Batch Print Server

The Batch Print Server option is used to select and view all printed and non-printed batch notices, and to configure batch printers for printing the notices. This option allows the System Administrator to perform record maintenance on the request queue and error tables. Users can also search for a specific notice by application ID using this option. Additional information concerning the set up of printers and batch notice modules can be found in the CLAIMS 4.0 Operations and Administration Guide.

The following options are available from the Batch Print Server screen (Exhibit 11–5, Batch Print Server):

- Print Notice
- Reprint Notice
- Find Notice
- Database Maintenance
- Configure Printers

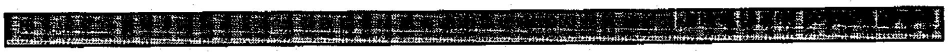
Print Notice

After the batch has been created, the Print Notice option is used to request a print job for a new notice. Either all notices in the print queue or only those of a particular notice type can be printed.

To print new notices, perform the following steps:

Click the  (Batch Print Server) toolbar button or select Batch Print Server from the File menu to access the Batch Print Server screen (Exhibit 11–5).

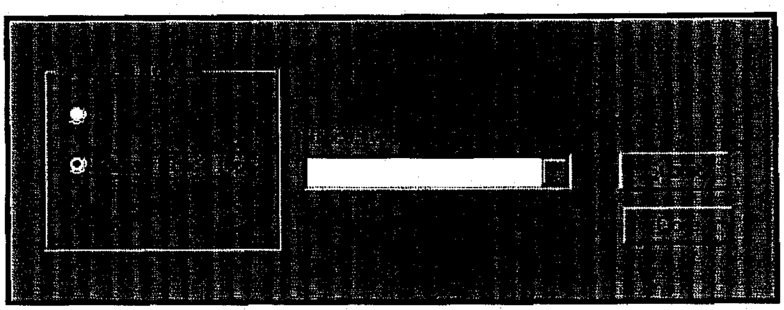
Exhibit 11–5: Batch Print Server



In the New Notices Queue section, click on a notice type in the list.

Click the (Print Notices) toolbar button. The Print New Notices window (Exhibit 11–6, Print New Notices)appears.

Exhibit 11–6: Print New Notices



Click on the applicable radio button in the Print New Notices box, as follows:

- **All**—To select all new notices in the New Notices Queue list.
- **Partial - Notice Type**—To select the notice type to be printed. In the Notice Type field, click the to select the notice type.

Click to request the notices for printing. When the Available Printers window appears, select one or more printers.

Reprint Notice

The Reprint Notice option is used to request a reprint of previously printed notices. Reprints are requested by job ID. This option also allows the reprint of either an entire print job or a partial one. A partial reprint can be specified by ZIP code range, application ID, or job notice type.

To reprint previously printed notices, perform the following steps:

In the Previously Printed Jobs section of the Batch Print Server screen (Exhibit 11–5), select a print job.

Click the (Reprint Notice) toolbar button. The Reprint Notice window (Exhibit 11–7, Reprint Notices) appears.

Exhibit 11–7: Reprint Notices

To reprint all notices in a specified print job, perform the following steps:

Click the radio button.

Click the m in the Job ID field to select the job to be reprinted.

Click to submit the job for printing. When the Available Printers window appears, select one or more printers.

To reprint a partial print job, perform the following steps:

Click the radio button.

Click the m in the Job ID field to select the job to be reprinted.

Click on the appropriate radio button to select the range of notices to be reprinted:

- If is selected, enter the starting and ending ZIP codes.
- If is selected, click the to select the application ID and the notice type.
- If is selected, click the to select the notice type.

Click to submit the job for printing. When the Available Printers window appears, select one or more printers.

Click to return to the Batch Print Server screen.

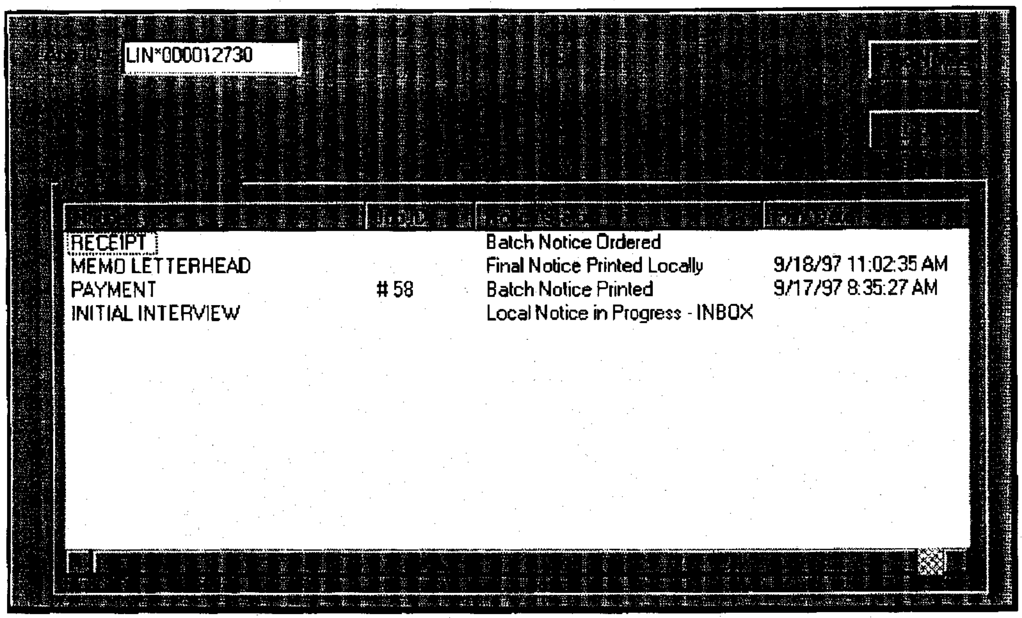
Find Notice

This function is used to quickly locate a notice that is in the Notices to be Printed queue, without having to scroll through the entire list. This minimizes the time needed to determine whether a notice has printed. The Find Notice screen displays the status of both local and batch notices for an application ID.

To locate a notice, perform the following steps:

From the Batch Print Server screen, click the (Find Notice) toolbar button to access the Find Notice screen (Exhibit 11–8, Find Notice).

Exhibit 11–8: Find Notice



Enter the application ID assigned to the notice you want to find.

Click . All notices for that application ID appear in the Notices in Print Queue list box. The status of the notice and print date, if applicable, also appears. If a particular notice was printed in a batch print request, the job ID appears.

Click to exit the Find Notice function.

Database Maintenance

The Database Maintenance option is used to delete error records from the Error Log table or print request status records from the Request table. If an error occurs and print requests are in an intermediate print status, the Reset Oracle option can be used to reset the Notice Records to requested status.

To delete records, perform the following steps:

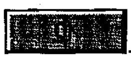
From the Batch Print Server screen, click the  (Database Maintenance) toolbar button to access the Maintenance dialog box (Exhibit 11–9, Maintenance).

Click on the Maintain Screens tab.

Exhibit 11–9: Maintenance

Click the  and/or the  check box to select the type of records to be deleted.

Enter the minimum number of days after which the old records should be deleted.

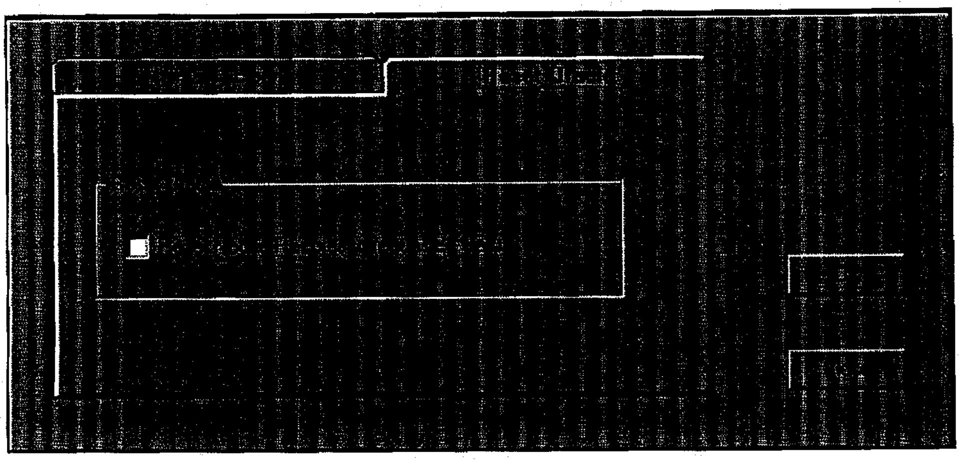
Click . When the confirmation window appears, click  to continue the delete request and return to the Batch Print Server screen.

To reset notices to requested status, perform the following steps:

Click the  (Database Maintenance) toolbar button to access the Maintenance dialog box (Exhibit 11–9).

Click on the Reset Oracle tab (Exhibit 11–10).

Exhibit 11–10: Reset Oracle



Click the check box.

Click to process the requests. When the confirmation window appears, click to continue the reset request and return to the Batch Print Server screen.

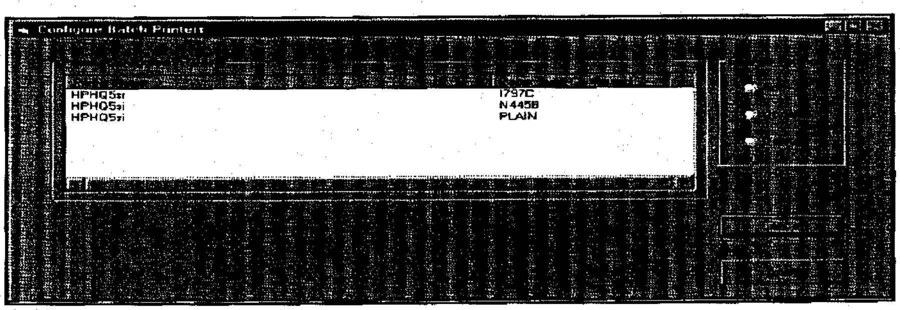
Configure Printers

The Configure Printers option is used to add, update, or delete printer references and paper type selections in the Oracle configuration table. These procedures are directly related to setting up paper types on the printer.

To configure a printer, perform the following steps:

From the Batch Print Server screen, click the (Configure Printer) toolbar button to access the Configure Batch Printers window (Exhibit 11–11, Configure Batch Printers).

Exhibit 11–11: Configure Batch Printers



To add a printer to the table, perform the following steps:

Click the radio button in the Change Settings box. The Selections Available section displays at the bottom of the Configure Batch Printers screen.

Click the in the Server Printers field to select a printer.

Click the in the Paper Types field to select a paper type.

Click to save the changes.

To update paper type settings, perform the following steps:

Click on a printer in the Printers Configured in Oracle list box.

Click the radio button in the Change Settings box. A "Selections Available" section appears at the bottom of the Configure Batch Printers screen.

Click the in the Paper Types field to select a paper type.

Click to save the changes. The Configure Batch Printers screen is refreshed and the changes appear.

To delete a printer from the table, perform the following steps:

Click on a printer in the Printers Configured in Oracle list box.

Click the radio button in the Change Settings box.

