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FAX 96-27

Field Operations Memo 96-9
March 11, 1996

TO: Local Office Staff

FROM: Joyce Sampson, Assistant Commissioner for Field Operations

RE: TAFDC Tracking System

Overview

As TAFDC is being implemented, the need for local office staff to track certain TAFDC information on cases is essential for assisting staff in monitoring case activity and complying with the new TAFDC regulations. In response to this need, offices have been taking the initiative and developing PC-based tracking systems.

Various tracking systems were reviewed by Central Office staff to determine if one of these tracking systems could meet the needs of all local offices to track TAFDC information. The tracking system selected was the TAFDC tracking system developed in the Springfield State office, which will be implemented statewide in two phases.

Phase 1 Implementation

The Springfield TAFDC tracking system will be available to all local offices. This will enable local offices that currently do not have a tracking system in place to begin tracking TAFDC information.

During phase 1 local office staff should become familiar with the tracking system.

The use of the TAFDC tracking system will be optional until phase 2 is implemented. Phase 2 will be a fully documented system with the capability to do letters. Until that time, offices may continue to use their own tracking systems . When phase 2 is implemented, the use of the TAFDC tracking system will be mandatory for all local offices. Phase 2 will be implemented in the near future.

The EDP coordinators will be installing the tracking system in local offices during the week of March 11,1996.

Phase 1 Implementation (cont.)

Documentation developed by the designers of the tracking system will be distributed by Printing and Distribution to all local office staff during the week of March 11.

Phase 2 Implementation

Phase 2 implementation will include standardized procedural documentation, training and enhancements to the original tracking system.

Attachments

Attachment A: Import Procedures

Attachment A provides instructions for obtaining updated demographic data from ARTS in order that data will be available in the tracking system. This process must only be completed once a week after the ARTS download occurs.

Attachment B: Data Element Definitions

Attachment B defines the data elements displayed on the TAFDC Tracking Information Screen. A screen facsimile is also included for reference purposes.

Questions

Questions regarding accessing and using the TAFDC Tracking System are to be directed to the Customer Support Services Hotline at 348-5290.

Import Procedures

1. Perform the weekly download

2. Select the **ONGOING CASE QUERY** by clicking its icon on the Windows Desktop

3. After ARTS loads, Select Transfer option from ARTS Main Menu

4. Select Import option from the ARTS Transfer Menu

5. Enter Categories to exclude (NOTE: do not exclude cat 2)

6. Enter status to exclude (NOTE: do not exclude status 1,2,3)

7. Select **Yes** to purge data popup window

8. After import is completed, Exit to the ARTS Main Menu

9. Select **Query** from the ARTS Main Menu

10. Select Queries from the Query Menu

11. Highlight the **TAFDC Tracking Query**

12. Select **Load** from the Queries Menu

13. After Query is Loaded, return to Query Menu

14. Select **GO** from the Query Menu

15. ARTS provides a popup window to allow the user to sort the output

16. Select the default by pressing <Enter>

17. The query is performed

18. After the query is completed, the Result Menu appears

19. Select **File** from the Result Menu

20. A drop down list of File types are displayed.

21. Select the **dBASE** file format and then press <Enter>

22. The found records are then exported to a file named QUERY.DBF. This file should be located in the **<drive>:\data\arts\down** directory

23. Exit ARTS

24. Find and double click the TAFDC Import Icon from the Windows Desktop with mouse

25. After the Query.APR file loads, click the **Import** button with the mouse.

26. When the import is completed, click **Exit** button with the mouse.

The updated demographic data are now available in the TAFDC tracking system.

