

**WORK FIRST USER'S MANUAL
EPIS INSTRUCTIONS**

Change #5-2008

HISTORICAL DATA ENTRY

December 1, 2008

The Historical Client Record – Add screen displays.

WFJ081FM #000		HISTORICAL CLIENT RECORD - ADD			08/12/2008	
EIS ID		RPT MNTH	COMPONENT	JOB TYPE	6908? Y	
CNTY #	WKR #	UPDATE DATE	081208			
NAME		EIS CASE ID				
HISTORICAL DATA HOURS TO BE INCLUDED IN PRIOR REPORT MONTH PERIOD						
----- PROGRAM PARTICIPATION -----						
	BEG	END		HRS	HRS	EXCU HOL
IDX	COMP	ACT	PROV	DATE	DATE	RSN SELF DATE SCH COMP HRS HRS WKS
----- EMPLOYMENT -----						
IDX	JOB	BEG.DT	END.DT	JOBDEV	TYPE	DATE S.HRS HRS.WK WKS RANGE
PF3=MAIN MENU PF10=COMPONENT PF11=EMPLOYMENT						
WFJ150 - ENTER EIS ID, REPORT MONTH, AND COMPONENT JOB TYPE - or <PF3> to EXIT						

EP601.03 Historical Client Record - Add

I. General Information

- A. Additional hours to an existing Component and/or Job Type and new Component and/or Job Type may be keyed using the Historical Client Record – Add screen. The EPIS Status for the individual must be Active, Potential, or Closed.
- B. The Report Month cannot be prior to October 2007 **and** cannot be the current Report Month.
- C. The individual must exist in EPIS for the Report Month entered.
- D. If there are both Component and Employment historical hours for the same report month, both may be keyed on the same Historical Client Record – Add screen.
- E. Other current DSS-6908 Data Entry edits apply to the data entered on the Historical Client Record – Add screen.

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Change #2-2009

October 1, 2009

II. Component Hours

Components 'CC', 'JF', 'JS', 'PR', and 'VT' are not allowed.

A. Existing Component and Report Month

1. Enter the EIS Individual ID number, RPT MNTH (Report Month, must be CCYYMM), and COMPONENT. Press Enter.
2. The following screen displays with:
 - a. The individual's name, county number, worker number, and EIS case ID number.
 - b. Existing Component data for the report month.
 - c. A second line of existing Component data with HRS.SCH (Scheduled Hours), HRS.COMP (Hours Completed), EXCU HRS (Excused Absence Hours), HOL HRS (Holiday Hours), and WKS (Weeks) blank to allow **additional** hours to be keyed. If less than three digits, use leading zero(s).

WFJ081FM #000	HISTORICAL CLIENT RECORD - ADD	08/12/2008
EIS ID xxxxxxxxP RPT MNTH 200801 COMPONENT OA JOB TYPE 6908? Y		
CNTY # 83 WKR # xxx UPDATE DATE 081208		
NAME xxxxxx x xxxxxx EIS CASE ID xxxxxxxx		
HISTORICAL DATA HOURS TO BE INCLUDED IN PRIOR REPORT MONTH PERIOD		
----- PROGRAM PARTICIPATION -----		
BEG END HRS HRS EXCU HOL		
IDX COMP ACT PROV DATE DATE RSN SELF DATE SCH COMP HRS HRS WKS		
7 OA 00 51 100506 013108 1 N 0108 002 002 40		
7 OA 00 51 100506 013108 1 N 0108		
----- EMPLOYMENT -----		
IDX JOB BEG.DT END.DT JOBDEV TYPE DATE S.HRS HRS.WK WKS RANGE		
PF3=MAIN MENU PF10=COMPONENT PF11=EMPLOYMENT		
WFJ153 - ENTER ADDITIONAL HOURS TO EXISTING ACTIVITY		

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3. Enter the **additional** hours. At least one, HRS. SCH, HRS.COMP, or WKS must be keyed. If less than three digits, use leading zero(s). Press ENTER. If the entry is successful, the message, 'WFJ004-UPDATE SUCCESSFUL – ENTER NEXT ID OR <PF3> TO EXIT' displays

For example: For the month of January 2008, an **additional** 20 hours completed needs to be keyed for Component 'OA'. Currently, for the month of January 2008, only 2 hours has been completed displays. Key the **additional** 20 hours as 020 in the HRS.COMP field.