Click to save the changes. The Configure Batch Printers screen is refreshed and the changes appear.

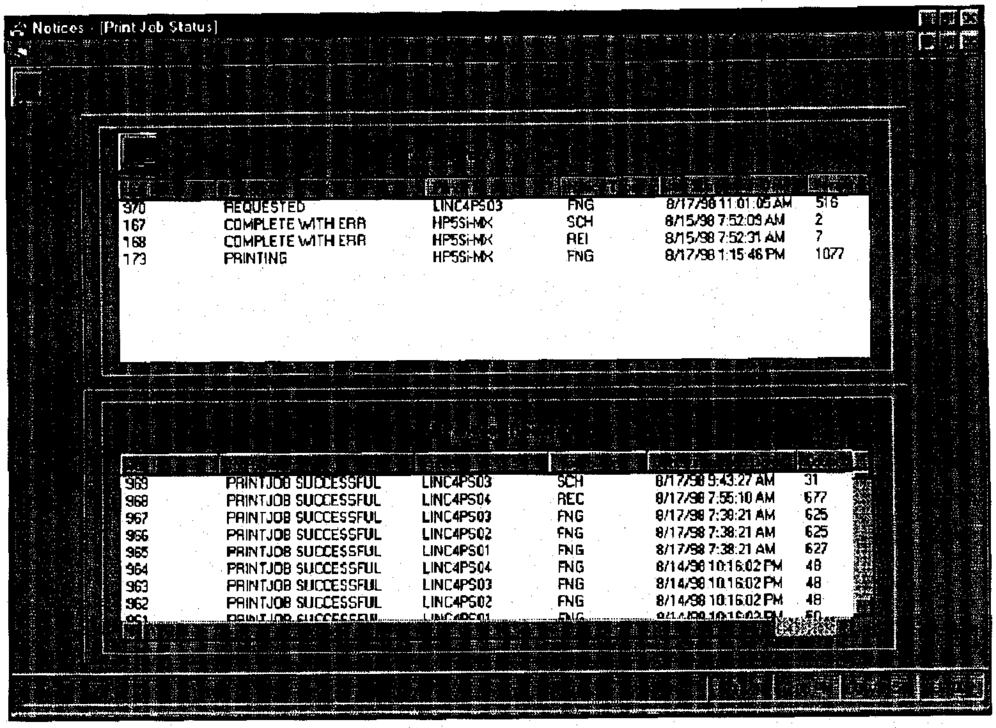
Current Print Job Status

The Current Print Job Status option provides monitoring ability for the current print job and allows the user to reset a current print job that was completed with errors.

To view the current print job status, perform the following steps:

From the Notices Main Menu screen, click the (Current Print Job Status) toolbar button. A list of current print job requests and a list of all print job requests appears in the Print Job Status screen (Exhibit 11–12, Print Job Status).

Exhibit 11–12: Print Job Status



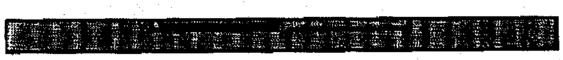
To refresh the current list only, click the (Refresh) button located in the Current Print Job Requests section.

To refresh both the current and completed lists, click the (Refresh) button located in the toolbar.

To reset a print job (completed with errors), perform the following steps:

Double click on the print job in the Current Print Job Request section with a status of "COMPLETE WITH ERRORS." A prompt (Exhibit 11–13, Prompt) appears.

Exhibit 11–13: Prompt



Click to continue. The print job is sent to a printer that is not currently in use. When the job is complete, the status appears in the All Print Job Requests section.

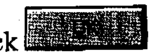
If the printer has a pending job, a prompt (Exhibit 11–14, Prompt) appears. Click  and repeat Steps 1 and 2 when the printer becomes available.

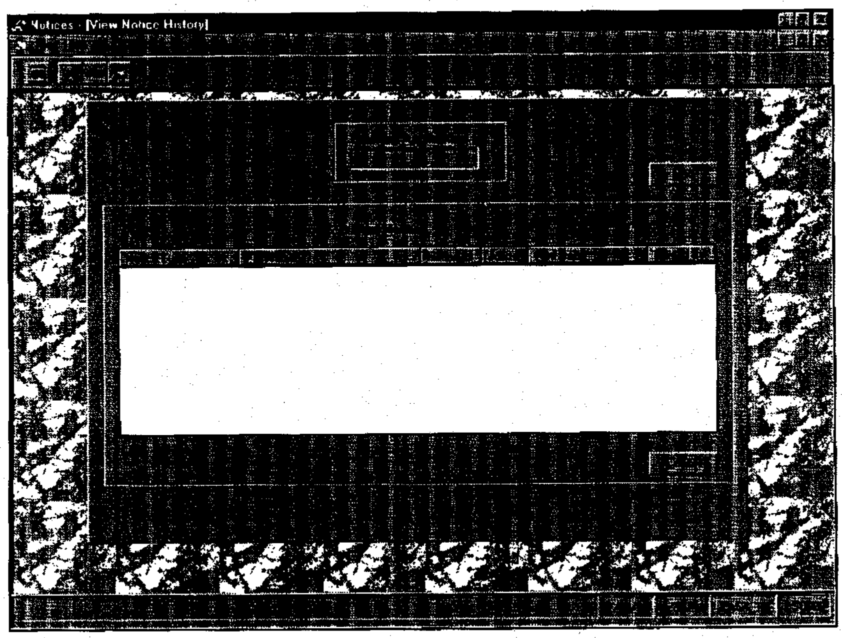
Exhibit 11–14: Prompt

View Notice History

The View Notice History option is used to view a list of previously printed notices for an individual applicant. To view or reprint notices that have already been printed, perform the following steps:

Click the  (View Notice History) toolbar button or select View Notice History from the File menu to access the View Notice History screen (Exhibit 11–15, View Notice History).

Exhibit 11–15: View Notice History



Enter the application ID assigned to the notices you want to view.

Click . A list of all previously printed notices for that ID appears in the Printed Notices section.

To return to the Notices Main Menu screen, click .

CASE MANAGEMENT

The Case Management module is used to resolve data discrepancies between CLAIMS 4.0 and CIS, to update case and address information, and to add FBI fingerprint information for an individual case or a group of cases. To enter the Case Management module, click the Case Management button (Exhibit 12–1, Case Management Button) in the CLAIMS 4.0 Main Menu screen.

Exhibit 12–1: Case Management Button

Exhibit 12–2, Case Management Module Options, lists the options available in the Case Management module.

Exhibit 12–2: Case Management Module Options

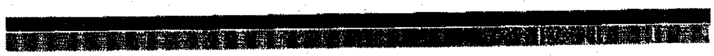
Title	Icon	Description
Claims Resolution		Used to add missing information to CLAIMS 4.0 and/or resolve mismatched data between CLAIMS 4.0 and CIS
Batch Status Update		Used to update case information for an individual case or a group of cases
Change of Address Request		Used to update address information for an individual case
FBI Fingerprint Result		Used to add FBI fingerprint information for an individual case

CLAIMS Resolution

The CLAIMS Resolution function allows you to resolve data discrepancies between CIS and CLAIMS 4.0 and/or enter missing required data. To open an application, perform the following steps:

From the Case Management screen, click the (CLAIMS Resolution) toolbar button. The CLAIMS Resolution main menu appears (Exhibit 12–3, View Activity Queue).

Exhibit 12–3: View Activity Queue



Click the appropriate radio button to indicate the correct form:

- to access the N400 - Application for Naturalization
- to access the I881 - Application for Suspension of Deportation

Select an Activity from the menu.

Enter the application ID number and press R. The CLAIMS/CIS A-Number Resolution screen (Exhibit 12–4, CLAIMS/CIS A-Number Resolution) appears. To select an application from a list, perform the following steps:

Click an activity in the Activity box.

- **CIS/Data Attended Search Processing**—Conduct initial resolution process.
- **Information Received**—Complete the resolution process based on information provided by the applicant.

Verify the code in the Office field. To view a list of cases in an office other than the one displayed, enter the code, or click to select from a list of office codes. To view a list for all offices, delete the office code in the Office field.

Click . A list of cases that are ready for the activity selected appears in the box on the right side of the screen.

Double click an application ID in the list.

The CLAIMS/CIS A-Number Resolution screen is displayed (Exhibit 12–4).

Exhibit 12–4: CLAIMS/CIS A-Number Resolution

[redacted]

To resolve missing information, perform the following steps:

A missing or invalid information field is indicated with red labels. An error box will also appear at the bottom of the screen. Tab to those fields, and enter the missing or valid information.

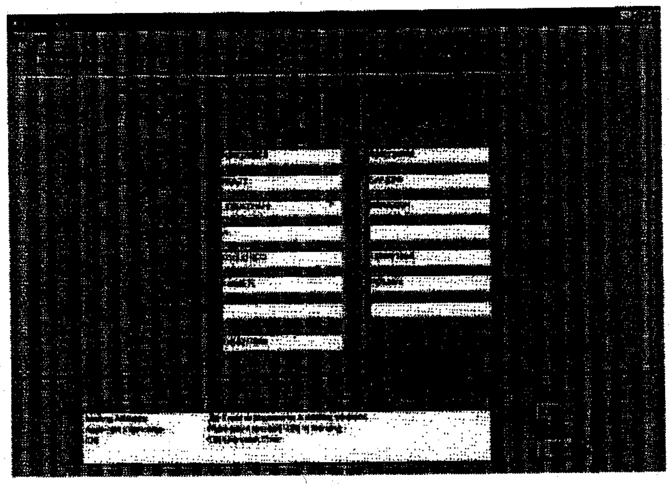
Click the Save button after you have made all the necessary corrections.

Note: If the information needed to resolve the case is unavailable the first time, a notice to the applicant is generated (unless the mailing address for the applicant has errors.) The system allows two attempts to resolve missing information.

To resolve mismatched information, perform the following steps:

Click on the CIS tab to access the CLAIMS/CIS Data Field Comparison screen (Exhibit 12–5, CLAIMS/CIS Data Field Comparison). Mismatched information appears in fields with red labels.

Exhibit 12–5: CLAIMS/CIS Data Field Comparison



Compare and verify information in the fields displayed with red labels.

If necessary, go to the corresponding field on the Applicant Information tab to change the mismatched information.

Click the Save button to save the case after you have made all the necessary corrections.

To exit the application and return to the Case Management main menu select Close from the File menu.

Status Update

The Batch Status Update module is used to update information for an individual case or a group of cases. The following options are available in Batch Status Update:

- **Batch Update**—Used to indicate that information or documents have been received, or that an action has occurred for one or more cases
- **Close Out Case**—Used to record that one or more applicants have been naturalized and their cases closed out
- **No-Show**—Used to indicate that one or more applicants did not show up for an OC or an interview and did not request that the appointment be canceled
- **Certificate Withheld**—Used to record certificates that were printed but not issued to applicants

Batch Update

The Batch Update option is used to indicate that information, such as evidence, has been received or that an action has occurred for a case. To update case information, perform the following steps:

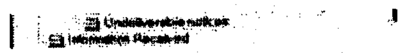
From the Case Management screen, click the (Batch Status Update) toolbar button to access the Batch Status Update screen (Exhibit 12–6, Batch Status Update).