TAFDC TRACKING INFORMATION SCREEN - DATA ELEMENT DEFINITIONS

FIELD NUMBER	DATA FIELD	DESCRIPTION
1	SSN	Case Social Security Number
2	Name	Recipient Name
3, 4, 5, 6	Address Information	Recipient's Address
7	Telephone Number	Recipient's Telephone Number
8	Program Code	Code to indicate exempt/nonexempt status of case
9	Conversion Type	Indentifies various groups of cases being reviewed for TAFDC eligibility
10	Start Date	TAFDC start date or date of transition review
11	CAN	Worker Case Assignment Number
12, 13	Work Requirement	Work Requirement Indicators - required or exempt
14, 15	Intake	Identifies type of intake case - new or reopen
16	Clear Button	Clears out entry in Intake field
17	Dispo. Date	Date of disposition
18	Dispo. Type	Identifies disposition of case - approved, withdrawn, or denied
19,20,21	ESP Codes	Identifies ESP component codes
22	Last Re-D.	Date of last eligibility reviw
23,24	Tickler	30-day tickler system
25, 26	Tickler	45-day tickler system

FIELD NUMBER	DATA FIELD	DESCRIPTION
27, 28	Tickler	60-day tickler system
29, 30, 31	Appointment	Follow-up date or date of scheduled appointment
32, 33, 34	Kept/Called	Indicates result of scheduled appointment
35	Immunization Track Date	Date immunization form is due back
36	Child Age 2	Date child turns two
37	Teen Turns 20	Date teen turns twenty
38	Living Arrangement	List of teen living arrangement codes
39	Education	Identifies education received
40	Other/Misc	Other tickler dates needed for tracking
41	Notes	Area for worker comments

File   Edit   View   Create   Form   Tools   Window   Help

TAFDC Tracking Information Screen

SSN [1] DC.SSN

[2] RY.RECIP NAM
[3] RY.STREET
[4] RY.CITY   [5] RY.   [6] RY.ZIP
[7] RY.phone

START DATE [10] DC.ST

CAN [11] RY.CAN

Program Code [8] RY. [±]

Conversion Type [9] DC.CONVERSI [±]

INTAKE

Work Requirement

[14] ake
[12] ork Required   [15] -Open
[13] ork Exempt   [16] ear Button

Dispo. Date [17] DC.DISP

Dispo. Type [18] DC.DISP

ESP Codes

COMP1	006 - 60 Day Work Program Activity
[19] DC.C	012 - Employment Assistance
	014 - DET Job Opportunity
COMP2	041 - Training/Education/Asst. Place
[20] DC.C	203 - Entered Employment
	204 - Employed After 30 Days
COMP3	300 - Develop TEMP Site
[21] DC.C	301 - Initial TEMP Site
	302 - Additional TEMP Site
	350 - Pending FEP
	351 - FEP
	906 - Sanction ** #1 AR27 #2 AR73

Ticklers

Last Re-D [22] RY.R

|	Date	Day	Appointment	Kept/Called
30th	[23] CKLER	[24] K DAY	[29] DC.APP	[32]
45th	[25] CKLER	[26] K DAY	[30] DC.APP	[33]
60th	[27] CKLER	[28] K DAY	[31] DC.APP	[34]

[42] Return to Main Menu

[43] rint Client Info. - F4

[44] rint Checklist - F6

[45] ete this Record - F6

[46] Future Use (letters)

Dependents
Immunization Track Date
[35] DC.IMMUNIZATION

Child Age 2   Enter Date of Child's 2nd Birthday
[36] DC.1 TU

OTHER/Misc.:
[40] DC.OTHERMis

Teen Cases   Teen Turns 20
[37] DC.Teen_T

Living Arrangement   Education
[38] DC.LIVING_A [±]   [39] DC.ED [±]

Notes:
[41] DC.Notes

Data Entry Screen   Design   W: 6.41 H: 3.61   100%

TAFDC Tracking System

User Guide
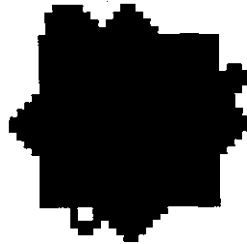
The TAFDC Tracking System was developed to help you with the additional tracking responsibilities associated with Welfare Reform. This system does not replace **any** of the Main Frame System tracking methods. This is meant to replace what ever method you may be trying to use to track various follow-up dates as part of a TAFDC case.

