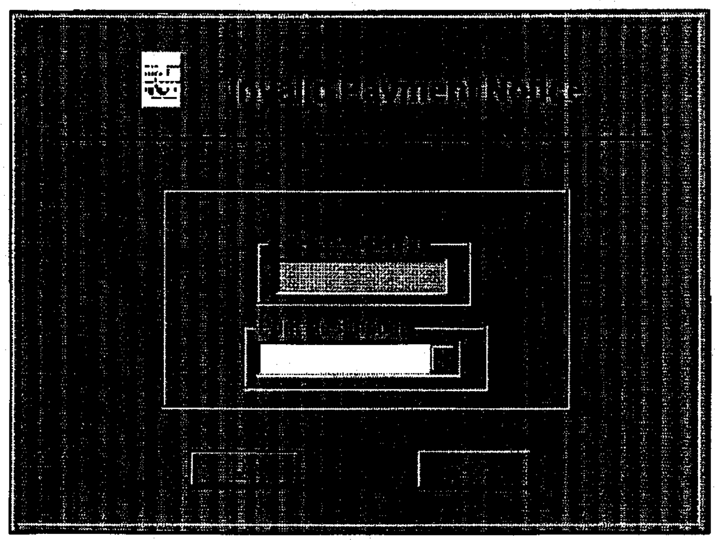
To request an invalid payment notice, perform the following steps:

1. Click the (Invalid Payment Notice) toolbar button to access the Invalid Payment Notice window (Exhibit 8–15, Invalid Payment Notice).

Exhibit 0–15: Invalid Payment Notice



2. Enter the payment ID.
3. Click m to select the print destination.
4. Click to process the request. When the confirmation window appears, click .
5. Click to exit.

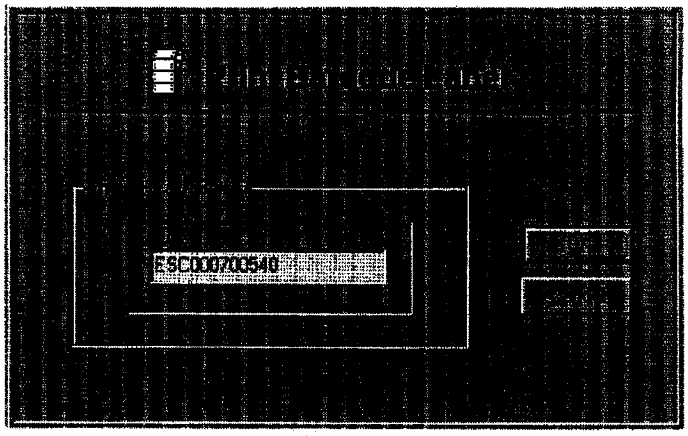
Print Labels

The Print Labels option is used to generate a cash box bar-code label.

To print a cash box bar-code label, perform the following steps:

1. Click the (Print Labels) toolbar button to access the Print Bar-Code Label window (Exhibit 8–16, Print Bar-Code Label).

Exhibit 8–16: Print Bar-Code Label



2. Verify the cash box ID displayed in the Cash Box ID field.
3. Click . When the confirmation window appears, click .
4. Click to exit.

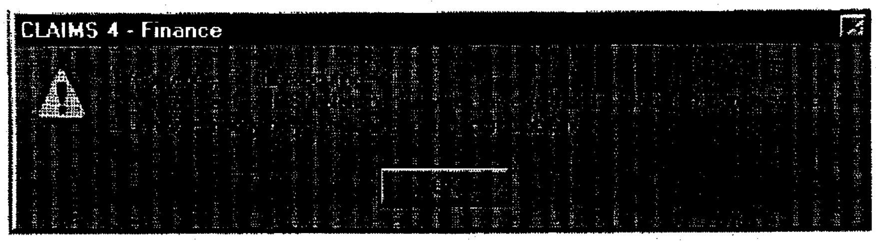
Test Printer

The Test Printer option is used to verify that the bar-code printer is working correctly. When this option is selected, a sample label is generated from the printer.

To test the bar-code printer, perform the following steps:

1. Click the (Test Printer) toolbar button. A sample label is generated from the bar-code printer.
2. If a label does not generate, verify that the printer is turned on and all connections are secure. Then return to Step 1. If a label is still not generated, call an SA.
3. If there is a delay, a message may appear (Exhibit 8–17, Test Printer Message).

Exhibit 8–17: Test Printer Message


CLAIMS 4 - Finance

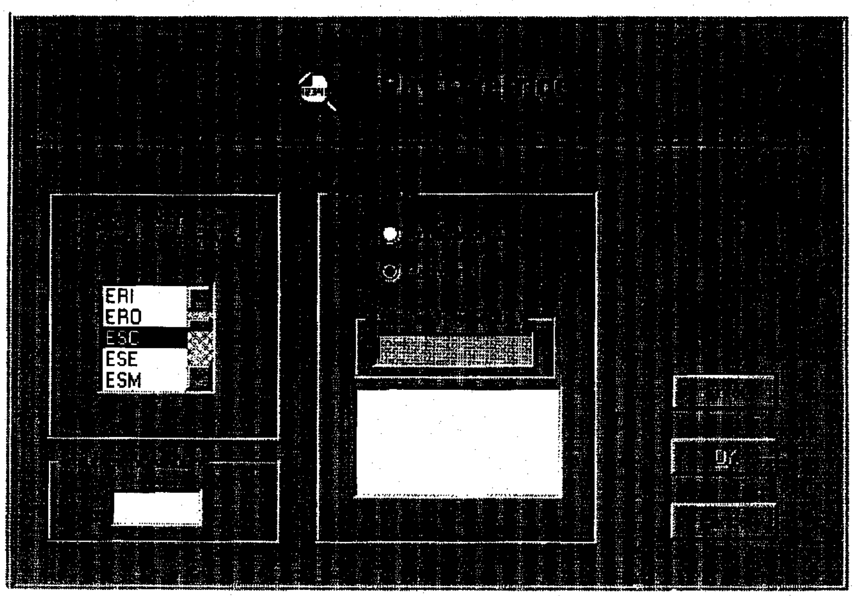
Pay Override

The Pay Override option is used to accept an eligible insufficient payment.

To indicate a "pay override" status, perform the following steps:

1. Click the (Pay Override) toolbar button to access the Pay Override window (Exhibit 8–18, Pay Override).

Exhibit 0–18: Pay Override



2. In the Select Location Where Payment Was Received field, use the arrow keys to scroll through the list of location codes. Double click on the location code of the site where the payment was received.
3. In the Select Type section, click or to indicate the type of identification number to be entered.
4. Enter the application ID or payment ID in the field below the Select Type radio buttons.
5. Click . The amount of the insufficient payment appears in the Insufficient Amount field. The user is prompted to accept the amount.
6. Click to accept the amount and complete the override. If the payment is not eligible, a window appears stating that the Process Pay Override option is not available.
7. Click to exit.

DATA ENTRY

After an application has been received in the Mailroom, clocked in, and assigned an application ID number, application information needs to be entered into CLAIMS 4.0. In addition, evidence and attorney information (G28) must be entered when applicable. This process is accomplished in the Data Entry module.

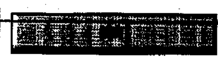
Also included in the Data Entry module is the Group function. The Group function is used to create and define groups. Groups are defined by type, such as family or organization, and are created for scheduling purposes. After a group has been created, group information and status can be changed, group members can be removed, or entire groups dissolved.

Click the Data Entry button (Exhibit 9–1, Data Entry Button) in the CLAIMS 4.0 main menu screen to enter the Data Entry module.

Exhibit 9–1: Data Entry Button

Exhibit 9–2, Data Entry Module Options, lists the screens to which the Data Entry main menu provides access.

Exhibit 9–2: Data Entry Module Options

Title	Icon	Description
N400 Data Entry		Used to enter information from the N400 Application for Naturalization
I881 Data Entry		Used to enter information from the I881 Application for Suspension of Deportation

N400 Application (Application for Naturalization)

The N400 Data Entry screen is divided into 10 parts that correspond to the sections of the N400 application. There are also sections for entering evidence, attorney (G28), and lead applicant information. Data must be entered into all required sections before the information can be saved.

Note: INS does not currently require data from all sections of the N400 application to be entered into CLAIMS 4.0. Those sections not required are grayed out on the screen.

Click the N400 button (Exhibit 9–3, N400 Button) in the Data Entry main menu screen to enter the N400 Data Entry screen.

Exhibit 9–3: N400 Button

Exhibit 9–4, N400 Data Entry Options, lists the available options in the N400 Data Entry screen.

Exhibit 9–4: N400 Data Entry Options

Title	Icon	Description
New		Used to enter new application information
Update		Used to update information for an existing application
Find		Used to search for an existing application using personal, mailing, attorney, or other information
Groups		Used to create, define, and maintain groups for scheduling purposes

New Application

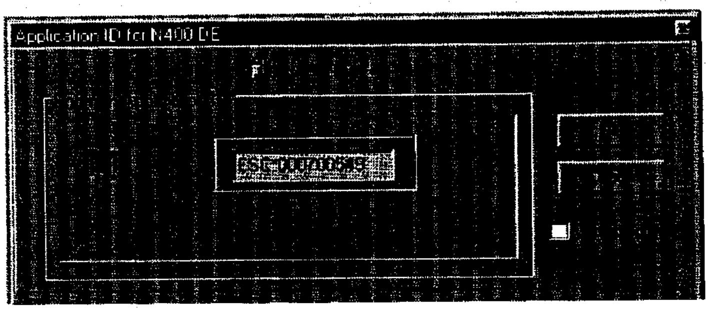
The New Application function provides access to a series of screens used for entering information from the N400 Application into CLAIMS 4.0. The following options are available for data entry:

Save	Used to save current application information
Scan 2-D Bar Code	Used to scan information from a 2-D bar code into N400 Data Entry screens
Print Labels	Used to print human and/or machine-readable labels, including address and application ID labels
Print Attorney Label	Used to print labels for an applicant's attorney
Test Label Printer	Used to print a test label on the label printer
Cancel	Used to close the current application without saving changes
Refresh	Used to clear all information from the current screen

To access the N400 Data Entry screen, perform the following steps:

1. From the Data Entry main menu screen, click the (New) toolbar button. The New Application window (Exhibit 9–5, New Application) appears.

Exhibit 9–5: New Application



2. Enter the application ID.
3. To group the applicant with other applicants for scheduling purposes, click the check box. Procedures for grouping are described in Section 9.1.4, Groups.
4. Click . The N400—Parts1, 2 section appears (Exhibit 9–6, N400—Parts 1 and 2).

1.1.1.1 N400 Parts 1 and 2

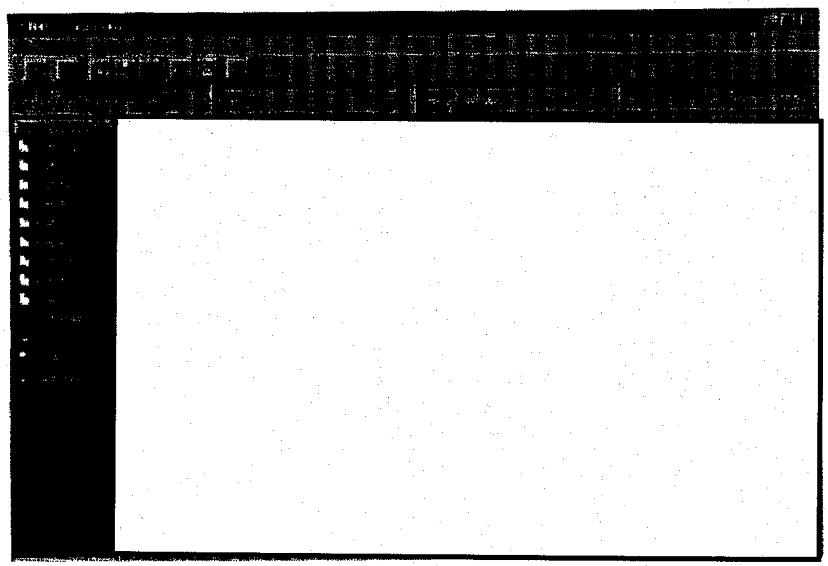
N400 data entry begins with Parts 1, 2 (Exhibit 9–6). Part 1 includes the applicant's name, mailing address, date of birth (DOB), country of birth (COB), and Social Security number (SSN). Part 2 includes the applicant's basis for eligibility.

To complete N400 Parts 1 and 2, perform the following steps:

1. If necessary, click the Parts 1,2 icon located at the left side of the screen.

Exhibit 9–6: N400—Parts 1 and 2

(b)(6)



2. Enter the appropriate information in the following fields:
   - **Alien Number**—A, followed by applicant's nine-digit A-Number
   - **Last Name**—Last name of applicant
   - **First Name**—First name of applicant
   - **Middle Name**—Full middle name of applicant (if applicable)
   - **Suffix**—Suffix (Jr., Sr., etc.) used in applicant's name, or click to select from a list of suffixes
   - **C/O**—Full name of any person or organization in care of whom correspondence should be sent
   - **Street #**—Street number of applicant's mailing address
   - **Street Name**—Street name of applicant's mailing address
   - **Apt. #**—Apartment number of applicant's mailing address
   - **Zip**—ZIP code of applicant's mailing address. Press T and the City/State/County fields automatically fill. If there is more than one match, a pop-up window appears. Double click on the correct city/state/county combination.
   - **Province**—Province of applicant's mailing address (if non-U.S. address)
   - **Postal Code**—Postal code of applicant's mailing address (if non-U.S. address)
   - **Country**—Country code (click to select code)

3. If applicable, click the check box.
4. Enter the appropriate information in the following fields:
   - **DOB**—Date (MM/DD/YYYY) applicant was born (click to select the date from a calendar)
   - **SSN**—Social Security number of applicant
   - **COB**—Country of applicant's birth (click to select appropriate code)
5. Click in the Basis for Eligibility field to select the basis on which the applicant is claiming eligibility for naturalization.

