Emergency Assistance Tracking System

Expected Outcome
Ability to use the Emergency Assistance Tracking System to properly determine eligibility for Emergency Assistance and track receipt of Emergency Assistance payments.

Objectives
Upon completion of this course, learners will be able to:

- Search for caretaker relatives
- Enter new grant information
- Edit grant information
- Retrieve and print reports

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For civil rights questions call (608) 266-6889 (Voice) or (866) 864-4585 (TTY).

Introduction

Historically, there was no programming in CARES or any other automated system to assist local staff in determining eligibility for or in sharing information about Emergency Assistance (EA) payments among staff or agencies. In 2001, representatives of local agencies requested that DWD automate verification and tracking.

In response to this request, DWD has created this Internet-based system, called the Emergency Assistance Tracking System, or EATS. Agencies will use the system to track receipt of all EA grants and denials in their agency, and they will use the system to verify receipt within the appropriate time limits for EA applicants. All of the data collected in EATS will come from the Emergency Assistance Application.

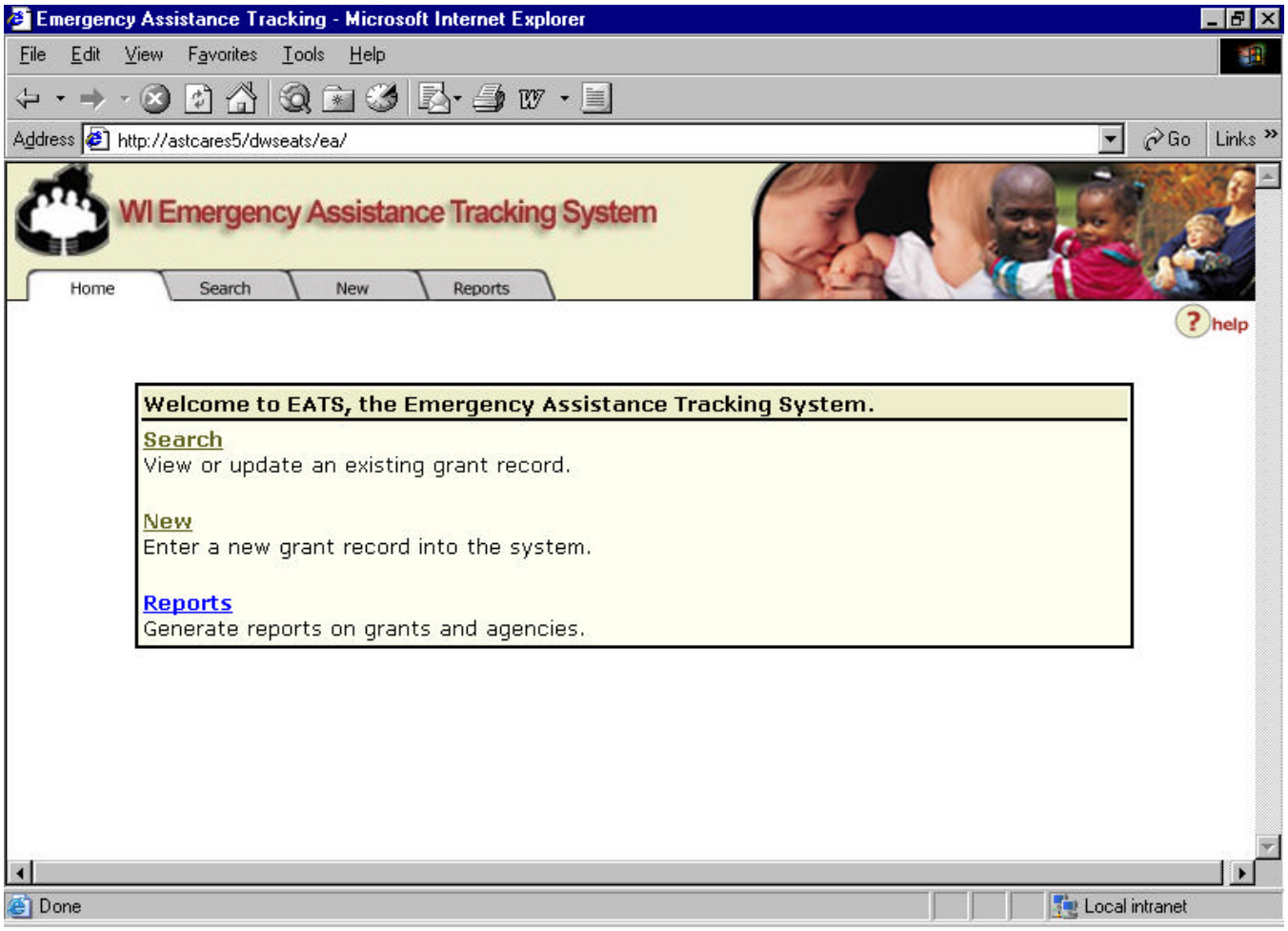
The ability to retrieve an applicant's EA grant history across the state is a key feature of EATS. For this reason, the information stored at the W-2 agencies for the 36 months prior to EATS implementation was submitted to DWD in July and August 2002 and uploaded to the system.

It is recommended that users of EATS follow this process when taking EA applications:

1. Customer requests EA
2. Customer fills out EA application/ Worker searches EATS to determine clock eligibility
3. Worker processes eligibility
4. Worker enters grant in EATS

The System

Home Page

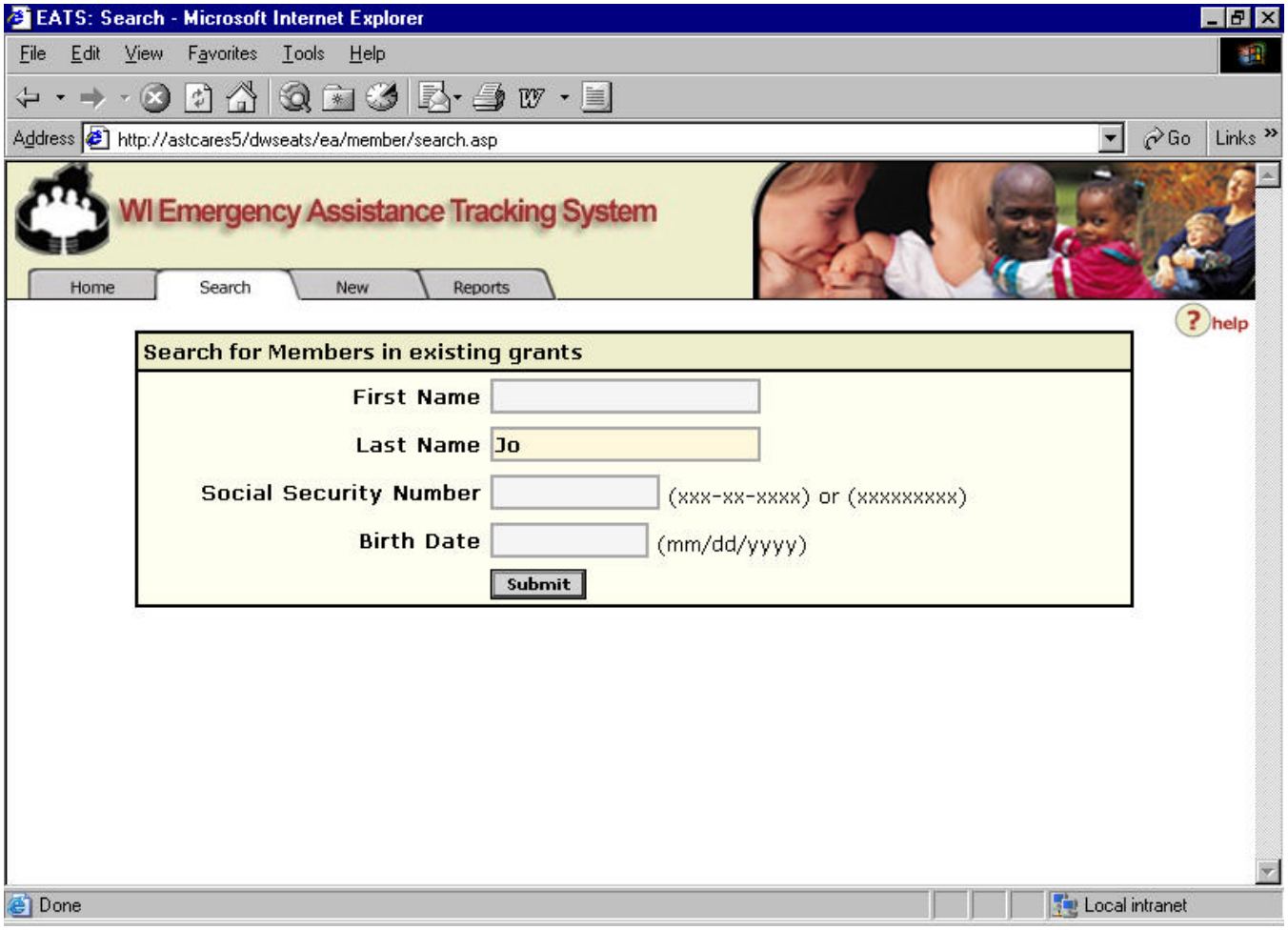


After logging in, the home page for EATS appears. It lists the three options available in the system.

- Search: Find individuals who have received EA grants in the past
- New: Enter a new EA grant
- Reports: View standard reports related to EA grants

There are two ways to navigate around EATS. The tabs across the top of the page always return the user to the home page for that section. Links in the text take users to specific pages containing detailed information.

Search



The Search function allows users to search the system for any caretaker relatives already entered in EATS and view information about any EA grants that person may have applied for. When a person wants to apply for an EA grant, workers should first search EATS to determine if the applicant is eligible based on the clocks for the emergency.

Users may search by any combination of first name, last name, social security number, or birth date. There must be at least one search criterion chosen. If more than 50 records are returned, the user will be asked to specify additional criteria.

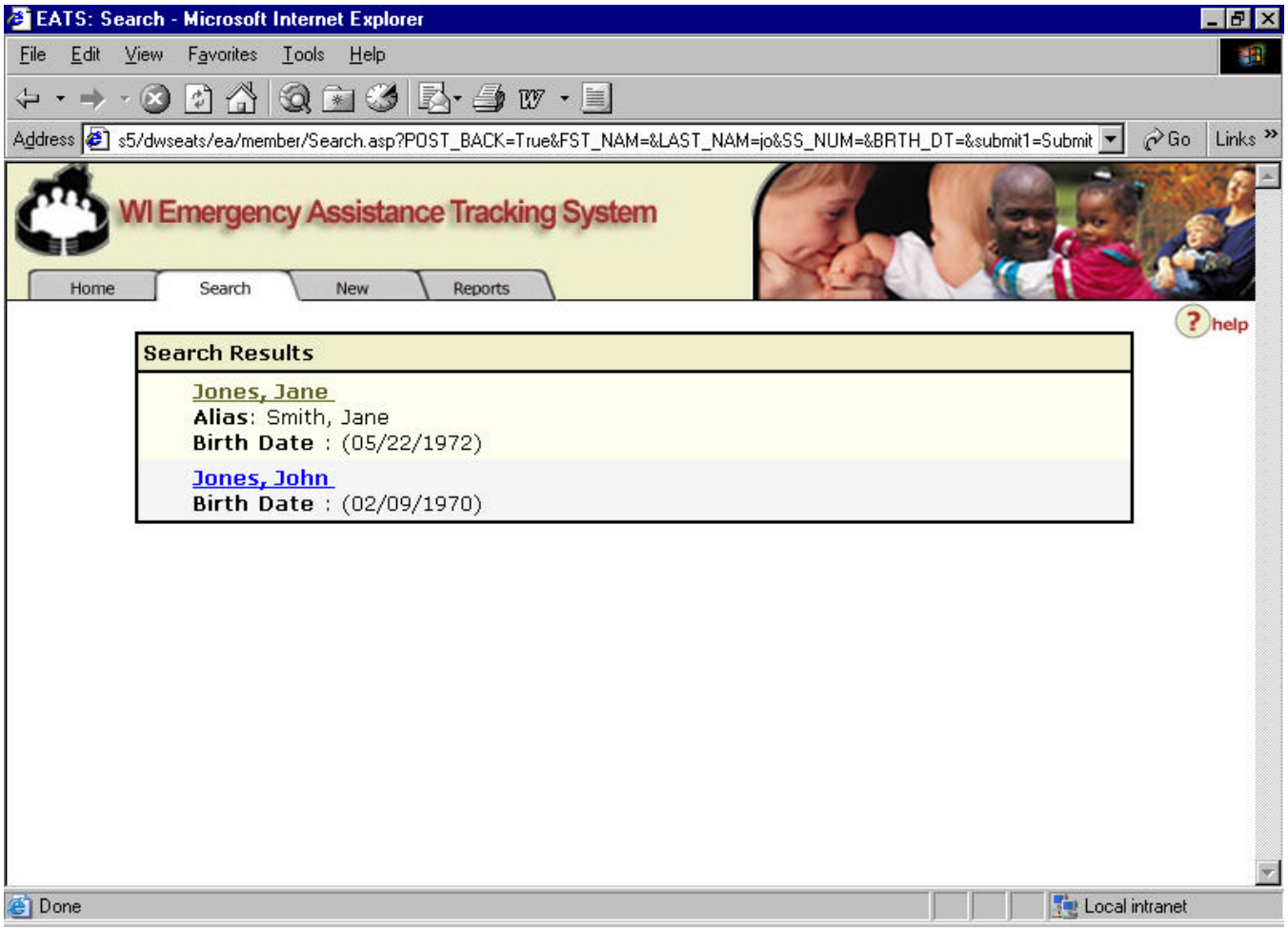
SSNs and birth dates must be entered in the format shown. Users may search by entering the first few letters of a name (see example above). Searching by using the first name only is not recommended. If a user searches using an alias, the name currently being used in EATS will return in the search results instead.

Example: If Jane Smith changes her name to Jane Martin and a user searches by Smith, her information will be returned as follows.

Jane Martin
Alias: Smith, Jane
Birth Date: (05/22/1977)

It is recommended that users search by SSN since only one record will be returned if that SSN exists in the system.

Search Results

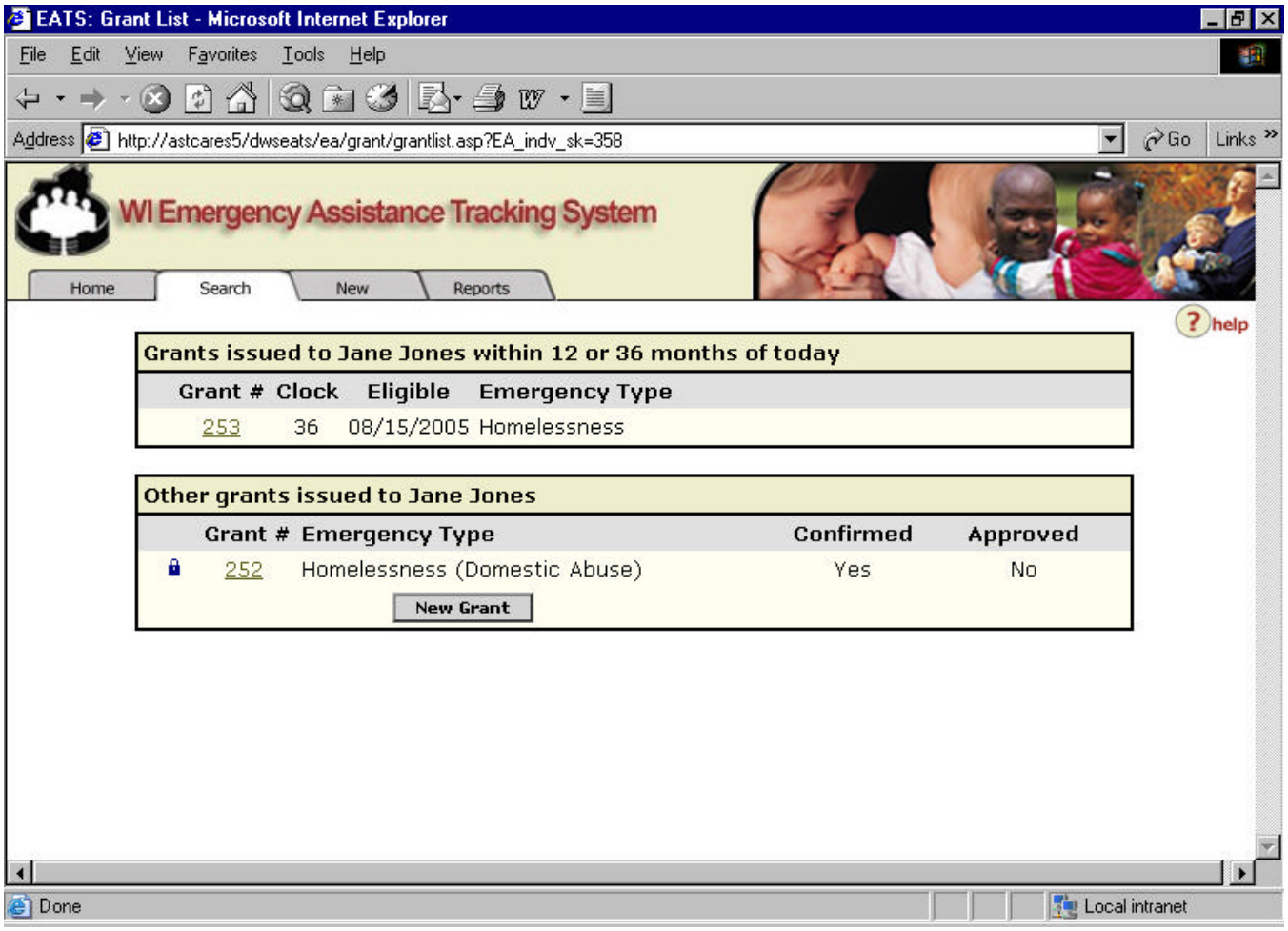


All caretaker relatives matching the specified search criteria are returned with complete names, birth dates, and aliases if applicable. SSNs will not display. If the search was done using the SSN, only one record will display, as duplicate SSNs are not allowed in EATS.

Users click an individual's name to go to Grant List to view specific information about grants that person has applied for.

> Note: The search feature will only return caretaker relatives. Children are not part of the search function.

Grant List



Grant List displays a list of all grants with which the caretaker relative selected from Search Results is associated. The information on Grant List is split into two categories: current grants issued within the last 12 or 36 months and grants that are older than those time frames, denied, or not confirmed.

