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DATA ENTRY APPENDIX F → DMA-2041 (THIRD PARTY RECOVERY)

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EIS 4900 - DATA ENTRY APPENDIX F - DMA-2041 (THIRD PARTY RECOVERY)  
REVISED 05/01/03 - CHANGE NO. 06-03

**I. GENERAL INFORMATION**

Use the Third Party Recovery data entry screens to enter information in EIS regarding a recipient's private health and/or accident insurance. EIS edits data and updates immediately. Use the TP function to view policy data and TI to view individual data.

**II. ACCESS**

A. There are two TPR update screens.

1. ADD/CHANGE POLICY OR ADD INDIVIDUAL (TA)

Use the TA screen, ADD/CHANGE POLICY OR ADD INDIVIDUAL, to enter insurance policy data and to add an individual to a policy.

From any EIS screen where the SELECTION field displays, enter TA in SELECTION and the policy number in KEY.

2. INDIVIDUAL UPDATE (TU)

Use the TU screen, INDIVIDUAL UPDATE, to enter changes to individual data when the individual is already associated with the policy.

From any EIS screen where the SELECTION field displays, enter TU in SELECTION and the EIS Individual ID in KEY.

B. Press ENTER. The selected screen displays.

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III. SCREENS

EJA914	THIRD PARTY RECOVERY ADD/CHANGE POLICY OR ADD INDIVIDUAL					FORM ID
WKR NO	CTY NO	DIST	DELETE POLICY?	LAST UPDATED		
POLICY NUMBER		INS COMP CD	INS TYPE CD			
POLICY HOLDERS NAME			GRP POLICY	GROUP POLICY NAME		
GROUP ADDRESS			CITY	ST	ZIP	
INDIVIDUAL REL	BEGIN	END	POL HOLDER NON-CUSTODIAL PARENT?			
SELECTION	KEY	PF2 - INQ MENU PF5 REFRESH PF8 NEXT				

EJA917	THIRD PARTY RECOVERY INDIVIDUAL UPDATE					FORM ID
WKR	CTY	DIST	JULIAN	LAST UPDATED	POLICY ADDED	
POLICY NUMBER		INS COMP CD	INS TYPE CD	POL EFF DATE	POL TERM DATE	
POLICY HOLDERS NAME			GRP POLICY	GROUP POLICY NAME		
IS POLICY HOLDER THE NON-CUSTODIAL PARENT?						
GROUP ADDRESS			CITY	ST	ZIP	
INDIVIUDAL ID	INDIVIUDAL NAME			REL		
DEL	BEGIN	END	DEL	BEGIN	END	DEL BEGIN END
ADD SELECTION	KEY	PF2 - INQ PF5 - REFRESH PF8 - NEXT POL FOR ID				

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IV. KEYING INSTRUCTIONS

- A. Use the following function keys to key the TPR screens.
- ENTER** → Press ENTER when you have keyed your data and are ready to update EIS. EIS edits the screen for errors and displays them one at a time.
  - PF2** → Press PF2 to return to the EIS INQUIRY MENU.
  - PF3** → Press PF3 to exit without updating.
  - PF5** → Press PF5 to clear the screen before you press ENTER to update. EIS erases the data you entered and displays the original screen.
  - PF8** → Press PF8 to display the next policy with the same policy number or the next policy for the individual.
- B. Enter data for the action you wish to complete. Refer to [EIS 3350](#) to determine the specific information you must key for the action you wish to complete.
- C. To add more than eight (8) individuals to a policy, key the first eight individuals and press Enter. EIS updates the first eight individuals.
- Press PF5. EIS displays the ADD/CHANGE POLICY OR ADD INDIVIDUAL screen again. Add the additional individuals. Press Enter. Repeat as necessary.
- D. EIS automatically displays the form ID number in the top right corner of the screen. If your county procedures require that you document the form ID number, record the number before proceeding.
- E. EIS edits the screen(s) for errors when you press ENTER. If there are errors, EIS displays the error message for the first error and highlights it on the screen. Correct the error and press ENTER. Repeat as necessary.
1. **When all the information is entered correctly** and the screen processes, EIS displays the screen again with your updates.
  2. If data is not as you intended, press PF3 to exit without updating. Key another TA or TU screen to correct the data.

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F. DELETE POLICY

**CAUTION:** DELETE A POLICY ONLY WHEN IT WAS KEYED IN THE SYSTEM IN ERROR! DO NOT USE THIS FUNCTION TO REMOVE A RECIPIENT FROM THE POLICY. USE THE TU FUNCTION TO ENTER AN INDIVIDUAL END DATE FOR THE INDIVIDUAL.

V. FORMS PROCESSED REPORT

When the TA or TU screen processes in EIS, the Form ID, Case ID, District Number, and Operator ID for that action is listed on the Forms Processed Report the following work day.

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