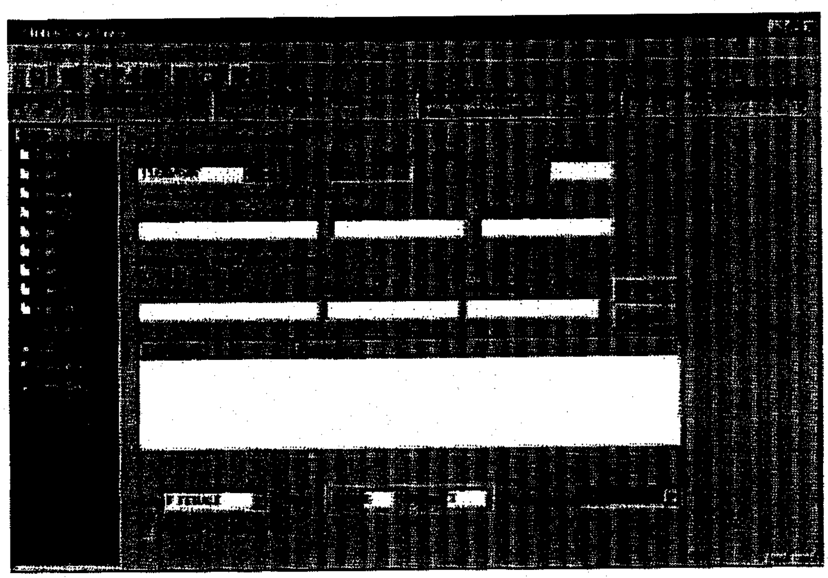
1.1.1.2 N400 Part 3

N400—Part 3 (Exhibit 9–7) includes the applicant's U.S. residency information, country of citizenship (COC), other names the applicant has used, and personal statistics.

To complete N400 Part 3, perform the following steps:

1. Click the Part 3 icon located on the left side of the screen.

Exhibit 9–7: N400—Part 3



2. Enter the appropriate information in the following fields:
   - **Date Residency Began**—Date (MM/DD/YYYY) applicant's residency began (click to select the date from a calendar)

- **Port of Entry or INS Office**—POE or INS office code (click to select appropriate code)
- **Citizenship**—Applicant's COC (click to select appropriate code)

3. If the applicant's name on the alien registration card (ARC) is different from the information entered in Part 1 of the application, enter the last, first and middle as shown on the ARC.
4. If applicable, enter the appropriate information in the following fields of the Other names used since resident section:
   - **Last Name**—Other last name used by applicant since becoming a resident of the United States
   - **First Name**—Other first name used by applicant since becoming a resident of the United States
   - **Middle Name**—Other middle name used by applicant since becoming a resident of the United States (if applicable)

   a. Click to add the name to the list box.
   b. To add additional names to the list, repeat Steps 4 and 4a.
   c. To remove a name from the list, perform the following steps:

      Click on the appropriate name to select it.
      Click .

   d. To edit applicant information, perform the following steps:
      - Double click on the name in the list.

      Click on the appropriate field, and edit the information.
      - Click .

5. Enter the applicant's personal statistics in the following fields:
   - **Sex**—M (male) or F (female) U (unknown) to indicate applicant's sex (click to select applicable gender from a list)
   - **Height: Feet/Inches**—Height of applicant in feet (one-digit numeric) and inches (two-digit numeric)
   - **Marital Status**—M (married), S (separated or single), D (divorced), or W (widowed) to indicate applicant's marital status (click to select applicable marital status from a list)

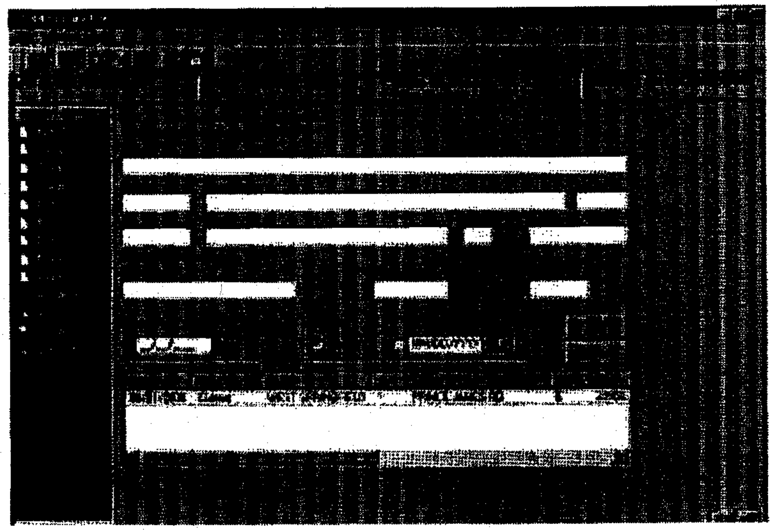
1.1.1.3 N400 Part 4A

The N400—Part 4A (Exhibit 9–8) includes the applicant's residential addresses for the past 5 years. If the box in Part 1, 2 was checked to indicate that the mailing address and current residence address are the same, the address information entered in Part 1 automatically fills in the current address fields.

To add an address in Part 4A, perform the following steps:

1. Click the Part 4a icon located at the left side of the screen.

Exhibit 9–8: N400—Part 4A



2. Enter the appropriate information in the following fields:
   - **C/O**—Full name of any person or organization in care of whom correspondence should be sent
   - **Street Number**—Street number of applicant's residence
   - **Street Name**—Street name of applicant's residence
   - **Apt #**—Apartment number of applicant's residence (if applicable)
   - **Zip**—ZIP code of applicant's residence. Press T, and the City/State/County fields automatically fill. If there is more than one match, a pop-up window appears. Double click on the correct city/state/county combination
   - **Province**—Province name of applicant's residence (if non-U.S. address)
   - **Postal Code**—Postal code of applicant's residence (if non-U.S. address)
   - **Country**—Country code of applicant's residence (if non-U.S. address) (click to select appropriate code from a list)
   - **Date From**—Date (MM/DD/YYYY) applicant's residency at this address began (click to select the date from a calendar)
   - **Date To**—Date (MM/DD/YYYY) applicant's residency at this address ended (click to select the date from a calendar) If the applicant still resides at the address, click the Current radio button.
3. Click to add the address to the list box.

a. To add additional residences to the list, repeat Steps 3 and 4.
b. To remove an address from the list, perform the following steps:
   - Click [redacted]opriate address to select it.
   - Click [redacted].
c. To edit address information, perform the following steps:
   - Double click on the address in the list.
   - Click [redacted]opriate field, and edit the information.
   - Click [redacted].

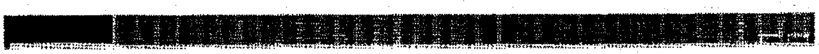
1.1.1.4 N400 Part 4B

N400—Part 4B (Exhibit 9–9) lists the applicant's employment history for the past 5 years. (Data entry is not currently required in this section.)

To complete N400 Part 4B, perform the following steps:

1. Click the Part 4b icon located at the left side of the screen.

Exhibit 9–9: N400—Part 4B



2. Enter the employment information in the following fields:
   - **Employer**—Name of employer
   - **Street #**—Street number of employer's business
   - **Street Name**—Street name of employer's business
   - **Room/Bldg**—Building or suite number of employer's business
   - **Zip**—ZIP code of employer's business. Press T, and the City/State/County fields automatically fill. If there is more than one match, a pop-up window appears. Double click on the correct city/state/county combination.
   - **Province**—Province of employer's business (if applicable)
   - **Postal Code**—Postal code of employer's business (if applicable)
   - **Country**—Country code of employer's business mailing address, or click [redacted] to select appropriate country from a list
   - **Occupation or Position Job Code**—Click [redacted] to view a list of codes. Highlight appropriate code, and click [redacted].
   - **Unlisted/Job Details**—If a code does not exist for applicant's occupation, or additional details are necessary to clarify applicant's position, enter the information.

- **Date Employed From**—Date (MM/DD/YYYY) applicant's employment began (click to select the date from a calendar)
- **Date Employed To**—Date (MM/DD/YYYY) applicant's employment ended (click to select the date from a calendar)

3. Click to add the employment information to the list box.
   a. To add additional employers to the list, repeat Steps 2 and 3.
   b. To remove an employer from the list, perform the following steps:
      - Click on the employer to select it.
      - Click .
   c. To edit employment information, perform the following steps:
      - Double click on the employer in the list.
      Click in the appropriate field, and edit the information.
      - Click .

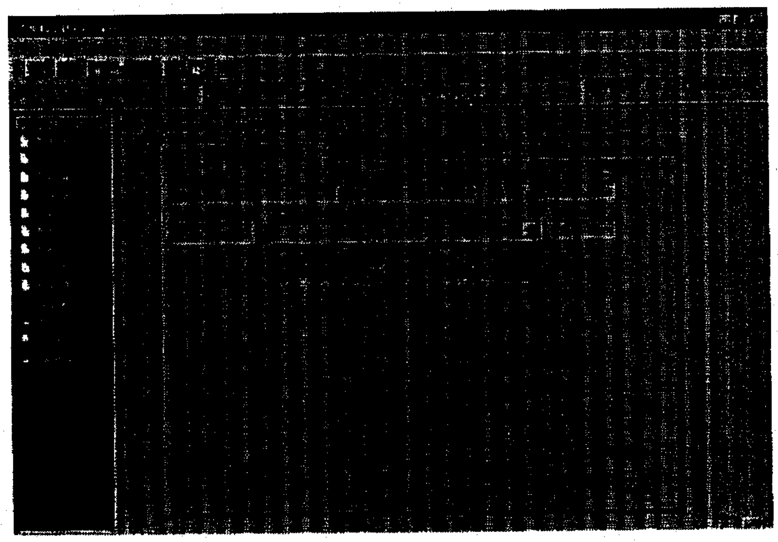
1.1.1.5 N400 Part 5

N400—Part 5 includes information about the applicant's current spouse and previous marriages. (Data entry is not currently required in this section.)

To enter current marital information, perform the following steps:

1. Click the Part 5 icon located at the left side of the screen.
2. If necessary, click the Current Marriage tab (Exhibit 9–10).

Exhibit 9–10: N400—Part 5: Current Marriage



3. Enter the appropriate information in the following fields:
   - **Last Name**—Last name of applicant's current spouse
   - **First Name**—First name of applicant's current spouse
   - **Middle Name**—Middle name of applicant's current spouse
   - **A-Number**—A, followed by current spouse's nine-digit A-Number (if applicable)
   - **Immigration Status**—Immigration status (code) of current spouse (click to select appropriate code)
   - **Citizenship**—COC of current spouse (click to select appropriate code)
   - **Date of Marriage**—Date (MM/DD/YYYY) marriage to current spouse took place (click to select the date from a calendar)
   - **Date of Birth**—Date (MM/DD/YYYY) current spouse was born (click to select the date from a calendar)

To enter previous marital information, perform the following steps:

1. Click the Marriage History tab (Exhibit 9–11).

Exhibit 9–11: N400—Part 5: Marriage History

2. Enter the appropriate information in the following fields:
   - **Last Name**—Last name of previous spouse
   - **First Name**—First name of previous spouse
   - **Middle Name**—Middle name (if applicable) of previous spouse
   - **Date of Marriage**—Date (MM/DD/YYYY) of marriage (click to select the date from a calendar)
   - **Date Marriage Ended**—Date (MM/DD/YYYY) marriage ended (click to select the date from a calendar)
   - **How Marriage Ended**—Reason marriage ended
3. Click to add the marriage to the list box.
   a. To add additional marriages to the list, repeat Step 2 and 3.
   b. To remove a previous spouse from the list, perform the following steps:
      - Click on the appropriate name to select it.
      - Click .
   c. To edit information for a previous spouse, perform the following steps:
      - Double click on the name in the list.

      Click on the appropriate field, and edit the information.
      - Click .

Click the Spouse Employment History tab to enter spouse employment history information, perform the following steps. (This function is not yet available.)

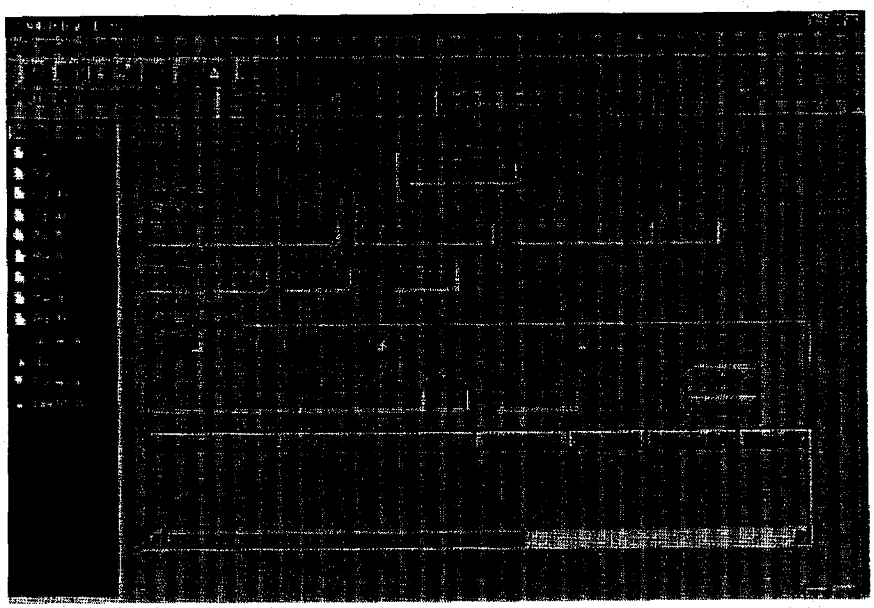
1.1.1.6 N400 Part 6

The N400—Part 6 (Exhibit 9–12) lists information about the applicant's children, including the residence and immigration status of each child. (Data entry is not currently required in this section.)

To complete the N400 Part 6, perform the following steps:

1. Click the Part 6 icon located at the left side of the screen.

Exhibit 9–12: N400—Part 6



2. If the applicant has children, enter the appropriate information in the following fields:
   - **Application ID**—A, followed by child's nine-digit A-Number
   - **Last Name**—Last name of child
   - **First Name**—First name of child
   - **Middle Name**—Middle name of child
   - **Suffix**—Enter Jr., Sr., II, III, etc.
   - **Date of Birth**—DOB (MM/DD/YYYY) of child (click to select the date from a calendar)

- **Country of Birth**—Country where child was born (click to select appropriate code from a list)
- **Country of Citizenship**—COC of child (click to select appropriate code from a list)

3. To indicate current status, click the appropriate radio button:

4. If the Address Listed Below radio button is selected, enter the address information in the following fields:
   - **City**—City where child resides (click to select appropriate code from a list)
   - **State**—State where child resides (click to select appropriate code from a list)
   - **Zip**—ZIP code where child resides (or click to select appropriate code from a list)
5. Click to add the information to the list.
   a. To add additional children to the list, repeat steps 2 through 5.
   b. To remove a child from the list, perform the following steps:
      - Click on the appropriate name to select it.
      - Click .
   c. To edit information for a child, perform the following steps:
      - Double click on the name in the list.
      Click in the appropriate field and edit the information.
      - Click .