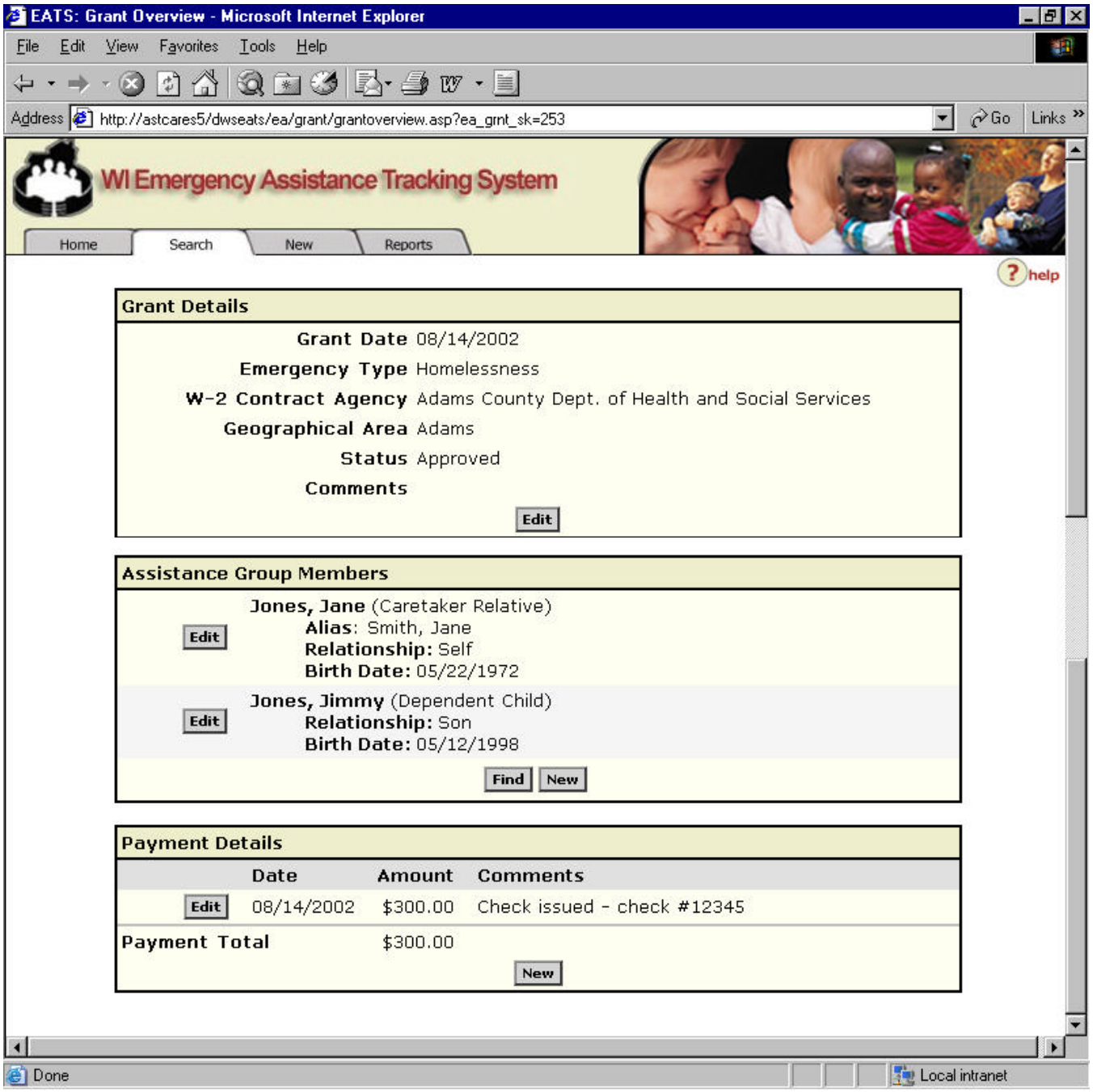
- Grant #: Assigned by EATS; number is unique to each grant; click the number to view details on Grant Overview
- Clock: 12 or 36 depending on the emergency type
- Eligible: Date the caretaker relative will be eligible to receive another EA grant for that clock type
- Emergency Type: Reason the EA grant was issued
- Confirmed: Yes or No
- Approved: Yes or No

In order to view specific information about a grant, the user clicks the grant number to go to Grant Overview. However, some EA grants (those involving domestic violence) are confidential. If a person does not have access to view the information in a

confidential grant, there is not an active link for that grant. A padlock displays in front of the grant number for all confidential grants.

Users who have proper access may create a new grant for this caretaker relative by clicking the New Grant button.

Grant Overview



Grant Overview displays all information pertaining to the grant selected from Grant List by clicking the grant number.

Based on a user's security profile, Grant Overview may look slightly different from this example. Users may only edit or add payment information for grants that their security profile allows.

Grant Details

- Grant Date: Date the EA grant is approved or denied; this sets the clock
- Emergency Type: The reason for the EA grant
- W-2 Contract Agency: Which agency issued the EA grant to the person
- Geographical Area: Where the W-2 Contract Agency is located
- Status: Approved or denial reason
- Comments: Miscellaneous comments about the grant in free format text

The Edit button allows users with appropriate access to change any of these details for an existing grant.

Assistance Group Members

- Name: All people listed on the EA application are either a caretaker relative (CR), other caretaker relative (OCR), or dependent child (DC)
- Relationship: Based on each person's relationship to the caretaker relative

The Find button allows users with appropriate access to locate all people previously associated with anyone currently attached to the grant. The New button allows users with appropriate access to add a new individual to an existing grant. The Edit buttons allow users with appropriate security to edit each person's demographic information.

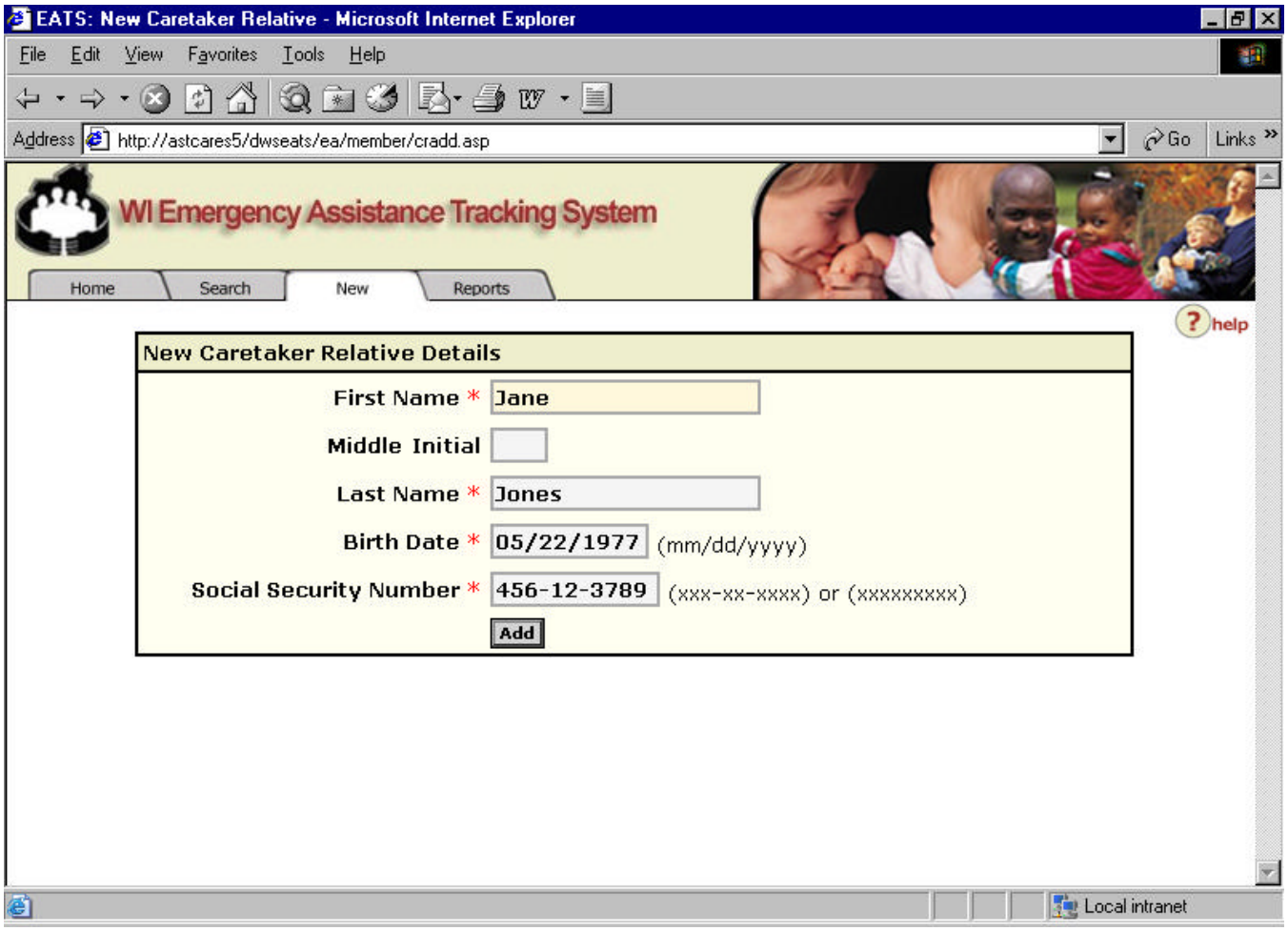
Payment Details

- Date: When the EA payment was issued; use the actual date, or if it is not known, use any date the agency deems appropriate
- Amount: Dollar amount of EA payment
- Comments: Miscellaneous comments about the payment
- Payment Total: Adds up all payments made for the EA grant

The Edit button allows the appropriate user to make changes to the payment details. The New button allows the appropriate user to add more payments to the grant. Multiple payments are permitted as long as the total does not exceed the maximum benefit allowed or demonstrated need.

New Grant

New Caretaker Relative

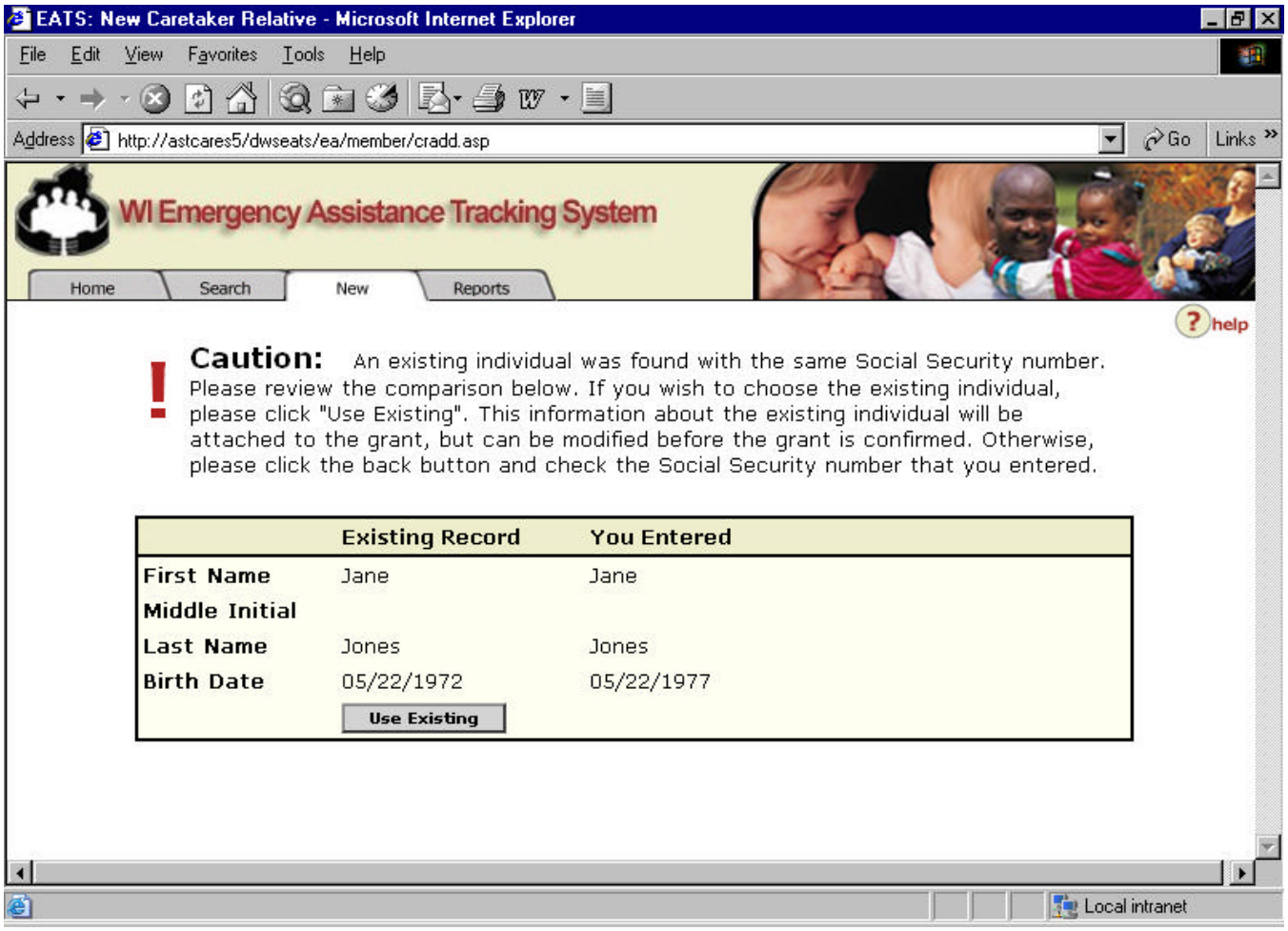


When a person completes the application process and is approved or denied for an EA grant, that information must be entered into EATS. The New tab or the New link from the home page takes users to the New Caretaker Relative screen.

Users enter information for the caretaker relative (person applying) for the grant. All fields with a red asterisk must be completed. There are edits/validations on these fields to ensure SSNs are of the proper length, dates are valid, etc.

Click Add to process the caretaker relative and move to New Grant.

Caretaker Relative Clearance

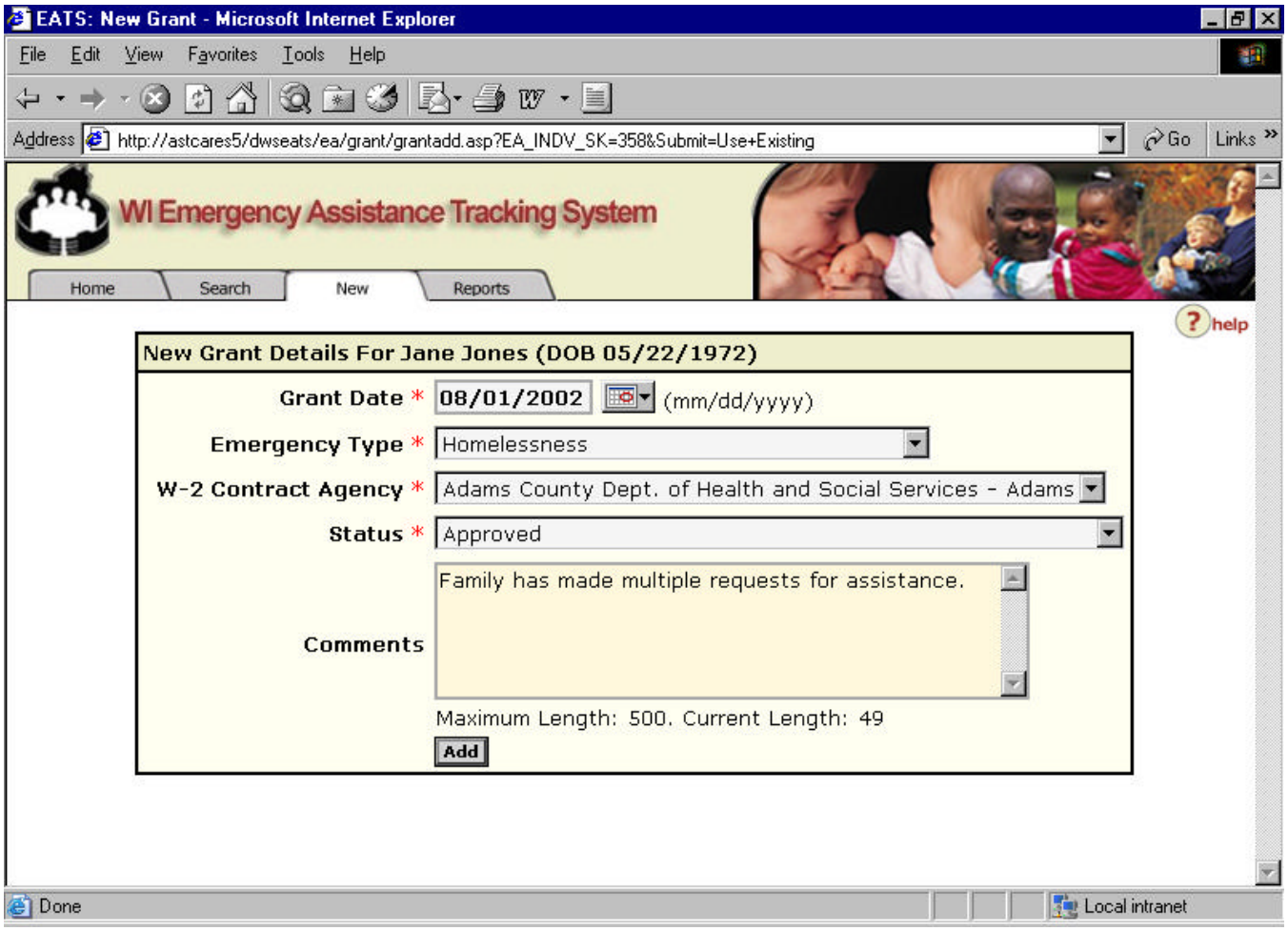


The clearance process checks if this caretaker relative is already known to the system. Multiple records with the same social security number are not permitted. If a duplicate SSN is found, the user is instructed to modify the SSN to create a new caretaker relative or use the existing individual. It is important that users completely compare the records to make the correct determination. Because duplicate SSNs are not allowed, if this is the same person, the user must use the existing individual. If the user chooses the existing entry, s/he may modify the individual's information after the grant is created. These changes will be reflected in all grants that the person is attached to.

If there is no existing record that matches the new caretaker relative, the security caution does not display and the user moves directly from New Caretaker Relative to New Grant.

> Note: Clearance is run on individuals any time a new person is added or an SSN is changed.

