#### Change #2-2009

# WORK FIRST USER'S MANUAL EPIS INSTRUCTIONS HISTORICAL DATA ENTRY

#### EP601 – HISTORICAL DATA ENTRY Change #2-2009 October 1, 2009

## EP601.01 General Information

EPIS allows data entry of hours for employment hours and certain specified components for previous report months. The hours keyed using the Historical Data Entry functions are not subject to the regular monthly EPIS deadline (no later than the 20<sup>th</sup> of the month following the month of reported activity). The Report Month cannot be prior to October 2007 **and** cannot be the current report month.

Any historical data keyed will be part of the monthly participation rate calculation whenever rates are being recalculated (monthly participation rates) or retransmitted (Federal participation rates). Federal Participation Rates are automatically transmitted.

# EP601.02 Access to Historical Client Record – Add Screen

WFJ000FM XXXXXXX #000	EMPLOYMENT PROGRAMS INFORMATION SYSTEM MAIN MENU	08/12/2008 12:34:41	
OPTIONS	DESCRIPTION		
	 6908 DATA ENTRY		
2	PARTICIPANT DATA INQUIRY		
3	PARTICIPANT COMPONENT INQUIRY		
4	PARTICIPANT EMPLOYMENT INQUIRY		
5	PARTICIPANT NAME SEARCH		
6	SECURITY SUBSYSTEM		
7	PARTICIPATION RATE QUERIES		
8	HISTORICAL HOURS - ADD		
9	PARTICIPANT TRACKING		
OPTION:			
PF4=EXIT			
WFJ061-ENTER	OPTION NUMBER		

From the Main Menu, enter option 8, Historical Hours - Add. Press Enter.

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# Change #5-2008

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December 1, 2008

The Historical Client Record – Add screen displays.

WFJ081FM #000	HISTORICAL	CLIENT RECORD - ADD		08/12/2008
EIS ID CNTY # V NAME	RPT MNTH WKR # UPDATE DATE EIS CASE ID	COMPONENT 081208	JOB TYPE	6908? Y
HISTORIC	CAL DATA HOURS TO BE INCL	UDED IN PRIOR REPOR	RT MONTH PER	liod
	PROGRAM PAR	TICIPATION		
	BEG END	HRS	HRS EXCU	HOL
IDX COMP ACT	PROV DATE DATE RSN	SELF DATE SCH	COMP HRS	HRS WKS
IDX JOB BEG.	EMPLOYM .DT END.DT JOBDEV TY	IENT PE DATE S.HRS HI	RS.WK WKS	RANGE
PF3=MAIN MENU WFJ150 - ENTER I	PF10=COMPONENT EIS ID, REPORT MONTH, AND	PF11=EMPLOYMENT COMPONENT JOB TYF	PE - or <pf3> to</pf3>	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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#### 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 CNTY # 83 WKR # XXX NAME XXXXXX X XXXXXX	200801 COMPONENT OA JOB TYPE 6908 UPDATE DATE 081208 EIS CASE ID xxxxxxxx	? Y			
HISTORICAL DATA HOUR	S TO BE INCLUDED IN PRIOR REPORT MONTH	PERIOD			
PF					
IDX COMP ACT PROV DAT	E DATE RSN SELF DATE SCH COMP HR	CU HOL S HRS WKS			
7 OA 00 51 1005	06 013108 1 N 0108 002 002 40				
7 OA 00 51 1005	06 013108 1 N 0108				
	EMPLOYMENT				
IDX JOB BEG.DT END.DT	JOBDEV TYPE DATE S.HRS HRS.WK V	WKS RANGE			
PF3=MAIN MENU PF10=COMPONENT PF11=EMPLOYMENT					
WFJ153 - ENTER ADDITIONAL	HOURS TO EXISTING ACTIVITY				

