

CLIENT INQUIRY PROCEDURE

INQUIRY FOR APPLICATION REGISTRATION

The objective of a client inquiry is to get a list of clients on the CLIS screen from which the appropriate client is registered to an existing EIS case or to a new case number if appropriate.

BE ALERT—if the client or family has been on assistance before, you should find them in EIS.

1. Go to the CLIR screen and follow the steps outlined below.
2. Take **extra care when entering** information in the system, data entry is very important!
3. Input the **first 2-3 letters of the last name**. If the client is not found or the list is very long, go to the next step.
4. **Add DOB and 'M' or 'F' for sex** and <ENTER>. The list returned is in alphabetical order. Carefully look for your client in the list. If the list is very long go to the next step.
5. Add **1-2 more letters of the last name** and <ENTER>. If the list is still long and the client has not been found, then go to the next step
6. Input **first initial of the first name** and <ENTER>. If the client still has not been found then complete the spelling of the entire last name, delete the asterisk from the parenthesis and <ENTER>.

NOTES ABOUT INQUIRY AND REGISTRATION

A. Creation of a duplicate client is a result of not doing a proper inquiry. If a duplicate is found or created, immediately report the duplicate client and the good client to the Help Desk. Report whatever you know about the situation but **DO NOT** make any changes to the client's name, DOB, sex, or SSN. **It is helpful to give the client ID numbers (begins with 06xxxxxxx), full name of the two clients, DOB and SSN in your message to the Help Desk.**

B. UNBORNS should be registered in EIS as follows:

Walker, Unborn (Mom's last name)

Hudson, Unborn (Dad's last name as an alias) **OR**

Hudson, Unborn (Dad's last name)

Walker, Unborn (Mom's last name as an alias)

AFTER THE CHILD IS BORN--BE ALERT

Inquire on new babies as Unborns before creating a new client. Do two inquiries, one with Mom's last name and the other inquiry with Dad's last name. Look real hard.

If it is known that Mom is getting Third Trimester TA or Third Trimester Family Medicaid then

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the unborn should be found in EIS during an inquiry about the new baby.

DO NOT register unborns as:

Unborn, Unborn
Unborn, Baby
Unborn, Child
Unknown, Unborn
Unknown, Baby girl

C. LAST NAMES:

Unusual last names should be easy to find. Is it 'Stern' or 'Staern' or 'Stearne?' (transposing letters causes lots of problems)

It is acceptable to use the hyphen (-) to separate long names. If the hyphenated name exceeds the surname field, ask the client which name should be used and set an alias using the other name.

Use an apostrophe in names like O'Rourke instead of the accent (´) mark. Set an alias without the apostrophe to assist others in finding the client in EIS. For example, June O'Rourke may have an alias of June Orourke.

D. FIRST NAMES:

Show name designations as "JR", "SR", "III" OR "IV." etc. as an **alias to the first name**. Do not use initials or nicknames except as an alias.
Exception: In a situation where two people have the same mailing address

and the Postmaster is unable to determine whose mail is whose, you may register "JR", "III", etc. to the case's First name rather than setting it as an alias. An example of when this is necessary might be in a rural area where many people use a General Delivery address to receive mail. The case name could be: Foster, John JR.

Remember:

>Inquire on William as well as Bill or Will
>Inquire on Robert as well as Bob or Rob
>Inquire on Margaret as well as Peggy, Marge or Maggie

- E. **NEVER CHANGE THE PI** that has been assigned to a particular case number. If an edit displays saying the person was not the PI in the past, stop registration and check the client's history further. Contact Help Desk for assistance.
- F. **ALIASES** should be added via the CLPM screen, function 6. Children who have or who could be known by more than one last name should have an alias set up for the other name. The CLIS screen shows aliases as ** in the far right hand column.