

## How to Add a Person in EIS

Adding a client to a case begins with a proper system inquiry. ***A proper system inquiry prevents the creation of duplicate clients.***

1. To complete a client inquiry, go to the CLIA screen and select  
1. INQUIRE ON PERSON.

Type in a few letters of the client's last name in the SURNAME field to obtain the CLIENT INQUIRY SHORT LIST.

If you do not obtain a SHORT LIST using a few letters of the client's last name, enter a few letters of the client's first name in the GIVEN NAME field or add the DATE OF BIRTH in the DOB field and 'M' or 'F' in the SEX field.

*\*If you receive a SHORT LIST of clients, select the matched client by their number and hit enter to obtain the client's CLPM screen. **Be sure to review the DOB and SSN fields to verify you are selecting the correct client.***

2. On the CLPM screen, select 1. SAVE FOR MAINTENANCE.
3. The CLIA screen appears again. Select 4. ADD EXISTING CLIENT TO CASE.

Under the ENTER FOR FUNCTIONS 3 AND 4: field enter the CASE NUMBER; PROGRAM TYPE [If it is a combo case, always enter the AF (ATAP).] and the BENEFIT PERIOD START (MMDDYY) which is the effective date of the client's program eligibility

4. *\*If you do not receive a SHORT LIST listing the client, the client needs to be added to EIS.*

Add the client on the CLIA by selecting 3. ADD NEW CLIENT TO CASE and complete the identifying information of SURNAME, GIVEN; NAME, MIDDLE INITIAL, DOB, SSN and SEX.

Under the ENTER FOR FUNCTIONS 3 AND 4: field enter the CASE NUMBER; PROGRAM TYPE [If it is a combo case, always enter the AF (ATAP).] and the BENEFIT PERIOD START (MMDDYY) which is the effective date of the client's program eligibility

**NOTE:** *You do not need to complete the BENEFIT PERIOD END (MMYY): field unless after adding a person to the case, you realize you should have added them a month earlier than you did. For example: You've completed a proper inquiry and selected and added Billy Jo to your on-going ATAP case effective 040109. Later, you realize you had intended to add him effective 030109. After completing a proper inquiry and selecting him for maintenance, you will complete the steps*

outlined above. Type 030109 in the *BENEFIT PERIOD START (MMDDYY)*: field and type 0309 in the *BENEFIT PERIOD END (MMYY)*: field on the CLIA.

**Additional tips:**

\*\* Household members displaying on CAP2 are specific to whichever program month is out the furthest under *CURRENT MONTH*.

\*\* Before adding a newborn (baby) to EIS, complete a proper inquiry using mother's last name with UNBORN as the first name. After searching under the mother's last name; inquire again using the father's last name with UNBORN as the first name. Many babies are already known to the system from Third Trimester ATAP involvements, and numerous duplicate clients are regularly created due to improper UNBORN inquiries. Once UNBORN is found, worker can update the Client Identifying information on CLPM with newborns legal first and last name.

***Duplicate Clients*** - If a duplicate client is found during your inquiry, please report it to the Help Desk.

Reporting a duplicate client is easy. Go to the Systems Operations website and select Help Requests. You will find an automated form 'Duplicate Client' to complete and send to Help Desk.