Exhibit 12–6: Batch Status Update

[redacted]

Click on the Batch Update tab (Exhibit 12–6). A directory structure appears (Exhibit 12–7, Directory Structure) on the left side of the screen.

Exhibit 12–7: Directory Structure



Click the folder that contains the information/action to be updated.

Note: A ⊞ to the left of a folder indicates additional options are available. Continue to click a folder until the desired option is located.

Click the appropriate option. The option appears in the Option Selected field.

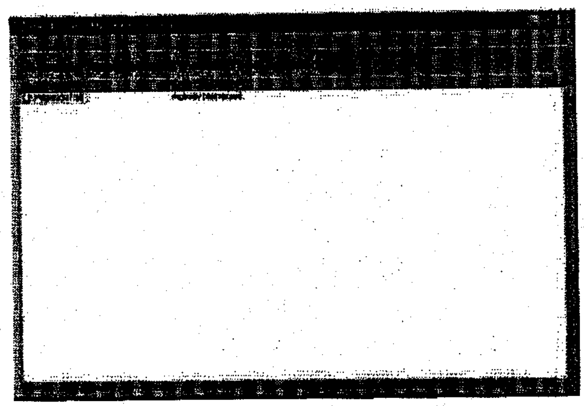
Enter the application ID of the case to be updated, and press R. The application ID number appears in the Application ID list.
or
In the A-Number field, enter the A-Number of the case to be updated, and press R. A list of cases matching the A-Number appears in an Application Information field at the bottom of the screen. Click on the correct application ID to add it to the Application ID list.

To update multiple cases simultaneously, repeat Step 5 until all cases to be updated have been entered.

Click to update the cases. Check the status bar for the following messages: "Begin Update" and "Update Complete." If errors occur during processing, a list of application IDs that did not update successfully and a description of the errors appears in the Batch Status Update Error Log window after processing has been completed.

Note: The Batch Status Update Error Log window (Exhibit 12–8, Batch Status Update Error Log) should appear automatically when errors occur. To access the Error Log manually, select Error Log from the File menu. If the Error Log option is grayed out, no processing errors have occurred.

Exhibit 12–8: Batch Status Update Error Log



To exit, click the control button, or select Exit from the File menu.

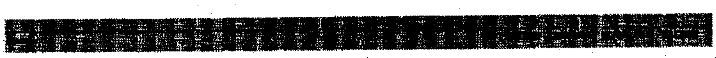
Close Out Case

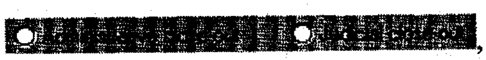
The Close Out Case option is used to record that one or more applicants have been naturalized and their cases closed out. An Administrative or Judicial close Out can be performed using the Close Out Case option. To close out a cases, perform the following steps:

From the Case Management screen, click the (Batch Status Update) toolbar button.

Click on the Close Out Case tab (Exhibit 12–9, Close Out Case).

Exhibit 12–9: Close Out Case



Click the appropriate radio button, , to indicate the type of closure.

Tab to the Naturalization Date field, and enter the date of naturalization (MM/DD/YYYY).

Do one of the following to indicate which applications are to be closed:

- Tab over to the Ceremony Date/Location section, and enter the date and location of a ceremony. Press R. A list of sublocations appears in the Location Information section. Click the sublocation. A list of application IDs for the selected ceremony will appear in the Application ID section.
- Enter the application ID to be closed out, and press R. The application ID to be processed appears in the list. To close out multiple cases, repeat until all application IDs to be closed out have been entered.

- In the A-Number field, enter the A-Number of the case to be updated, and press R. A list of cases matching the A-Number appears in the Application Information field. Click on the correct application ID to add it to the Application ID list. To close out multiple cases, repeat until all application IDs to be closed out have been entered.

Click to close the cases, or click Clear List to clear the list.

To exit, click the control button, or select Exit from the file menu.

No-Show

The No-Show option is used to indicate that one or more applicants did not appear for an interview or an OC and did not cancel the appointment. To indicate a no-show, perform the following steps:

From the Case Management screen, click the (Batch Status Update) toolbar button.

Click on the No-Show tab (Exhibit 12–10, No-Show).

Exhibit 12–10: No-Show

Click the appropriate radio button, , to indicate the type of no-show.

Enter the application ID of the case that is to be indicated as a no-show, and press R. The application ID number appears in the Application ID list.

In the A-Number field, enter the A-Number of the case to be updated, and press R. A list of cases matching the A-Number appears in the Application Information field. Click on the correct application ID to add it to the Application ID list.

To update multiple cases simultaneously, repeat Step 4 until all cases to be closed out have been entered.

Click to process or Clear List to clear the list.

To exit, click the control button, or select Exit from the File menu.

Certificate Withheld

The Certificate Withheld option is used to record certificates that were printed but not issued to applicants. To record that an applicant's certificate was withheld, perform the following steps:

From the Case Management screen, click the (Batch Status Update) toolbar button.

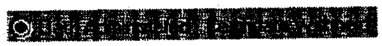
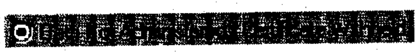
Click on the Certificate Withheld tab (Exhibit 12–11, Certificate Withheld).

Exhibit 12–11: Certificate Withheld

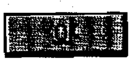
Do one of the following:

- Enter the application ID of the case for which the certificate is to be withheld, and press R. The application ID number appears in the list.
- In the Enter A-Number field, enter the A-Number of the case for which the certificate is to be withheld, and press R. A list of cases matching the A-Number appears in the Application Information field. Click on the correct application ID to add it to the Application ID list.
- In the Enter Certificate Number field, enter the number of the certificate that is to be withheld. The case matching the certificate number is listed in the Application Information field. Click on the application ID to add it to the Application ID list.

Click on the appropriate radio button in the Oath Ceremony Status section:

-  to indicate that the oath was administered
-  to indicate that the oath was not administered

To update multiple cases simultaneously, repeat Step 2 until all cases for which certificates were withheld have been entered.

Click  to process, or click Clear List to clear the list.

To exit, click the  control button, or select Exit from the File menu.

Change of Address Request

The Change of Address Request function allows you to update an applicant's mailing and/or residential address. To update an address, perform the following steps:

From the Case Management screen, click the [redacted] (Change of Address Request) toolbar button. The Change of Address window (Exhibit 12–12, Change of Address) appears.

Exhibit 12–12: Change of Address

[redacted]

Enter the Application ID and click Apply. The Address Change Petition screen (Exhibit 12–13, Address Change Petition) appears.

Exhibit 12–13: Address Change Petition

[redacted]

Click the appropriate radio button to indicate the type of address change:

- [redacted] to change the residential address only (the Resident Address section appears)
- [redacted] to change the mailing address only (the Mailing Address section appears)
- [redacted] to change both the residential and mailing addresses (changes can be entered in either address section and both addresses are updated)

To clear all fields, click [redacted].

Click in the appropriate fields and enter the correct information.

To enter changes on both fields, click the Copy button.

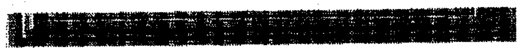
Click [redacted].

FBI Fingerprint Result

The FBI Fingerprint Result function allows you to enter FBI fingerprint response codes and dates for an applicant. These results can also be entered into CLAIMS 4.0 automatically through the FD-258 EE interface or by an adjudicator using the Adjudications module. CLAIMS 4.0 maintains a history of responses, which appears in the FBI Fingerprint Card Result History window of the FBI Result—Adding New screen. To add FBI Fingerprint Result information, perform the following steps:

From the Case Management screen, click the (FBI Fingerprint Result) toolbar button. The FBI Fingerprint Result window (Exhibit 12–14, FBI Fingerprint Result) appears.

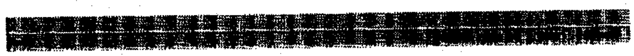
Exhibit 12–14: FBI Fingerprint Result



Enter the application ID.

Click Apply. The FBI Result—Adding New screen (Exhibit 12–15, FBI Result—Adding New) appears. A list of previously entered responses appears in the FBI Fingerprint Card Result History window. When a list item is selected, any reason for that item's modification entered in the Adjudications module appears in the Reason for Modification field.

Exhibit 12–15: FBI Result—Adding New



Enter the following information:

In the Response Code field, enter the response code received from the FBI or click to select the appropriate code from a list.

In the Response Date field, enter the date of the response or click to select the date from a calendar.

Enter the Adjudicator's user ID.

Click to add the information. The information is displayed in the FBI Fingerprint Card Result History window.

To modify information before saving, perform the following steps:

In the FBI Fingerprint Card Result History window, click on the information to be modified.

Make necessary changes in the appropriate fields.

Click .

Note: Information can only be modified before it is saved. After information is saved, it cannot be edited.

To close the FBI Result—Adding New screen and save changes, click .

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

CASE STATUS

The Case Status module is used to access the status and history of a case and can be used to search the system to find an application ID using some other search key. A database search must be conducted to retrieve this information. Searches can be based on the applicant's personal information, mailing address, attorney, or other information such as certificate number. When a match is found, the case status and history appear. To enter the Case Status module, click the Case Status button (Exhibit 13–1, Case Status Button) in the CLAIMS 4.0 Main Menu screen.

Exhibit 13–1: Case Status Button

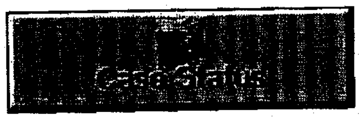


Exhibit 13–2, Case Status Module Options, lists the options available in the Case Status module.

Exhibit 13–2: Case Status Module Options

Title	Icon	Description
New Search		Used to clear the data from a search screen and perform a search on another case
Search		Used to search for information on a case within CLAIMS 4.0

Search

When a case status query is initiated, the system searches the CLAIMS 4.0 database to find a match to the criteria entered. Four categories of search criteria are available. These categories appear as folder tabs on the Case Status Inquiry screen (Exhibit 13–3, Case Status Inquiry):

- **Personal**—Used to search for an application based on the application ID number, A-Number, form number, last name, first name, SSN, DOB, or COB
- **Mailing Address**—Used to search for an application based on the applicant's mailing address
- **Attorney**—Used to search for cases based on the attorney assigned to the case
- **Other**—Used to perform a search based on other available information such as owner location code, port of entry, date range of entry, payment ID, certificate number, or DOB range

Searches can be initiated using criteria entered in just one category or in multiple categories.

Exhibit 13–3: Case Status Inquiry

[redacted]

To initiate a search, perform the following steps:

Click on the applicable tab: Personal, Mailing Address, Attorney, or Other.

Enter search criteria in the appropriate fields.

To add search criteria from a second category, repeat Steps 1 and 2.

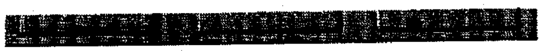
Click [redacted]. One of the following search results occurs:

No Match—The following message appears in a pop-up window: "No Application ID(s) found in Workflow for this search."