B. Component For The Report Month Does Not Exist

1. Enter the EIS Individual ID number, RPT MNTH (Report Month, must be CCYYMM), and COMPONENT. Press Enter.
2. The following screen displays with:
 - a. The individual's name, county number, worker number, and EIS case ID number.
 - b. The index number.
 - c. The new COMP (Component), and DATE (Report Month).

```
WFJ081FM #000          HISTORICAL CLIENT RECORD - ADD          08/12/2008
EIS ID xxxxxxxxxL  RPT MNTH 200801  COMPONENT PS  JOB TYPE  6908? Y
CNTY # xx          WKR #  xxx          UPDATE DATE 081208
NAME  xxxxx      xxxxx                  EIS CASE ID  xxxxxxxx

      HISTORICAL DATA HOURS TO BE INCLUDED IN PRIOR REPORT MONTH PERIOD

----- PROGRAM PARTICIPATION -----
      BEG  END          HRS HRS  EXCU  HOL
      IDX COMP ACT PROV DATE DATE RSN SELF DATE SCH COMP HRS  HRS WKS
6     PS                                0108

----- EMPLOYMENT -----
      IDX JOB  BEG.DT  END.DT JOBDEV TYPE  DATE S.HRS HRS.WK WKS  RANGE

PF3=MAIN MENU  PF10=COMPONENT  PF11=EMPLOYMENT
WFJ166 - ADD HOURS TO NEW HISTORICAL ACTIVITY
```

3. Enter the following:
 - a. ACT (Activity) – Required.

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- b. PROV (Provider) – Required.
- c. BEG.DT (Begin Date) – Required.
- d. END.DT (End Date) - Optional.
- e. RSN (Reason) - Required if END.DT entered.
- f. SELF (Self Initiated) – Optional.
- g. HRS.SCH (Hours Scheduled) - Must be greater than zero. If less than three digits, use leading zero(s).
- h. HRS.COMP (Hours Completed) - Optional. If entered, must be greater than zero. If less than three digits, use leading zero(s).
- i. EXCU HRS (Excused Absence Hours) – Optional. If entered, must be greater than zero. If less than three digits, use leading zero(s).
- j. HOL HRS (Holiday Hours) – Optional. If entered, must be a month that has a holiday and cannot exceed maximum hours for that month. (Refer to Holiday Table in EP600.02)
- k. WKS (Weeks) – Optional. Required if HRS.COMP entered.

For example: For the month of January 2008, a component of PS is needed with 25 hours scheduled and completed. The component has not previously been entered. Enter the required fields and the **total** number of scheduled (025), completed hours (025), and weeks.

- 4. Press ENTER. If the entry is successful, the message, 'WFJ004-UPDATE SUCCESSFUL – ENTER NEXT ID OR <PF3> TO EXIT' displays.

III. Employment Hours

A. Existing Job Type and Report Month

- 1. Enter the EIS Individual ID number, RPT MNTH (Report Month, must be CCYYMM), and JOB TYPE. Press Enter.

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2. The following screen displays with:
 - a. The individual's name, county number, worker number, and EIS case ID number.
 - b. Existing employment data for the report month.
 - c. A second line of existing employment data with HRS.SCH (Hours Scheduled), HRS WK (Hours Worked), WKS (Weeks), and RANGE (Wage Range) blank to allow **additional** hours to be keyed. If less than three digits, use leading zero(s).

```
WFJ081FM #000      HISTORICAL CLIENT RECORD - ADD      08/12/2008
EIS ID xxxxxxxxxP RPT MNTH 200801 COMPONENT OA JOB TYPE 6908? Y
CNTY # xx      WKR # xxx      UPDATE DATE 081208
NAME xxxxxx x xxxxxx      EIS CASE ID xxxxxxxx

      HISTORICAL DATA HOURS TO BE INCLUDED IN PRIOR REPORT MONTH PERIOD

----- PROGRAM PARTICIPATION -----
              BEG  END              HRS HRS  EXCU HOL
            IDXCMP ACT PROV DATE DATE RSN SELF DATE SCH  COMP HRS  HRS  WKS

----- EMPLOYMENT -----
            IDXCMP ACT PROV DATE DATE RSN SELF DATE S.HRS  HRS.WK  WKS  RANGE
            2  31  031507      N  U  0108  174    174    40    86
            2  31  031507      N  U  0108

PF3=MAIN MENU      PF10=COMPONENT      PF11=EMPLOYMENT
WFJ153 - ENTER ADDITIONAL HOURS TO EXISTING ACTIVITY
```

2. Enter the **additional** hours. At least one, S.HRS, HRS.WK, or WKS, must be entered. If less than three digits, use leading zero(s).
 - a. If HRS.WK entered, RANGE must be entered.
 - b. Press ENTER. If the entry is successful, the message, 'WFJ004-UPDATE SUCCESSFUL – ENTER NEXT ID OR <PF3> TO EXIT' displays.