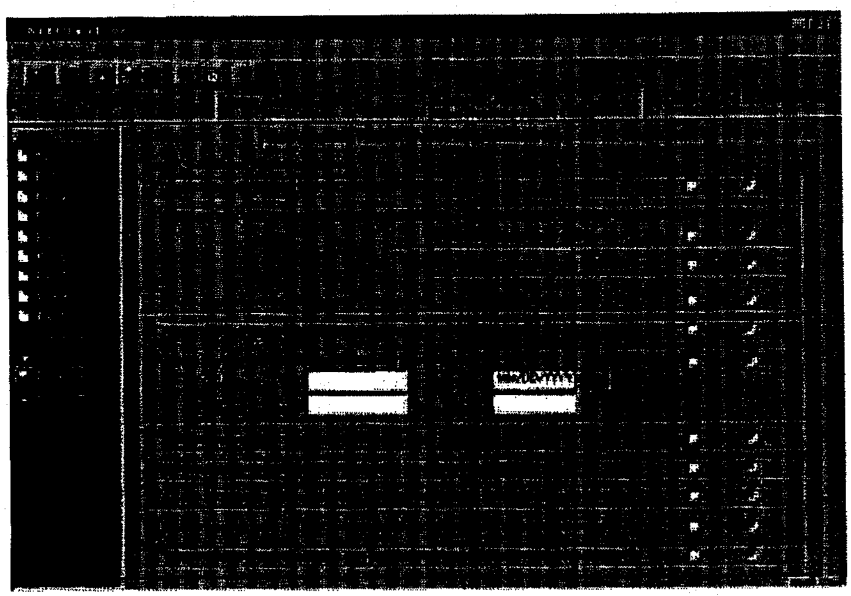
1.1.1.7 N400 Part 7, 8

N400—Part 7, 8 screen lists answers to the eligibility questionnaire. This screen is divided into three folder-tabbed sections. Part 7: Questions 1 to 10 and Part 7: Questions 11 to 15 deal with the applicant's past. Part 8: Plus Details of Crime lists questions that deal with the applicant's allegiance to the United States. This section also allows the user to enter details of any crimes the applicant has committed.

To complete eligibility Questions 1 through 10, perform the following steps:

1. Click the Part 7,8 icon located at the left side of the screen.
2. If necessary, click the Part 7: Questions 1 to 10 tab (Exhibit 9–13).

Exhibit 9–13: N400—Part 7: Questions 1 to 10

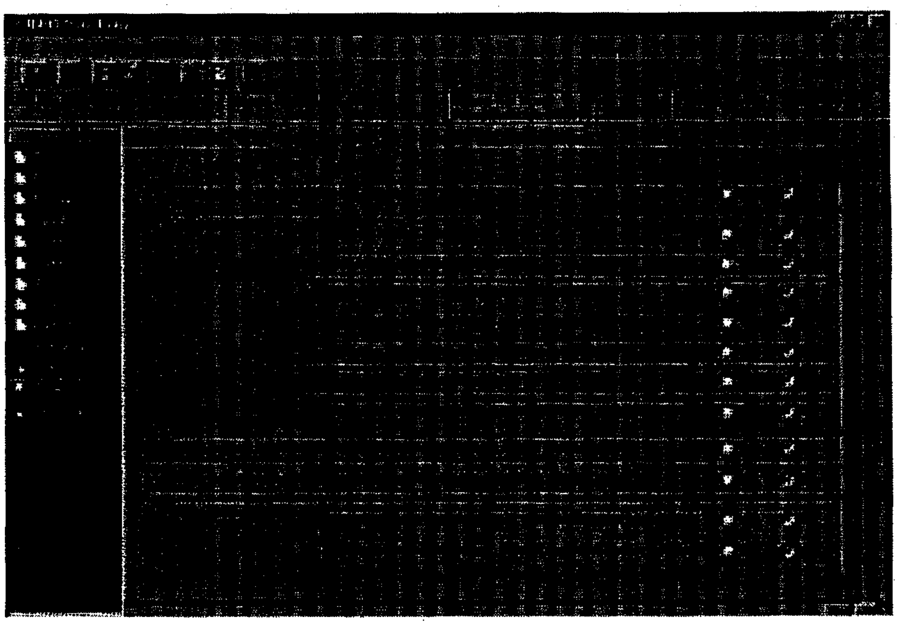


3. Verify with the applicant's response on the N400 application and, if necessary, click the or radio button to change the response.
4. If the applicant is subject to selective service requirements, enter the appropriate information in the following fields:
   - **Sel Serv Nbr**—Selective Service number
   - **Date**—Date (MM/DD/YYYY) of Selective Service registration (click to select the date from a calendar)
   - **Local Board Nbr**—Local board number
   - **Classification**—Selective Service classification

To complete eligibility questions 11 to 15, perform the following steps:

1. Click the Part 7: Questions 11 to 15 tab (Exhibit 9–14).
2. Verify with the applicant's response on the N400 application and, if necessary, click the or radio button to change the response.

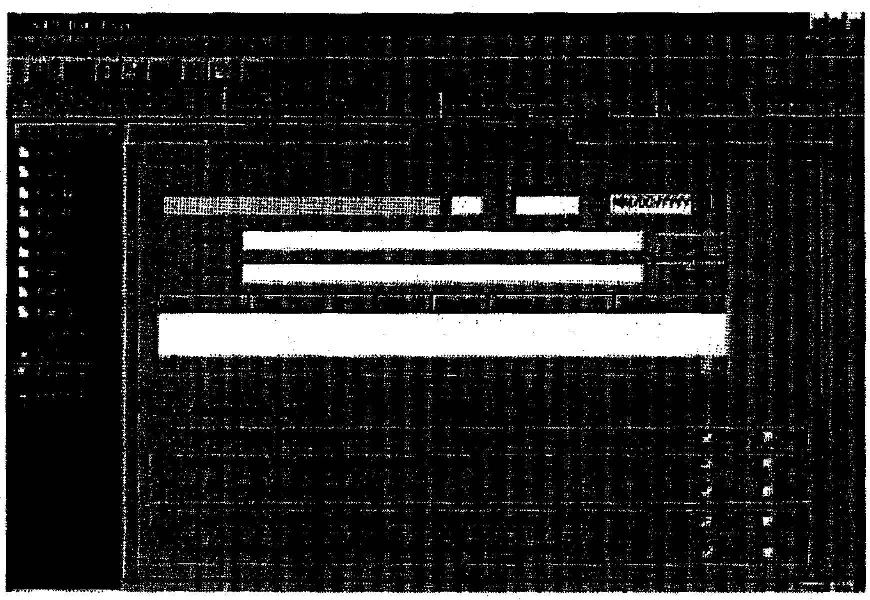
Exhibit 9–14: N400—Part 7: Questions 11 to 15



To complete Part 8, Plus Details of Crimes, perform the following steps:

1. Click the Part 8, Plus Details of Crime tab (Exhibit 9–15).

Exhibit 9–15: N400—Part 8: Plus Details of Crime



2. If the answer to either question 15a or 15b (Part 7) is YES, enter the crime detail information in the following fields:
   - **City**—City where offense took place
   - **State**—State where offense took place, or click to select appropriate code from a list
   - **Country**—Country where offense took place, or click to select appropriate code from a list
   - **Date**—Date (MM/DD/YYYY) of offense
   - **Nature**—Nature of offense
   - **Outcome**—Outcome or disposition of case
3. Click to add the information to the list box.
4. To add additional crimes to the list, repeat steps 2 and 3.
5. To remove a crime detail from the list, perform the following steps:
   a. Click on the appropriate detail to select it.
   b. Click .
6. To edit crime detail information, perform the following steps:
   a. Double click on a detail in the list. The information displays in the fields and the Add button changes to Update.
   b. Click on the appropriate field, and edit the information.
   c. Click .
7. Questions 1 through 5 default to YES. Verify with the applicant's response on the N400 application and, if necessary, click the radio button to change the response.

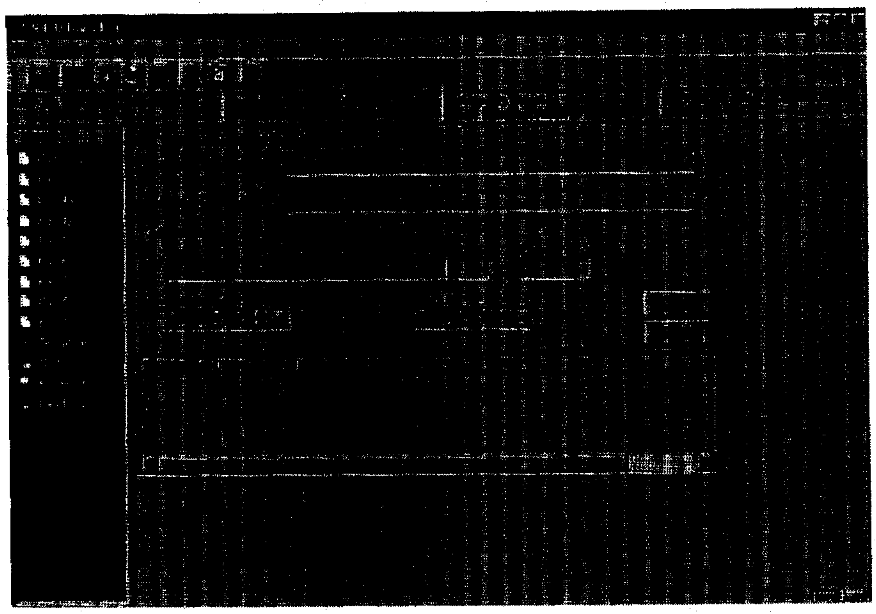
1.1.1.8 N400 Part 9

N400—Part 9 (Exhibit 9-16, N400—Part 9) lists information about organizations with which the applicant has been affiliated. (Data entry is not currently required in this section.)

To complete Part 9, perform the following steps:

1. Click the Part 9 icon located at the left side of the screen.

Exhibit 9–16: N400—Part 9



2. Enter the organization information in the following fields:
   - **Name of Organization**—Name of organization
   - **Nature of the Organization**—Nature of organization
   - **City**—City where organization is located
   - **State**—State where organization is located
   - **Country**—Country where organization is located (click to select the applicable code from a list)
   - **Date Joined**—Date (MM/DD/YYYY) applicant joined organization (click to select the date from a calendar)
   - **Date Left**—Date (MM/DD/YYYY) applicant quit organization (click to select the date from a calendar)
3. Click to add the information to the list.
4. To add additional organizations to the list, repeat steps 2 and 3.
5. To remove an organization from the list, perform the following steps:
   a. Click on the appropriate organization to select it.
   b. Click .

6. To edit organization information, perform the following steps:
   a. Double click on an organization in the list. The information displays in the fields and the Add button changes to Update.
   b. Click on the appropriate field, and edit the information.
   c. Click .

1.1.1.9 N400 Part 10

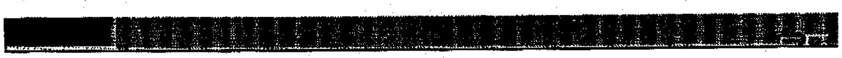
N400—Part 10 (Exhibit 9–17, N400—Part 10) lists information about the applicant's parents, including residence and immigration status. If box "C" in Part 2 (Basis for Eligibility) of the N400 was checked, Part 10 must be completed. Otherwise proceed to the Signature information (Section 9.1.1.10). (Data entry is not currently required in this section.)

To complete Part 10, perform the following steps:

1. Click the 

icon located at the left side of the screen.

Exhibit 9–17: N400—Part 10



2. Click on the appropriate radio button to indicate whether none, one, or both of the applicant's parents are U.S. citizens.
3. Enter the information about one U.S. citizen parent in the following fields:
   - **Last Name**—Last name of parent
   - **First Name**—First name of parent
   - **Middle Name**—Middle name of parent (if applicable)
   - **Suffix**—Jr., Sr., II, III, etc.
   - **C/O**—The name of any person or organization in care of whom correspondence should be sent
   - **Street Number**—Street number of parent's residence
   - **Street Name**—Street name of parent's residence
   - **Apt #**—Apartment number of parent's residence (if applicable)
   - **Zip**—ZIP code of parent's address. Press T. The City/State/County fields automatically fill. If there is more than one match, a pop-up window appears. Double click on the correct city/state/county combination.
   - **Province**—Province of parent's residence (if non-U.S. address)

- **Postal Code**—Postal code of parent's residence (if non-U.S. address)
- **Country**—Country where parent resides (if non-U.S. address) (click  to select appropriate code from a list)

4. To indicate the basis for citizenship, click the appropriate radio button: .
5. If the Naturalized radio button is selected, enter the certificate number in the Certificate Number field.
6. To indicate the parent's or guardian's relationship to applicant, click the appropriate radio button: .
7. Enter the date the applicant was adopted or legitimated.
8. To indicate whether or not this parent has legal custody over the applicant, click the appropriate radio button: .

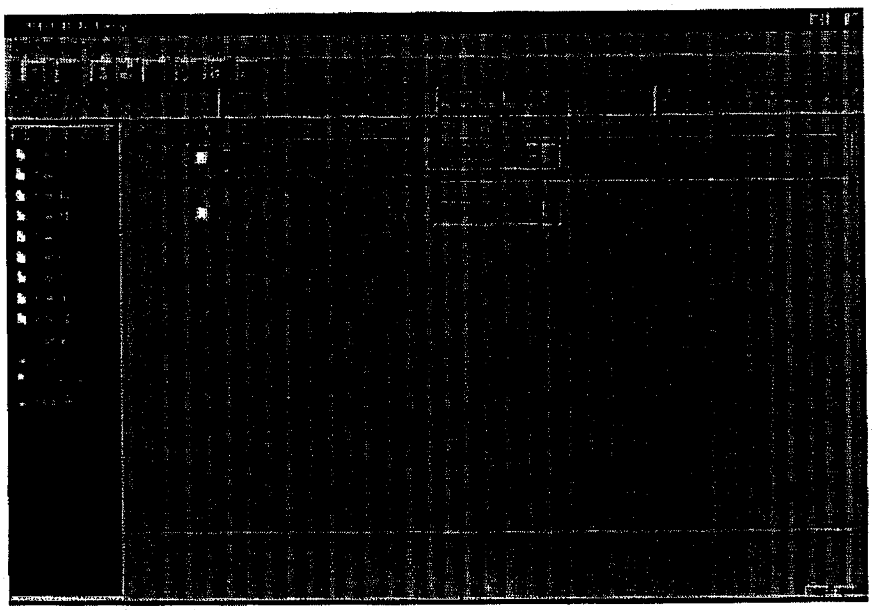
1.1.1.10 N400 Signature

The N400—Signature (Exhibit 9–18) section records that the form has been signed by the applicant and/or by the representative who may have prepared the form on the applicant's behalf.

To complete the N400 Signature, perform the following steps:

1. Click the  icon at the left side of the screen.

Exhibit 9–18: N400—Signature



2. To indicate the applicant signed the form, click the check box.
3. If available, enter the date (MM/DD/YYYY) the application was signed.
4. To indicate that someone other than the applicant prepared the form, click the check box.
5. Enter the Date (MM/DD/YYYY) the representative signed the form.

