MAY CHANGE EACH TIME YOU KEY AN 8125 FOR THE CASE.

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III.A. (CONT'D)

press PF4, the action is immediately placed on hold. The system displays a blank 8125 screen with the message "**FORM 8125 PUT ON HOLD, FORM ID - XXXXXXXB**" displayed at the bottom of the screen.

- PF5** Press PF5 to delete the form you are keying and display a blank 8125 screen.
- PF6** Press PF6 to tell the system you have finished the 8125. The system will display the EIS FORM 8125 ERROR screen or process the form (if error free). **PF6 is not allowed on the first 8125 screen.**
- PF7** Press PF7 to delete an 8125 that is on hold.
- PF8** Press PF8 to ignore the error(s) on the current screen and display the next screen.

B. SPECIAL FIELDS

- There are certain fields that you cannot key. These fields are highlighted and protected.
- In most cases, the cursor does not stop in these fields, or if it does, the system will not allow any information to be keyed.
- The system displays the "not allowed" symbol in the lower left corner of the screen. This symbol is an X and a little stick figure with arrows beside each hand.
- To remove this figure, press the RESET key. Tab to the next appropriate field and continue keying.

C. IMPORTANT TIPS REGARDING REMOVING/DELETING INFORMATION

- If zeroes are keyed to remove information on the first screen of the 8125 and that action is placed on hold for any reason, the zeroes will not be displayed on the first screen when the action is called back up. **REKEY THE ZEROES.**

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III.C. (CONT'D)

- To remove information from the first screen of the 8125, refer to the instructions in EIS 3100.
- To remove information from any of the CONTINUATION screens of the 8125, press the EOF key.

NOTE: ON THE INDIVIDUAL SCREENS, ZEROS IN NET EARNED INCOME CAN BE A VALID AMOUNT.

D. IMPORTANT TIPS REGARDING TIMELY ACTIONS

- If a second 8125 is keyed during the 10-day suspense period and contains errors, the 8125 cannot be placed on hold.
- An 8125 cannot be keyed on the same day a timely action for that case is due to process unless the second 8125 contains a Change or Termination Code.

E. REQUIRED FIELDS

Refer to the appropriate section in Volume III of the EIS Manual to determine the specific information you must key for the action you wish to complete.

F. EIS FORM 8125 SCREEN

1. Key the applicable information on the 8125 screen.
2. Press ENTER. The system automatically assigns a form ID number to the action and displays the form ID in the top right corner of the screen. **If your county procedures require that you document the form ID, record this number before proceeding.**

NOTE: ONLY ONE 8125 FOR A CASE CAN BE KEYED INTO THE SYSTEM ON THE SAME DAY. THIS INCLUDES ANY 8125'S THAT ARE PUT ON HOLD AND REMAIN IN THE SYSTEM SEVERAL DAYS.

IF YOU ATTEMPT TO KEY AN 8125 AND THERE IS ALREADY AN 8125 ON HOLD, THE SYSTEM WILL DISPLAY A MESSAGE AT THE BOTTOM OF THE SCREEN TELLING YOU THAT ANOTHER 8125 EXISTS FOR THE CASE. THE FORM ID FOR THE OTHER 8125 IS DISPLAYED IN THE MESSAGE. SHOULD THIS OCCUR, PRESS PF5 TO DELETE THE SECOND 8125.

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III. (CONT'D)

G. ERRORS - EIS FORM 8125 SCREEN

When ENTER is pressed, the system edits the screen for errors.

1. **If the information is incorrect**, the incorrect information is highlighted. The system displays an error number and error message at the bottom of the screen. If there is more than one error, the additional error numbers will also be displayed. Up to 19 additional error numbers can be displayed.
 - a. Correct the highlighted fields and press ENTER.
 - b. The system will continue to highlight incorrect information until it is corrected successfully.
2. When all information on the first screen is entered correctly, the system displays the EIS FORM 8125 CONT screen.