New Grant



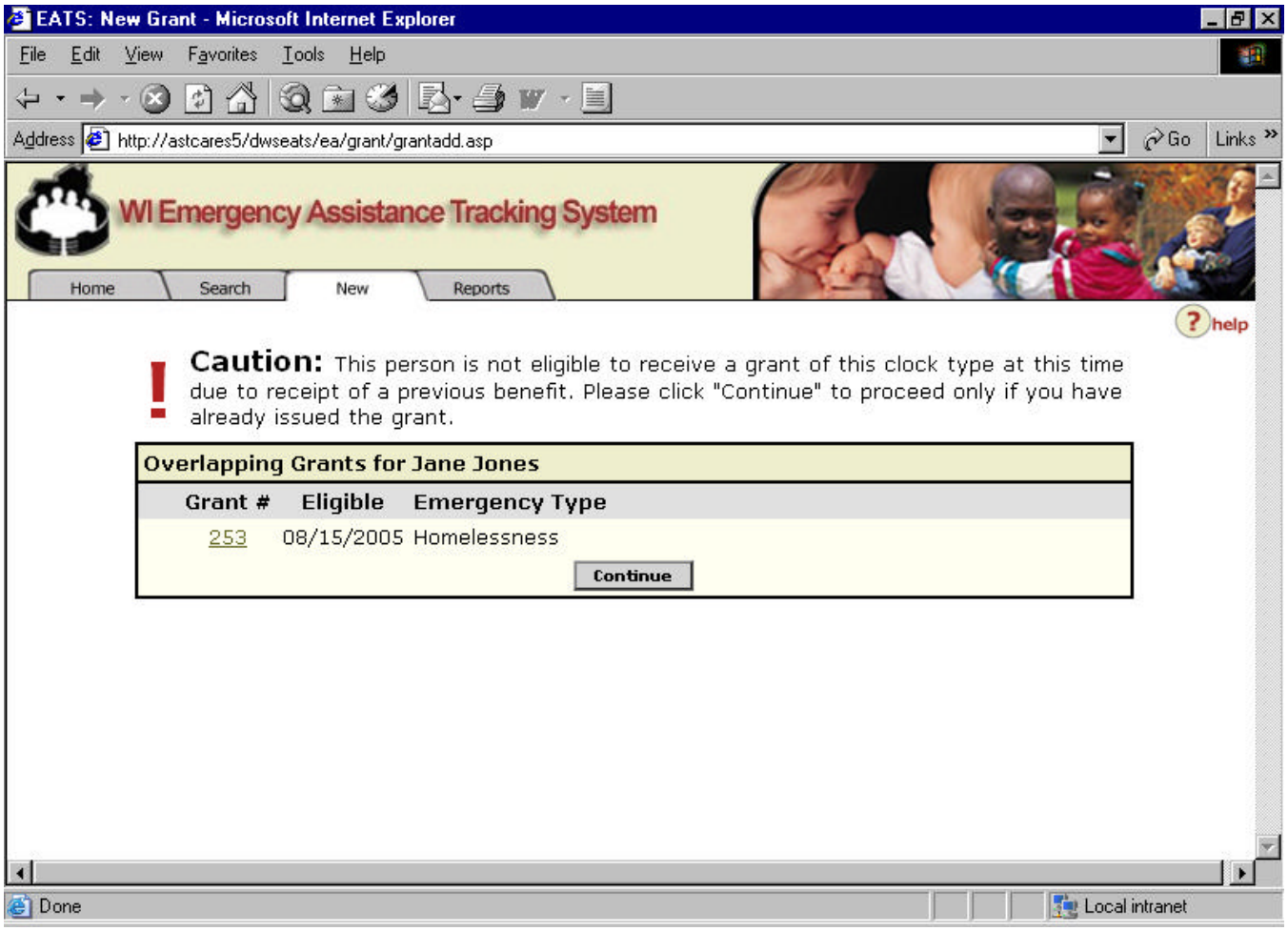
This page collects information specific to the new grant. Items marked with a red asterisk are mandatory.

- Grant Date: Date the grant is approved or denied
- Emergency Type: Users select from a list of options
- W-2 Contract Agency: Automatically filled in based on the user ID; includes geographical area; if user is from an agency with multiple geographical areas, this will be a drop down box and the user must make the correct selection
- Status: Approved or denial reason
- Comments: Users may enter appropriate comments as needed

Note: All comment fields have a 500-character limit.

Click the Add button to process the grant information and move to Grant Overview.

New Grant Clearance

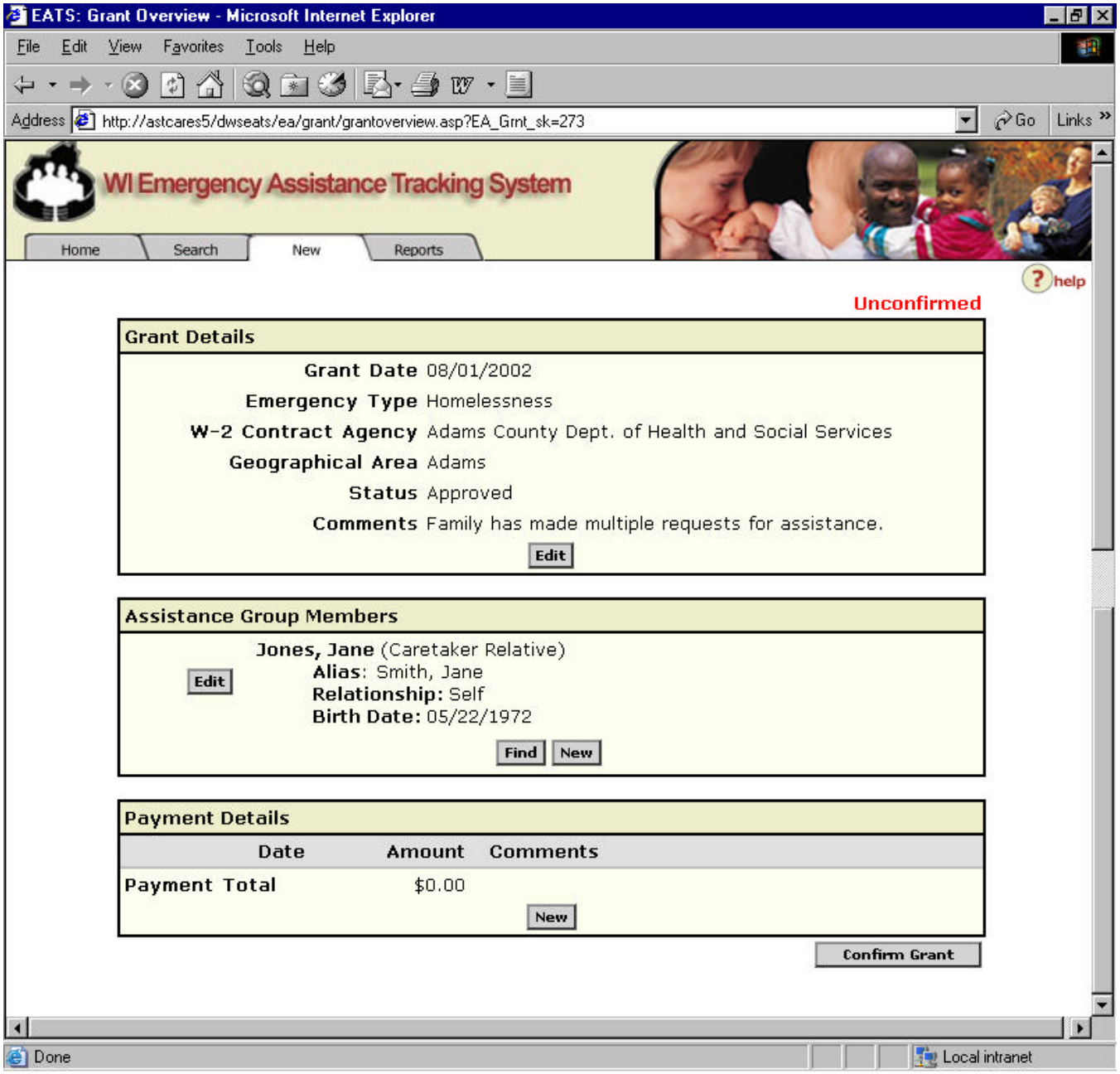


If the new EA grant falls within a period of ineligibility for the caretaker relative due to the emergency type clock, the Grant Clearance screen displays. Users may click a grant number to view details of the previous grant. If the user does not want to create an overlapping grant, s/he can use the back button to return to New Grant and change the details or stop processing the grant entirely. (Any grants that are not completely processed will be deleted from EATS each evening. This will be explained further later in the packet.)

If the user does want to create an overlapping grant, s/he should click the Continue button to process the grant and move forward to Grant Overview.

> Note: EATS will not prevent overlapping grants. It is up to the worker to determine eligibility correctly. Using the Search function prior to the customer completing an application will help prevent overlapping grants.

Grant Overview



Grant Overview displays a summary of all grant and individual information the user has entered up to this point (grant details and the caretaker relative). (This is the same screen that displays during a search.)

From this page, users modify grant details, add other people in the home, edit individual information, and add and edit payments. The word Unconfirmed displays in the upper right corner of the screen to let the user know that the grant has not been saved by the system yet.

Grant Details

- Edit: Change the grant information

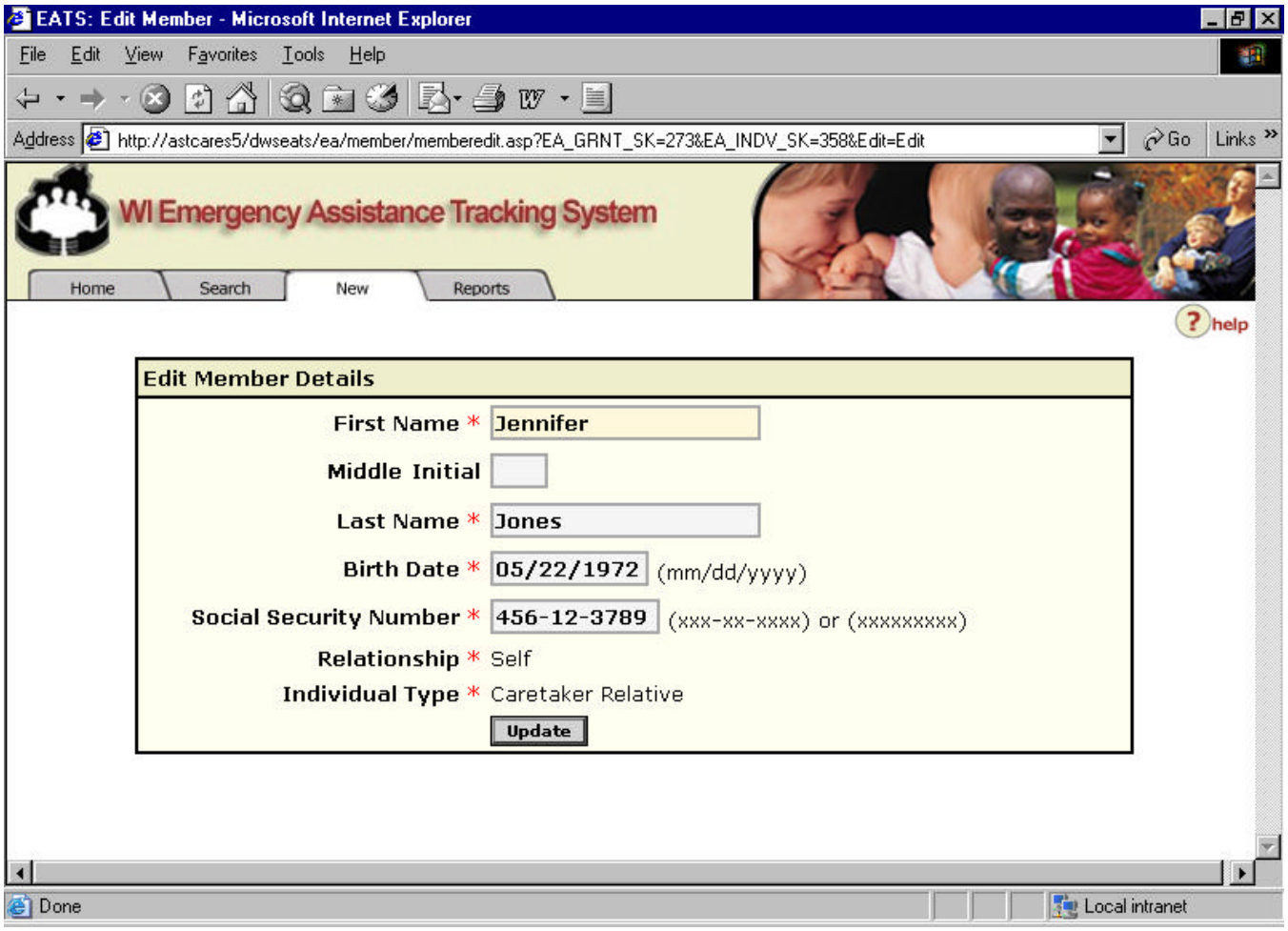
Assistance Group Members

- Edit: Change the group member's demographic details
- Find: Find people who previously received an EA grant with anyone already attached to this grant
- New: Add new members to the grant

Payment Details

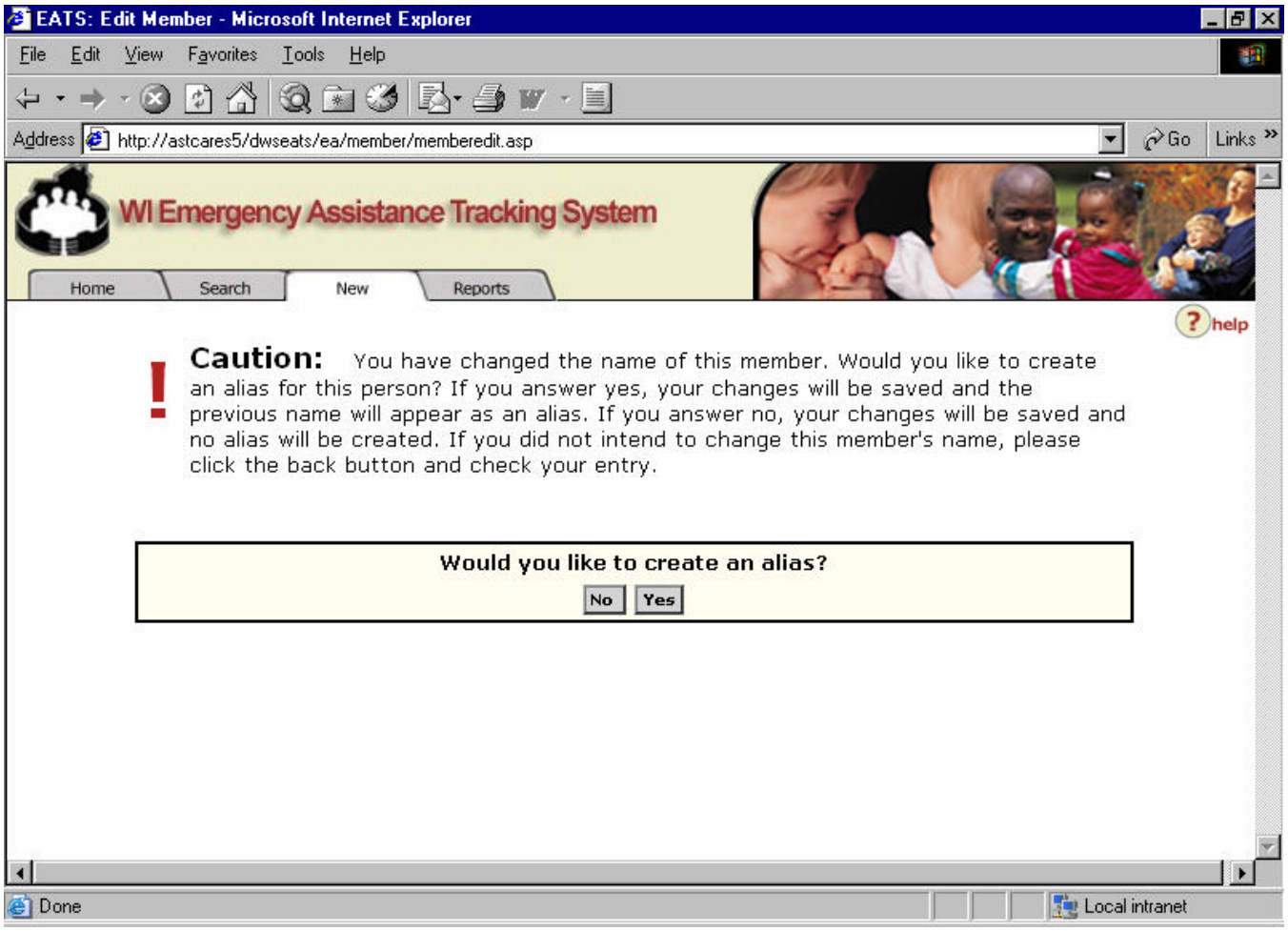
- New: Add payment information
- Edit: Change payment information (this button will display after a payment has been added)

Edit Member



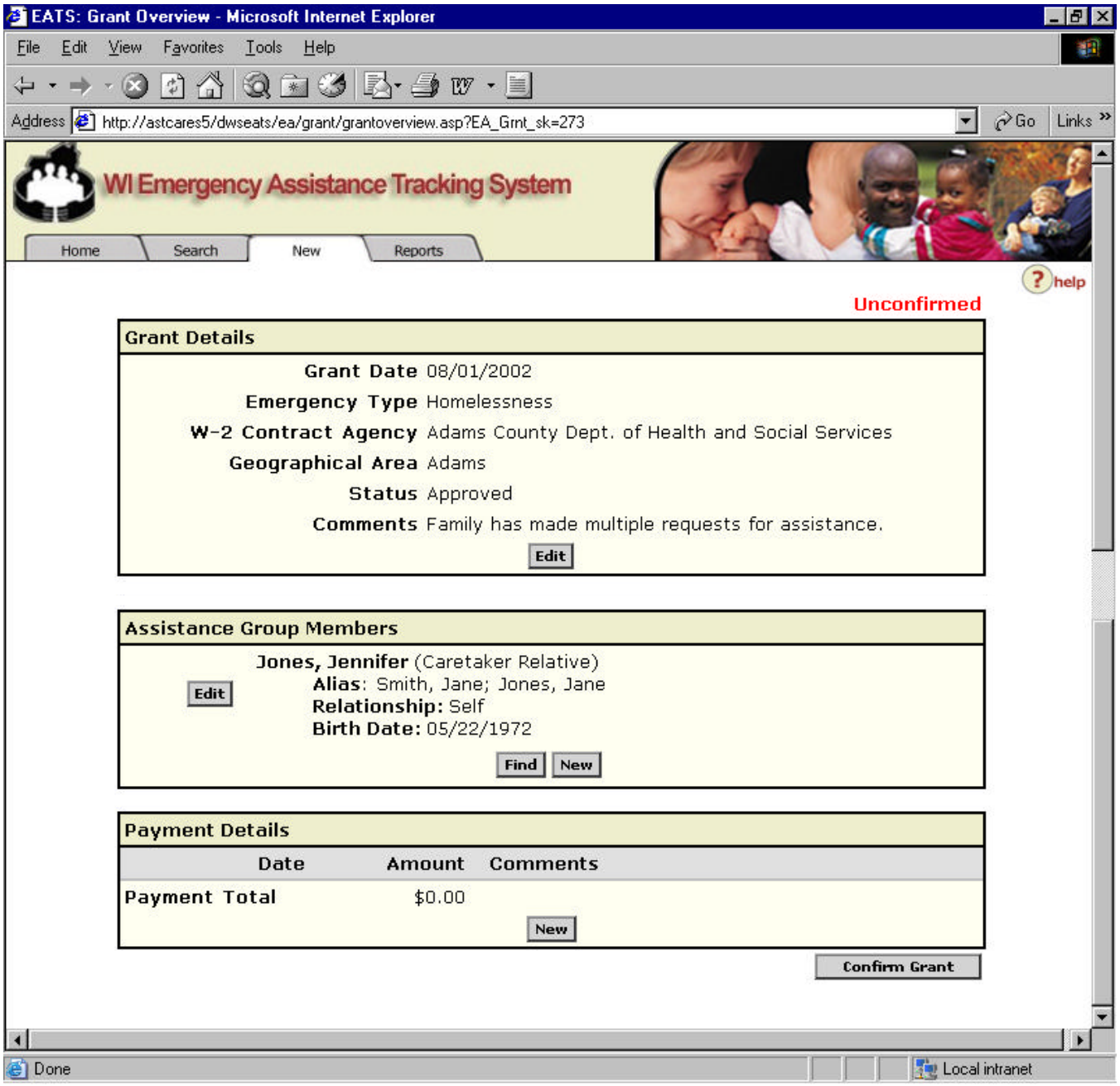
If information needs to be changed for an individual, users click the Edit button in front of the person on Grant Overview to go to the Edit Member Details page. Users may change the person's name, birth date, or SSN. If the person being modified is not the caretaker relative, the relationship (to the caretaker relative) and individual type may also be changed.