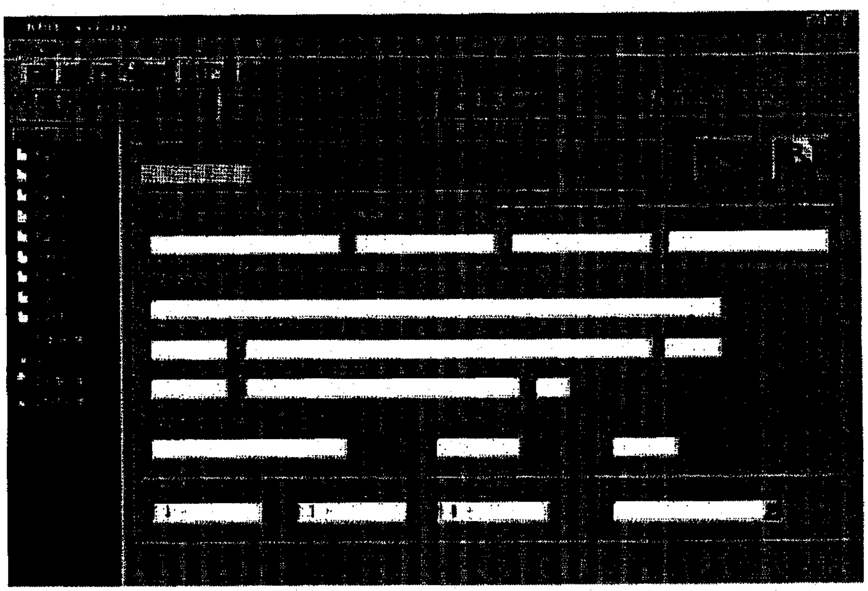
1.1.1.11 G28

The G28 Form screen (Exhibit 9–19, G28 Form) is used to enter attorney/representative information. If the applicant provides this information, all mailings to the applicant are also sent to the attorney or representative.

To enter Attorney/Representative information, perform the following steps:

1. Click the G28 icon on the left side of the screen. The G28 Form screen appears (Exhibit 9–19).

Exhibit 9–19: G28 Form



2. To search the database for attorney information:

   a. Tab to any of the following fields and enter the applicable information: PAM ID, Last Name, City, State, Zip, or Firm/VOLAG. (A combination of fields will narrow the search.)

   b. Click .

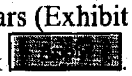
      - If the attorney number is listed in the Private Attorney Maintenance System (PAMS) database, the attorney information appears.
      - If more than one attorney matches the attorney number, an Attorney Search Results list appears (Exhibit 9–20, Attorney Search Results). Select an attorney from the list and click .

Exhibit 9–20: Attorney Search Results

If the database does not contain attorney information, enter the appropriate information from the G-28 form in the following fields:

- **Last Name**—Last name of the attorney
- **First Name**—First name of the attorney
- **Middle Name**—Middle name of the attorney (if applicable)
- **Firm/VOLAG**—Name of firm or volunteer agency representing applicant
- **Street #**—Street number of firm's mailing address
- **Street Name**—Street name of firm's mailing address
- **Room/Bldg**—Room number or name of building
- **Zip**—ZIP code of firm's mailing address Press T, and the city/state/county fields automatically fill. If there is more than one match, double click on the correct combination in the pop-up window.
- **Province**—Province name of firm's address (if applicable)
- **Postal Code**—Postal code of firm's address (if applicable))
- **Country**—Country code of firm's address (if applicable), or click to select appropriate code from a list
- **Phone Number**—Attorney's phone number
- **Fax/Beeper Nbr**—Attorney's fax or beeper number (if applicable)
- **Mobile Number**—Attorney's cell phone number (if applicable)
- **Type of Appearance**—Code for legal representative, or click and select from a list of codes.

c. To clear all fields, click .

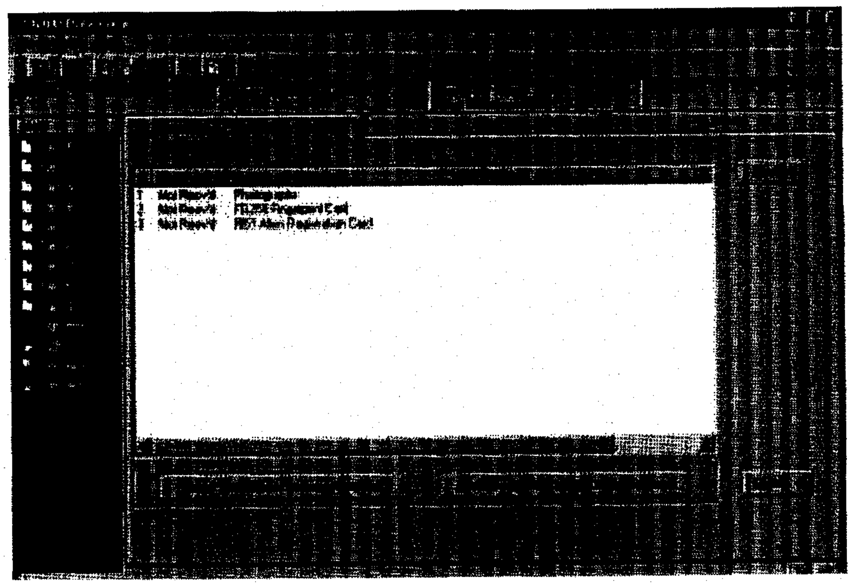
1.1.1.12 Evidence

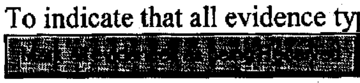
The Evidence screens are used to record the receipt of required and other evidence, and to record notes about evidence. All supporting evidence submitted with the application must be recorded as received in CLAIMS 4.0.

To record evidence as having been received, perform the following steps:

1. Click the Evidence icon at the left side of the screen. A list of required evidence displays in the Required/Provided Evidence screen (Exhibit 9–21, Required/Provided Evidence).

Exhibit 9–21: Required/Provided Evidence

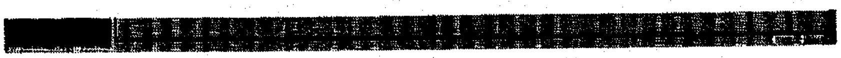


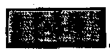
2. To indicate that all evidence types have been received, click the  button located along the bottom of the screen.
3. To indicate that a specific evidence type has been received, double click on the evidence type.

To add additional evidence, perform the following steps:

1. Click on the Other tab (Exhibit 9–22, Other).

Exhibit 9–22: Other

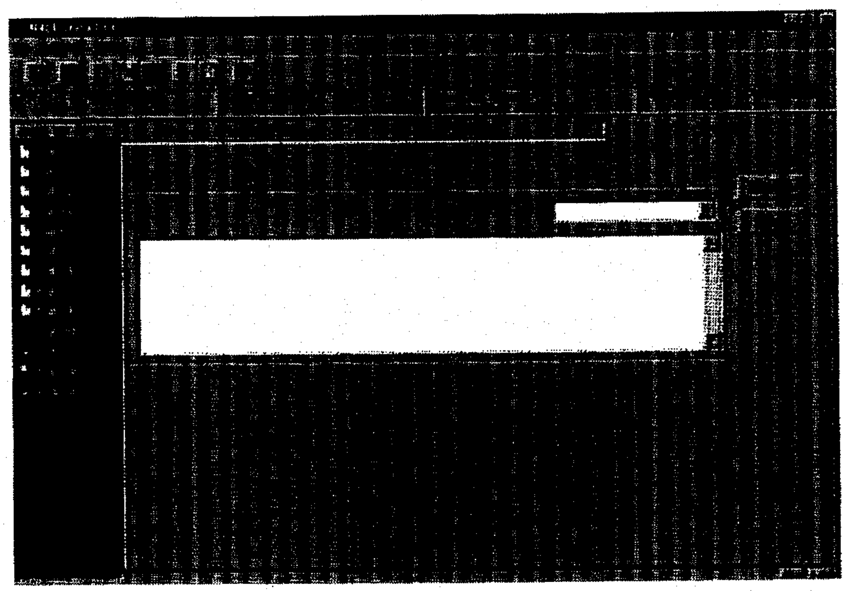


2. Click on the evidence type to be added.
3. Click .

To add evidence details, perform the following steps:

1. In the Required Provided/Evidence or Other screen, click on the evidence for which details are to be provided.
2. Click on the Details tab (Exhibit 9–23, Details).

Exhibit 9–23: Details



3. Click to select Received or Not Received as the status.
4. Click in the field below the name of the evidence and type any applicable comments.
5. Click to save the information or to clear the information.

1.1.1.13 Lead Applicant

When multiple applications are submitted with a single payment, the Lead Applicant screen is used to record a primary contact person for payment notices.

To designate a lead applicant, perform the following steps:

1. Click the Lead App icon at the left side of the screen. (**Note:** This icon displays only when payment is received.) A list of all applicants in the payment group is displayed in the N400 Data Entry screen (Exhibit 9–24, N400 Data Entry With Lead Applicant List):

Exhibit 9–24: N400 Data Entry With Lead Applicant List

[redacted]

2. Click on the application ID of the applicant to be designated lead applicant. This applicant will receive any underpayment or refund notices generated for the payment group.

   Note: If no lead applicant is selected, the oldest applicant in the group is selected as lead applicant by default. In the example above, there is only one applicant.

1.1.1.14 Saving the Data

After all required sections of the Data Entry for N400 screen have been completed, the information must be saved.

To save the N400 application information, click the (Save) toolbar button, or select Save from the File menu. **Note:** If data are missing from required fields, a message box displays a list of the fields in which data must still be entered.

To close without saving, Click the (Cancel) toolbar button.

Payment Not Received

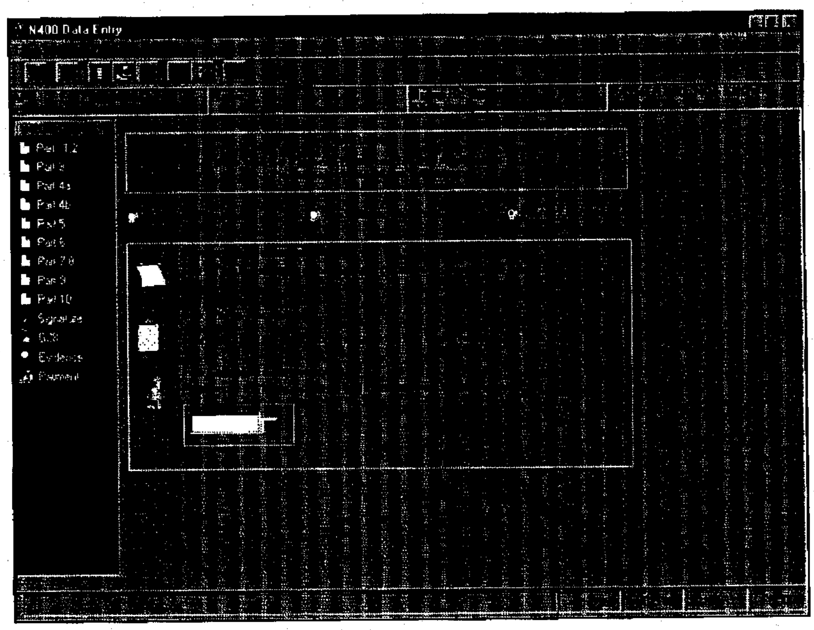
When a payment is not received in the mailroom, no payment ID is generated. It is necessary to indicate why the payment was not received before continuing to enter a case. There are three reasons why a payment would not be received in the mailroom:

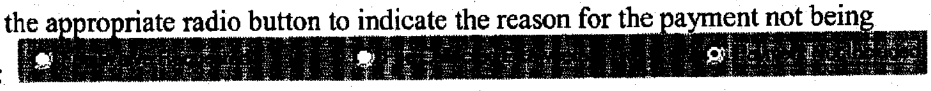
- A fee waive was requested
  The fee was collected elsewhere
- The payment was not included

To indicate why a payment was not received, perform the following steps:

1. Click the Payment icon located at the left side of the screen. (**Note**: This icon displays only when payment is not received.) The N400 Data Entry—Warning screen appears (Exhibit 9–25, N400 Data Entry—Warning).

Exhibit 9–25: N400 Data Entry—Warning



2. Click on the appropriate radio button to indicate the reason for the payment not being received: 
3. If payment was received at another location, enter the three-digit code of the site that collected the fee, or click to select the location from a list.

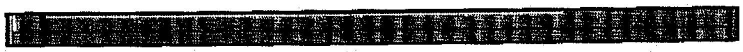
Update Application

Application information can be edited the same day by the same user who entered the information into the system. The procedures for entering a new application (Section 9.1, New Application) apply to updating an application.

To update an application, perform the following steps:

1. Click the (Update) toolbar button to access the Update Application window (Exhibit 9–26, Update Application).

Exhibit 9–26: Update Application



2. Enter the application ID and click . The corresponding application displays.
3. Click on the appropriate icons at the left side of the screen to access the parts of the application that need to be updated.
4. Make the necessary changes. To clear all information from a screen, click the (Refresh) toolbar button.
5. Click the (Save) toolbar button to save the information. To close the N400 Data Entry screen without saving changes, click the (Cancel) toolbar button.

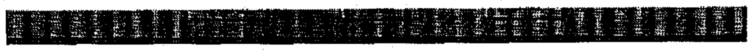
Find

The Find function allows users to search for an existing application using personal, mailing, attorney, or other information.

To open an existing application, perform the following steps:

1. In the N400 Data Entry screen, click the (Find) toolbar button. The Find Application screen displays (Exhibit 9–27, Find Application).

Exhibit 9–27: Find Application



2. Click on the applicable tab: Personal, Mailing Address, Attorney, or Other.
3. Enter search criteria in the appropriate fields.
4. To add search criteria from a second category, repeat Steps 1 and 2.
5. Click . The Search Results window appears.
   a. If multiple matches are listed, click on the application to be opened.
   b. Click . The corresponding application ID populates the Application ID window.
6. Click . Depending on the workflow state, the corresponding application is opened in either update or review mode.

Group Management

The Group Management function is used to create and define groups. Groups are defined by type, such as family or organization, and are created for scheduling purposes. When a group is created, a group ID is generated, and members are added to the group by application ID. A group can be defined at the initial startup of the data entry process or after the application information for each group member has been entered into the system. After a group has been created, group information and status can be changed, group members can be removed, or entire groups can be dissolved.

To access the Group Management function, do one of the following:

- In the N400 Data Entry main menu screen, click the (Groups) toolbar button.
- In the New Application window, click the checkbox.

Exhibit 9–28, Group Management Options, lists the available options in the Group Management main menu window.

Exhibit 9–28: Group Management Options

Title	Icon	Description
Add Group Definition		Used to define a group and add group members
Groups Maintenance		Used to change group information and status, remove group members, and dissolve groups
Return to Data Entry		Used to exit the Groups function and return to the Data Entry screen.