Exact Match—The Case Status screen (Exhibit 13–5, Case Status) appears. The Status section shows the most recent activity on the case. The History section shows all activity on the case, with the most recent activity at the top of the list

Multiple Matches—If there are multiple matches, the Case Search window appears (Exhibit 13–4, Case Search). Click on the applicable option to continue the search. If the option to modify the search is selected, repeat Steps 1 through 4. If either option to view records is selected, a Search Results box with a list of records appears at the bottom of the Case Status Inquiry screen. Click on the application ID number of the desired case and click [redacted]. The Case Status screen (Exhibit 13–5) appears.

Exhibit 13–4: Case Search

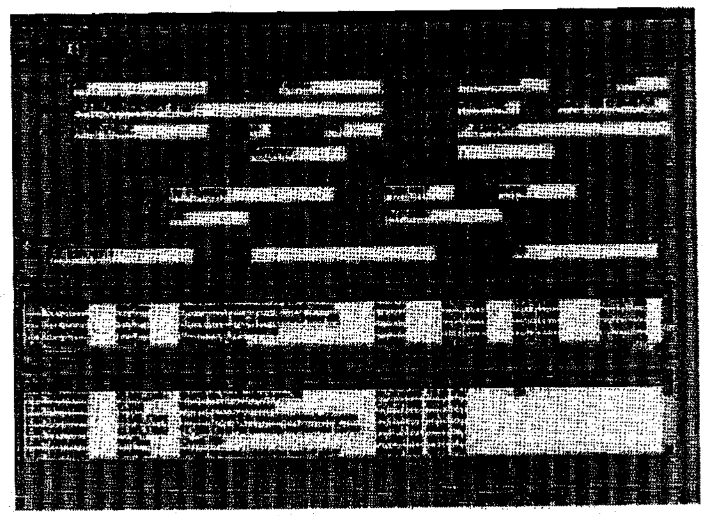


To initiate a new search, perform the following steps:

Click in the Case Status Inquiry screen.

Repeat Steps 1 through 4 above.

Exhibit 13–5: Case Status



To view case information, perform the following steps:

To scroll through the Status or History list, click or in the scroll bar.

To view scheduled appointments, click the (Schedule) toolbar button. If there are scheduled appointments, the location, room number, room section, date, and time appear in the Interview Schedule screen (Exhibit 13–6, Interview Schedule).

Exhibit 13–6: Interview Schedule

[redacted]

To return to the Case Status screen, click [redacted].

To view attorney information, click the (Attorney) toolbar button. If there is attorney information, the Attorney Information screen (Exhibit 13–7, Attorney Information) appears.

Exhibit 13–7: Attorney Information

[redacted]

To return to the Case Status screen, select Close from the File menu.

To view FBI fingerprint and name check results, click the (FBI Result) toolbar button. If fingerprint and/or FBI name check results have been received, the FBI Result screen (Exhibit 13–8, FBI Result) appears.

Exhibit 13–8: FBI Result

[redacted]

To return to the Case Status screen, select Close from the File menu.

To view payment information, click the (Payment Details) toolbar button. If there is payment information, the Pay Details screen (Exhibit 13–9, Pay Details) appears.

Exhibit 13–9: Pay Details

[redacted]

To return to the Case Status screen, select Close from the File menu.

Print Labels/Print Case Status

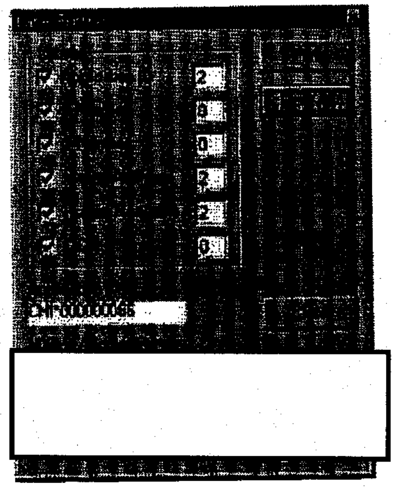
If a copy of the case status information is needed, or if additional labels are required for an application ID, they can be printed from the Case Status module. The types of available labels include the following:

- Application ID
A-Number
T-Number
Mailing address
Human readable
- CIDN

To print a label, perform the following steps:

Click the (Print Labels) toolbar button to access the Label Printing window (Exhibit 13–10, Label Printing).

Exhibit 13–10: Label Printing



(b)(6)

Enter the appropriate application ID in the Application ID field. All the label options are selected by default. To deselect a label option, click on the appropriate check box.

Click in the amount fields to enter the total number of labels desired for each label option.

Click to print the labels.

Click to clear all fields.

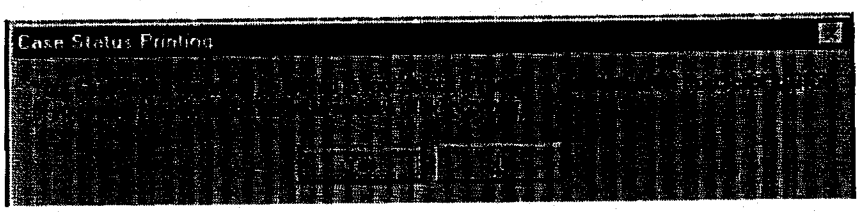
Click to return to the Case Status Inquiry screen.

To print case status information, perform the following steps:

From the Case Status window, click the (Print Case Status) toolbar button.

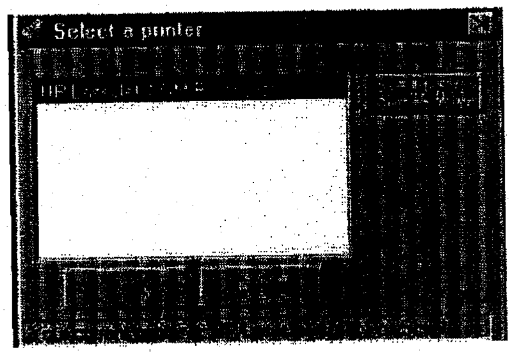
When a prompt appears (Exhibit 13–11, Case Status Printing Prompt), click on the appropriate response.

Exhibit 13–11: Case Status Printing Prompt

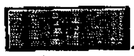


- If you click Yes, the case status information prints to your default printer.
- If you click No, a prompt appears (Exhibit 13–12, Select a Printer Prompt).

Exhibit 13–12: Select a Printer Prompt



Click on a printer in the list, and click .

Click . The case status information prints to the selected printer.

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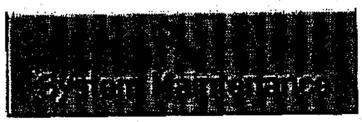
SYSTEM MAINTENANCE

The System Maintenance module is used to update the CLAIMS 4.0 database, set up new locations, and set up all user functions. Most the options within the System Maintenance module are accessed from the menu bar. To access the System Maintenance module, click the System Maintenance button (Exhibit 14–1, System Maintenance Button) in the CLAIMS 4.0 Main Menu screen.

Exhibit 14–1: System Maintenance Button



The following menus are accessible from the System Maintenance menu bar:

- **File**—This menu contains the Exit option, which is used to return to the CLAIMS 4.0 main menu.
- **Profiles**—This menu contains options that are used to set up a location, set up the services offered at that location, and assign user rights.
- **Tables**—This menu contains options that are used to display look-up tables.
- **Status**—This menu contains the workflow option used to view the status of a case at a location, determine the completed elements of the process, and view a workflow diagram of a case.
- **Window**—This menu allows you to arrange the desktop and open windows.
- **Help**—This menu provides access to Online Help and information about this version of CLAIMS 4.0. (Refer to Section 6, CLAIMS 4.0 Online Help, for further instruction.)

Profiles Menu

The Profiles menu is used to define a location and the services to be performed at that location. It is also used to create users, define user permissions, and establish application ID, payment ID, A-Number, and certificate number pools for a location. The following options are available from the Profiles menu:

- Select a Location
Location Profile
Services
Workflow Participant Roles
Report Access Groups
Users
Application ID, Payment ID, A-Number

Certificate Numbers

- Forms

Select a Location

The Select a Location option is the first step to setting up a location profile and the services available at that location. To select a location when the location code is known, perform the following steps:

Select the Select a Location menu option from the Profiles menu. The Location Profiles window (Exhibit 14–2, Location Profiles) appears.

Exhibit 14–2: Location Profiles

Verify the location code. Click to view the location type and description.

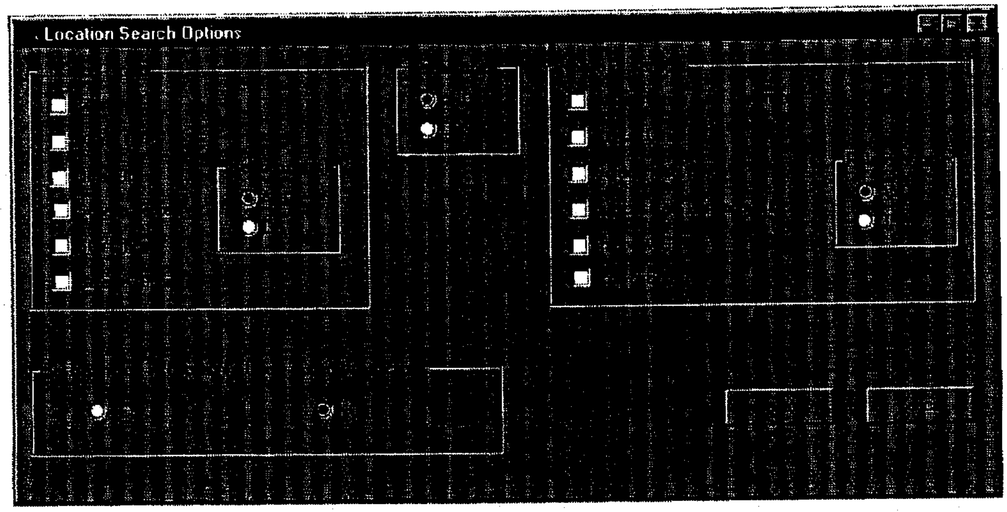
If the location code is correct, click to select the location.

To select a location when the location code is unknown, perform the following steps:

Select the Select a Location menu option from the Profile menu. The Location Profiles window (Exhibit 14–2) appears.

Click in the Location field to perform a search. The Location Search Options window (Exhibit 14–3, Location Search Options) appears.