To **START** the Application:

Double Click on Tracking Icon from Program Manager
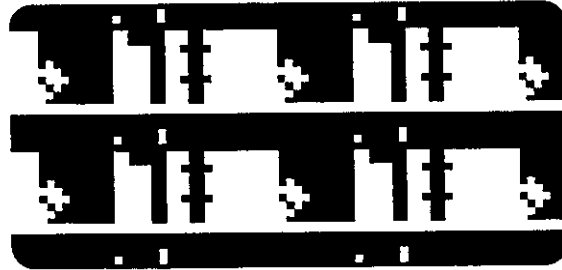
The Main Menu will appear.
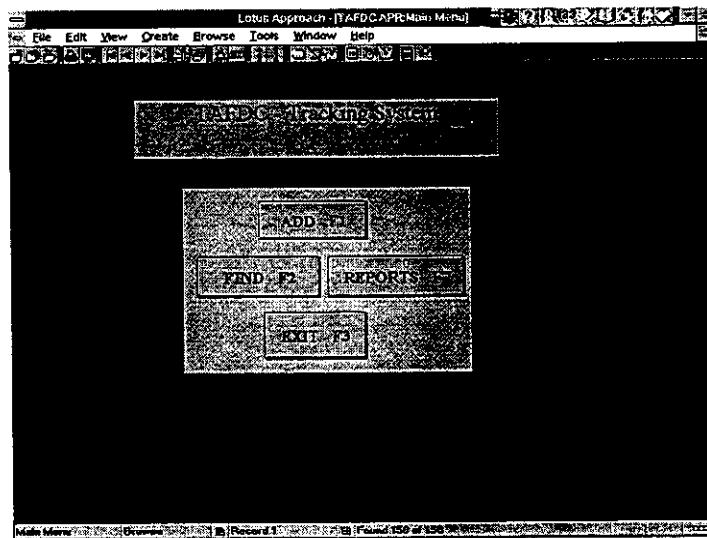
Using either the Mouse or corresponding Function Keys, you may **ADD** a record, **FIND** a record, Print a **REPORT** or **EXIT** the application.

*Note: In the left hand bottom corner you will see a screen indicator. This tells you the name of the screen you are currently in. The name of this screen is MAIN MENU. If for some reason you are unable to get out of any screen, click on this area. A list of all the application screens will appear. Click on MAIN MENU and you will be returned to this screen

ADD a record

Click on ADD from the Main Menu. The Data Entry screen will appear with a blank record. The cursor will be blinking in the SSN field.

Use TAB key to move from field to field

Type SSN with dashes "-"

Type in Clients Social Security Number and Press Tab.
*Note - If the client already exists on the Tracking System you will see a message indicating the SSN must be unique. Click OK, return to Main Menu and FIND the client.

If the client existed on the Main Frame System as of the previous month, all light green areas will contain data from that system. If the client is new and no information appears in light green area, you may fill this information in.
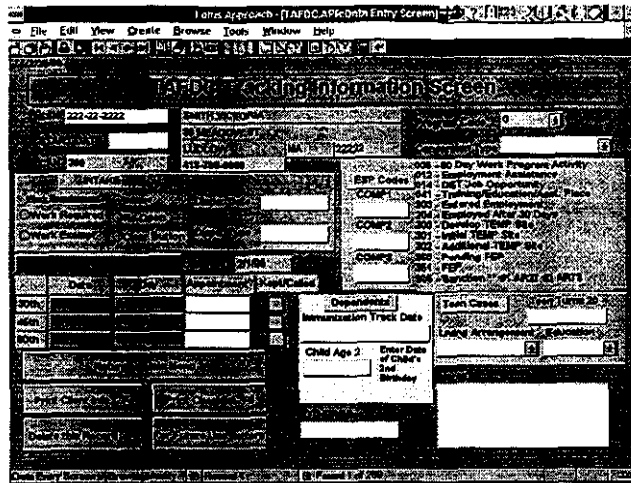
Add all information you would like to track on this system. Any fields followed by a drop down arrow indicate a list of choices is provided. Most fields and sections are self explanatory. I have listed any that may be ambiguous.