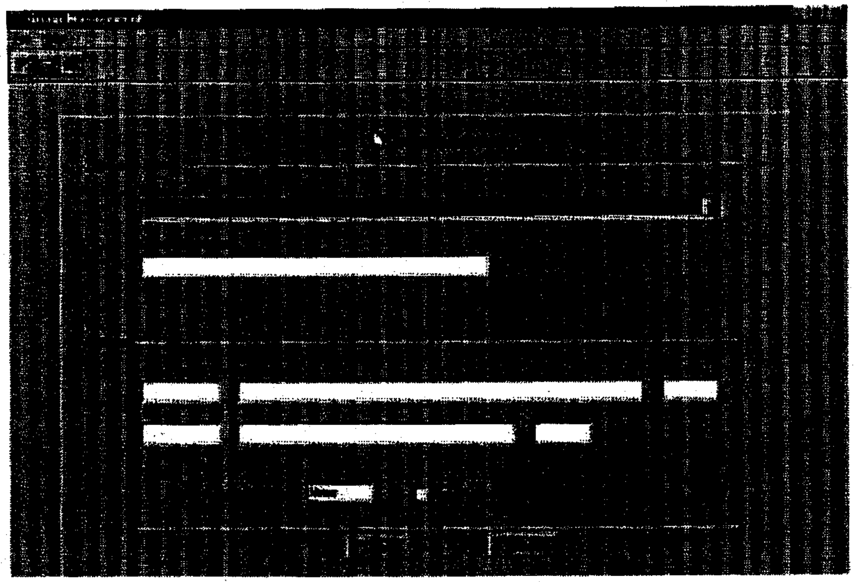
1.1.1.15 Add Group Definition

The Add Group Definition option is used to define a group and add group members. Information used to define a group is entered in the Add Group Definition screen (Exhibit 9–29, Add Group Definition), and members are added to a group in the Group Information screen (Exhibit 9–30, Add Group Description).

To define a group and add group members, perform the following steps:

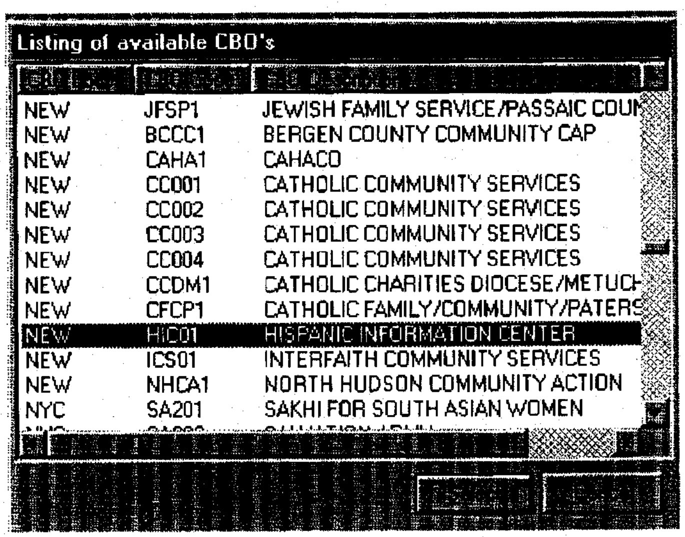
1. Click the  (Add Group Definition) toolbar button. The Add Group Definitions screen displays (Exhibit 9–29).

Exhibit 9–29: Add Group Definition



2. Enter a type in the Group Type field or click to select one of the following group types:
   - CBO group
   - Family groups or groups of related applications
3. If the group type is a CBO, a list of available CBO descriptions appears in a pop-up window. To select a description, perform the following steps:
   a. Click on a description.
   b. Click . The appropriate fields are automatically populated with the group description, CBO description, CBO location, CBO code, and address information.

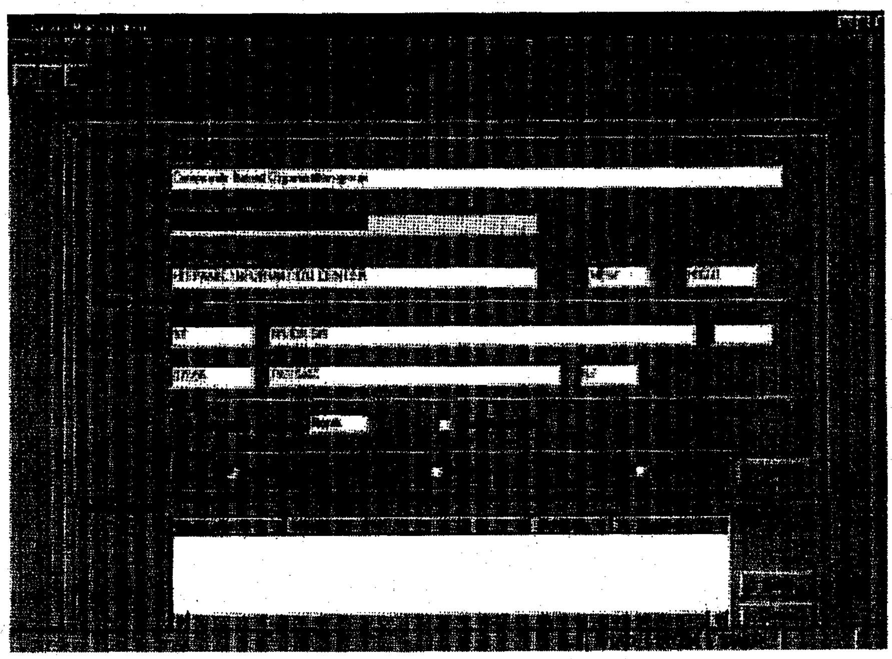
Exhibit 9–30: Add Group Description



4. If the group type is a family group or group of related applications, perform the following steps:
   a. Enter a description of the group in the Group Description field.
   b. Enter the group address information in the following fields:
      - **Street #**—Street number of group mailing address
      - **Street Name**—Street name of group mailing address
      - **Bldg. Rm**—Building or room used in group mailing address
      - **Zip**—ZIP code of group's mailing address. Press T, and the city/state/county fields automatically fill. If there is more than one match, a pop-up window displays. Double click on the correct city/state/county combination.
5. Enter the maximum number of group members in the Limit to Number in Group field.

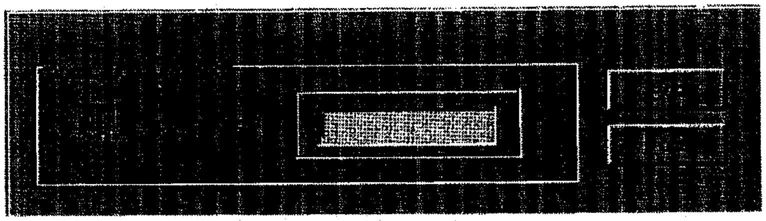
6. If applicable, click the check box. If the box is checked, a To field displays. Click the to the right of the field to select one of the following notice recipient options:
    - **Both**—Sends notices to both individual group members and group address
    - **Individuals only**—Sends notices to individual group members but not to the group address
    - **Group only**—Sends notices to the group address but not to individual group members
7. Click. The information entered in the Add Group Definition screen appears in the Group Information screen (Exhibit 9–31, Group Information).

Exhibit 9–31: Group Information



8. Verify the information in the Group Information section.
9. To change the group status , click on the appropriate radio button: .
10. Click . The Application ID to Add window (Exhibit 9–32, Application ID to Add) appears.

Exhibit 9–32: Application ID to Add



a. Enter the application ID of the applicant you want to add to the group.

b. Click . To add additional members, repeat Steps 9a and 9b until all group members are added to the group.

c. When all group members are added, click . The Group Information screen appears.

11. Verify the names listed in the Group Members box of the Group Information screen.

  a. To remove a group member, perform the following steps:

  - Click on the name in the Group Members box.
  - Click .

  b. To save the information, click .

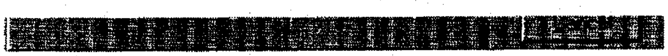
1.1.1.16 Group Maintenance

The Group Maintenance function is used to change a group's name and address information and status, dissolve a group, or remove members. If the group ID is unknown, a search can be initiated to display a list of groups by group type and/or status.

To access group information when Group ID is known, perform the following steps:

1. Click the (Group Maintenance) toolbar button from the Group Management screen. The Group ID box (Exhibit 9–33, Group ID) appears.

Exhibit 9–33: Group ID

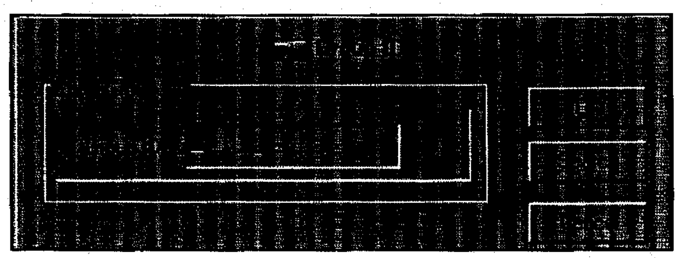


2. Enter the group ID and click . The Group Information screen (Exhibit 9–31) appears.

To access group information when Group ID is unknown, perform the following steps:

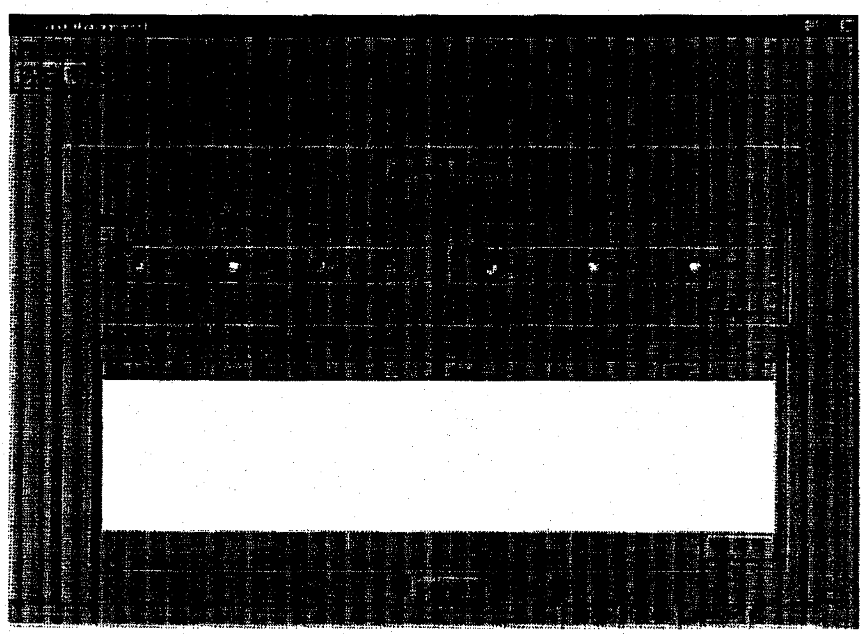
1. Click the (Group Maintenance) toolbar button. The Group ID box (Exhibit 9–34, Group ID) appears.

Exhibit 9–34: Group ID



2. Click to access the Group Selection screen (Exhibit 9–35, Group Selection).

Exhibit 9–35: Group Selection

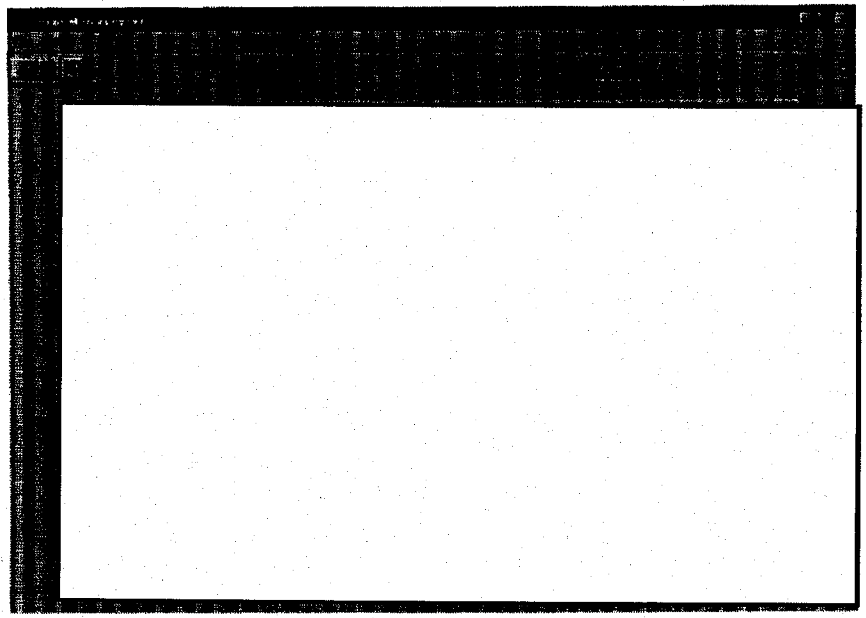


3. Click on the appropriate radio button to select a Group Type: .
4. Click on the appropriate radio button to select a Status: .
5. Click . A list of corresponding groups appears in the List of Corresponding Groups window.

6. Double click on the desired group ID in the list, or click once on an ID and then click . The Group Information screen (Exhibit 9–36, Group Information) appears.

Exhibit 9–36: Group Information

(b)(6)



To edit group information, perform the following steps:

1. If necessary, edit the name and address information.
2. To change the status, click on the appropriate radio button: .
3. To remove a group member, perform the following steps:
   a. Click on the name in the Group Members box.
   b. Click .
4. To dissolve a group, click .
5. To save the edits and return to the Group ID box, click .
6. To close without saving and return to the Group Management screen, click .
7. To exit the Groups function, click the (Return to Data Entry) toolbar button or select Return to Data Entry from the File menu.

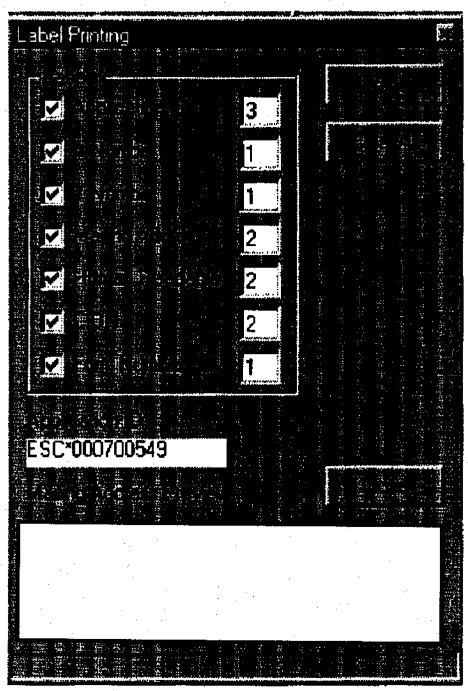
Print Labels

The Print Labels option is used to print human and/or machine-readable labels, including address and application ID labels.