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	3.	Enter the SCH, H than the ENTEF 'WFJ00 ID OR	he <b>additional</b> hours. IRS.COMP, or WKS ree digits, use leadin R. If the entry is succ 04-UPDATE SUCCE <pf3> TO EXIT' disp</pf3>	At least one, HRS. must be keyed. If less g zero(s). Press essful, the message, SSFUL – ENTER NEXT blays
		For exa additic for Cor Januar display the HR	ample: For the month onal 20 hours complet nponent 'OA'. Current y 2008, only 2 hours s. Key the <b>addition</b> S.COMP field.	n of January 2008, an eted needs to be keyed ntly, for the month of has been completed <b>al</b> 20 hours as 020 in
В.	Compo	onent Fo	or The Report Month	Does Not Exist
	1.	Enter tl (Repor COMP	he EIS Individual ID r t Month, must be CC ONENT. Press Ente	number, RPT MNTH YYMM), and r.
	2.	The fol	lowing screen display	/s with:
		a.	The individual's nam worker number, and	e, county number, EIS case ID number.
		b.	The index number.	
		C.	The new COMP (Co (Report Month).	mponent), and DATE
WFJ081FM #000	н	STORICAL	CLIENT RECORD - ADD	08/12/2008
EIS ID XXXXXXXXL CNTY # XX NAME XXXXX	RPT MNTI WKR # xxxx	H 200801 C xxx	COMPONENT PS JOB TYPE UPDATE DATE 081208 EIS CASE ID xxxxx	6908? Y xxxx
HISTORICAL	DATA HOUP	RS TO BE IN	ICLUDED IN PRIOR REPORT M	IONTH PERIOD
	F BE(	PROGRAM P G END	PARTICIPATION	EXCU HOL
IDX COMP ACT	PROV DA	TE DATE	RSN SELF DATE SCH COMP	HRS HRS WKS
6 PS			0108	
IDX JOB BEG.	DT END.D	EMPLO T JOBDEV	DYMENT TYPE DATE S.HRS HRS.WK	WKS RANGE
PF3=MAIN MENU	PF10=C	OMPONEN	T PF11=EMPLOYMENT	

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

# WORK FIRST USER'S MANUAL EPIS INSTRUCTIONS HISTORICAL DATA ENTRY December 1, 2008 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).
- 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 <u>EP600.02</u>)
- 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.

 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. Th	ne following screen disp	lays with:
	a.	The individual's na worker number, ar	ame, county number, nd EIS case ID number.
	b.	Existing employme month.	ent data for the report
	C.	A second line of ex with HRS.SCH (He WK (Hours Worke RANGE (Wage Ra <i>additional</i> hours t three digits, use le	xisting employment data ours Scheduled), HRS d), WKS (Weeks), and ange) blank to allow to be keyed. If less than eading zero(s).
WFJ081F	M #000 HIST	FORICAL CLIENT RECORD - AE	DD 08/12/2008
EIS ID xx CNTY # x NAME x	xxxxxxxP RPT MN xx WKR # xx xxxxxx x xxxxxx	TH 200801 COMPONENT OA (x UPDATE DATE 081208 EIS CASE ID xxxxx	JOB TYPE 6908? Y
HIST	ORICAL DATA HOL	JRS TO BE INCLUDED IN PRIO	R REPORT MONTH PERIOD
IDX CO	BE MP ACT PROV DA	PROGRAM PARTICIPATION EG END ATE DATE RSN SELF DATE	HRS HRS EXCU HOL SCH COMP HRS HRS WKS
IDX CO IDX JO 2 31 2 31	BE MP ACT PROV DA B BEG.DT END.D 031507 031507	PROGRAM PARTICIPATION EG END ATE DATE RSN SELF DATE EMPLOYMENT DT JOBDEV TYPE DATE S N U 0108 N U 0108	HRS HRS EXCU HOL SCH COMP HRS HRS WKS S.HRS HRS.WK WKS RANGE 174 174 40 86

- 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.

W	ORK FIR EPIS	ST USER'S MANUAL	
Change #5-2008	HISTOR	ICAL DATA ENTRY	December 1, 2008
В.	Job Type	e For The Report Month Do	oes Not Exist
	1. E (F C	nter the EIS Individual ID r Report Month, must be CC OMPONENT. Press Ente	umber, RPT MNTH YYMM), and r.
	2. T	he following screen display	/s with:
	a	. The individual's nam worker number, and	ie, county number, EIS case ID number.
	b	. The IDX (index num	ber).
	C.	The new JOB (Job T	ype).
	d	. DATE (Report Montl	า).
WFJ081FM #000	D HIST	ORICAL CLIENT RECORD - ADD	08/12/2008
EIS ID XXXXXXXX CNTY # 83 NAME XXXXXX	XP RPT MN WKR # xx x xxxxxx	TH 200801 COMPONENT JOB x UPDATE DATE 081208 EIS CASE ID xxxxxxxx	TYPE 25 6908? Y
HISTORICA	AL DATA HOU	RS TO BE INCLUDED IN PRIOR R	EPORT MONTH PERIOD
IDX COMP AC	BE CT PROV DA	PROGRAM PARTICIPATION G END HRS TE DATE RSN SELF DATE SCH	FIRS EXCU HOL COMP HRS HRS WKS
IDX JOB BE 4 25	G.DT END.D	EMPLOYMENT T JOBDEV TYPE DATE S.HR 0108	S HRS.WK WKS RANGE
PF3=MAIN MEN WFJ153 - ENTE	U PF10=C R ADDITION	COMPONENT PF11=EMPLOYM	ENT /
	3. E	nter the following:	
	a	. BEG.DT (Begin Date) –	Required.
	b	. END.DT (End Date) – C	ptional.
	C.	JOBDEV (Job Developn	nent) – Optional.
	d	TYPE (Employment Typ	e) – 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.