H. EIS FORM 8125 CONTINUATION SCREEN(S)

PAGE NO	** EIS FORM 8125 CONT. **	FORM ID
EJA007		
SG1	SG2	SG3
SP1	2	3
AUTHORIZED REP		ADDRESS
ADDRESS2	CITY	STATE ZIP
NOTICE CODE	SPOUSE	CHILD ONLY RSN
TX1		
TX2		
TX3		

INDIVIDUAL ID	NAME	
SOC SEC NUM	INDIV TERM DATE	STATUS R BIRTH
SEX F RSDI CLAIM	MED A MED B	FAM ST LIV.ARR.
SPEC.RPT	JOBS/WORK REG	SPECIAL USE REFG STATUS
DATE OF DEATH	CITIZEN/ID	ALIEN ID
REL TO PAYEE	SPEC NEED E&T	JOBS/WORK SAV ED. EMPL
INCOME	EXPENSES C/A CARE	NET INC. ED. LEVEL
EPICS CLM N DQ N ED		
CAROLINA ACCESS	PCP: AUTO ASGN	CHG CD DISTPV
PRESS ENTER TO EDIT THIS SCREEN AND UPDATE DATA BASE		

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III.H. (CONT'D)

1. Information keyed on this screen includes SPECIAL COVERAGE GROUP, SUB PROGRAM, SPOUSE INDICATOR, CHILD ONLY REASON, AUTHORIZED REPRESENTATIVE, SUPPLEMENTAL NOTICE TEXT, RELATIONSHIP TO PAYEE, and other INDIVIDUAL DATA.
2. The individual data from the case is automatically brought forward to the 8125 CONTINUATION screens.

NOTE: THE MEDICARE A AND B INDICATORS (Y OR N) ARE NOT DISPLAYED ON THE SCREEN. DO NOT REKEY THESE INDICATORS.

3. If special coverage group, authorized representative, supplemental notice text, and individual data are not required for the case action you are keying, press PF6 to bypass the remaining individual data screens and process the form. The system displays a blank 8125 screen.
4. If any of this information is required, key all necessary information on the 8125 CONTINUATION screen and press ENTER. The system edits the screen for errors.

NOTE: EIS displays the most current EPICS Claim Indicator in the EPICS CLM field for each individual. THE CLAIM INDICATOR MAY CHANGE EACH TIME YOU KEY AN 8125 FOR THE CASE.

I. ERRORS - EIS FORM 8125 CONTINUATION SCREEN(S)

1. **If the information is incorrect**, the incorrect information is highlighted. The system displays an error number and error message at the bottom of the screen. If there is more than one error, the additional error numbers will also be displayed. Up to 19 additional error numbers can be displayed.
 - a. Correct the highlighted fields and press ENTER.
 - b. The system will continue to highlight incorrect information until it is corrected successfully.
2. When all information on the continuation screen is entered correctly and there is more than one individual on the case, the system displays another EIS FORM 8125 CONTINUATION screen. This will continue until all individuals on the case have been displayed.

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III.I. (CONT'D)

3. Once the first CONTINUATION screen is displayed, you may press PF6 at any time to bypass the remaining individual screens and process the form. The system displays a blank 8125 screen.

J. ERRORS - EIS FORM 8125 ERROR SCREEN

1. The last screen to display when there are errors, is the EIS 8125 ERROR SCREEN. On this screen, the system displays all unresolved errors from any of the preceding screens. Up to 18 error numbers and error messages can be displayed.
2. To review the preceding screens for errors:
 - a. Key "01" beside PAGE NO in the upper left hand corner of the EIS FORM 8125 ERROR SCREEN.
 - b. Press ENTER. The system displays the first screen of the 8125.
 - c. Press ENTER on the first screen. If there were no errors on the first screen, press ENTER to move to the next screen.
 - d. Repeat this process until you have reviewed every screen or the screen with the error is displayed.
3. You may press PF4 or ENTER on the EIS FORM 8125 ERROR screen to place the action on hold. If the form is error free, you may press PF4 on the last individual screen to place the action on hold.

NOTE: IF THE SYSTEM REQUIRES YOU TO PRESS PF4 TO PLACE THE FORM ON HOLD, YOU CANNOT RETURN TO THE FIRST SCREEN OF THE 8125 FROM THE EIS FORM 8125 ERROR SCREEN. TO VIEW OR CORRECT THE FORM, YOU MUST DO A REENTRY.

K. PROCESSING THE ACTION

Once all errors have been corrected, press ENTER to process the action. The system displays a blank 8125 screen.

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IV. ERROR AND ATTENTION REPORT

- A. The Error and Attention Report lists all unprocessed 8125 actions that are on hold in the system. The action appears on the report the first work day after it is placed on hold and continues to appear until the form is successfully processed.
- B. **Review the Error and Attention Report daily** to determine if any 8125 actions that processed on-line were rejected in the nightly update.
- C. This report is available in the Report Distribution System (XPTR). [Refer to EIS 1061](#) for instructions regarding how to view and/or print this report.
- D. 8125 actions that are on hold in the system are listed in the section of the report entitled "ONLINE FORMS ON-HOLD OR REJECTED".
- E. The 8125 action could be on hold because:

- 1. The keyer placed the action on hold and the form was not processed the same day, or
- 2. The system placed the action on hold because it rejected in the nightly update.