To print labels, perform the following steps:

1. Click on the (Print Labels) toolbar button. A Label Printing window (Exhibit 9–37, Label Printing) appears.

Exhibit 9–37: Label Printing



(b)(6)

2. Click in the applicable checkboxes to select or deselect the types of labels to be printed. To clear all checkmarks, click [redacted].
3. Enter the number of each type of label to be printed in the appropriate field.
4. Click [redacted].
5. To exit the Label Printing window without printing, click [redacted].

Print Attorney Label

The Print Attorney Label option allows the user to print an attorney address label.

To print an attorney address label, click the (Print Attorney label) toolbar button. A single standard attorney address label prints on the label printer.

Test Printer

The Test Printer option is used to verify that the bar-code printer is working correctly. When this option is selected, a sample label is generated from the printer.

To test the bar-code printer, perform the following steps:

1. Click the (Test Printer) toolbar button. A sample label is generated from the bar-code printer.
2. If a label is not generated, verify that the printer is turned on and all connections are secure. Then repeat Step 1. If a label is still not generated, call an SA.

I881 Data Entry

The Data Entry for the I881 module comprises five parts that correspond to the parts of the I881 form an applicant submits to the INS to request suspension of deportation. The module includes sections for entering biographical data, evidence, and attorney information (G28), and for identifying the lead applicant of a family or group. Data must be entered in all required sections before the information can be saved.

Click the I881 button (Exhibit 9–38, I881 Button) in the Data Entry main menu screen to access the I881 Data Entry screen.

Exhibit 9–38: I881 Button

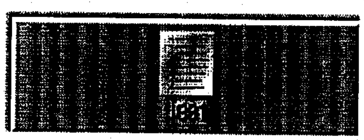


Exhibit 9–39, I881 Menu Options, lists the options available on the I881 Data Entry screen.

Exhibit 9–39: I881 Menu Options

Title	Icon	Description

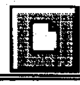
New		Used to enter new application information

Exhibit 9–39: I881 Menu Options (continued)

Title	Icon	Description
Update		Used to update information for an existing application
Find		Used to search for and open a second application without closing the first; searches can be conducted based on personal, mailing, attorney, or other information

New Application

The New Application function is used to enter information from the I881 application into CLAIMS 4.0. Exhibit 9–40, I881 Data Entry Options, lists the available options for data entry.

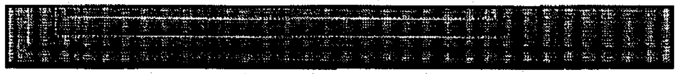
Exhibit 9–40: I881 Data Entry Options

Title	Icon	Description
Save		Used to save current application information
Print		Used by CBOs to print copies of data-entered I881 applications
View		Used to preview copies of data-entered I881 applications
Scan 2-D Bar Code		Used to scan information from a 2-D bar code into I881 Data Entry screens
Print Labels		Used to print human and/or machine-readable labels, including address and application ID labels
Print Attorney Label		Used to print labels for an applicant's attorney
Test Label Printer		Used to print a test label on the label printer
Cancel		Used to close the current application without saving changes
Refresh		Used to clear all information from the current screen

To access the Data Entry for I881 screen, perform the following steps:

1. Click the (New Application) toolbar button. The Application ID for I881 screen (Exhibit 9–41, Application ID for I881) appears.

Exhibit 9–41: Application ID for I881



2. Enter the application ID.
3. Click . The I88I Part 1 screen appears (Exhibit 9–42, I881—Part 1).

1.1.1.17 I881 Data Entry Part 1

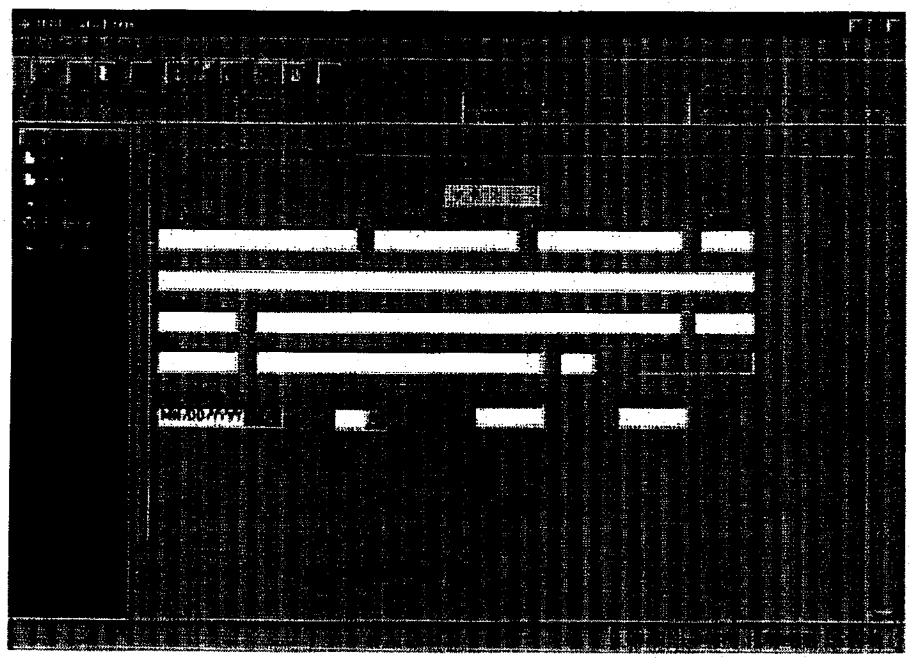
I881—Part 1 includes the applicant's name, mailing address, biographical information, date and place of first entry into the United States, and current status.

To complete I881 Part 1, perform the following steps:

1. If necessary, click the 

icon on the left side of the screen.

Exhibit 9–42: I881—Part 1



1. Enter the appropriate information in the following fields:
   - **Alien Number**—A, followed by applicant's nine-digit A-Number
   - **Last Name**—Last name of the applicant
   - **First Name**—First name of the applicant
   - **Middle Name**—Full middle name of the applicant (if applicable)
   - **Suffix**—Suffix (Jr., Sr., etc.) used in applicant's name, or click to select from a list of suffixes
   - **C/O**—Full name of the person or organization in care of whom correspondence should be sent (if applicable)
   - **Street #**—Street number of applicant's mailing address
   - **Street Name**—Street name of applicant's mailing address
   - **Apt. #**—Apartment number of applicant's mailing address
   - **Zip**—ZIP code of applicant's mailing address. Press T and the City/State/County fields automatically fill. If there is more than one match, double click on the correct combination in the pop-up window.
   - **Date of Birth**—Applicant's DOB (MM/DD/YYYY) (click to select the date from a calendar)
   - **Sex**—M (male) or F (female) U (unknown) to indicate applicant's sex, or click to select appropriate sex
   - **Country of Birth**—Applicant's COB (click to select code)
   - **Nationality**—Applicant's nationality (click to select code)
   - **Date**—Date the applicant last entered the United States (MM/DD/YYY) (click to select the date from a calendar)
   - **Place**—Port of entry where the applicant last entered the United States (click to select code)
   - **Date Authorized Stay Expires**—Expiration date of authorized stay (MM/DD/YYY) (click to select the date from a calendar)
   - **Status**—Legal basis on which the applicant last entered the country (click to select the status from a list)

1.1.1.18 I881 Part 2

I881—Part 2 (Exhibit 9–43, I881—Part 2) includes information about the type of application the applicant has submitted. Application types include the following:

- Guatemalan or Salvadoran ABC

Guatemalan or Salvadoran asylum applicant on or before April 1, 1990

FSB Applicant

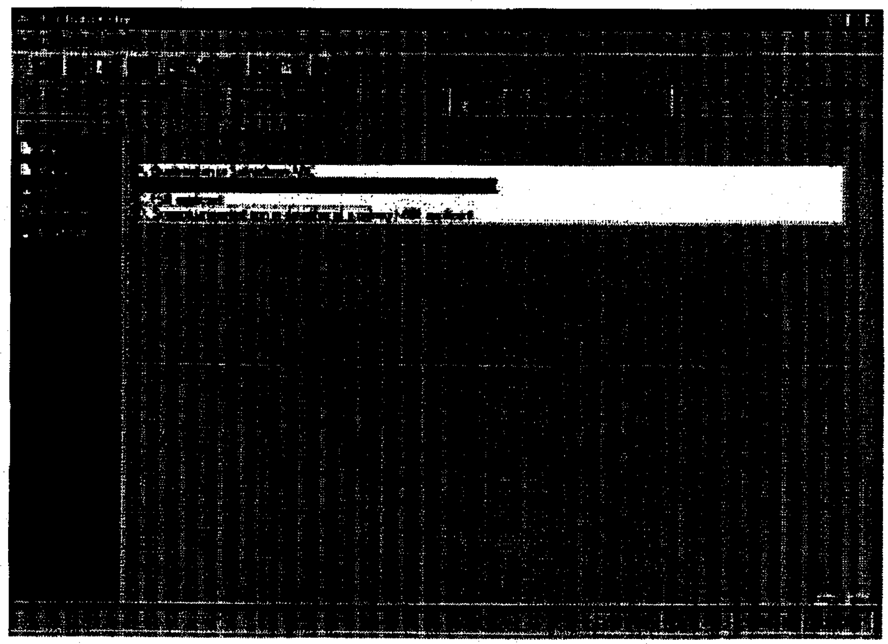
- Spouse or unmarried son or daughter of a primary I881 applicant

One or more application types can be selected for each applicant.

To complete I881 Part 2, perform the following steps:

1. Click the Part 2 icon located on the left side of the screen.

Exhibit 9–43: I881—Part 2



2. Select the appropriate application types from the application type list.
3. If Option D is selected, additional fields display (Exhibit 9–44, I881—Part 2 With Relative Fields).

Exhibit 9–44: I881—Part 2 With Relative Fields

4. To record relative information about the applicant, perform the following steps:
   a. Click in the Relationship to Primary Applicant field to select the appropriate relationship description
   b. Enter the A-Number of the Primary Applicant if available, or click on an application ID from the list provided in the lower part of the screen.
   c. Click in the Primary Applicant Filing Location field to indicate whether the primary applicant applied at an INS location or at an Executive Office of Immigration Review location.
   d. To clear the information entered about the applicant's relative, click the (Refresh) toolbar button.

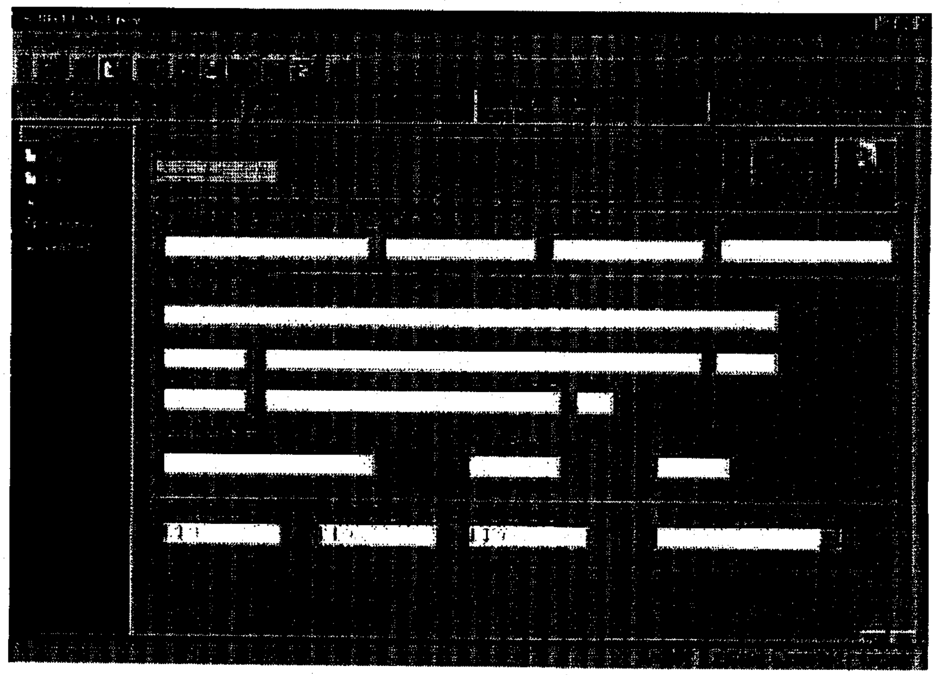
1.1.1.19 I881—G-28

The I881—G28 screen is used to enter attorney/representative information. If the applicant provides this information, all mailings to the applicant are also sent to the attorney or representative.

To enter Attorney/Representative information, perform the following steps:

1. Click the G28 icon on the left side of the screen. The I881—G28 screen appears (Exhibit 9–45, I881—G28).

Exhibit 9–45: I881—G28



2. To search the database for attorney information, perform the following steps:
   a. Tab to any of the following fields and enter the applicable information: PAM ID, Last Name, City, State, Zip, or Firm/VOLAG. (A combination of fields will narrow the search.)
   b. Click .
      - If the attorney number is listed in PAMS database, the attorney information appears.
      - If more than one attorney matches the attorney number, an Attorney Search Results list appears (Exhibit 9–46, Attorney Search Results). Select an attorney from the list and click .

Exhibit 9–46: Attorney Search Results

[redacted]

- If the database does not contain attorney information, enter the appropriate information from the G-28 form in the following fields:
  - **Last Name**—Last name of the attorney
  - **First Name**—First name of the attorney
  - **Middle Name**—Middle name of the attorney (if applicable)
  - **Firm/VOLAG**—Name of firm or volunteer agency representing applicant
  - **Street #**—Street number of firm's mailing address
  - **Street Name**—Street name of firm's mailing address
  - **Room/Bldg**—Room number or name of building
  - **Zip**—ZIP code of firm's mailing address. Press T, and the City/State/County fields automatically fill. If there is more than one match, double click on the correct combination in the pop-up window.
  - **Province**—Province name of firm's address (if applicable)
  - **Postal Code**—Postal code of firm's address (if applicable)
  - **Country**—Country code of firm's address (if applicable), or click to select appropriate code from a list
  - **Phone Number**—Attorney's phone number
  - **Fax/Beeper Nbr**—Attorney's fax or beeper number (if applicable)
  - **Mobile Number**—Attorney's cell phone number (if applicable)
  - **Type of Appearance**—Code for legal representative, or click and select from a list of codes

c. To clear all fields, click .