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 COMPONEN	NT INQUIRY	08/21/2008	
EIS.ID xxxxxxxxxr NAME xxxxxx x xxx	xxx I	EIS.CASE xxxxxxx	WORKER xxx	
HIST CTY INX COMF * 37 1 AE	BEGI PACT PROV DAT 00 51 0220	N ENDING END E DATE RSN 08	SELF REPT HRS INIT DATE SCH N 0801 000 0801 100	HRS EXCU HOL COMP HRS HRS WKS 020 00 040 30
PF2=HIST DATA ENTF PF9=6908 DATA ENTF WFJ003- ENTER EIS	RY PF3 =MAIN MEI RY PF10=PARTIC I ID- or <pf3> to EXI</pf3>	NU PF4 =EXIT EF DATA PF11=EMPL T	PIS PF7 =BACK PF OYMENT PF12=NAN	8=FORWARD /E SEARCH
WFJ003FM	EPIS EMPLOY	MENT INQUIRY	08/21/2008	
EIS.ID xxxxxxxxxr NAME xxxxxx x xxxxx	x	EIS.CASE xxxx	xxxx WORKER xx	x
JOB HIST CTY INX TYPE * 37 1 92	BEGIN ENDING DATE DATE 032708	JOB JOB REPT DEV TYPE DATE Y U 0801 0801	HRS HRS SCH WORK WKS 000 020 00 166 140 40	WAGE S RANGE 86
PF2=HIST DATA ENTF PF9=6908 DATA ENTF WFJ003- ENTER EIS	RY PF3 =MAIN MEI RY PF10=PARTIC I ID- or <pf3> to EXI</pf3>	NU PF4 =EXIT EF DATA PF11=COMF T	PIS PF7=BACK PF PONENT PF12=NAM	8=FORWARD IE SEARCH

# 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.

# WORK FIRST USER'S MANUAL EPIS INSTRUCTIONS HISTORICAL DATA ENTRY September 22, 2008

# Change #3-2008

# 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: XXXXXXXXX HISTORICAL CLIENT RECORD DATA KEYED
RPT DATE: 200804 WORKER ID: XXX NAME: XXXXXX X XXXX IND ID : XXXXXXXXL CASE ID : XXXXXXX
BEGIN END END SELF SCH COM IDX COMP ACT PROV DATE DATE RSN INIT HRS HRS WKS
COMP NEW 3 OT 15 51 2008-04-01 2008-05-30 N 50 50 40
RPT DATE: 200805 WORKER ID: XXX NAME: XXXXXXXX X XXXX IND ID : XXXXXXXXXC CASE ID : XXXXXXXX
BEGIN         END         END         SELF         SCH         COM           IDX         COMP         ACT         PROV         DATE         DATE         RSN         INIT         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:3TOTAL NEW COMPONENT HOURS COMPLETED:70TOTAL OLD EMPLOYMENT HOURS COMPLETED:0TOTAL NEW EMPLOYMENT HOURS COMPLETED:0

State Summary Totals Page

	N.C. DE	PARTMENT OF H	EALTH AND HUM	AN SERVICES	RUN DATE: 2008-08-12
REPORT: WFJ28	0-1	DIVISION OF	SOCIAL SERVIC	ES	
	EMP	LOYMENT PROGR	RAMS INFORMAT	ION SYSTEM	
STATE TOTALS		HISTORICAL CL	IENT RECORD D	ATA KEYED	
-					
			EMPL HKS	EMPLARS	
****					
XXXXXXX					
XXXXXXX					
XXXXXXX					
STATE					

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