Click Update to process the new information and return to Grant Overview.



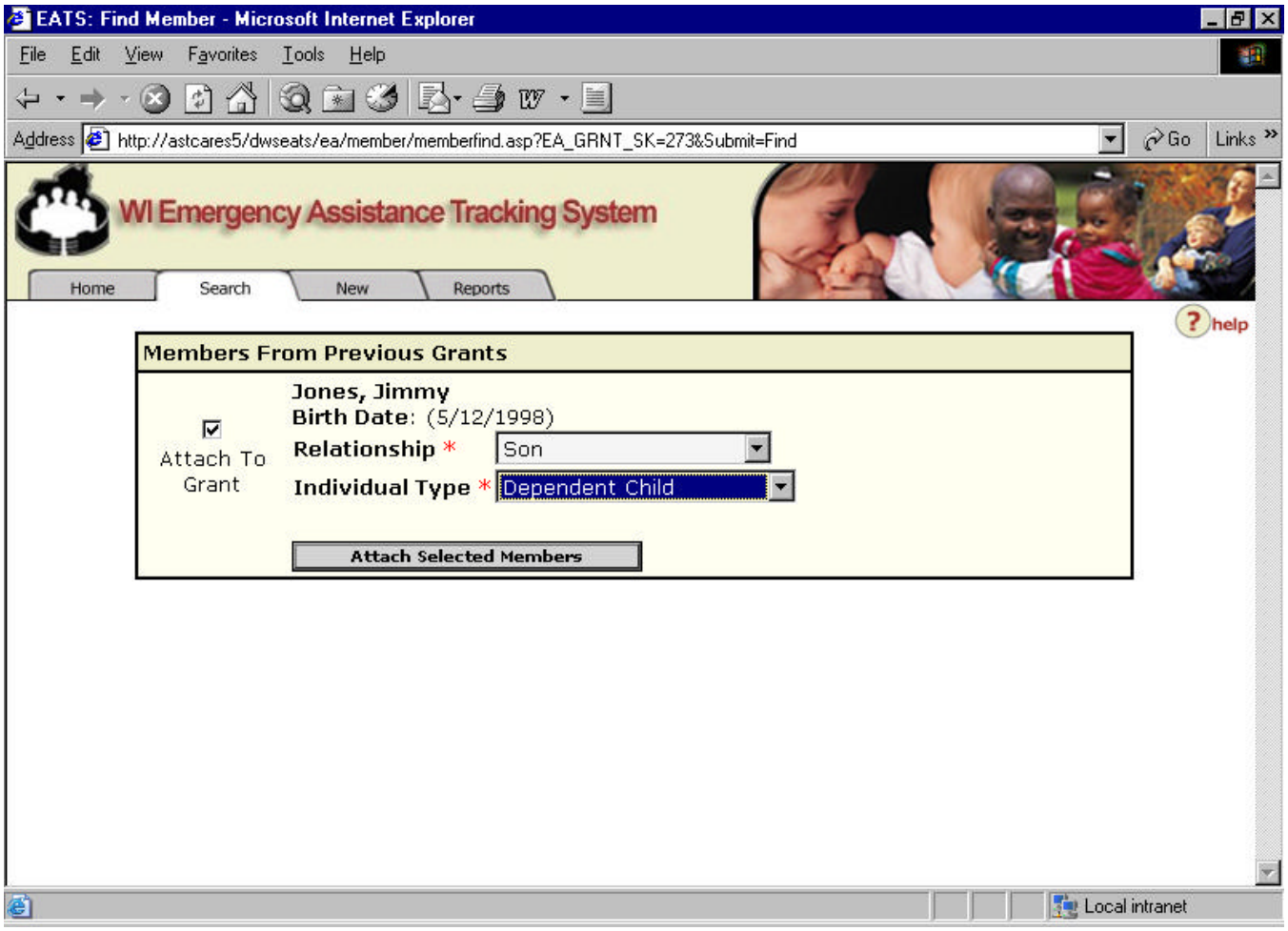
After clicking Update on Edit Member Details, a caution message appears if the name of a person was changed. If the user wants to create an alias and save the name, click Yes to return to Grant Overview. If the user does not want to create an alias, click No.

In this example, Yes was chosen.



After clicking Yes, the user returns to Grant Overview and the new name of the caretaker relative displays. The previous name now shows as an alias.

Find Member

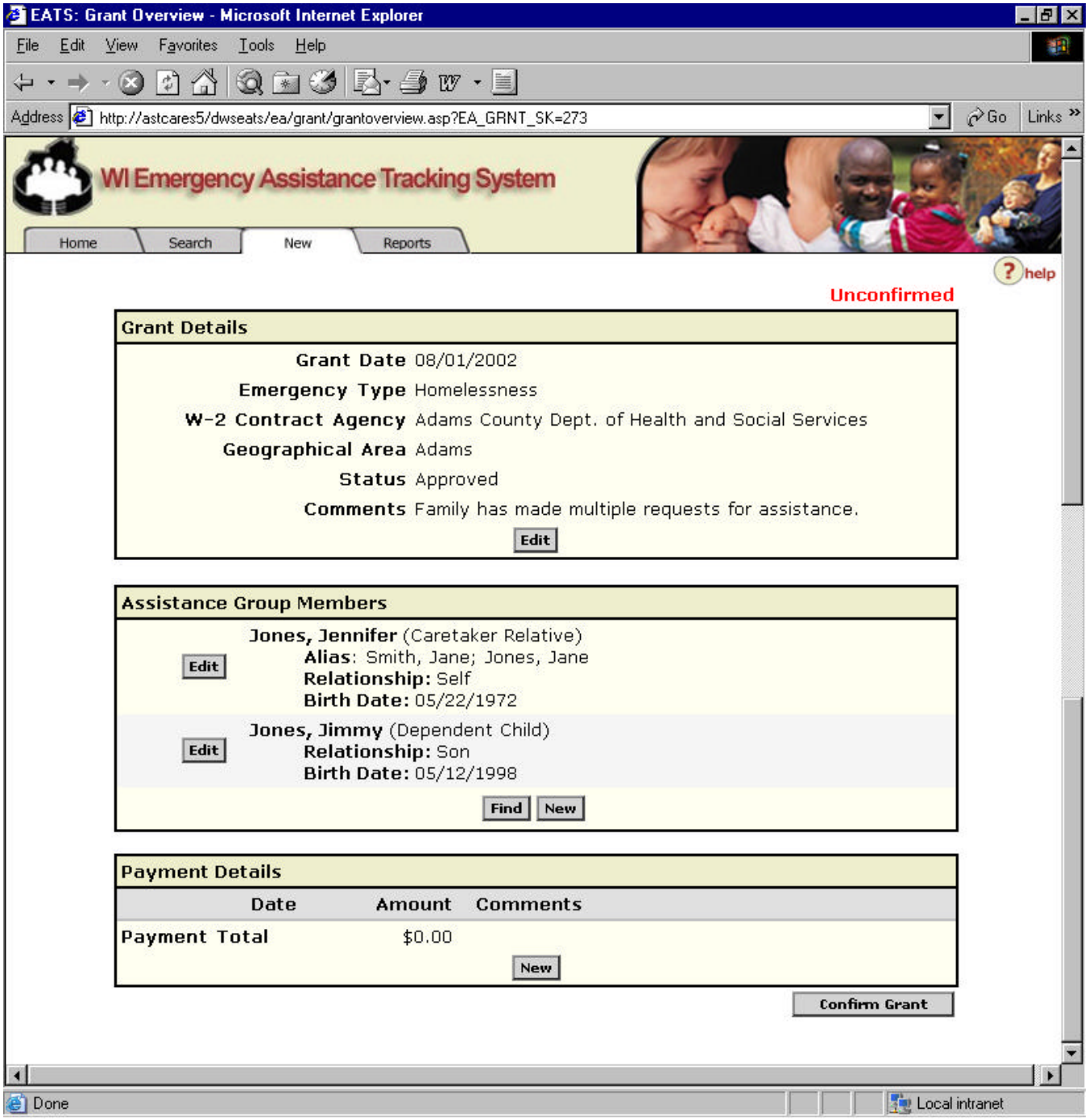


The find functionality for Assistance Group Members on Grant Overview returns a list of all individuals who were associated with the caretaker relative in previous grants. Users may select as many of the individuals as needed for the new grant or none of the individuals. Users may also remove individuals from the grant (except for the caretaker relative) by unchecking the Attach to Grant box for that person.

If a person is selected, the fields with red asterisks must be completed.

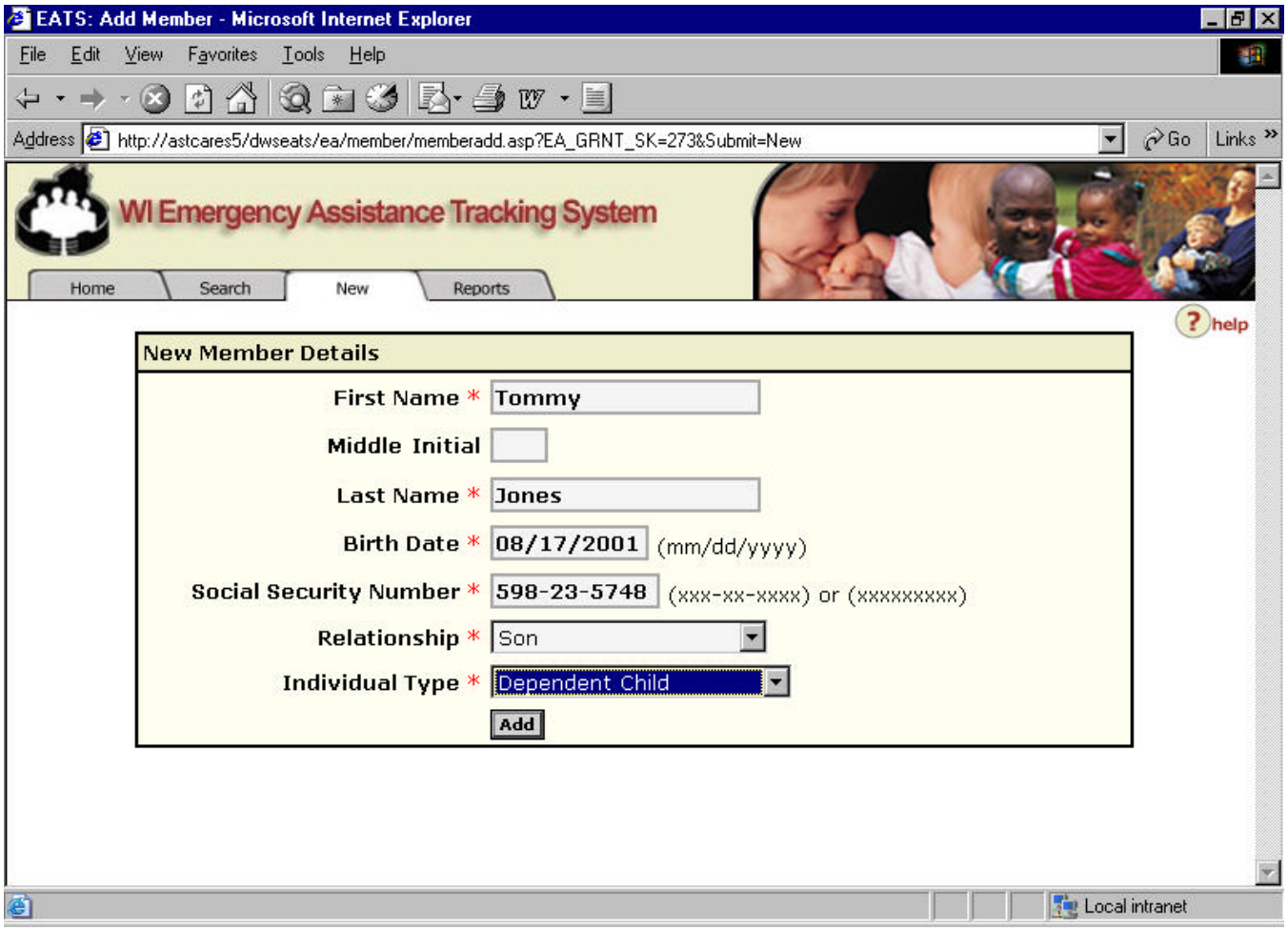
- Relationship: Choose the relationship of this person to the caretaker relative.
- Individual Type: Other caretaker relative or dependent child

Click Attach Selected Members to add the individuals to the current grant and return to Grant Overview.



The user returns to Grant Overview. The individuals who were selected on Find Member now appear in the Assistance Group Members details. Users may edit the information for any assistance group member after s/he has been added to the grant and before it is confirmed. Once a grant is confirmed only those people with a higher level of security access may edit individual member information.

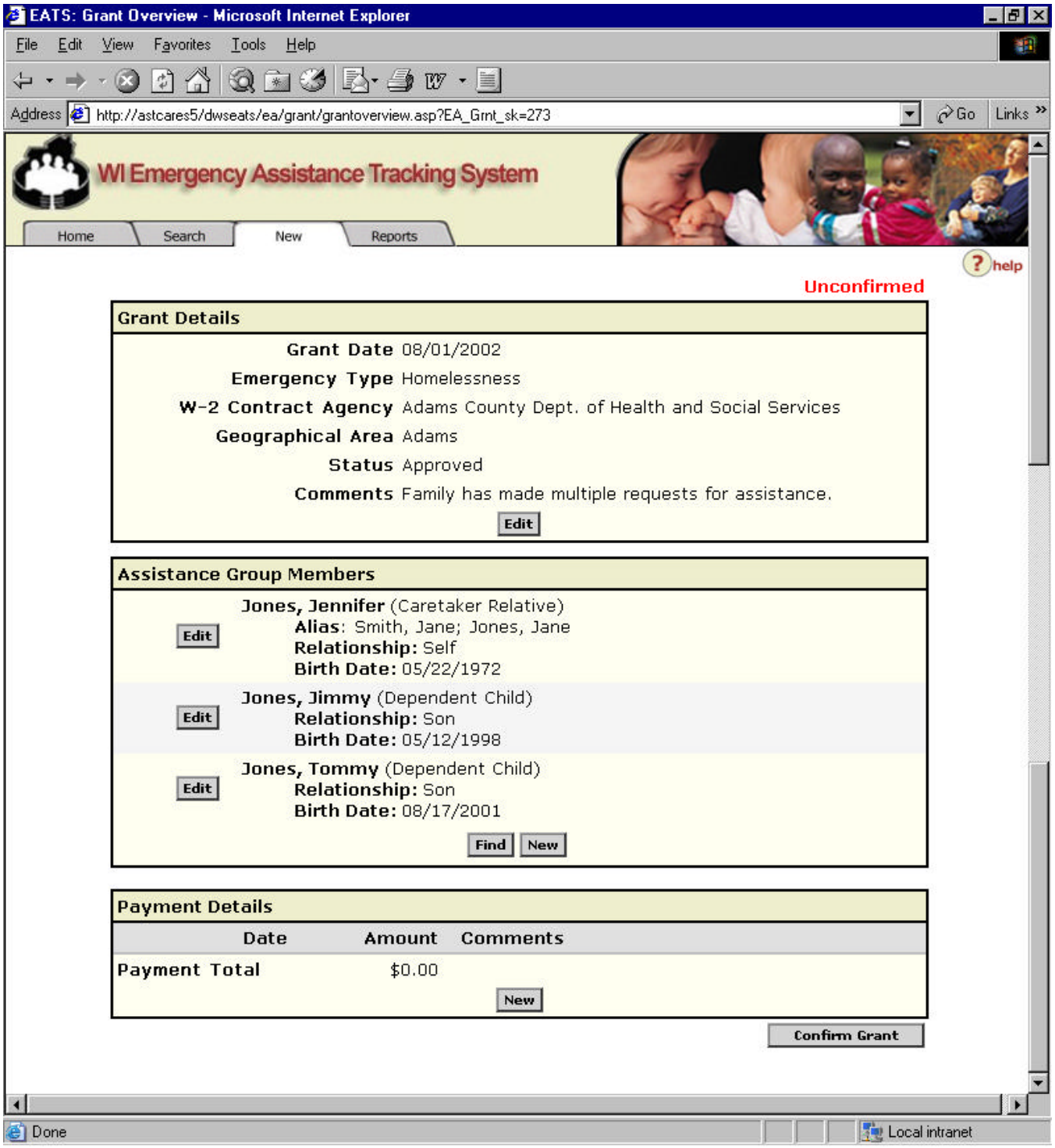
Add Member



If users need to add a new member, they do so on the Add Member screen. This screen appears after clicking New in the Assistance Group Members section of Grant Overview. All fields marked with a red asterisk must be completed.