Exhibit 14–3: Location Search Options

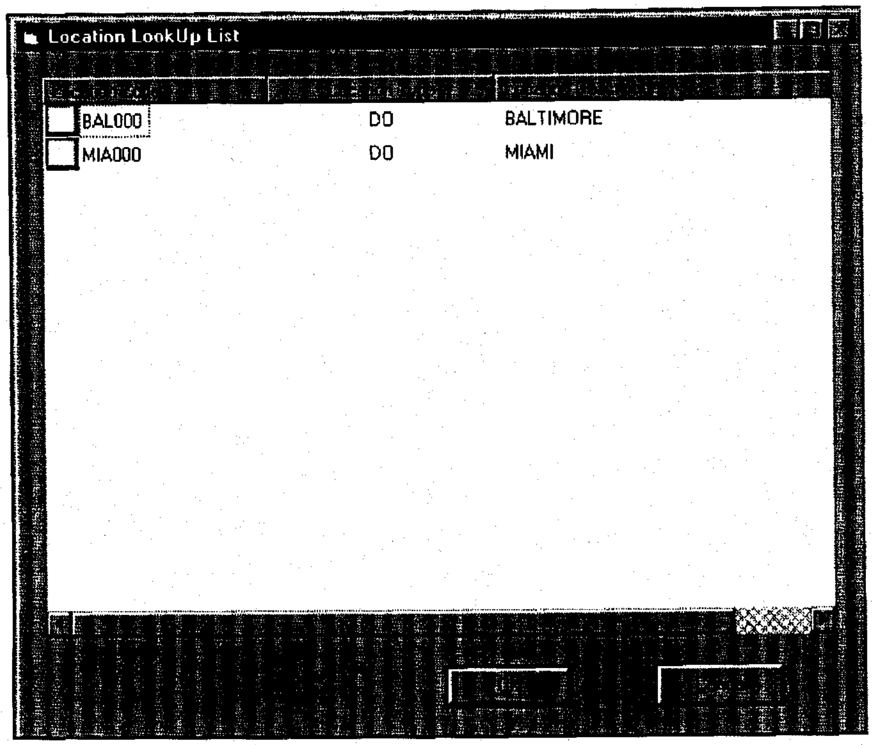


Select one or all of the following to enter the desired search criteria:

- **Location Type**—Click the appropriate check box to select the location type. When selecting more than one location type, click the radio button if the location is both types. Click the radio button if the location type may be one or the other.
- **Nature of Service**—Click the appropriate check box to select the nature of service. When selecting more than one service, click the radio button if the location offers both types. Click the radio button if the location may offer one or the other.
- **Relationship**—If the search is to include criteria selected from both the Location Types and the Nature of Service sections, click the radio button. If the search is to include criteria selected from either the Location Types or the Nature of Service sections, click the radio button.
- **Set Restriction to Locations Under Current Jurisdiction?**—Click to restrict the search to locations under current jurisdiction; otherwise, click .

Click to perform the search. A list of locations that match the search criteria appears in the Location Look-Up List window (Exhibit 14–4, Location Look-Up List).

Exhibit 14–4: Location Look-Up List



To select a location, click on the check box to the left of the location, and click . When the Profile Location window appears, verify the code in the Location Code field, and click .

If the list is empty or does not display the desired location code, click , and perform Steps 1 through 4 again.

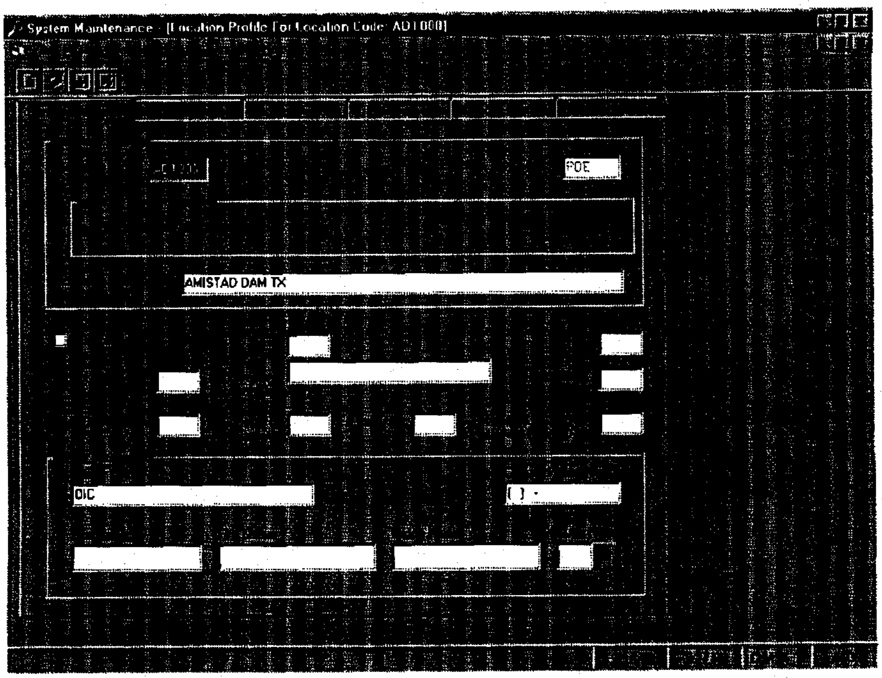
Location Profile

The Location Profile option is used to set up or modify a location's profile. The Location Profile screen is used to enter general information, type of location, location address, jurisdiction information, and branch locations. To set up a location profile, perform the following steps:

Select the location for which the profile is to be set up by following the steps described in Section 14.1.1, Select a Location.

Select the Location Profile menu option from the Profiles menu to access the Location Profile screen (Exhibit 14–5, Location Profile).

Exhibit 14–5: Location Profile



Click on the General Information tab. The location code along with other codes and descriptions that apply to the location appear.

Enter the endorsement account number, operating days and times, fingerprint expiration days, estimated interview notice days, and contact officer title, name and phone number in the appropriate fields. Modify the location codes and descriptions, if necessary.

Click on the Nature of Services tab (Exhibit 14–6, Nature of Services) to view available services.

Exhibit 14–6: Nature of Services

[redacted]

Click in the boxes to indicate the nature of the services provided at the selected location.

Click on the Location Address tab (Exhibit 14–7, Location Address).

Exhibit 14–7: Location Address

[redacted]

Enter or edit the appropriate information.

Click on the Other Information tab (Exhibit 14–8, Other Information).

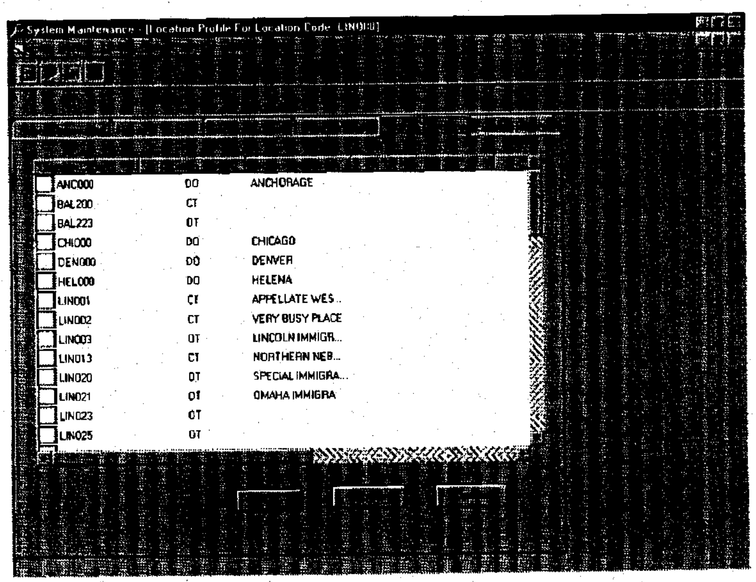
Exhibit 14–8: Other Information

Enter or edit the appropriate information.

To add, update, or browse a branch location, perform the following steps:

Click on the Branch Locations tab (Exhibit 14–9, Branch Locations). This option allows you to add, update, and browse a branch location.

Exhibit 14–9: Branch Locations



To add a new branch location, perform the following steps:

Click .

Select the type of location to be added. Click .

Follow Steps 3 through 10 in the previous section to enter information about the new branch location.

Click on the Function Buttons tab.

Click to save the branch information.

Click to confirm the save, and click .

To update a branch location, perform the following steps:

Click on the box to the left of the branch to be updated.

Click .

Click the tabs to view all current information about the selected branch. Edit the information as necessary (refer to Steps 3 through 10 of the previous section).

Click on the Function Buttons tab.

Click to save the branch information.

Click to save updates.

Click .

Click to return to the Location Profile screen for the primary location.

To browse a branch location, perform the following steps:

Click on the box to the left of the branch to be browsed.

Click .

Click the folder tabs to view all current information about the selected branch.

Click on the Function Buttons tab, and click to return to the Location Profile screen of the primary location.

To delete, save, refresh, or close a location, perform the following steps:

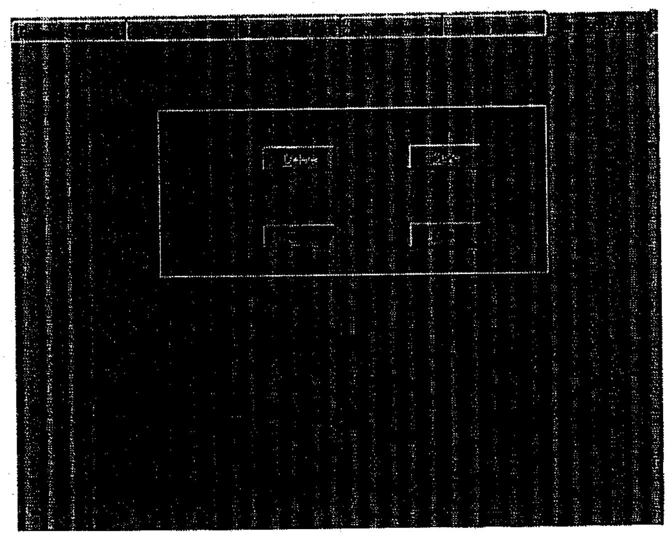
Click on the Branch Locations tab (Exhibit 14–9).

Click on the box to the left of the branch to be selected.

Click .

Click on the Function Buttons tab (Exhibit 14–10, Function Buttons).

Exhibit 14–10: Function Buttons



Click one of the following buttons:

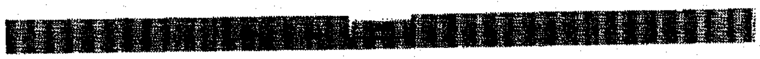
- to delete the location
- to save the location information
- to return the location to its original settings
- to close the Location Profile screen

Services

Before services can be scheduled at a location in the Scheduling module, those services must be defined in System Maintenance. The Services option is used to view and define the service types that the selected location (refer to Section 14.1.1, Select a Location) oversees. Through the Services option, each service is attached to a location referred to as a "service location." When the service option is selected, a list of service locations affiliated with the selected location appears. The following toolbar buttons are available from the List of Services Locations screen (Exhibit 14–11, List of Service Locations):

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record
- **Delete** —Deletes a record

Exhibit 14–11: List of Service Locations



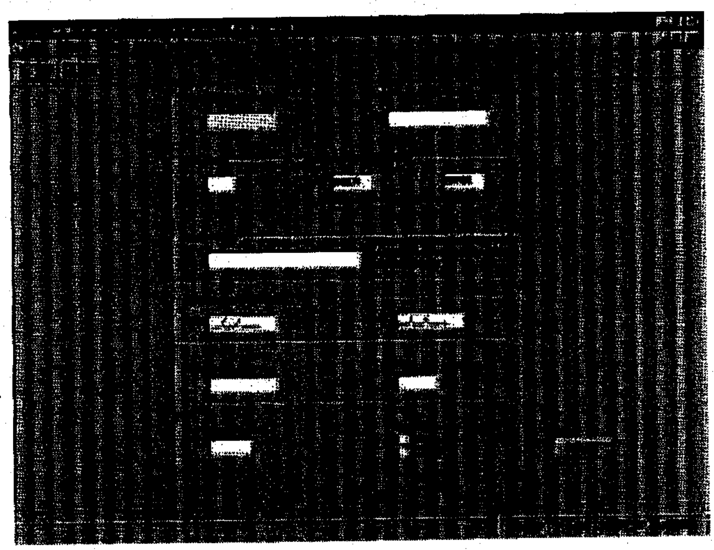
To add a new record, perform the following steps:

Select the location for which the service is to be set up by following the steps described in Section 14.1.1.