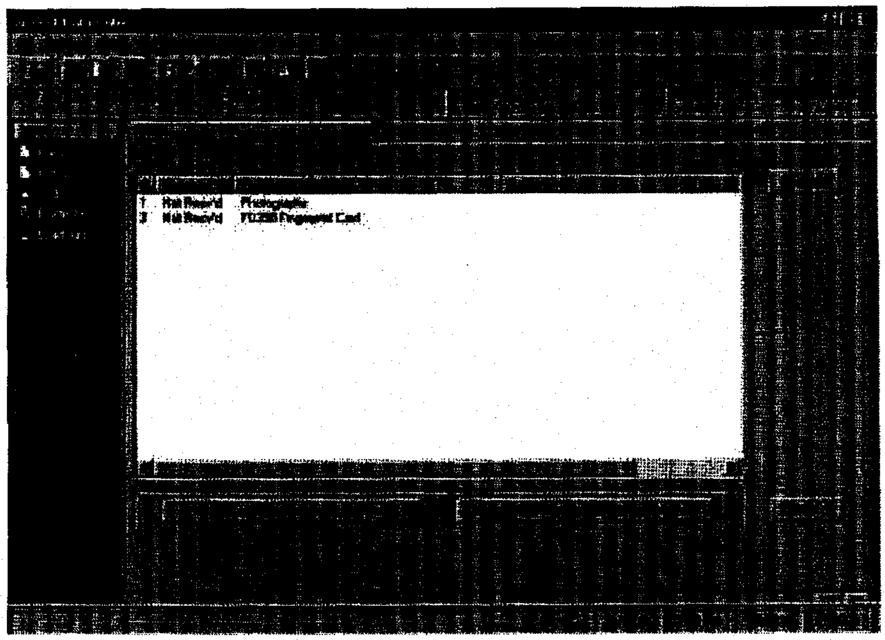
1.1.1.20 Evidence

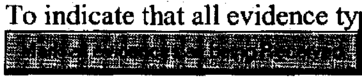
The Evidence screens are used to record the receipt of required and other evidence, and to enter notes about evidence. All evidence submitted with an I881 form must be recorded as received in CLAIMS 4.0.

To record evidence as received, perform the following steps.

1. Click the Evidence icon at the left side of the screen A list of required evidence appears in the Required/Provided Evidence screen (Exhibit 9–47, Required/Provided Evidence).

Exhibit 9–47: Required/Provided Evidence

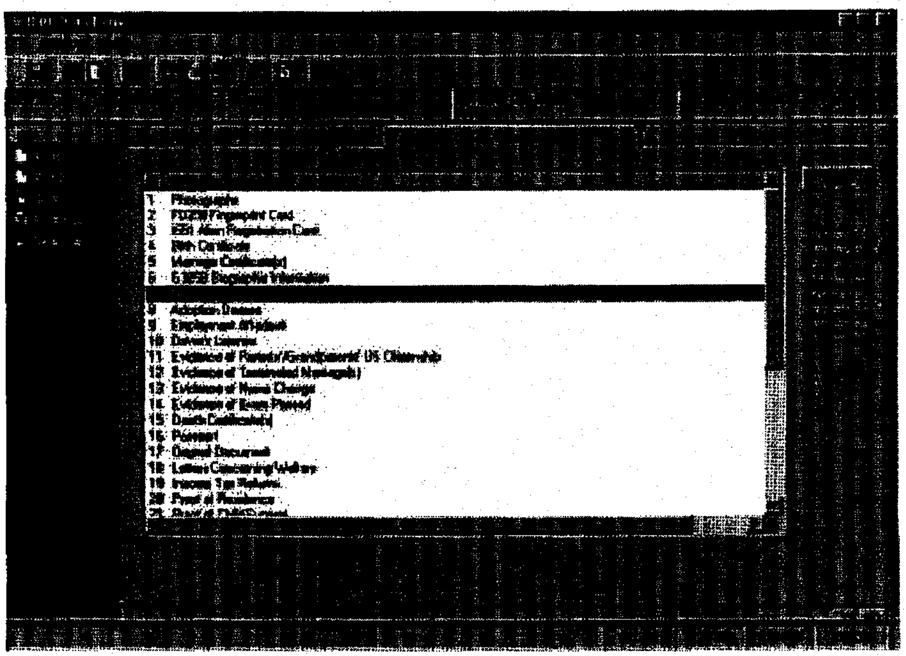


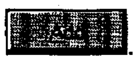
2. To indicate that all evidence types have been received, click the  button located along the bottom of the screen.
3. To indicate that a specific evidence type has been received, double click on the evidence type.

To add additional evidence, perform the following steps:

1. Click on the Other tab (Exhibit 9–48, Evidence—Other).

Exhibit 9–48: Evidence—Other

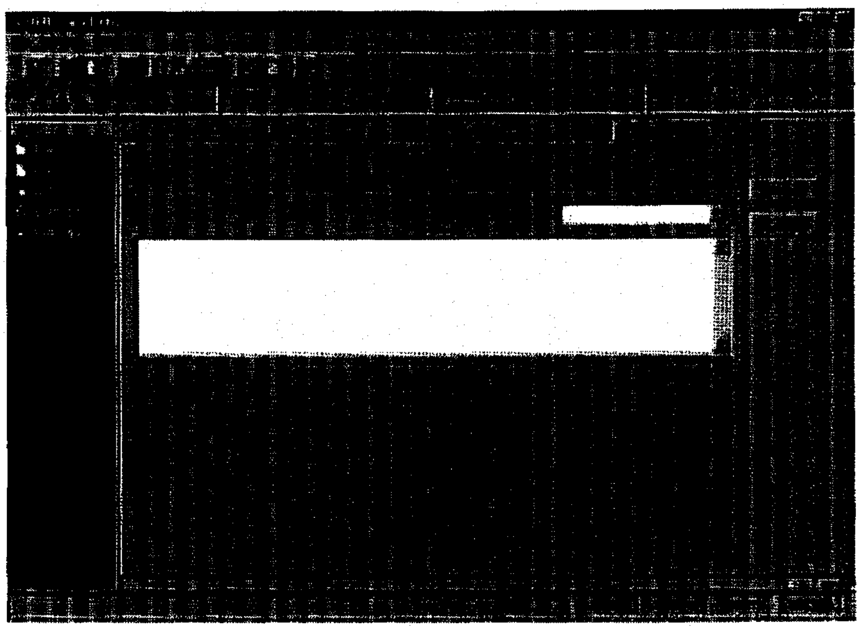


2. Click on the evidence type to be added.
3. Click .

To add evidence details, perform the following steps:

1. In the Required Provided/Evidence or Other screen, click on the evidence for which details are to be provided.
2. Click on the Details tab (Exhibit 9–49, Evidence—Details).

Exhibit 9–49: Evidence—Details



3. Click to select Received or Not Received as the status.
4. Click in the field below the name of the evidence and type any applicable comments.
5. Click to save the information or to clear the information

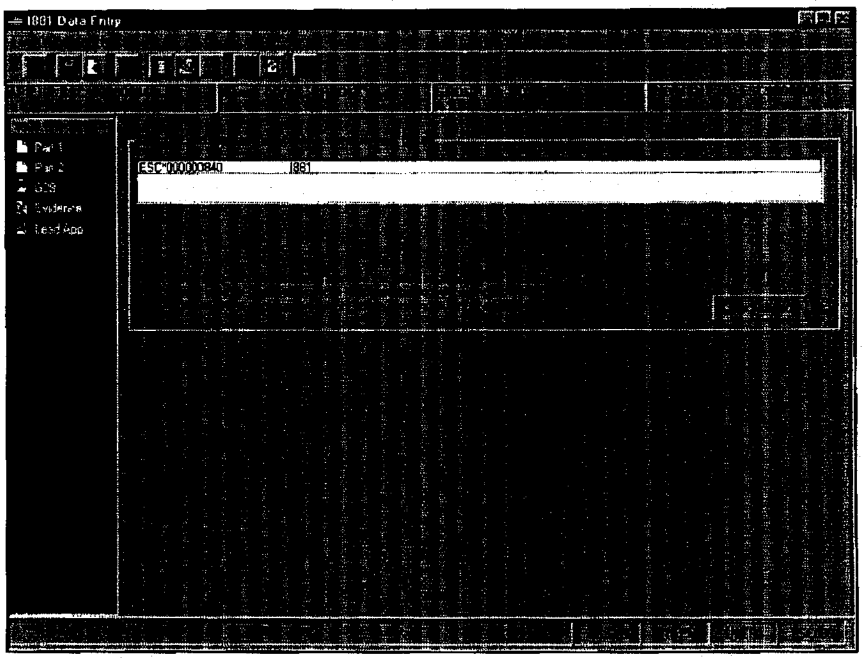
1.1.1.21 Lead Applicant

When multiple applications are submitted with a single payment, the Lead Applicant screen is used to record a primary contact person for payment notices.

To designate a lead applicant, perform the following steps:

1. Click the Lead App icon at the left side of the screen. (**Note:** This icon appears only when payment is received.) A list of all applicants in the payment group is displayed in the I881 Data Entry screen (Exhibit 9–50, I881 Data Entry With Applicant List).

Exhibit 9–50: I881 Data Entry With Applicant List



2. Click on the application ID of the applicant to be designated lead applicant. This applicant will receive any underpayment or refund notices generated for the payment group.

   Note: If no lead applicant is selected, the oldest applicant in the group is selected as lead applicant by default.

1.1.1.22 Saving the Data

After all required sections of the Data Entry for I881 screen have been completed, the information must be saved. After Mailroom Entry, Data Entry, and Finance functions have been completed, the application is transferred to RAPS to complete processing.

To save the information, Click the (Save) toolbar button, or select Save from the File menu. **Note:** If data are missing from required fields, a series of message boxes display the fields in which data must still be entered.

To close without saving, click the (Cancel) toolbar button.

Payment Not Received

When a payment is not received in the mailroom, no payment ID is generated. It is necessary to indicate why the payment was not received before continuing to enter a case. There are three reasons why a payment would not be received in the mailroom:

- A fee waive was requested.

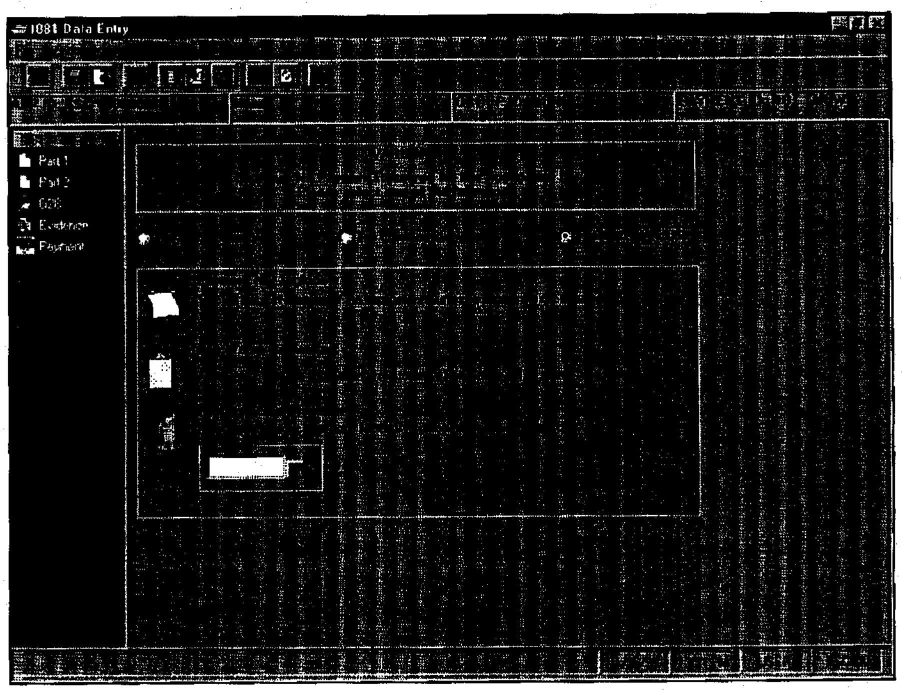
The fee was collected elsewhere.

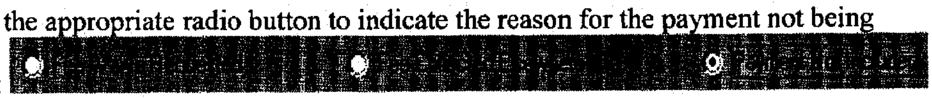
- The payment was not included.

To indicate why a payment was not received, perform the following steps:

1. Click the Payment icon located at the left side of the screen. (**Note:** This icon appears only when payment is not received.) The I881 Data Entry Warning screen appears (Exhibit 9–51, I881 Data Entry Warning).

Exhibit 9–51: I881 Data Entry Warning



2. Click on the appropriate radio button to indicate the reason for the payment not being received: 
3. If payment was received at another location, enter the three-digit code of the site that collected the fee, or click to select the location from a list.

Update Application

Application information can be edited the same day by the same user who entered the information into the system. The procedures for entering a new application (Section 9.2, New Application) apply to updating an application.

To update an application, perform the following steps:

1. Click the (Update) toolbar button to access the Update Application window (Exhibit 9–52, Update Application).

Exhibit 9–52: Update Application

2. Enter the application ID and click . The corresponding application appears.
3. Click on the appropriate icons at the left side of the screen to access the parts of the application needing to be updated.
4. Make the necessary changes. To clear all information from a screen, click the (Refresh) toolbar button.
5. Click to save the information. To close the I881 Data Entry screen without saving changes, click the (Cancel) toolbar button.

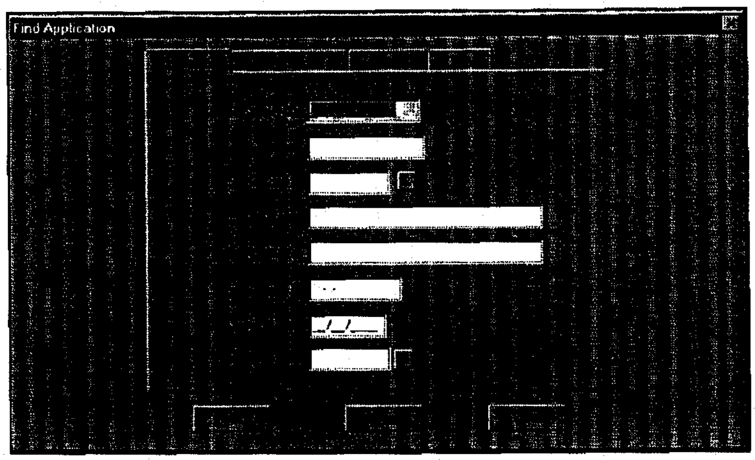
Find

The Find function allows users to search for an existing application using personal, mailing, attorney, or other information. When a search is conducted successfully, the application ID populates the Update Application window.

To open an additional application, perform the following steps:

1. In the I881 Data Entry screen, click the (Find) toolbar button. The Find Application screen appears (Exhibit 9–53, Find Application).

Exhibit 9–53: Find Application



1. Click on the applicable tab: Personal, Mailing Address, Attorney, or Other.
2. Enter search criteria in the appropriate fields.
3. To add search criteria from a second category, repeat steps 1 and 2.
4. Click . The Search Results window displays.
   a) If multiple matches are listed, click on the application to be opened.
   b) Click . The corresponding application ID populates the Update Application ID window (Exhibit 9–52).
1. Click . The corresponding application information displays.