Start Date - This is the date that begins the tracking. The date the client applied or was converted to TAFDC.

INTAKE Section - Should be used by everyone (Work Requirement) and must always be completed by the Intake Unit when adding an intake case.
Work Requirement Button should be used by all workers as this field prints on reports and applies to all TAFDC Clients.
Clear Button - Simply clears Intake and Re-Open in the event an error was made and neither should be selected.

ESP Section - There is an abbreviated listing of ESP Codes provided here. You may use any of the many codes not listed here but keep in mind that the ESP\MIS Main Frame System will take care of the detailed tracking. This system is a information source for the Case Manager only.

Other/Misc. - This is a date field to *tickle* any thing you might need that is not included as a field in this application.

Notes - This is for any notes or reminders to yourself. (Suggestion - If Teen Parent case, make a note. Also, if Other/Misc. field is used, indicate for what purpose as a note. *(i.e. Other - landlord verif. due)*)
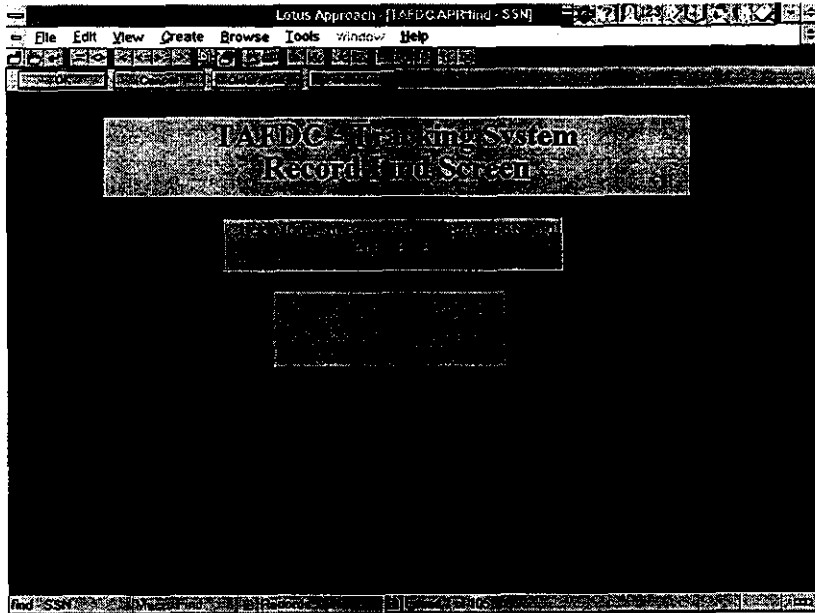
When complete
Click on.....

◆ Return to Main Menu   ◆ Delete the record

◆ Print Client Info.   ◆ Print Checklist

◆ For Future Use (letters) *not programmed yet*
(Sample of Client Info. and Checklist Attached)

FIND a record

Click on FIND from the Main Menu. The find-SSN screen will appear. Click Mouse in empty box, **Type SSN with dashes "-"** and press Enter.

If the record is found.... The screen will change to the Data Entry Screen with selected record in view.

If the record **is not** found...You will be asked if you would like to find again.
        If you click on **yes**..the screen remains and you may try again.
        If you click on **no**..the screen will change to the Data Entry Screen with record number 1 in view. **Click on Return to Main Menu.**

REPORTS
(Sample Reports are attached)