Click on the Services option in the Profiles menu to access the List of Service Locations screen (Exhibit 14–11).

Click the (Add New Record) toolbar button to access the Service Location Maintenance screen (Exhibit 14–12, Service Location Maintenance).

Exhibit 14–12: Service Location Maintenance



Enter the appropriate information in the following fields:

- **Default Service Location**—Service location, or click to select from a list of locations.
- **Service Type Code**—Service type code, or click to select from a list of codes.
- **State Code**—State abbreviation; click to select from a list of codes.
- **Zip Code Range From**—Beginning ZIP code for which the service location is responsible; click to perform a search of ZIP codes by county or city.
- **Zip Code Range To**—Ending ZIP code for which the service location is responsible; click to perform a search of ZIP codes by county or city. If this field is left blank, it defaults to the value contained in the ZIP Code Range From field.
- **County Name**—Automatically populated when the ZIP code range is entered; currently, this function does not support cross-county ZIP code ranges. This means that only one county can be included in each ZIP code range. Therefore, a ZIP code range for each county provided a service has to be entered.
- **Start Date Range**—Date (MM/DD/YYYY) the service begins at a location
- **End Date Range**—Date (MM/DD/YYYY) the service ends at a location. If the End Date Range is not provided, the date defaults to 01/01/9999.
- **Temporary Location**—Temporary location
- **Rule Code**—Rule code
- **Site Group Indicator**—Site group indicator code

If an OC is to occur at the service location, click the appropriate box in the Oath Ceremony Type field.

Click the (Save) toolbar button to save.

Click to return to the List of Service Locations window.

Warning: Clicking before clears the information entered and closes the New Record window without saving.

To edit a service location, perform the following steps:

Select the location for which the service is to be edited by following the steps described in Section 14.1.1.

Select the Services option in the Profiles menu to display the List of Service Locations screen (Exhibit 14–11).

From the Service Locations list, select the service location to be changed by clicking in the box to its left.

Click the (Edit) toolbar button to access the Service Location Maintenance window. Current information about the service location appears.

Edit the information.

Click the (Save) toolbar button to save.

To return to the List of Service Locations window, click .

Warning: Clicking before clears the information entered and closes the Edit Record window without saving.

To delete a record, perform the following steps:

Select the location for which the service is to be deleted by following the steps described in Section 14.1.1.

Select the Services option in the Profiles menu to display the List of Service Locations screen (Exhibit 14–11).

Select the service location in the list by clicking in the box to the left of the location.

Click the (Edit) toolbar button to access the Service Location Maintenance window. Current information about the service location appears.

Click the (Delete) toolbar button. A confirmation box appears. Click to delete the service or to cancel the deletion.

To return to the List of Service Locations window, click .

To exit the List of Service Locations window, click .

Workflow Participant Roles

When you are given access to CLAIMS 4.0, your privileges within the system are determined by what participant role you are assigned. The Workflow Participant Roles option is used to define the role you take within an office. For example, a small site may need to provide you with access to all the CLAIMS 4.0 functions. In this case, the site would create a participant role that includes all the possible workflow types. A larger site may have a specific set of roles designated for different classes of users. Such a site would create a workflow participant type for each class of user. The windows for the Workflow Participant Roles option contain the following toolbar buttons:

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record

- **Delete** —Deletes a record

Select the Workflow Participant Roles option in the Profiles menu to access the Participant Type Codes List screen (Exhibit 14–13, Participant Type Codes List). A list of participant type codes and descriptions appears.

Exhibit 14–13: Participant Type Codes List

[redacted]

To add a new record, perform the following steps:

Click the (Add New Record) toolbar button to access the Participant Roles screen (Exhibit 14–14, Participant Roles).

Exhibit 14–14: Participant Roles

[redacted]

Enter the appropriate information in the following fields:

- **Participant Type Code**—Code used to describe the access level
- **Participant Type Description**—Short description of the access level

To assign roles, click in the appropriate boxes to the left of the roles in the Participant Role Code Description section. As roles are selected, the window to the right of the screen displays their corresponding activities.

Note: At least one role must be selected for a participant role record to be created.

To save the record, click the (Save) toolbar button.

When the confirmation window appears, click to add the new record.

When the message box indicating that the record has been added successfully appears, click . The Participant Type Codes List window appears.

To edit a participant role record, perform the following steps:

Click in the box to the left of the code to select the record to be edited (Exhibit 14–13).

Click the (Edit) toolbar button to access the Participant Roles screen (Exhibit 14–13).

Add or delete roles by clicking in the boxes to left of the role.

Note: If all the roles are set to "No," the participant role record that is being edited is deleted.

To save the record, click the (Save) toolbar button.

When the confirmation box appears, click to save the changes.

When the message box indicating that the record has been changed successfully appears, click .

To return to the Participant Type Codes List window, click .

Warning: If you click the Close button before you click the Save button, it will clear the information entered. The information in the Edit Record window will not be saved.

To delete a participant role record, perform the following steps (**Note:** If current users are assigned to the participant role selected, deletion is denied.):

Click in the box to the left of the code to select the record to be deleted (Exhibit 13–13).

Click the (Edit) toolbar button to access the Participant Roles screen (Exhibit 13–14).

Click the (Delete) toolbar button.

When the confirmation window appears, click to delete the user profile.

When the message box indicating that the record has been deleted appears, click . The Participant Type Codes List screen showing the deletion appears.

To exit the Participant Type Codes List screen, click .

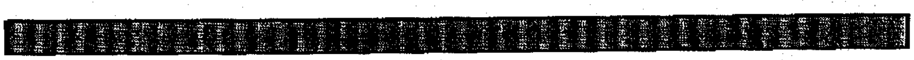
Report Access Groups

The Report Access Groups option is used to add, modify, or delete report access levels. Once a report access group is established, you are assigned to the group within your user profiles. This enables you to access reports affiliated with the report access group. The windows for the Report Access Groups option contain the following toolbar buttons:

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record
- **Delete** —Deletes a record

Select the Report Access Groups in the Profiles menu to access the Report Access Group Code for a Site window (Exhibit 14–15, Report Access Group Code for a Site). A list of report access group codes and descriptions appears.

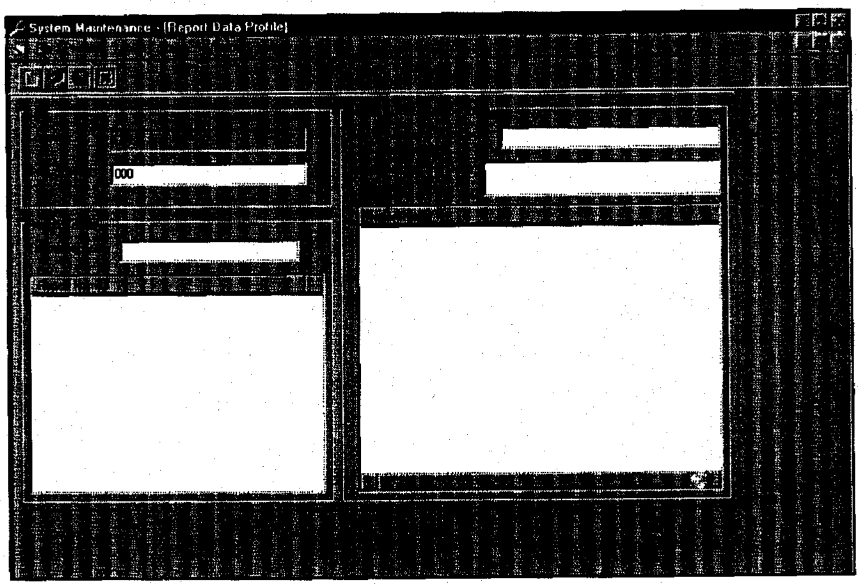
Exhibit 14–15: Report Access Group Code for a Site



To add a report access group code, perform the following steps:

Click the (Add) toolbar button to display the Report Data Profile (New Record) window (Exhibit 14–16, Report Data Profile—New Record).

Exhibit 14–16: Report Data Profile—New Record



Verify the location and sublocation codes in the Site section are correct. If necessary, click in the appropriate fields, and enter the appropriate information.

Enter the appropriate information in the following fields:

- **Report Access Group Code**—Maximum eight-digit code for the new report access group
- **Reprt Access Grp Desc**—Short description identifying the new code

In the Functional Area field, click . Click on the appropriate functional area, and press J. The report names appear in the Report Name box in the Report Details section below the functional area.

Click on the reports to be added to the new report access group. When a report is selected, it appears in the Report Name box of the Report Access Group Profile section. To remove a report from the Report Name box, click on the report and press D.

To select reports from an additional functional area, repeat Steps 4 and 5.

Click the (Save) toolbar button to save the new record.

When the confirmation window appears, click to add the new record. The Report Access Group for a Site screen appears.

To edit a report access group code, perform the following steps:

Click in the box to the left of the Location code to select the record to be edited (Exhibit 14–15).

Click the (Edit) toolbar button to access the Report Data Profile (Edit/Delete Record) screen (Exhibit 14–17, Report Data Profile—Edit/Delete Record).

Exhibit 14–17: Report Data Profile—Edit/Delete Record

To delete a report from the report access group, click on the report in the Report Name box of the Report Access Group Profile section, and press D.

To add reports to the report access group, perform the following steps:

In the Functional Area field, click . Click on the appropriate functional area, and press J. The report names appear in the Report Name box in the Report Details section below the functional area.

Click on the reports to be added to the report access group. When a report is selected, it appears in the Report Name box of the Report Access Group Profile section.

To select reports from an additional functional area, repeat Steps a and b.

Click the (Save) toolbar button to save the changes.

When the confirmation message appears, click to save the changes. The Report Access Group for a Site screen (Exhibit 14–15) appears.

To delete a report access group code, perform the following steps:

On the Report Access Group Code for a Site screen (Exhibit 14–15), click in the box to the left of the Location code for the record to be deleted.

Click the (Edit) toolbar button to display the Report Data Profile (Edit/Delete Record) window (Exhibit 14–17).

Click the (Delete) toolbar button.

When the confirmation message appears, click to delete the record.

When the message box indicating that the record has been deleted successfully appears, click . The Report Access Group for a Site screen appears.

To exit the Report Access Group Code for a Site screen, click .