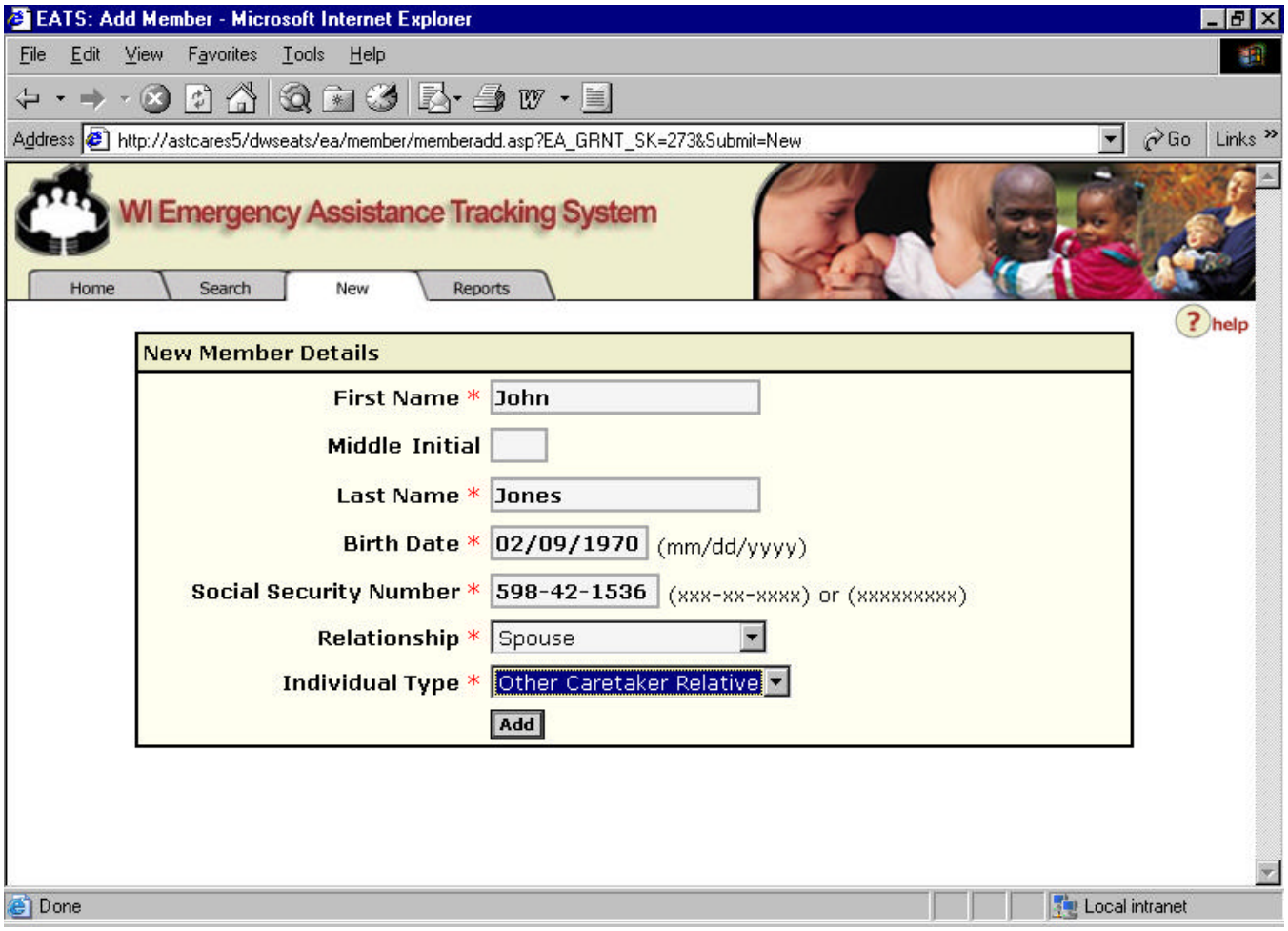
- Relationship: Select the group member's relationship to the caretaker relative
- Individual Type: Other caretaker relative or dependent child

Users click Add to save the new member's information and return to Grant Overview.



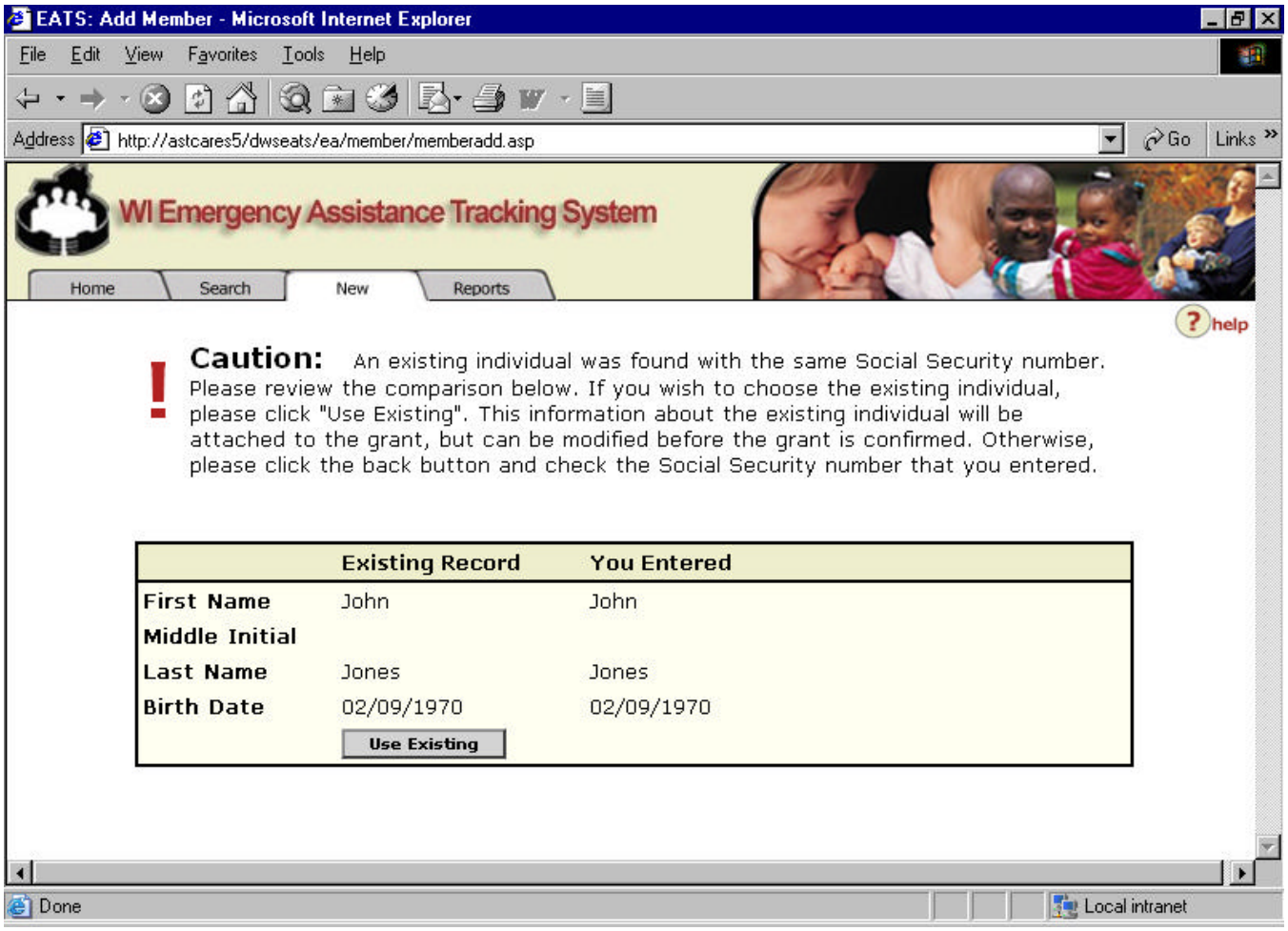
The newly added member appears on Grant Overview. Click New for each additional new person that needs to be added to the grant.

Add Member Part 2



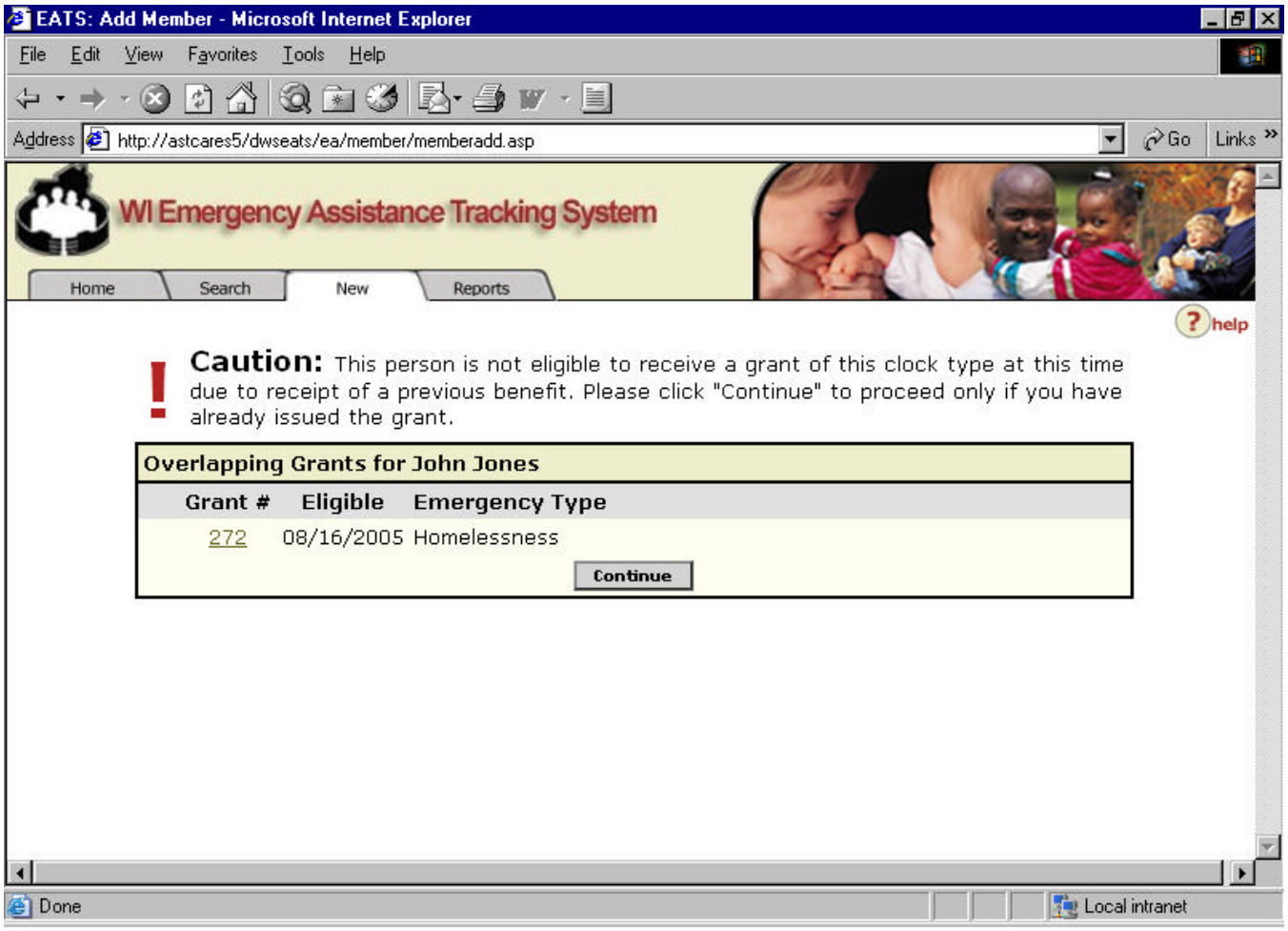
This is an example of how to add an other caretaker relative to a grant. Click Add to process the information. The other caretaker relative may go through several clearance processes.

Other Caretaker Relative Clearance

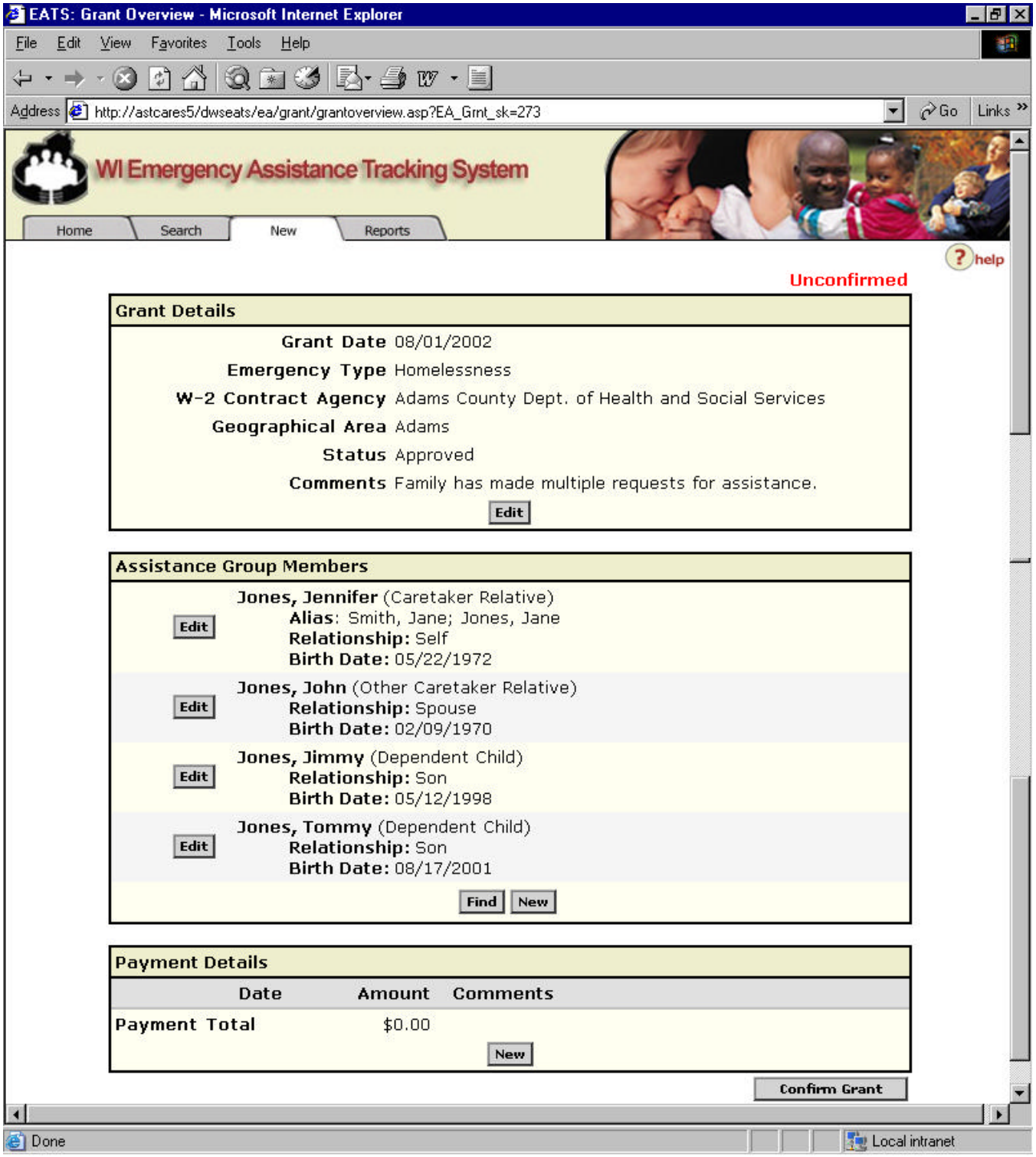


The other caretaker relative goes through the same individual clearance process as the caretaker relative. If the other caretaker relative is known to EATS, this message will appear. If the other caretaker relative is not known to EATS, this message will not appear. If this is the same person, click Use Existing to move forward to Grant Overview.

Other Caretaker Relative Grant Clearance

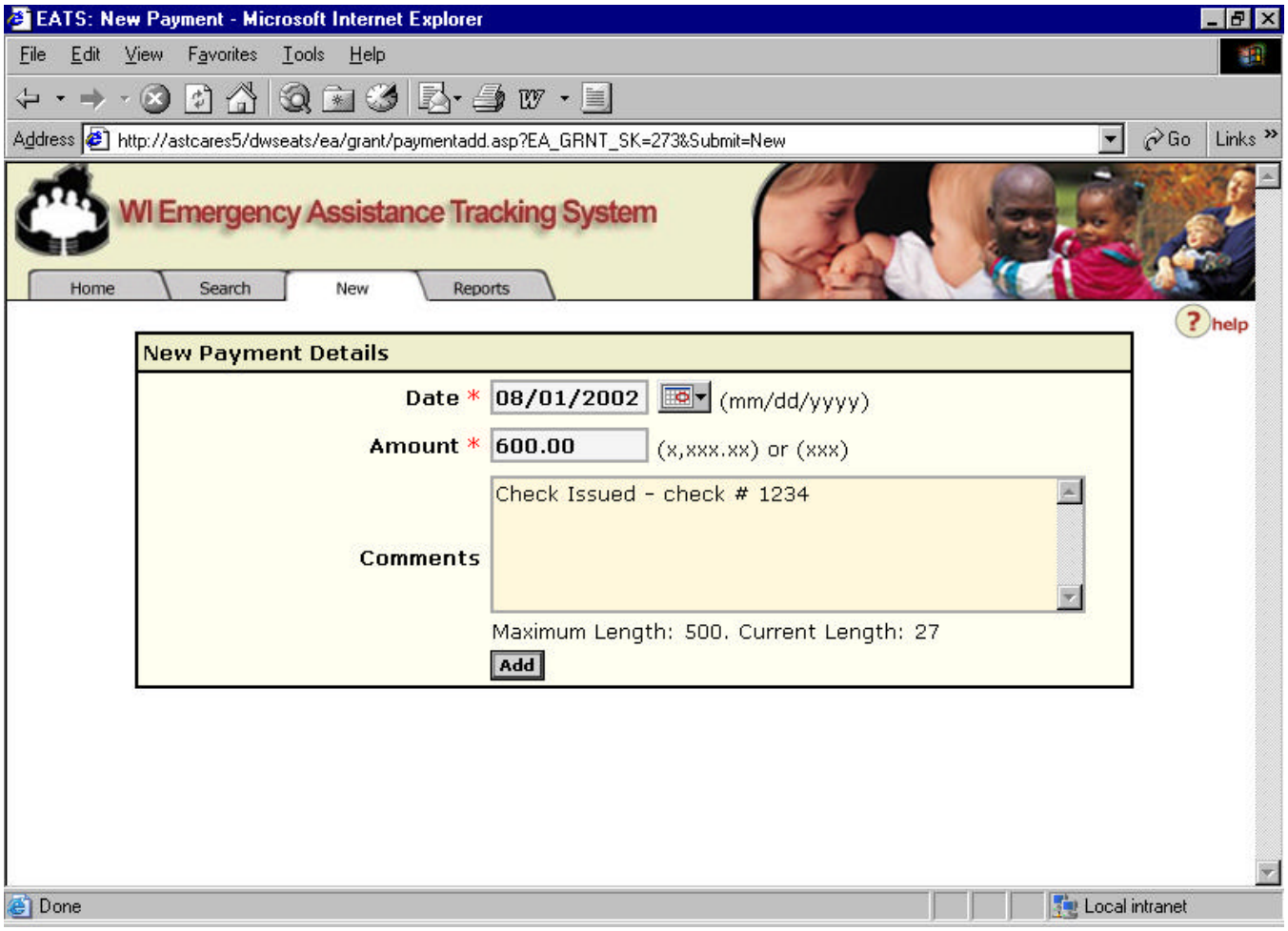


The other caretaker relative will also go through grant clearance. If the other caretaker relative has a current grant, this message will appear. If the other caretaker relative has no current grants, this message will not appear. Click Continue to finish processing the other caretaker relative, create an overlapping grant, and return to Grant Overview.



