

CLIENT INQUIRY/REGISTRATION MENU (CLIR) JOB AID

Used for application registration

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      1.  INQUIRE ON PERSON
      2.  CREATE AND SAVE CLIENT FOR REGISTRATION
      3.  REGISTER APPLICATION WITH EXISTING CASE NUMBER
      4.  REGISTER APPLICATION WITH NEW CASE NUMBER
      5.  DELETE PREVIOUSLY SAVED PERSONS

          FUNCTION: 1

INQUIRE BY CLIENT DATA:

SURNAME      :                ( * )
GIVEN NAME   :                ( * ) Remove '*' for direct
MIDDLE INITIAL:                name matches
DOB (MMDDYYYY):
SSN          :
SEX          :
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ENTER EXISTING CASE NUMBER (FOR FUNCTION 3) :

ENTER OFFICE, UNIT, AND CASELOAD NUMBER (FOR FUNCTION 4):

- 1) In FUNCTION: field, enter option 1
- 2) Enter a small portion (2 or 3 characters) of the client's last name in the SURNAME: field <press ENTER>
 - a. If there are less than 150 clients with that last name, it will take you to the CLIS screen
 - b. If there are more than 150 clients with that last name, you need to narrow your search
- 3) Enter the client's date of birth in the DOB field, gender in the SEX field; or 1 to 2 character's of the client's first name in the GIVEN NAME: field <press ENTER>
- 4) If there is more than one client that fits your search criteria, you will be taken to the CLIS screen. A list of the first 15 matches will be displayed.
- 5) If there is only one client that matches your search criteria, you will be taken directly to that client's CLPM screen
- 6) Locate the specific client you are looking for and enter the corresponding number in the <== INQUIRE ON CLIENT: field <press ENTER> this will take you to the client's CLPM screen.
 - a. If you do not see your client listed on the CLIS screen, PF8 to move to the next page of the list.
 - b. If your client is not listed at all, PF5 or PF9 to return to the CLIR screen and create the client by
 - i. Typing 2 in the FUNCTION: field and entering all of the client's data in the fields on the left hand side of the screen <press ENTER>. This will save the

client for registration and an edit message will appear at the top of the CLIR screen indicating the client followed by a number (01) – their last, first name and message “SAVED FOR REG.” will display highlighted

- 7) Once you are on the correct client’s CLPM screen, enter number 1 in the FUNCTION: field to save the client for registration <press ENTER>
- 8) You may repeat the above steps, inquiring and saving multiple clients for registration to the same case number/household
- 9) Once all clients have been properly inquired on and saved for registration, you can now register the application
 - a. To register with an existing case number, type 3 in the FUNCTION: field and type in the case number in the ENTER EXISTING CASE NUMBER : field at the bottom of the CLIR screen <press ENTER>
 - i. The REGISTER APPLICATION (REAP) screen will display. Complete the registration process following instructions outlined in the APPLICATION REGISTRATION job aid.
 - b. To create a new case number, enter 4 in the FUNCTION: field, enter the appropriate office, unit, and caseload number in the field at the bottom of the screen <press ENTER> the REAP screen will appear displaying a new case number and the newly registered client(s).
 - c. Refer to the previous steps outlined above regarding completing the required REAP fields and the APPLICATION REGISTRATION job aid.

Note: On-Line Help is available for all entry fields and can be accessed by placing the cursor in the specific field and pressing PF10. On-Line Help provides a list of available codes specific to a field, as well as specific field information and screen information.

Helpful Hints for Client Inquiries

1. Deletion of the asterisk (*) is required for a full surname search
2. Deletion of the asterisk (*) is required for a full given name search
3. The DATE OF BIRTH (DOB) field with a MMDDYYYY format, provides
 - ◆ a one (1) year variance for individuals who are age 0 through 20 years
 - ◆ A 5% variance for individuals age 21 and older