Click on REPORTS from the Main Menu. The Report List Screen will appear. Click on report choice.
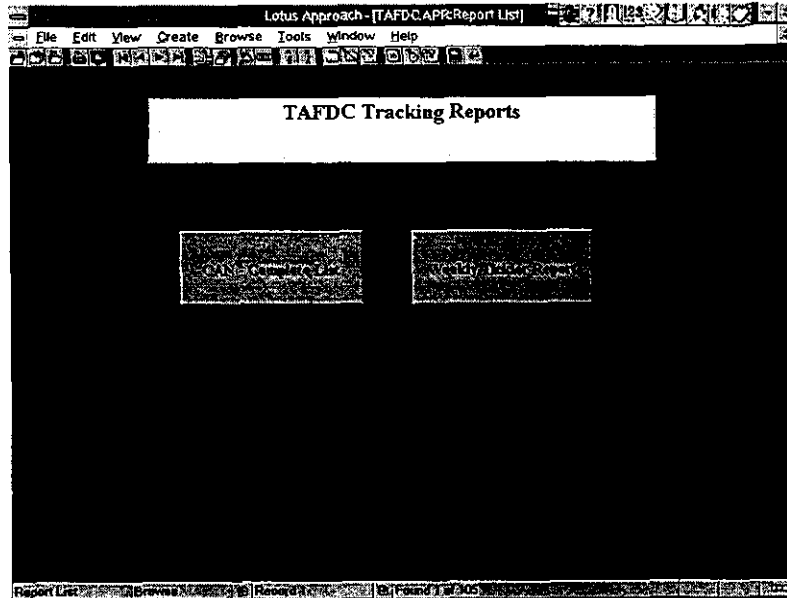

Currently there are two reports:

CAN - Complete List - This will report all records for a specific CAN number sorted by "start date".

Weekly Tickler Report - This will report all records for a specific CAN number that contain a *tickler* date for a specified date range.
>   ***Suggestion** - Use date range week dates of previous Saturday through upcoming Friday*

CAN - Complete List

Clicking on this report will bring up the find - CAN screen. Click mouse in the yellow box, type CAN number and press Enter. The report will print.
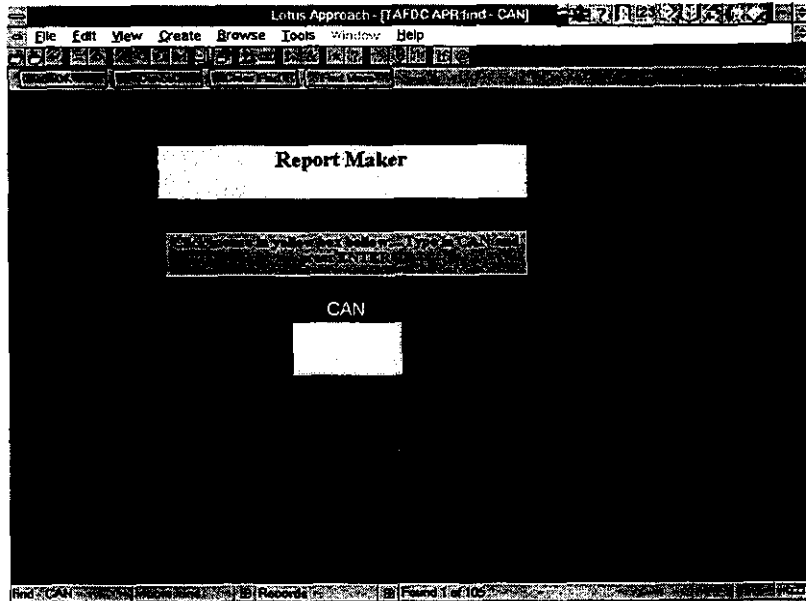
Weekly Tickler Report

Clicking on this report will also bring you to the Find - CAN screen. Click mouse in yellow box, type CAN and press Enter. The find - Date Range screen will then appear.

Press the TAB or click the mouse in *From* box, type date, press TAB, type *Through* date and click on Continue. The report will print.

Note - If there are no matching dates found, a message will appear indicating that no records where found and the macro chain will stop. Click on OK. You will then need to manually switch to the Main Menu by clicking on screen indicator box (lower left hand corner of screen). A list of all screens will appear. Click on Main Menu.

EXIT

Clicking on EXIT from the Main Menu will exit the TAFDC Tracking Application and return you to the Program.