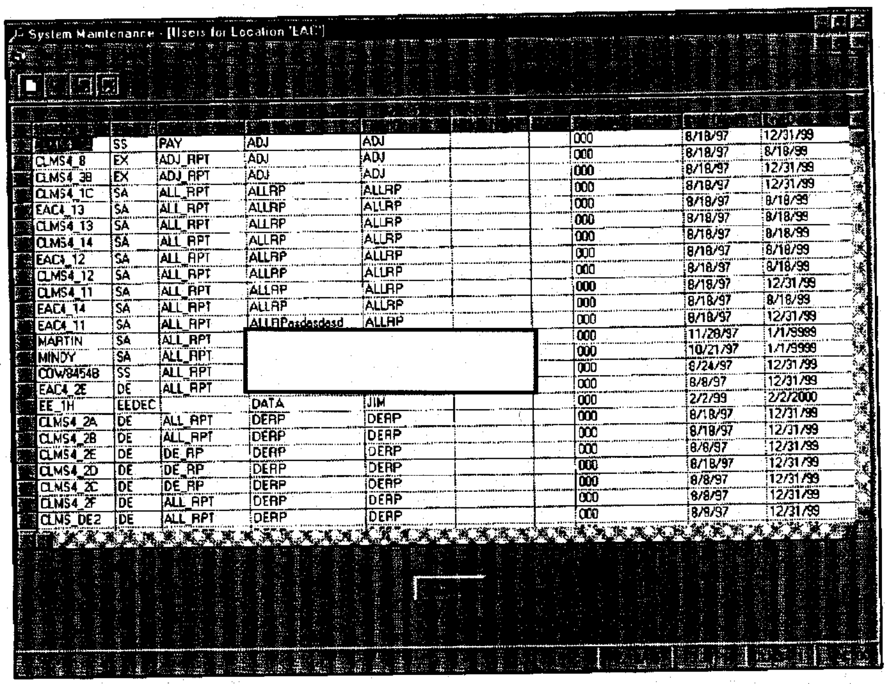
User Profile Record

The User Profile Record option is used to define your access level within CLAIMS 4.0. Access level is determined by assigning you to a Workflow Participant Group and a Report Access Group. The windows for the Users option contain the following toolbar buttons:

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record
- **Delete** —Deletes a record

To list current users at a site, select Users in the Profile menu to access the User Profile List screen (Exhibit 14–18, User Profile List). A list of current users at the selected site by user ID appears.

Exhibit 14–18: User Profile List



System Maintenance - [Users for Location 'EAC']

[illegible]	SS	PAY	ADJ	ADJ			000	8/18/97	12/31/99
CLMS4_8	EX	ADJ_RPT	ADJ	ADJ			000	8/18/97	8/18/99
CLMS4_3B	EX	ADJ_RPT	ADJ	ADJ			000	8/18/97	12/31/99
CLMS4_1C	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	12/31/99
EAC4_13	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
CLMS4_13	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
CLMS4_14	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
EAC4_12	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
CLMS4_12	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
CLMS4_11	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	12/31/99
EAC4_14	SA	ALL_RPT	ALLRP	ALLRP			000	8/18/97	8/18/99
EAC4_11	SA	ALL_RPT	ALLRPasdasdasd	ALLRP			000	8/18/97	12/31/99
MARTIN	SA	ALL_RPT	[redacted]				000	11/28/97	1/1/9999
MINDY	SA	ALL_RPT					000	10/21/97	1/1/9999
COW84548	SS	ALL_RPT					000	8/24/97	12/31/99
EAC4_2E	DE	ALL_RPT					000	8/8/97	12/31/99
EE_1H	EEDEC		DATA	JIM			000	2/2/99	2/2/2000
CLMS4_2A	DE	ALL_RPT	DERP	DERP			000	8/18/97	12/31/99
CLMS4_2B	DE	ALL_RPT	DERP	DERP			000	8/18/97	12/31/99
CLMS4_2E	DE	DE_RP	DERP	DERP			000	8/8/97	12/31/99
CLMS4_2D	DE	DE_RP	DERP	DERP			000	8/18/97	12/31/99
CLMS4_2C	DE	DE_RP	DERP	DERP			000	8/8/97	12/31/99
CLMS4_2F	DE	ALL_RPT	DERP	DERP			000	8/8/97	12/31/99
CLMS_DE2	DE	ALL_RPT	DERP	DERP			000	8/8/97	12/31/99

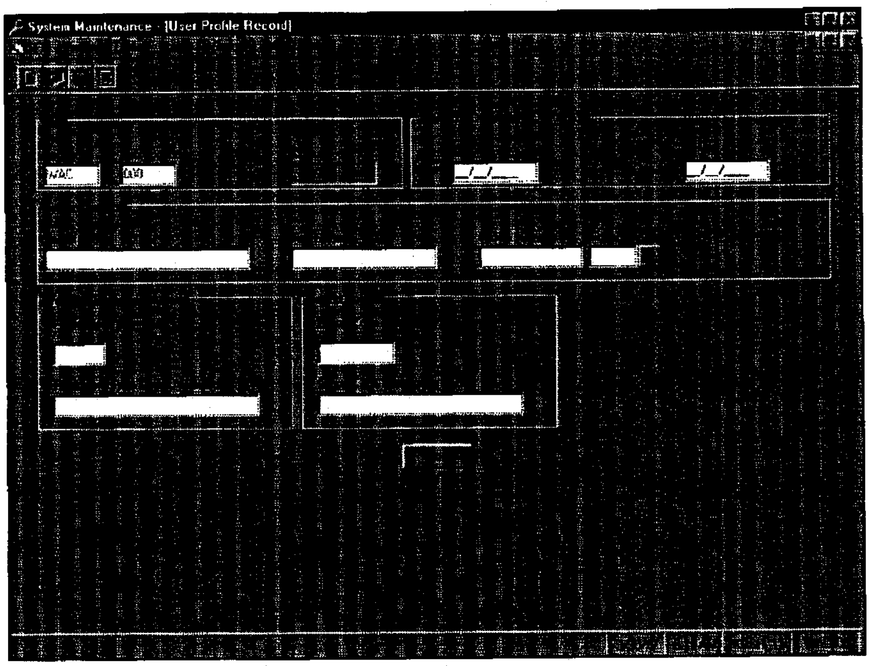
(b)(6)

To add a user profile record, perform the following steps:

Click the (Add) toolbar button to access the User Profile Record window (Exhibit 14–19, User Profile Record).

Note: You must also be added in Oracle. See the CLAIMS 4.0 Operations and Administration Guide for detailed instruction.

Exhibit 14–19: User Profile Record



Enter the appropriate information in the following fields:

- **ID**—The user's Password Issuance and Control System ID
- **Start**—Beginning date (MM/DD/YYYY) of the user's profile
- **End**—Ending date (MM/DD/YYYY) of the user's profile; if the end date range field is not provided, the date defaults to 01/01/9999.
- **Last Name**—User's last name
- **First Name**—User's first name
- **Middle Name**—User's middle name
- **Suffix**—Suffix used in the user's name; click to select from a list
- **Participant Type Code**—User's workflow participant access type code; click to select from a list
- **Participant Type Code Description**—Short description of the user's workflow participant access type code; this field appears automatically when the Participant Type Code is selected
- **Group Code**—User's report access group code; click to select from a list

- **Group Code Description**—Short description of the user's report access group code; this field appears automatically when the Group Code is selected

To save the record, click the (Save) toolbar button.

When the confirmation box appears, click to add the new record.

When the message box indicating that the record has been added successfully appears, click . A blank User Profile Record window appears.

Enter the next new user profile, or click to return to the User Profile List window.

Warning: Clicking before clears the information entered; closing the Add Record window without saving.

To edit a current user profile record, perform the following steps:

Click in the box to the left of the user ID to select the user profile to be edited (Exhibit 14–18).

Click the (Edit) toolbar button to access the User Profile Record window (Exhibit 14–19).

Change necessary information. (Refer to Step 2 of the above section for information on the fields.)

To save the changes, click the (Save) toolbar button.

When the confirmation box appears, click to save the changes.

When the message box indicating that the record has been changed successfully appears, click .

Click to return to the User Profile List window.

Warning: Clicking before clears the information entered and closes the Edit Record window without saving.

To delete a current user profile record, perform the following steps:

Click in the box to the left of the user ID to select the user profile to be deleted (Exhibit 14–18).

Click the (Edit) toolbar button to access the User Profile Record window.

Click the (Delete) toolbar button.

When the confirmation window appears, click to delete the user profile.

When the message box indicating the user ID has been deleted successfully appears, click . The User Profile List screen appears.

To exit the User Profile List screen, click .

Application ID, Payment ID, Alien Number

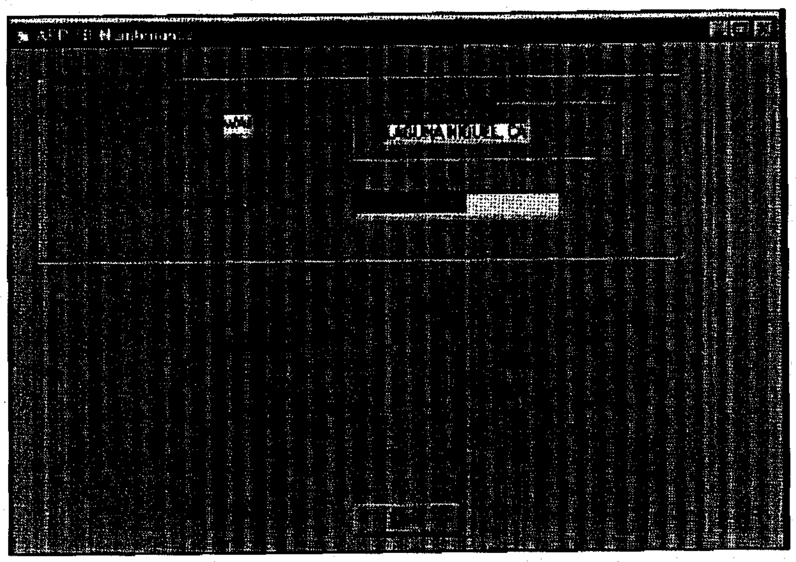
The Application ID, Payment ID, Alien Number option is used to view and edit the last application ID, payment ID, and A-Number used in the system and to enter or modify an A-Number ceiling. To view/edit the last application ID, perform the following steps:

Select the Application ID, Payment ID, and Alien Number menu option in the Profiles menu to access the Number Pool Profile Menu (Exhibit 14–20, Number Pool Profile Menu).

Exhibit 14–20: Number Pool Profile Menu

Select the Application ID menu option, and click to display the APP_ID Maintenance window (Exhibit 14–21, APP_ID Maintenance).

Exhibit 14–21: APP_ID Maintenance



Verify the application ID (the last application ID used at the selected location).

If the number is correct, go to Step 4.

If the number is incorrect, perform one of the following steps:

- To change the number, enter the correct application ID. Click the (Save) toolbar button. Click to confirm the change. Click .
- To delete the number, click the (Delete) toolbar button. Click to confirm the change. Click .

Warning: Deleting an application ID can disable the MailRoom and Data Entry functions.

Click to exit.