For example: For the month of January 2008, an **additional** 20 hours worked needs to be keyed for Job Type 31. Currently, for the month of January 2008, 174 hours worked displays. Key the **additional** 20 hours as 020 in the HRS.WK field and wage range in the RANGE field, even if the same wage range.

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- B. Job Type For The Report Month Does Not Exist
1. Enter the EIS Individual ID number, RPT MNTH (Report Month, must be CCYYMM), and COMPONENT. Press Enter.
 2. The following screen displays with:
 - a. The individual's name, county number, worker number, and EIS case ID number.
 - b. The IDX (index number).
 - c. The new JOB (Job Type).
 - d. DATE (Report Month).

```
WFJ081FM #000      HISTORICAL CLIENT RECORD - ADD      08/12/2008
EIS ID xxxxxxxxP  RPT MNTH 200801  COMPONENT   JOB TYPE 25  6908? Y
CNTY # 83        WKR # xxx      UPDATE DATE 081208
NAME xxxxxx  x xxxxxx          EIS CASE ID xxxxxxxx

      HISTORICAL DATA HOURS TO BE INCLUDED IN PRIOR REPORT MONTH PERIOD

----- PROGRAM PARTICIPATION -----
      BEG  END          HRS HRS  EXCU HOL
      IDX COMP ACT PROV DATE DATE RSN SELF DATE SCH COMP HRS  HRS  WKS

----- EMPLOYMENT -----
      IDX JOB BEG.DT  END.DT  JOBDEV TYPE  DATE S.HRS  HRS.WK  WKS  RANGE
      4  25

PF3=MAIN MENU  PF10=COMPONENT  PF11=EMPLOYMENT
WFJ153 - ENTER ADDITIONAL HOURS TO EXISTING ACTIVITY
```

3. Enter the following:
 - a. BEG.DT (Begin Date) – Required.
 - b. END.DT (End Date) – Optional.
 - c. JOBDEV (Job Development) – Optional.
 - d. TYPE (Employment Type) – Required.
 - e. S.HRS (Scheduled Hours) – Required and must be greater than zero. If less than three digits, use leading zero(s).
 - f. HRS.WK (Hours Worked) – Optional. If entered, must be greater than zero. If less than three digits, use leading zero(s).
 - g. WKS (Weeks) – Optional. Required if HRS.WK entered.

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h. RANGE (Wage Range) – Optional. Required if HRS.WK entered.

For example: For the month of January 2008, a job type 25 is needed with 25 hours scheduled and hours worked. The job type has not previously been entered. Enter the required fields and the **total** number of scheduled hours (025), hours worked (025), and wage range.

4. Press ENTER. If the entry is successful, the message, 'WFJ004-UPDATE SUCCESSFUL – ENTER NEXT ID OR <PF3> TO EXIT' displays.

IV. EPIS Component and EPIS Employment Inquiry

The EPIS COMPONENT INQUIRY and EPIS EMPLOYMENT INQUIRY screens are updated immediately with the historical data keyed. An asterisk (*) displays in the HIST (History) column identifying the historical data.

WFJ002FM		EPIS COMPONENT INQUIRY										08/21/2008			
EIS.ID xxxxxxxxxr															
NAME xxxxxx x xxxxxx		EIS.CASE xxxxxxxx					WORKER xxx								
						BEGIN	ENDING	END	SELF	REPT	HRS	HRS	EXCU	HOL	
HIST	CTY	INX	COMP	ACT	PROV	DATE	DATE	RSN	INIT	DATE	SCH	COMP	HRS	HRS	WKS
*	37	1	AE	00	51	022008			N	0801	000	020	00		
										0801	100	040	30		
PF2=HIST DATA ENTRY PF3=MAIN MENU PF4=EXIT EPIS PF7=BACK PF8=FORWARD PF9=6908 DATA ENTRY PF10=PARTIC DATA PF11=EMPLOYMENT PF12=NAME SEARCH WFJ003- ENTER EIS ID- or <PF3> to EXIT															

WFJ003FM		EPIS EMPLOYMENT INQUIRY										08/21/2008		
EIS.ID xxxxxxxxxr														
NAME xxxxxx x xxxxxx		EIS.CASE xxxxxxxx					WORKER xxx							
						JOB	BEGIN	ENDING	JOB	JOB	REPT	HRS	HRS	WAGE
HIST	CTY	INX	TYPE	DATE	DATE	DEV	TYPE	DATE	SCH	WORK	WKS	RANGE		
*	37	1	92	032708		Y	U	0801	000	020	00	86		
								0801	166	140	40			
PF2=HIST DATA ENTRY PF3=MAIN MENU PF4=EXIT EPIS PF7=BACK PF8=FORWARD PF9=6908 DATA ENTRY PF10=PARTIC DATA PF11=COMPONENT PF12=NAME SEARCH WFJ003- ENTER EIS ID- or <PF3> to EXIT														

V. Deletion of Historical Hours

- A. To delete Component Historical hours that were entered erroneously, key '999' in the HRS.SCH (Hours Scheduled) field. Press ENTER. The historical data is removed from EPIS COMPONENT INQUIRY screen.