The other caretaker relative has now been added to the grant.

New Payment



Users enter details of the grant amount on the New Payment screen by clicking the New button in the Payment Details section of Grant Overview. EATS allows users to record more than one payment per EA grant by using this process repeatedly.

- Date: Date the payment is issued; future dates are not allowed
- Amount: Dollar amount of the payment; enter using the format shown
- Comments: Specific comments about the payment

If the grant status is denied, the system will not permit the user to enter payments. If a user changes the status of a grant from approved to denied, the system will check that the payment total for that grant is equal to zero. If it is not, an error message appears prompting the user to zero out all payments before changing the grant status.

If a payment is returned for any reason, users should click the Edit button in Payment Details on Grant Overview and zero out the amount. Use the comments field to indicate the payment was returned and why.

Click Add to process the payment and add it to the grant.

The user returns once again to Grant Overview.

EATS: Grant Overview - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://astcares5/dwseats/ea/grant/grantoverview.asp?ea_grnt_sk=273 Go Links

WI Emergency Assistance Tracking System

Home Search New Reports

help

Unconfirmed

Grant Details

Grant Date	08/01/2002
Emergency Type	Homelessness
W-2 Contract Agency	Adams County Dept. of Health and Social Services
Geographical Area	Adams
Status	Approved
Comments	Family has made multiple requests for assistance.

Edit

Assistance Group Members

Edit **Jones, Jennifer** (Caretaker Relative)
Alias: Smith, Jane; Jones, Jane
Relationship: Self
Birth Date: 05/22/1972

Edit **Jones, John** (Other Caretaker Relative)
Relationship: Spouse
Birth Date: 02/09/1970

Edit **Jones, Jimmy** (Dependent Child)
Relationship: Son
Birth Date: 05/12/1998

Edit **Jones, Tommy** (Dependent Child)
Relationship: Son
Birth Date: 08/17/2001

Find New

Payment Details

	Date	Amount	Comments
Edit	08/01/2002	$600.00	Check Issued - check # 1234
Payment Total		$600.00	

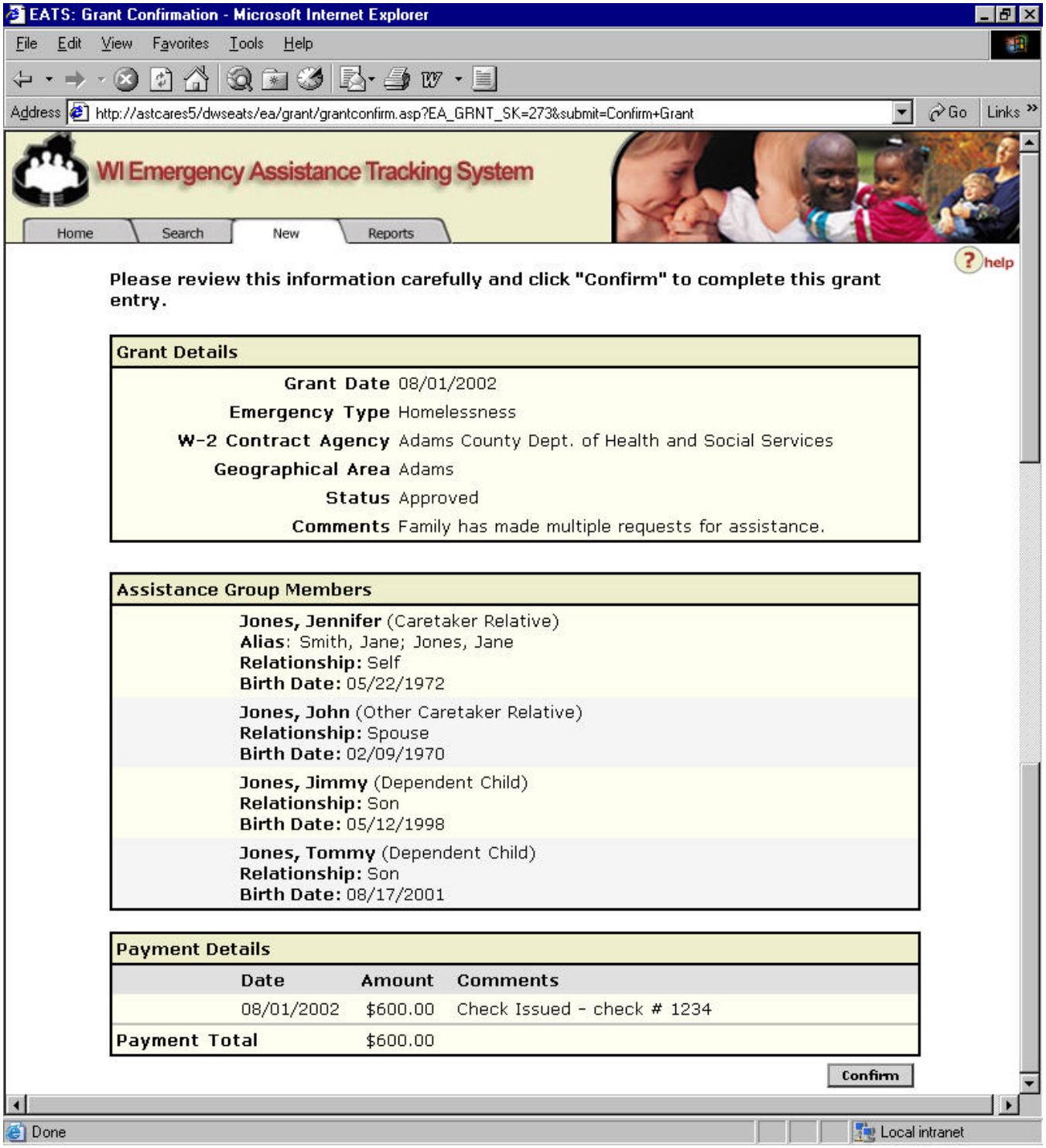
New

Confirm Grant

Done Local intranet

If the user is finished entering grant information, s/he clicks the Confirm Grant button.

Grant Confirmation



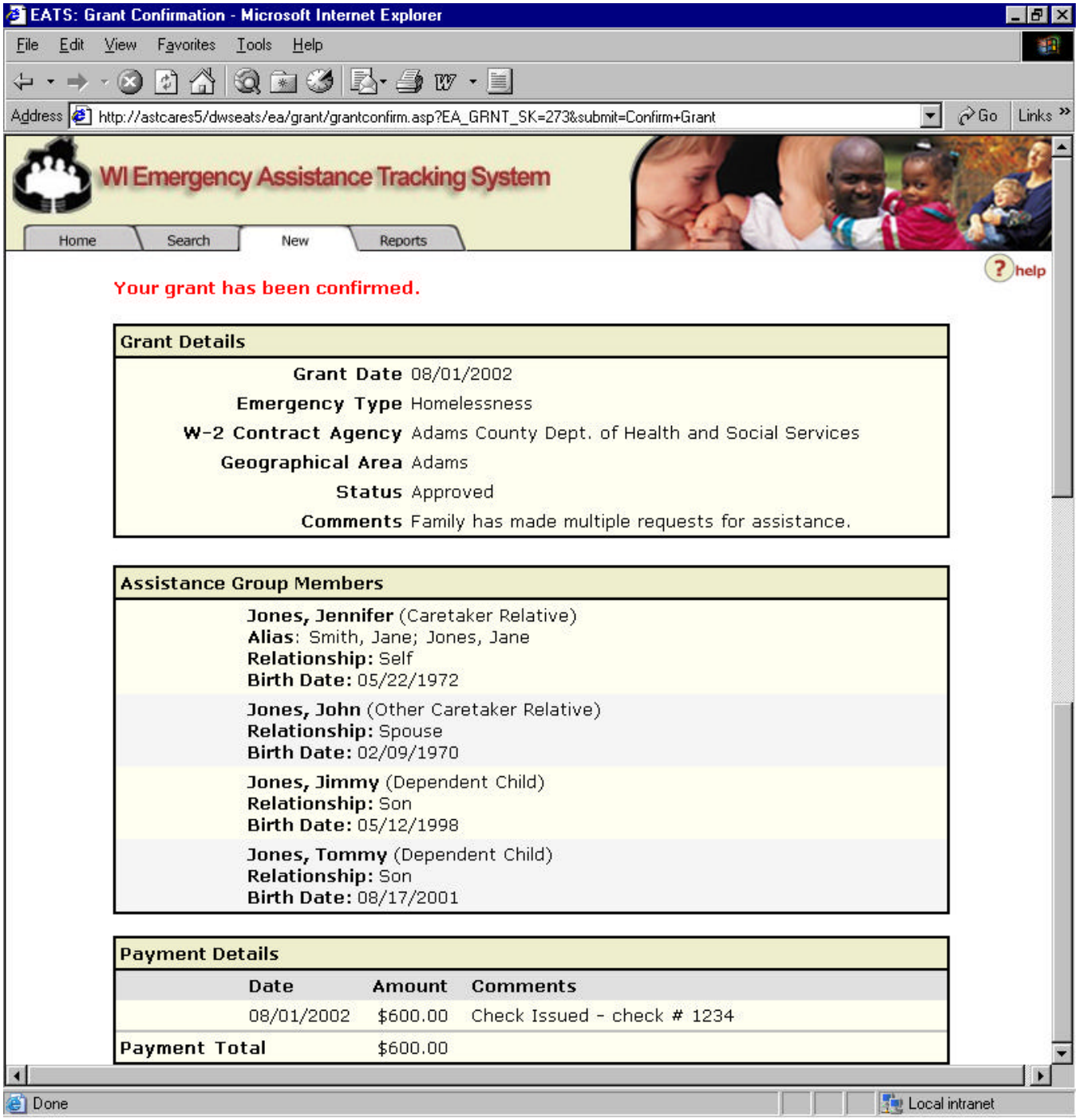
After clicking Confirm Grant, the system asks the user to confirm the grant information. If there is an error, users should use the back button to return to Grant Overview and edit the information. Do not confirm the grant until all information has been entered and

is correct, since users may not be able to make changes once the grant is confirmed based on their security clearance. If the information is correct, users should click Confirm to save the grant in EATS.

Note: Data entry and confirmation must take place on the **same day** in order for the grant to be saved in EATS! If the grant is not confirmed, all data entered will be purged from the system overnight. This includes individuals who are not attached to any other confirmed grant.

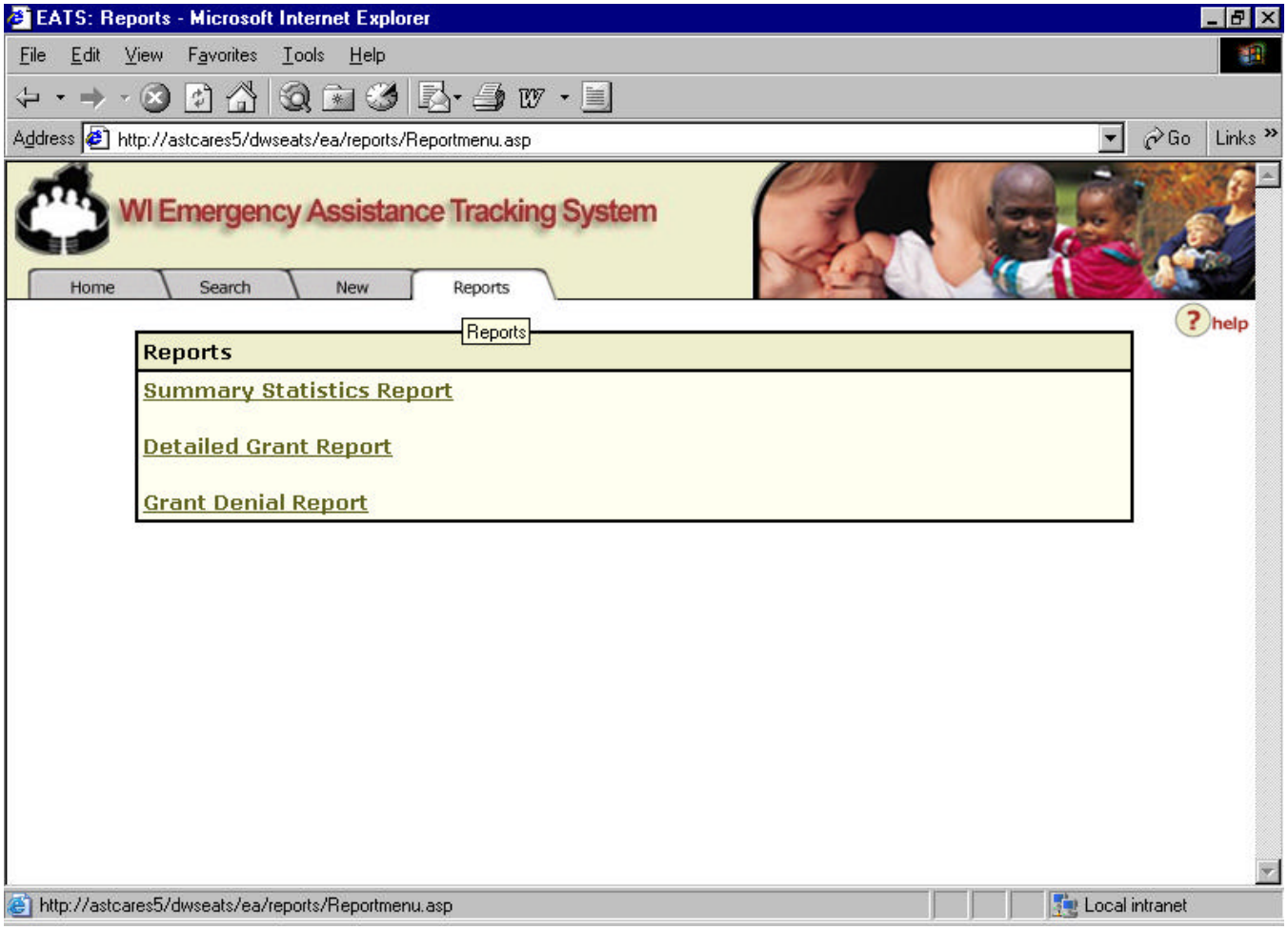
If the user stops prior to confirmation, s/he can do a search for the caretaker relative within the same day in order to complete the grant entry. The grant information will appear as unconfirmed.

If at any point, the user determines that the grant is being entered in error, s/he can stop adding or editing information and leave the grant unconfirmed. The grant will be deleted automatically by the system. There is no manual way for a user to delete grants from EATS.



After clicking Confirm, the user receives a confirmation message indicating that the new grant has been entered into the system. This completes the process for entering a new grant.

Reports



There are three types of reports in EATS that provide statistical information. Click the report name to go to that report.

The **Summary Statistics Report** provides numerical information based on the selected geographical areas or W-2 contract agencies for a specified time period. This report does not include any individual details such as name of the recipient or the worker in the agency that processed the grant. Report information is not restricted by the user's security access.

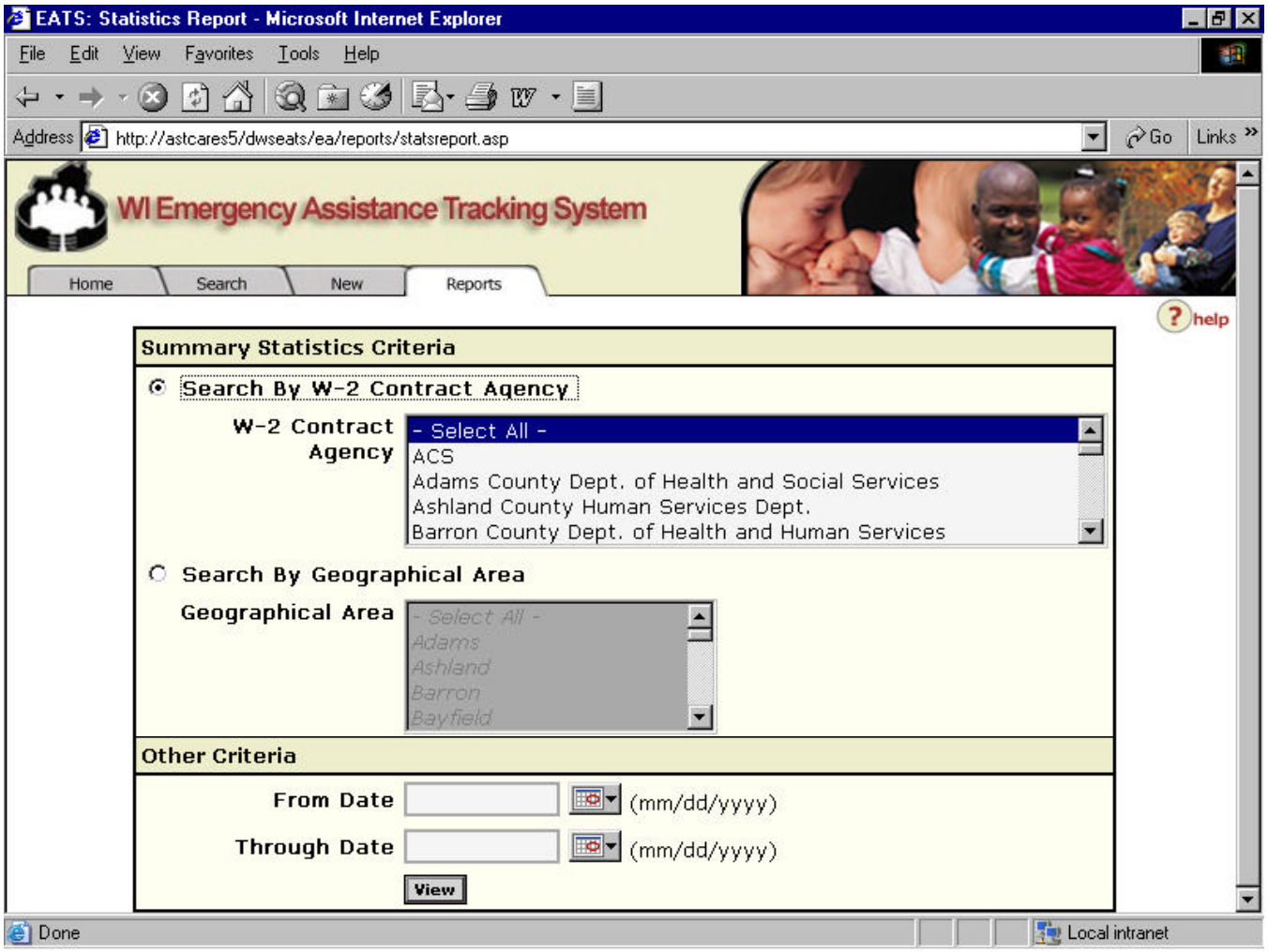
The **Detailed Grant Report** provides individual information for each W-2 contract agency and geographical area. This report can be further defined by emergency type and time period. This report is restricted based on the user's security access and the geographic areas and W-2 contract agencies assigned to the user. Statewide access is not available.