The action is listed on the report in either case.

- F. The following information is displayed for each 8125 action:
 - 1. WORKER NO - The worker number on the 8125.
 - 2. POST DATE - The date the action was placed on hold.
 - 3. FORM ID.
 - 4. TYPE FORM - 8124, 8125, or 2041.
 - 5. OPERATOR ID - The operator ID of the individual who keyed the action.
 - 6. ERROR MESSAGE - A message indicating why the form is on hold.
 - a. If the keyer placed the action on hold, the message will read "FORMS ALREADY IN HOLD STATUS" indicating that the form was already on hold before the system began the nightly update.

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IV. F. (CONT'D)

- b. If the system places the action on hold because it rejects in the nightly update, a message is displayed indicating why the form was rejected.

Refer to EIS 3402 for a description of each of the error messages.

The error message is displayed only once on the first work day following the night the form rejects. If the form is not corrected, the next day the error message is replaced with "FORMS ALREADY IN HOLD STATUS".

7. CASE ID.

- G. Review the actions that are on hold and make the necessary corrections to ensure that all changes are processed in a timely manner. Follow the instructions below to access any 8125 action that is on hold in the system.

V. ACCESSING 8125 ACTIONS PLACED ON HOLD

- A. The 8125 action can be placed on hold in two ways:

- 1. The keyer places the 8125 on hold, or
- 2. The 8125 action rejects during the nightly update. When this occurs, the system automatically puts the 8125 on hold.

- B. To call up an 8125 that has been placed on hold:

- 1. Key "Y" beside RE-ENTRY.
- 2. Key the form ID number.
- 3. Key your COUNTY NUMBER.
- 4. Press ENTER.
- 5. The DSS-8125 screen is displayed. Everything that was previously keyed is displayed with the following exceptions:
 - a. Any zeroes that were previously keyed (on the first 8125 screen) will no longer be on the first screen and must be rekeyed. **KEY THE ZEROES AGAIN.**

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V.B.5. (CONT'D)

- b. If you previously keyed a case change that included the deletion of a grant recoupment, the asterisk (*) you keyed to remove the GRANT RECOUPMENT CODE and the zeroes you keyed to remove the GRANT RECOUPMENT AMOUNT and END DATE will no longer be on the screen. **DO NOT KEY THE ASTERISK (*) AGAIN. DO KEY THE ZEROES AGAIN.**
6. Key corrections, if necessary, and press ENTER to process the action.

VI. DELETING 8125 ACTIONS

To delete any 8125 action that is on hold or is in suspense for the ten work day notice period:

- A. Key "Y" beside RE-ENTRY.
- B. Key the form ID number for the action you wish to delete.
- C. Key your COUNTY NUMBER.
- D. DO NOT PRESS ENTER. PRESS PF7.
- E. The 8125 will appear with the following message displayed at the bottom of the screen: PF7/19 TO CONFIRM THAT THIS RECORD IS TO BE DELETED. Review the information on the screen to ensure it is the form you wish to delete.
 1. If you have mistakenly called up the wrong action or decide not to delete the action, press ENTER to process through the screens and put the action back on hold. A blank 8125 screen will be displayed with the following message: **FORM 8125 PUT ON HOLD, FORM ID - XXXXXXXB.**
 2. To delete the form, press PF7 again. The form is deleted and a blank screen will appear with the following message displayed: **FORM HAS BEEN DELETED.** Press ENTER to display a blank 8125 screen.

CAUTION: PF5 DOES NOT DELETE A FORM ONCE THAT FORM HAS BEEN ACCEPTED BY THE SYSTEM OR PUT ON HOLD. THE ONLY TIME THE PF5 KEY WILL REMOVE A FORM IS WHEN YOU ARE KEYING THE FORM FOR THE FIRST TIME AND YOU HAVE NOT YET PRESSED ENTER ON THE LAST SCREEN.

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VII. CASE PROFILES

Once an 8125 is keyed and accepted by the system, a case profile is generated in the nightly update and mailed to the county the following work day.

VIII. FORMS PROCESSED REPORT

Once an 8125 is keyed and accepted by the system, the form ID, case ID, operator ID, and district number for that case action is listed on the Forms Processed Report the following work day.

This report is available in the Report Distribution System (XPTR). [Refer to EIS 1061](#) for instructions regarding how to view and/or print this report.