- B. To delete Employment Historical hours that were entered erroneously, key '999' in the S.HRS (Scheduled Hours) field. Press ENTER. The historical data is removed from the EPIS EMPLOYMENT INQUIRY screen.

EP601.04 Historical DSS-6908

A DSS-6908 is created when additional and new Component and/or Employment hours are entered on the Historical Client Record – Add screen. The DSS-6908 identifies the historical data with 'HIST' in the INDEX NUMBER field.

EP601.05 EPIS Historical Component/Employment Data Reports

- A. A weekly report titled, 'EPIS HISTORICAL CLIENT RECORD DATA KEYED', is created each Friday night to display Historical Component/Employment Hours keyed. The report is displayed in NCXPTR under the name: 'DHRWFJ HISTORICAL DATA ENTRY'. No hard copy of the report is created.

Included on the report:

- 1. Report Date (CCYYMM)
- 2. Individual Name
- 3. Individual ID Number
- 4. EIS Case ID Number
- 5. Worker Number
- 6. Old Component Data
- 7. Additional and New Component Data
- 8. Old Employment Data
- 9. Additional and New Employment Data
- 10. Total of Old and New Hours
- 11. State Totals

The report is sorted by county, report month, worker number, and in alphabetical order within worker.

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Change #3-2008 HISTORICAL DATA ENTRY September 22, 2008

County Detail Report Page

N.C. DEPARTMENT OF HEALTH AND HUMAN SERVICES										RUN DATE: 2008-08-12
REPORT: WFJ280-1					DIVISION OF SOCIAL SERVICES					
COUNTY NUM: XXX					EMPLOYMENT PROGRAMS INFORMATION SYSTEM					
COUNTY NAME: XXXXXXXXXXXX					HISTORICAL CLIENT RECORD DATA KEYED					

RPT DATE: 200804		WORKER ID: XXX		NAME: XXXXXXXX X XXXX						
IND ID : XXXXXXXXXXXL		CASE ID : XXXXXXXX								
					BEGIN	END	END SELF	SCH COM		
	IDX	COMP	ACT	PROV	DATE	DATE	RSN INIT	HRS HRS	HRS	WKS
COMP OLD										
	3	OT	15	51	2008-04-01	2008-05-30	N	50	50	40

RPT DATE: 200805		WORKER ID: XXX		NAME: XXXXXXXXXXXX X XXXX						
IND ID : XXXXXXXXXXXXC		CASE ID : XXXXXXXX								
					BEGIN	END	END SELF	SCH COM		
	IDX	COMP	ACT	PROV	DATE	DATE	RSN INIT	HRS HRS	HRS	WKS
COMP OLD 1 AE 00 51 2008-04-09 2008-04-09 8 N 3 3 10										
COMP NEW 1 AE 00 51 2008-04-09 2008-04-09 8 N 00 20										
TOTALS FOR COUNTY XXX										

TOTAL OLD COMPONENT HOURS COMPLETED:										3
TOTAL NEW COMPONENT HOURS COMPLETED:										70
TOTAL OLD EMPLOYMENT HOURS COMPLETED:										0
TOTAL NEW EMPLOYMENT HOURS COMPLETED:										0

State Summary Totals Page

N.C. DEPARTMENT OF HEALTH AND HUMAN SERVICES										RUN DATE: 2008-08-12
REPORT: WFJ280-1					DIVISION OF SOCIAL SERVICES					
STATE TOTALS					EMPLOYMENT PROGRAMS INFORMATION SYSTEM					
					HISTORICAL CLIENT RECORD DATA KEYED					
		TOTAL OLD	TOTAL NEW	TOTAL OLD	TOTAL NEW					
		COMP HRS	COMP HRS	EMPL HRS	EMPL HRS					
XXXXXXXX										
XXXXXXXX										
XXXXXXXX										
XXXXXXXX										
STATE										

- B. A query is available in the Client Services Data Warehouse for counties to display historical hours keyed.