The **Grant Denial Report** tracks the total number of denials and breaks it down by denial reason. This is similar to the summary statistics report except it includes the

denied grants with recorded denial reasons. Report information is not restricted by the user's security access.

Note: Reports for time periods prior to 10/01/02 may not contain completely accurate information if the information provided during the conversion process was incomplete.

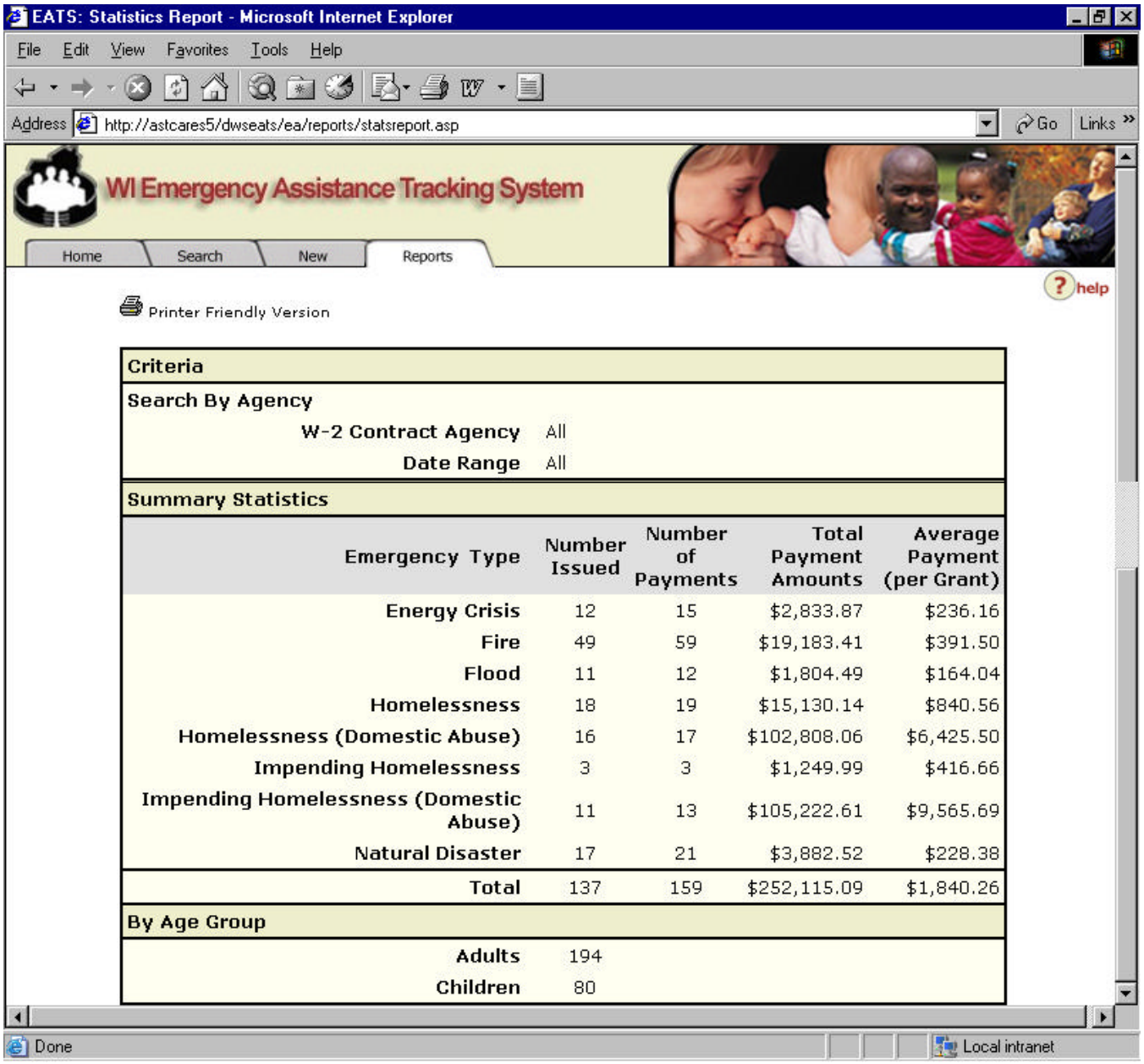
Statistics Report



This report summarizes the total number of grants, total number of payments, total amount of payments, and the average grant payment amount for each grant emergency type. The report also displays the number of children and adults served by the program.

Users specify different search criteria to retrieve information. Each item limits the number of records returned based on that condition. Users may search by agency or geographical area but not both. More than one agency or area may be selected at the same time by holding the Control key down while selecting items.

- Search by W-2 Contract Agency: Choose from a list of agencies that provide EA services
- Search by Geographical Area: Choose from a list of counties, tribes, or regions
- From Date Through Date: Limit the time period for report information; leave blank to view all; the dates pull from the Grant Date for each grant



Criteria

Search By Agency

W-2 Contract Agency	All
Date Range	All

Summary Statistics

Emergency Type	Number Issued	Number of Payments	Total Payment Amounts	Average Payment (per Grant)
Energy Crisis	12	15	$2,833.87	$236.16
Fire	49	59	$19,183.41	$391.50
Flood	11	12	$1,804.49	$164.04
Homelessness	18	19	$15,130.14	$840.56
Homelessness (Domestic Abuse)	16	17	$102,808.06	$6,425.50
Impending Homelessness	3	3	$1,249.99	$416.66
Impending Homelessness (Domestic Abuse)	11	13	$105,222.61	$9,565.69
Natural Disaster	17	21	$3,882.52	$228.38
Total	137	159	$252,115.09	$1,840.26

By Age Group

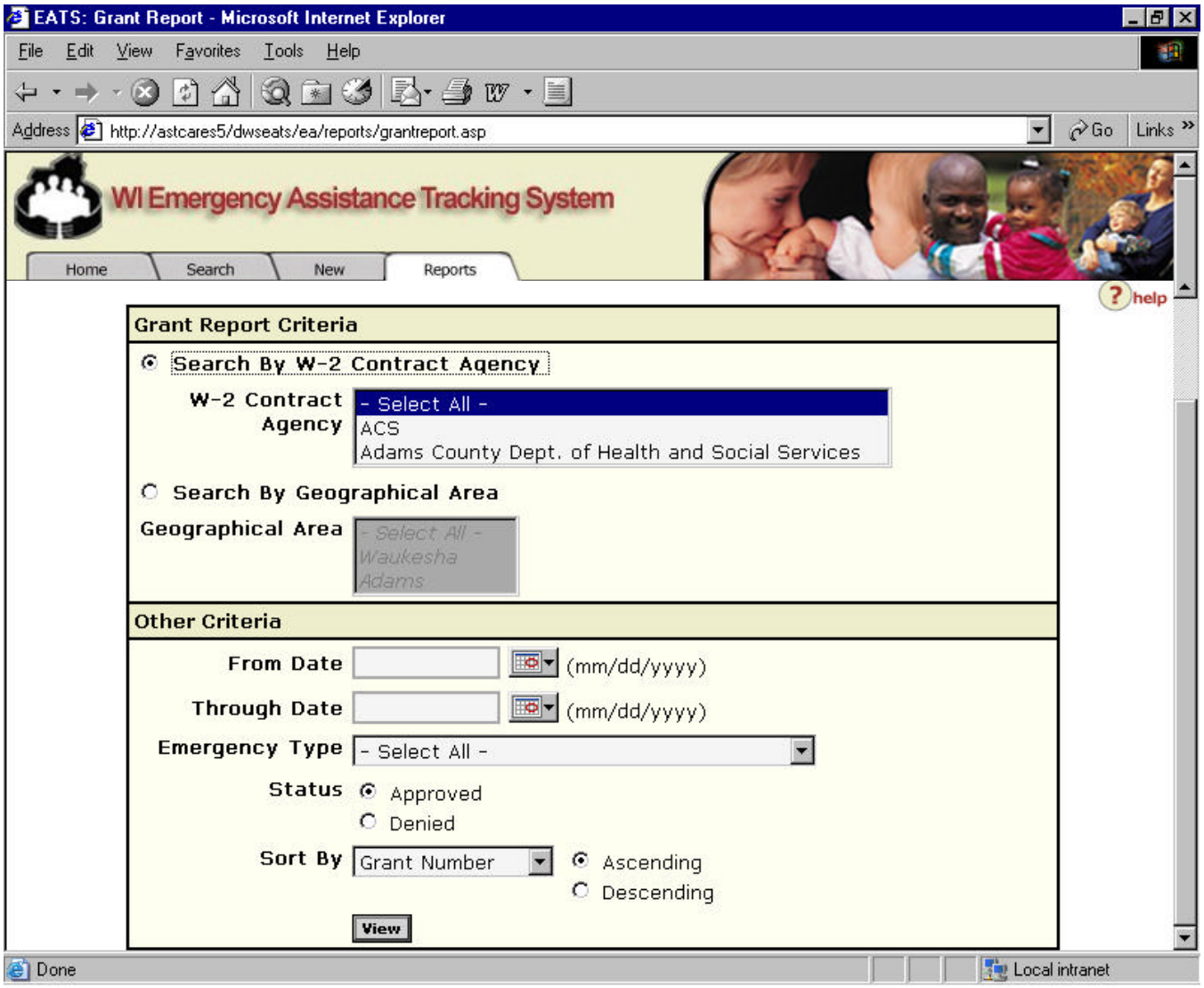
Adults	194
Children	80

The results display summary information meeting the specified criteria.

- Criteria: Lists which criteria were selected for the results displayed
- Summary Statistics: Displays details for each grant type
- By Age Group: Totals the number of adults and children included in the results

Use the Printer Friendly Version button to print a copy of the report. Clicking the Printer Friendly Version button displays the report in a window that does not contain the header of the regular system web pages. Use the File menu then Print to print the report.

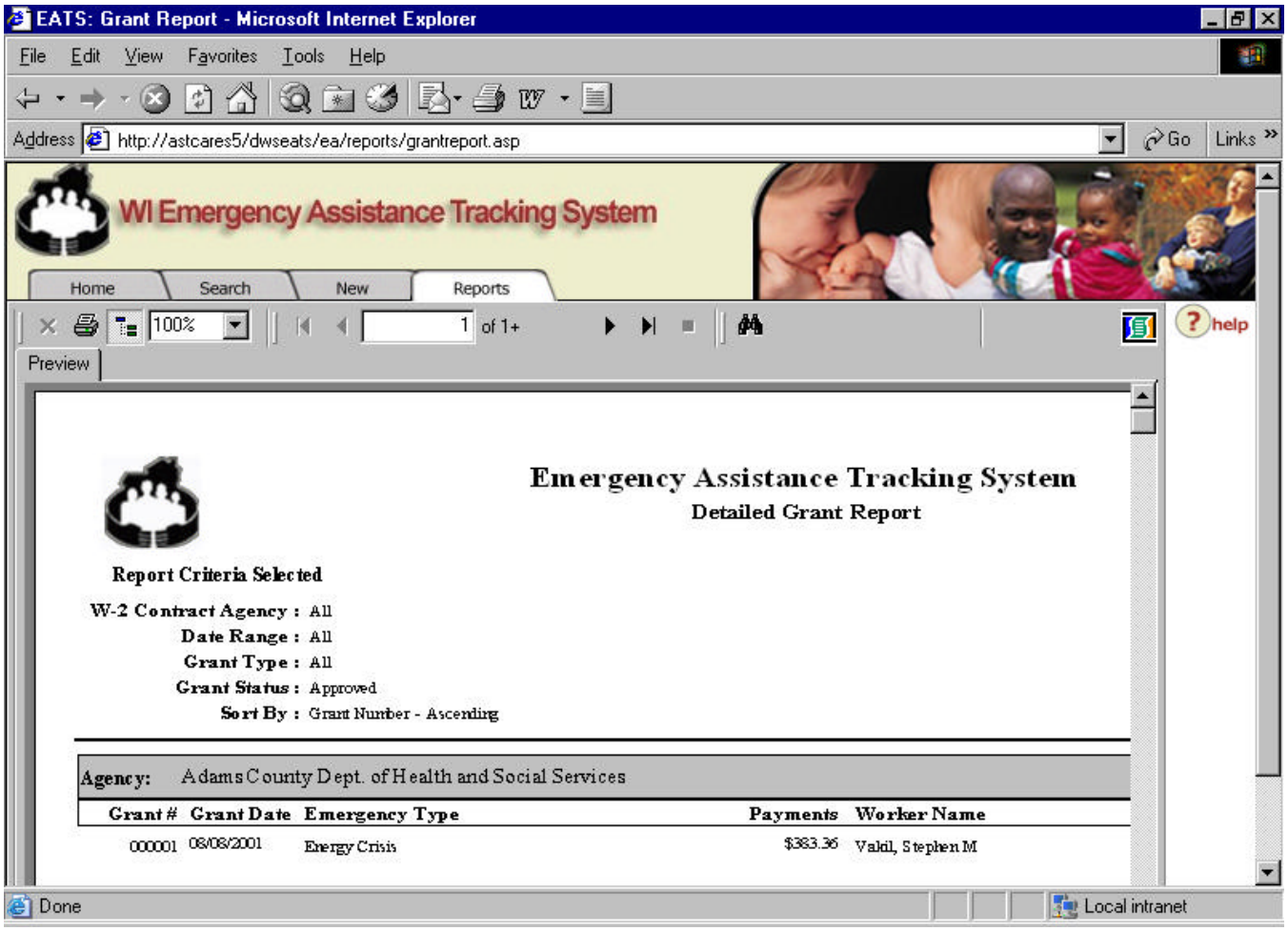
Detailed Grant Report



This report contains the names of the adults in the grant, the worker that entered the grant, payment amount, grant date, grant emergency type, and grant number. If a grant is confidential, only the worker who confirmed the grant, last updated the grant, or users who have appropriate security rights will see the names of the recipients. All other workers will see the word “Confidential” in place of the recipient names.

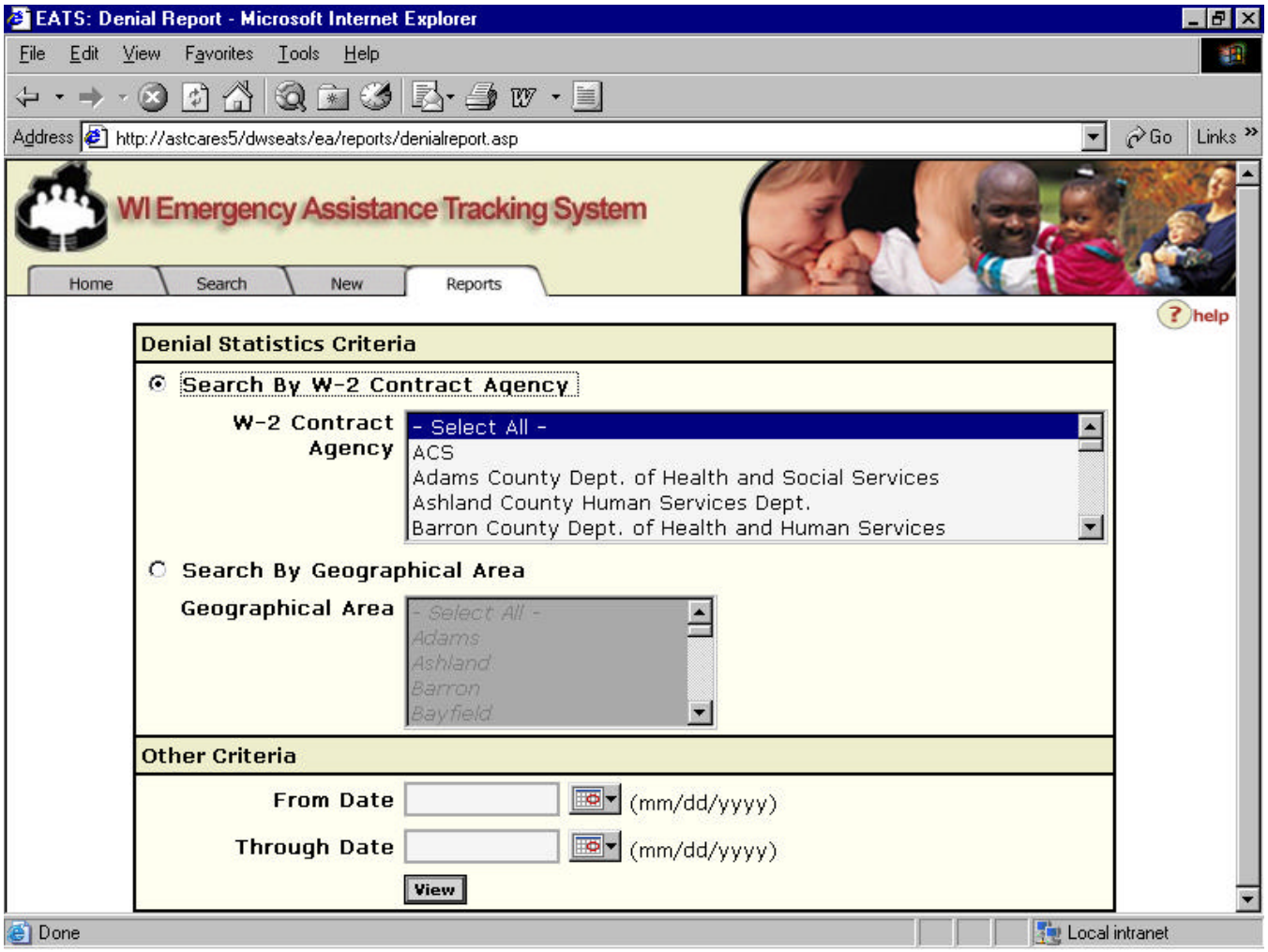
Users may specify report criteria to limit the results.