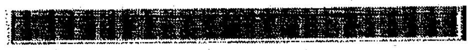
Print Labels

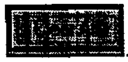
The Print Labels option is used to print human and/or machine-readable labels, including address and application ID labels.

To print labels, perform the following steps:

1. Click on the (Print Labels) toolbar button. A Label Printing window (Exhibit 9–54, Label Printing) appears.

Exhibit 9–54: Label Printing



2. Click in the applicable checkboxes to select or deselect the types of labels to be printed. To clear all checkmarks, click .
3. Enter the number of each type of label to be printed in the appropriate field.
4. Click .
5. To exit the Label Printing window without printing, click .

Print Attorney Label

The Print Attorney Label option allows the user to print an attorney address label.

To print an attorney address label, Click the  (Print Attorney label) toolbar button. A single standard attorney address label prints on the label printer.

Test Printer

The Test Printer option is used to verify that the bar-code printer is working correctly. When this option is selected, a sample label is generated from the printer.

To test the bar-code printer, perform the following steps:

1. Click the  (Test Printer) toolbar button. A sample label is generated from the bar-code printer.
2. If a label is not generated, verify that the printer is turned on and all connections are secure. Then repeat Step 1. If a label is still not generated, call an SA.

This page is intentionally left blank.

Please throw away this page after printing. It is merely used for pagination.

REPORTING

The Reporting module is used to generate and print reports related to CLAIMS 4.0. A report query can be initiated to generate reports based on selected criteria. Reports can be requested according to functional areas available to the current user. Each area contains several types of reports, each with unique query criteria selection fields. To enter the Reporting module, click the Reporting button (Exhibit 10–1, Reporting Button) in the CLAIMS 4.0 Main Menu screen.

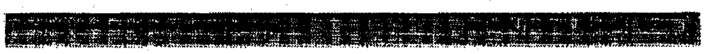
Exhibit 10–1: Reporting Button

Initiating a Report Query

Before a report can be generated in CLAIMS 4.0, you need to initiate a report query in the CLAIMS Reports screen (Exhibit 10–2, CLAIMS Reports). The report query allows you to define the criteria used to generate the report. To initiate a report query, perform the following steps:

Click the (Main Menu) toolbar button to access the CLAIMS Reports main screen (Exhibit 10–2).

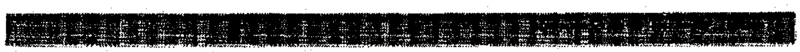
Exhibit 10–2: CLAIMS Reports



Click on the appropriate folder in the Functional Area section.

Double click on the desired report from the list of available report types in the Reports section. The CLAIMS Tracking Report Query Builder screen (Exhibit 10–3, CLAIMS Tracking Report Query Builder) for that report type appears.

Exhibit 10–3: CLAIMS Tracking Report Query Builder



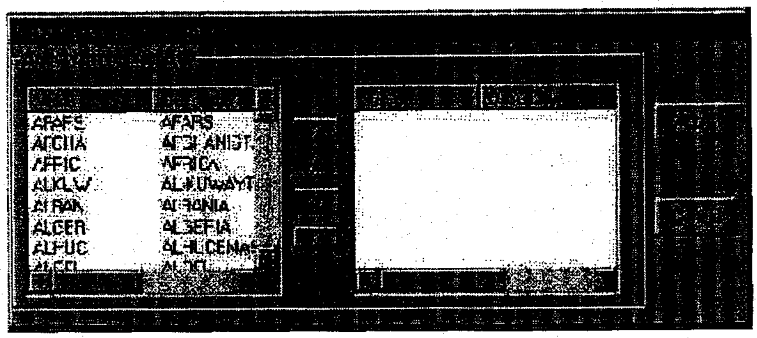
In the INS Location section, click to select a description, location code, or service center location.

Click in the appropriate field to select criteria to define the report query.

To create new search criteria, perform the following steps:

Click . The Select Your Search Options screen (Exhibit 10–4, Select Your Search Options) appears.

Exhibit 10–4: Select Your Search Options



In the Select Your Search Options window, click on the desired selection.

Click to add the selection. Click to add all of the items in the selection list.

Click .

To select the sort order, perform the following steps:

To select the order of the sort, use the scroll bars on the Available Sorts list boxes.

To add a sort criterion, click on the desired selection.

Click to add the selection. Click to add all of the items in the selection list.

To save a report query script, perform the following steps:

Select Save Query from the File menu.

Enter a name to identify the report query.

Click . When the confirmation box appears, click .

(Follow the procedures in Section 10.2, Report Functions, to generate reports based on the query criteria you have defined.)

Report Functions

After initiating a report query, report functions (Exhibit 10–5, Report Function Options) can be accessed through the Report Query Builder window.

Exhibit 10–5: Report Function Options

Title	Icon	Description
Count		Used to display the current number of records matching the selected query criteria
View		Used to preview a report matching the selected query criteria
Printer		Used to print a report matching the selected query criteria
Batch		Used to create daily, weekly, or monthly batch reports based on the selected query criteria
Save		Used to save the current selection criteria query (where available)
Delete		Used to delete a query script (where available)
Return		Used to exit the Reporting Query screen

To use the Report functions, perform the following steps:

Initiate a report query using the procedure described in Section 10.2.1, Using the Report Viewer Screen.

Click on the toolbar button that corresponds with the function you want to perform.

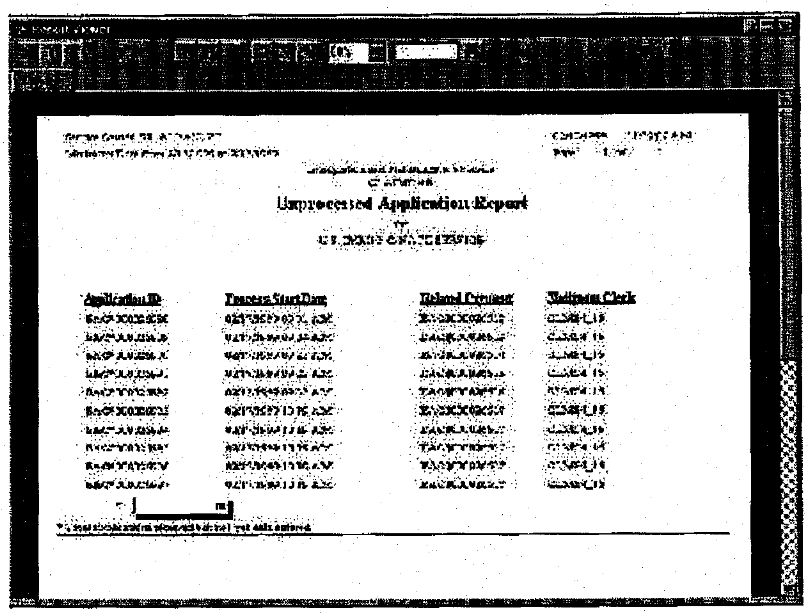
Using the Report Viewer Screen

Perform the following steps to use the Report Viewer screen:

Click to access the Report Viewer screen (Exhibit 10–6, Report Viewer). The toolbar buttons located along the top of the Report Viewer screen can be used to perform the following actions:

- Print —Prints the displayed report
- Printer Setup —Creates printer defaults
- Export —Exports the displayed report to a disk file or e-mail
- Find —Searches for specific text within the displayed report

Exhibit 10–6: Report Viewer



If the report is a multiple page report, click the following buttons:

- to view the first page
- to view the previous page
- to view the next page

to view the last page

- or in the scroll bar to scroll through the report

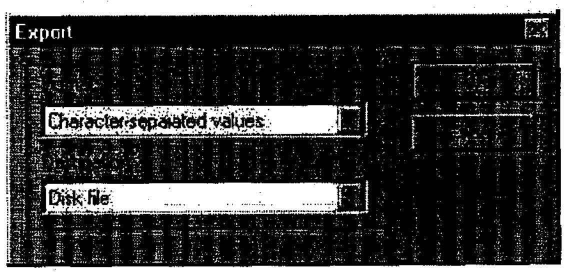
To adjust the size of the report on the screen, click in the toolbar and select a size.

To search for specific text in the displayed report, enter the text in the field to the left of the (Find) toolbar button. Then click . The first occurrence in the report of the selected text is displayed. (Each click of causes the screen to advance to the next occurrence of the selected text.)

To export a report, perform the following steps:

Click the (Export) toolbar button. The Export window appears (Exhibit 10–7, Export).

Exhibit 10–7: Export



Click to select an export format.

Click to select a destination. (To save the report as a file and import it into another program, select the Disk File destination.)

Click .

If necessary, enter the characters that will be used to separate the records and/or specify whether or not the date and number field formatting should remain the same.

Select a folder in which to save the file and give the file a descriptive name.

Click . A status message showing the export progress appears. When export is completed, the Report Screen Viewer appears.

To exit the Report Viewer, click the control button in the upper left corner of the screen.

To exit the Reporting Query screen, click the (Return) toolbar button.

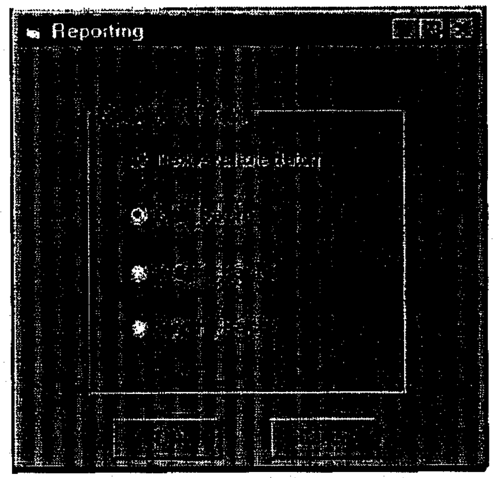
To exit the Reporting module, select Exit from the File menu, or click the control button in the upper right corner of the screen.

Using the Batch Option

The Batch option allows you to create daily, weekly, or monthly batch reports based on selected query criteria. Rather than printing reports manually each day, you can have scheduled reports printed in your local ADP rooms during off-hours. To use the Batch option, perform the following steps:

From the CLAIMS Tracking Report Query Builder screen (Exhibit 10–3), click the (Batch) toolbar button. The Reporting screen (Exhibit 10–8, Reporting) is displayed:

Exhibit 10–8: Reporting



Click on a radio button to indicate how often the batch should be run.

Click .

NOTICES

The Notices module is used to print or reprint notices created to inform applicants of scheduled appointments and the status of their applications. This module allows users to view a list of notices that are waiting to be created, to search for a notice by application ID, and to view a list of previously printed notices for an individual application. Users can also view the status of print jobs, reset print jobs, and configure printers using this module.

To enter the Notices module, click the Notices button (Exhibit 11–1, Notices Button) in the CLAIMS 4.0 Main Menu screen.

Exhibit 11–1: Notices Button

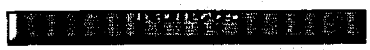
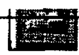


Exhibit 11–2, Notices Module Options, lists the available options in the Notices module.

Exhibit 11–2: Notices Module Options

Title	Icon	Description
Notices Awaiting Creation		Used to view a list of notices that are waiting to be created
Batch Print Server		Used to print and reprint notices, configure printers, and perform database maintenance
Current Print Job Status		Used to view the status of print jobs. Displays the status of both print jobs that have been completed and jobs that are currently being printed
View Notice History		Used to view a list of previously printed notices for an individual application

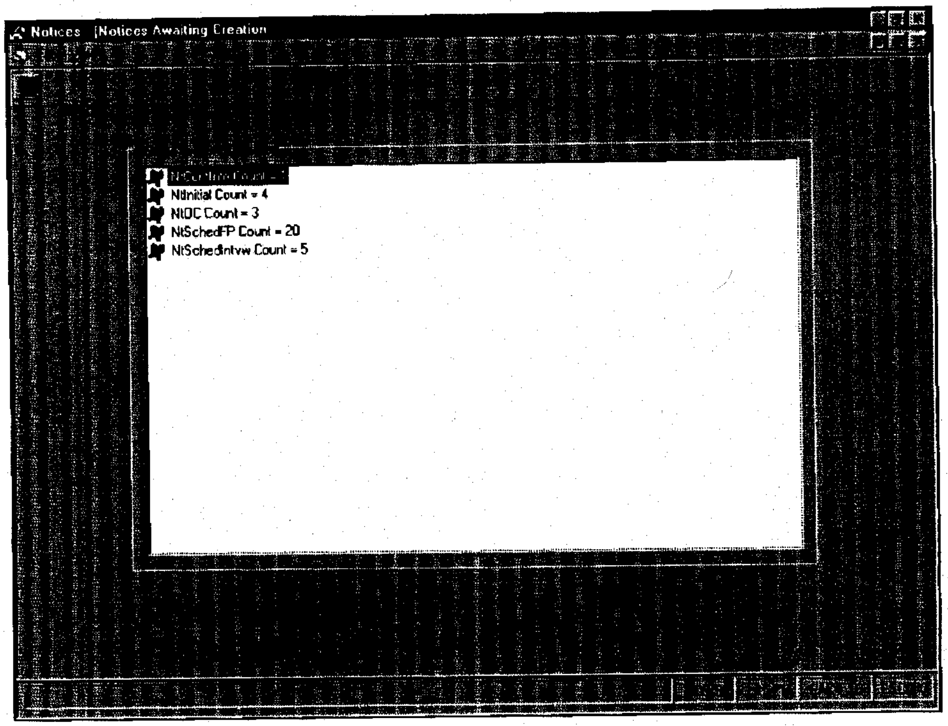
Notices Awaiting Creation

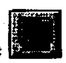
The Notices Awaiting Creation option is used to view a list of notices that are waiting to be created. The total number for each notice type also displays.

To view a list of notices, perform the following steps:

Click the  (Notices Awaiting Creation) toolbar button or select Notices Awaiting Creation from the File menu to access the Notices Awaiting Creation screen (Exhibit 11–3, Notices Awaiting Creation).

Exhibit 11–3: Notices Awaiting Creation



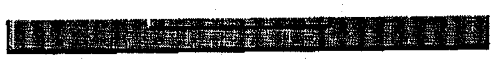
To refresh the list, click the  (Refresh) toolbar button.

To return to the Notices Main Menu screen, select the Exit option in the File menu.

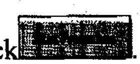
To create batch notices, perform the following steps:

Double click on STARTC4BATCH.EXE (file location: C:\PROGRAM FILES\CLAIMS4 SERVER). The Priority Sets for NT Server window (Exhibit 11–4, Priority Sets for NT Server) appears.

Exhibit 11–4: Priority Sets for NT Server



Click on the Start Notice Batch Create radio button.

Click . (For further printing instructions, refer to Section 11.2, Batch Print Server.)