- Search by W-2 Contract Agency: Automatically chosen based on user ID
- Search by Geographical Area: Automatically chosen based on user ID
- From Date Through Date: Specify a date range
- Emergency Type: Select from a list of options
- Status: Approved or Denied
- Sort By: Select from a list of options to organize the report results

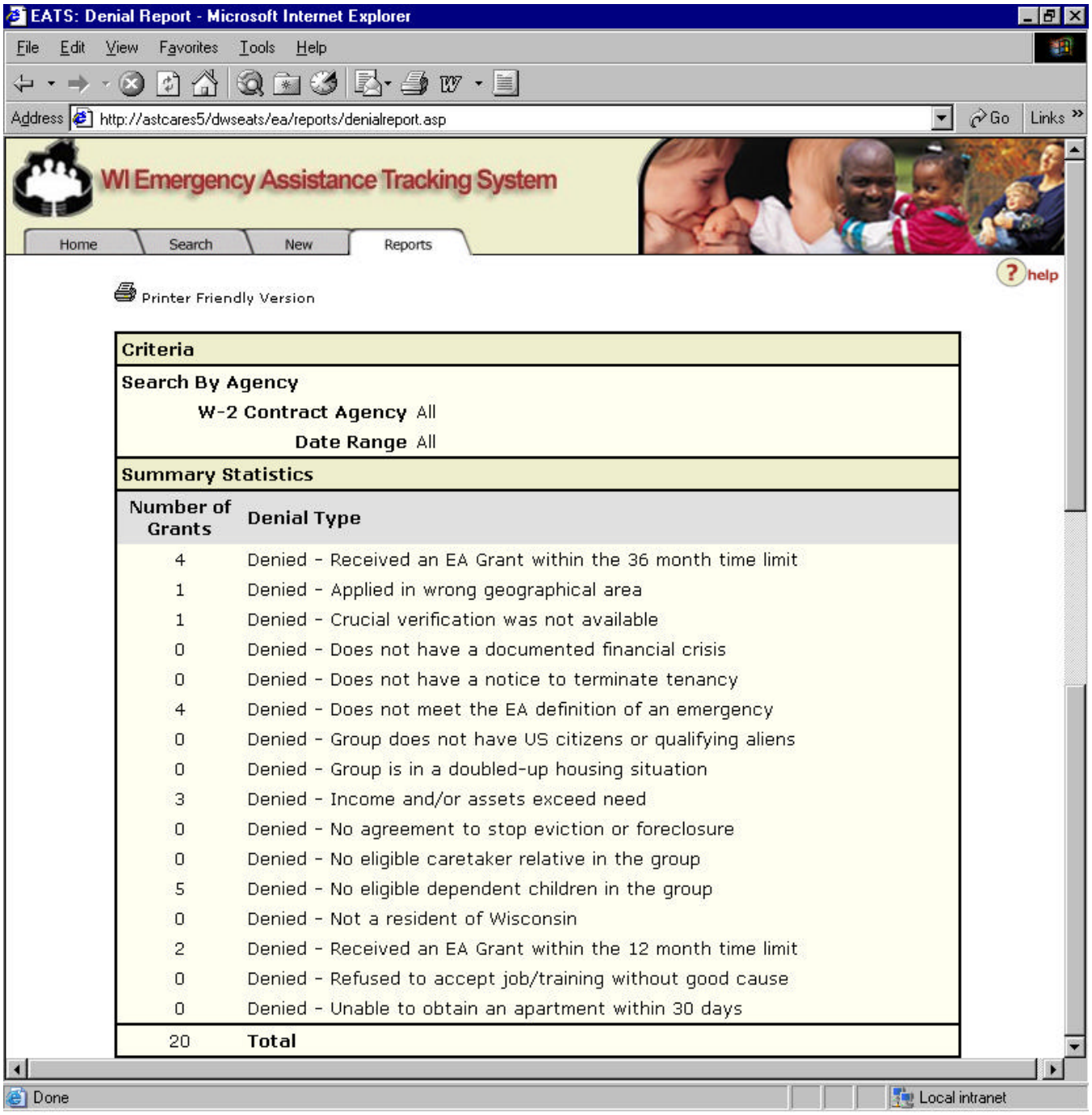


The results of the Detailed Grant Report display in a formatted report within the EATS window. Users can use the scroll bars within the report viewer to view the report online. To print the report, use the printer icon in the report viewer tool bar.

Denial Report



The Denial Report options are the same as the options for the Summary Statistics Report. However, the information returned will be only for grants that were not approved.



Criteria

Search By Agency

W-2 Contract Agency All

Date Range All

Summary Statistics

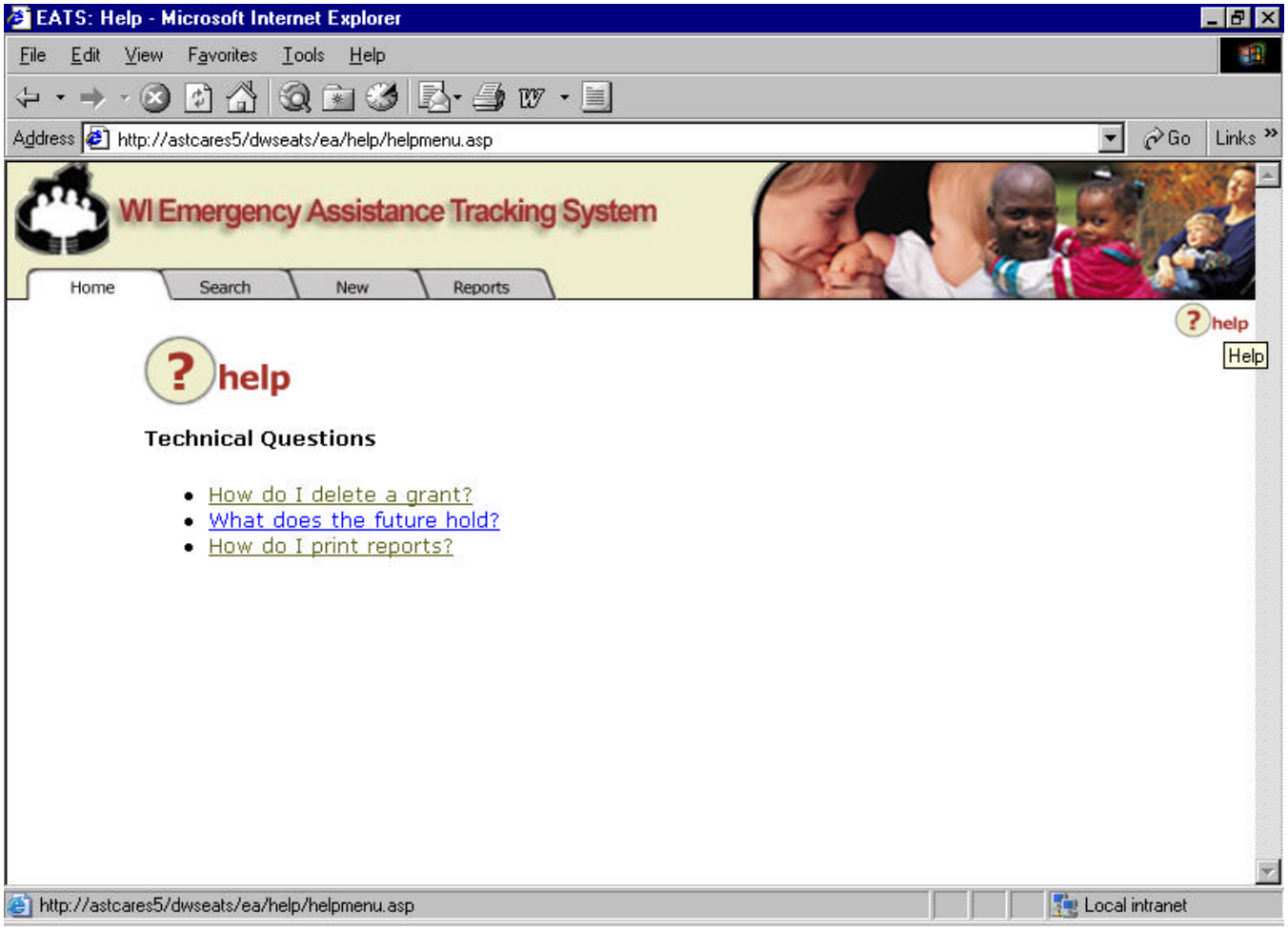
Number of Grants	Denial Type
4	Denied - Received an EA Grant within the 36 month time limit
1	Denied - Applied in wrong geographical area
1	Denied - Crucial verification was not available
0	Denied - Does not have a documented financial crisis
0	Denied - Does not have a notice to terminate tenancy
4	Denied - Does not meet the EA definition of an emergency
0	Denied - Group does not have US citizens or qualifying aliens
0	Denied - Group is in a doubled-up housing situation
3	Denied - Income and/or assets exceed need
0	Denied - No agreement to stop eviction or foreclosure
0	Denied - No eligible caretaker relative in the group
5	Denied - No eligible dependent children in the group
0	Denied - Not a resident of Wisconsin
2	Denied - Received an EA Grant within the 12 month time limit
0	Denied - Refused to accept job/training without good cause
0	Denied - Unable to obtain an apartment within 30 days
20	**Total**

The results display summary information meeting the specified criteria.

- Criteria: Lists which criteria were selected for the results displayed
- Summary Statistics: Displays how many grants were denied for each reason

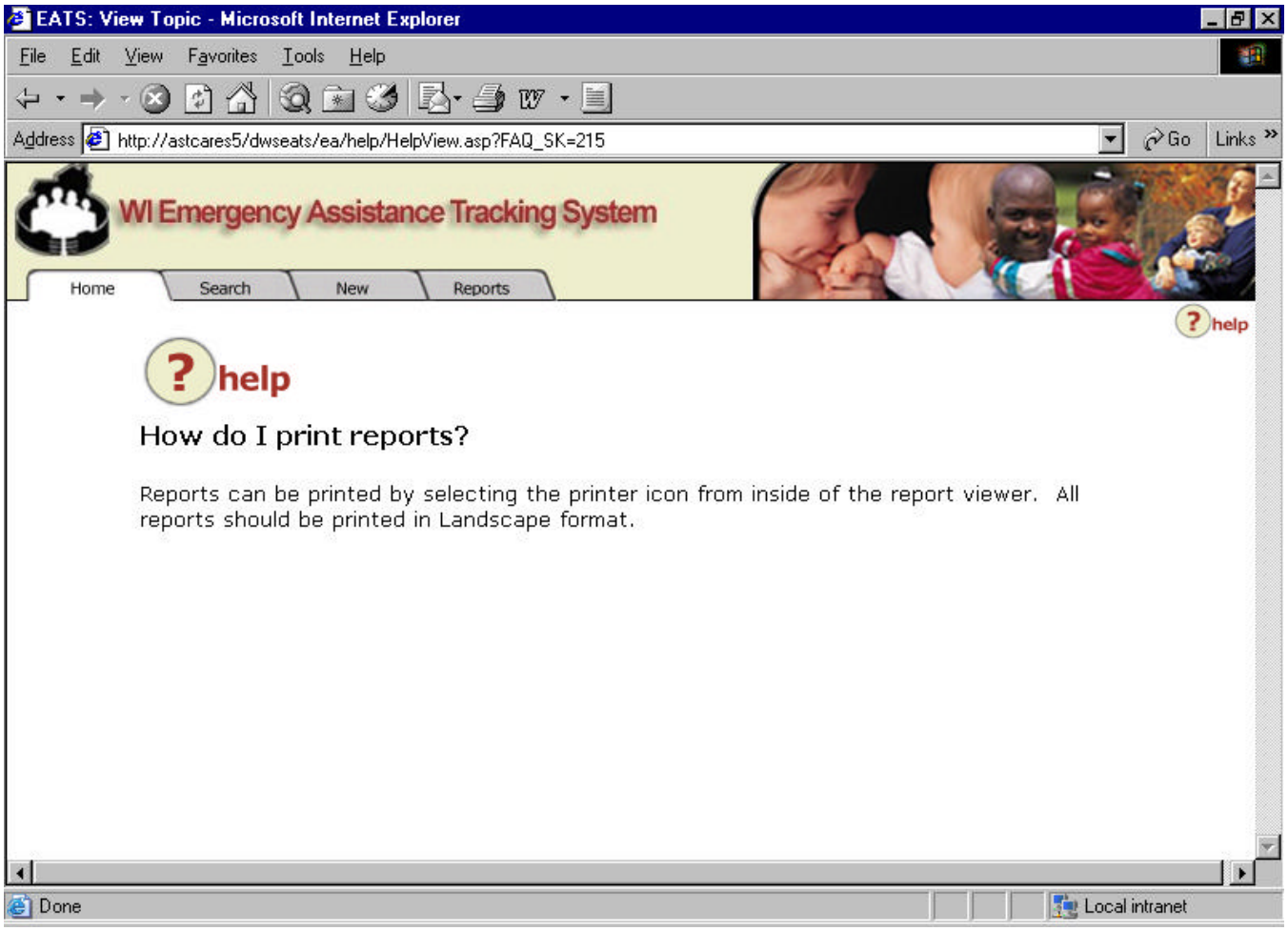
Use the Printer Friendly Version button to print a copy of the report.

Help



Help can be accessed at any time by clicking the question mark icon in the upper right corner of the screen. Users click a topic or question to view information. All Help topics display together. If a user is in Search or New, the same Help topics appear when s/he clicks the Help icon. The Help screens will be updated with more information as needed.

View Topic

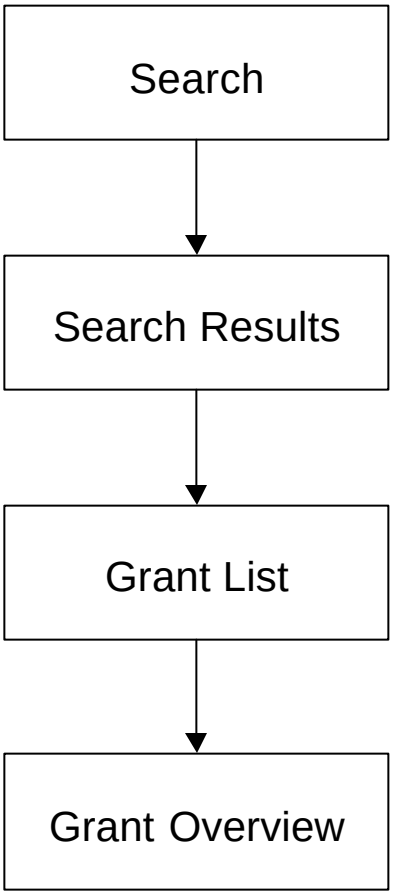


Specific information related to the help topic displays. To return to the page in EATS that the user accessed Help from, use the back button until the correct page displays.

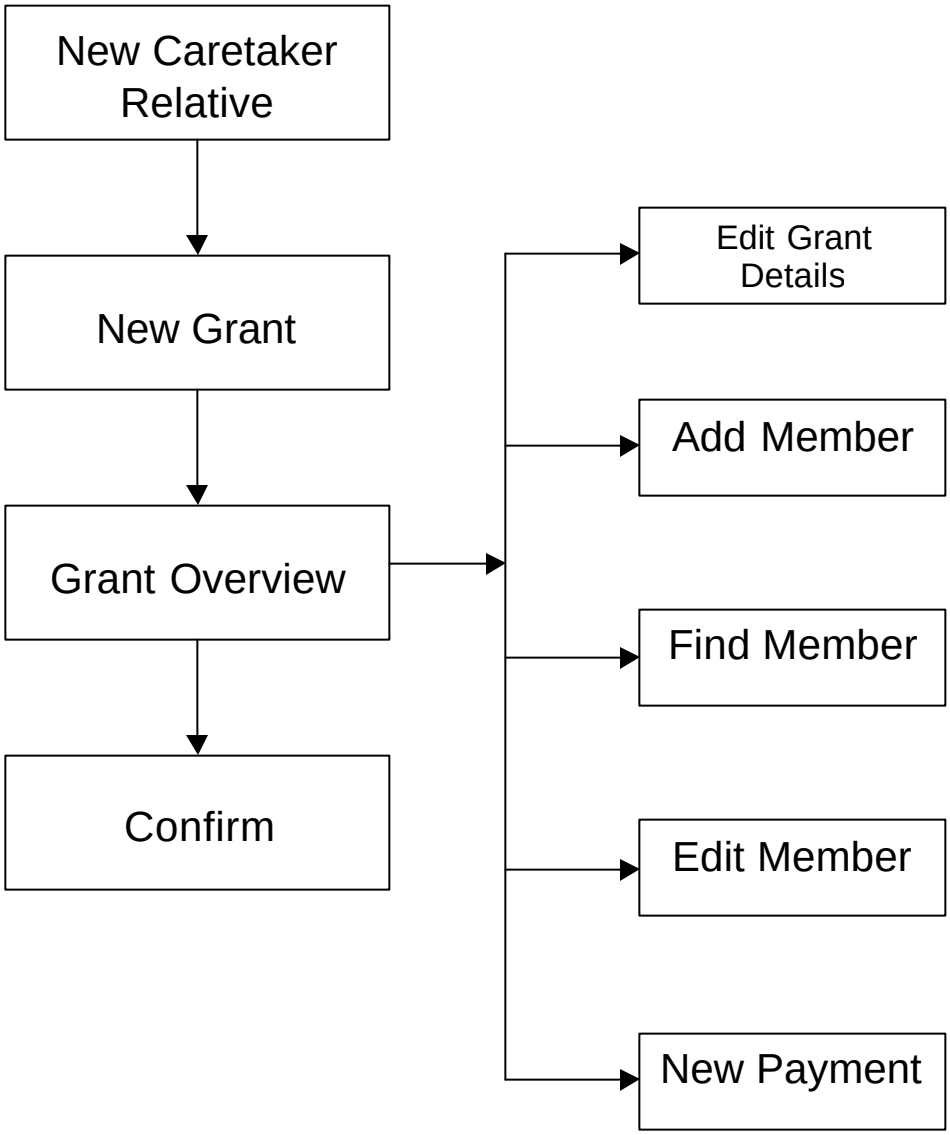
Appendix

EATS Flows

Search



New Grant


New Caretaker Relative
New Grant
Grant Overview
Confirm
Edit Grant Details
Add Member
Find Member
Edit Member
New Payment