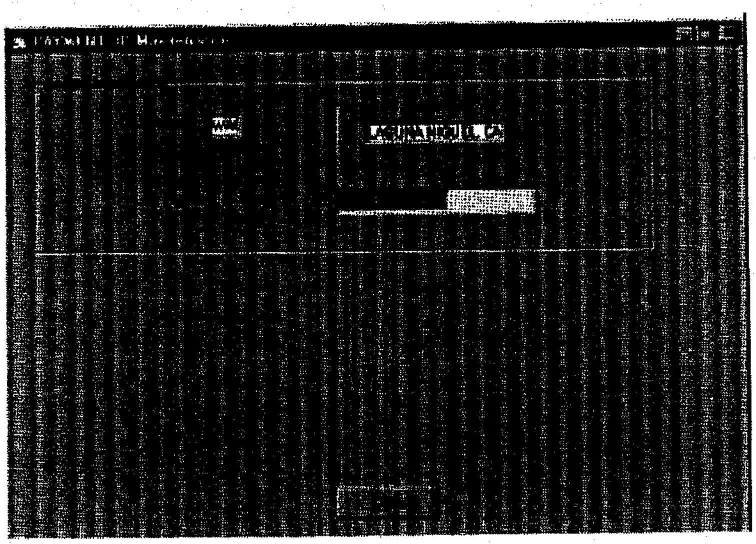
Warning: Clicking before clears the information entered and closes the Edit Record window without saving.

To view/edit the last payment ID, perform the following steps:

Select the Application ID, Payment ID, and Alien Number menu option in the Profiles menu to access the Number Pool Profile Menu (Exhibit 14–20).

Select the Payment ID menu option, and click to display the PAYMENT_ID Maintenance window (Exhibit 14–22, PAYMENT_ID Maintenance).

Exhibit 14–22: PAYMENT_ID Maintenance



Verify the payment ID (this field represents the last payment ID used at the site):

If the number is correct, go to Step 4.

If the number is incorrect, perform one of the following steps:

- To change the number, enter the correct payment ID. Click the (Save) toolbar button. Click to confirm the change. Click .
- To delete the number, click the (Delete) toolbar button. Click to confirm the change. Click .

Warning: Deleting a payment ID can disable the Mailroom and Data Entry functions.

Click to exit.

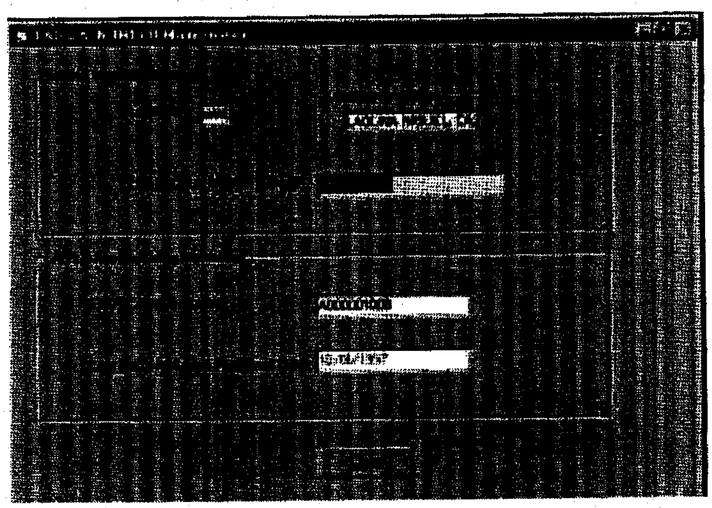
Warning: Clicking before clears the information entered and closes the current window without saving.

To view/edit the last A-Number, perform the following steps:

Select the Application ID, Payment, and Alien Number menu option in the Profiles menu to display the Number Pool Profile Menu (Exhibit 14–20).

Select the A-Number option, and click to display the Employment Authorization Document's (EAD's) A_NUMBER Maintenance window (Exhibit 14–23, EAD's A_NUMBER Maintenance).

Exhibit 14–23: EAD's A_NUMBER Maintenance



Verify the last EAD's A-Number (this number represents the last employment authorization card's A-Number):

If the number is correct, go to Step 4.

If the number is incorrect, perform one of the following steps:

- To change the number, enter the correct A-Number.
- To delete the number, click the (Delete) toolbar button. Click to confirm the change. Click .

Verify the EAD A-Number ceiling (this field represents the highest EAD A-Number to be used):

If the number is correct, go to Step 5.

If the number is incorrect, perform one of the following steps:

- To change the number, enter the correct A-Number.
- To delete the number, click the (Delete) toolbar button. Click to confirm the change. Click .

Click the (Save) toolbar button.

When the confirmation message appears, click to confirm the change.

When the message box indicating that changes were made appears, click .

Click to exit.

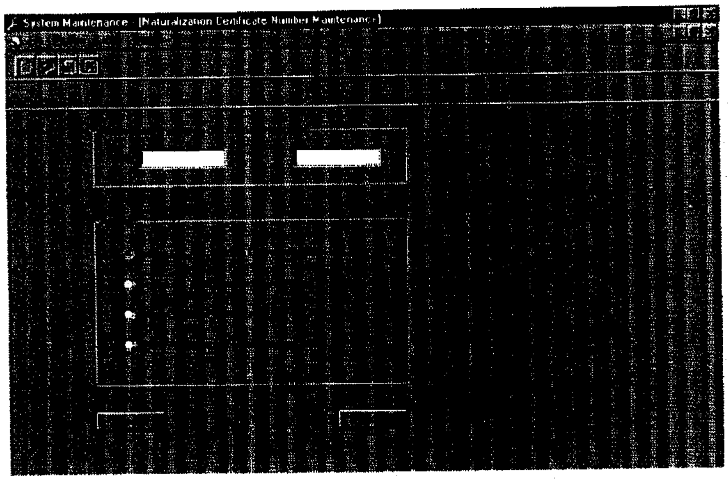
Warning: Clicking before clears the information entered and closes the current window without saving.

Certificate Numbers

The Certificate Numbers option is used to browse certificate information, both locally and Service-wide. It is also used to assign certificate ranges to a location. To browse local certificate number information, perform the following steps:

Select the Certificate Numbers menu option from the Profiles menu to access the Naturalization Certificate Number Maintenance screen (Exhibit 14–24, Naturalization Certificate Number Maintenance).

Exhibit 14–24: Naturalization Certificate Number Maintenance



Click the [redacted] radio button.

Click [redacted]. A list of naturalization certificate numbers for the location appears (Exhibit 14–25, List of Naturalization Certificate Numbers for the Location).

Exhibit 14–25: List of Naturalization Certificate Numbers for the Location

Click [redacted] to return to the Naturalization Certificate Number Maintenance screen.

To view the details of a certificate number entry, click [redacted]. To view the history of a certificate number entry, click [redacted].

To exit the Naturalization Certificate Number Maintenance screen, click [redacted].

To browse all certificate control information, perform the following steps:

Select the Certificate Numbers menu option from the Profiles menu to access the Naturalization Certificate Maintenance screen (Exhibit 14–24).

Click the [redacted] radio button.

Click [redacted]. A list of naturalization certificate numbers for the entire service appears (Exhibit 14–25).

To view the details of a certificate number entry, click [redacted].

To view the history of a certificate number entry, click .

To return to the Naturalization Certificate Number Maintenance screen, click .

To assign certificate numbers to a site, perform the following steps:

Select the Certificate Numbers menu option from the Profiles menu to access the Naturalization Certificate Number Maintenance screen (Exhibit 14–25).

Enter the new certificate number range in the From and To fields.

Click the radio button.

Click to assign the certificate number range.

When the confirmation box appears, click to save the changes.

When the message box indicating that the record has been changed successfully appears, click .

To exit the Naturalization Certificate Number Maintenance screen, click .

To undo the assignment of certificate numbers, perform the following steps:

Select the Certificate Numbers menu option from the Profiles menu to access the Naturalization Certificate Number Maintenance screen (Exhibit 14–25).

Enter the certificate number range to be removed in the From and To fields.

Click the radio button.

Click to undo the assignment of the certificate number range.

When the confirmation box appears, click to save the changes.

When the message box indicating that the record has been changed successfully appears, click .

To exit the Naturalization Certificate Number Maintenance screen, click .

Forms

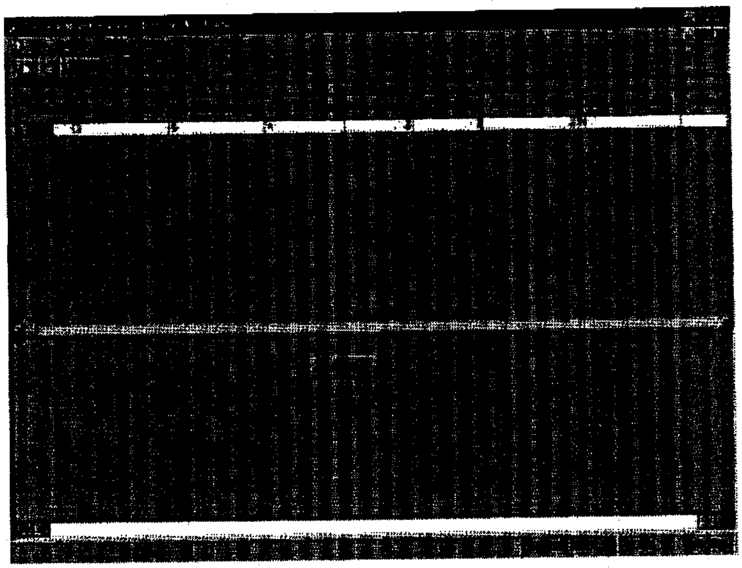
This option is used to add, edit, and delete form-processing information for a site. The windows for the Forms option contain the following toolbar buttons:

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record

- **Delete** —Deletes a record

Select the Forms option in the Profile menu to access the List of INS Forms screen (Exhibit 14–26, List of INS Forms). A list of current INS forms for the selected location appears.

Exhibit 14–26: List of INS Forms



To add new form information, perform the following steps:

Click the (Add) toolbar button to access the INS Form Data—By Location window (Exhibit 14–27, INS Form Data—By Location).

Exhibit 14–27: INS Form Data—By Location

Enter the appropriate information in the following fields:

- **Form Number**—Form code; to select from a list of codes, click .
- **Form Description**—Short description of the form; this field populates automatically when the form number is entered
- **Minimum Processing Days**—Minimum number of days required for processing this form
- **Maximum Processing Days**—Maximum number of days required for processing this form
- **Human Readable**—Number of human readable labels required for this form
- **Bar Code Readable**—Number of bar-code readable labels required for this form
- **Address**—Number of address labels required for this form
- **A-Number**—A-Number required for this form
- **Temporary A-Number**—Temporary A-Number required for this form, if applicable
- **Gov't Agency ID**—Gov't Agency ID number required for this form

To identify how Special Requests are to be handled, click on one or both of the following:

- Send to Clerical check box for data entry
- Check Evidence check box to have evidence checked

Click the (Save) toolbar button.

When the confirmation box appears, click to add the record.

When the message box indicating that the record has been added successfully appears, click .

Click . The List of INS Forms screen (Exhibit 14–27) appears showing the new form number.

Warning: Clicking before clears the information entered and closes the current window without saving.

To edit a form information record, perform the following steps:

On the List of INS Forms screen (Exhibit 14–26), click in the box to the left of the Form Number to be edited.

Click the (Edit) toolbar button to access the INS Form Data–By Location window (Exhibit 14–27).

Edit the information. (Refer to Step 2 of the above section for field information.)

Click the (Save) toolbar button.

When the confirmation box appears, click to save the changes.

When the message box indicating that the record has been changed successfully appears, click .

Click . The List of INS Forms screen (Exhibit 14–27) appears, showing the new form number.

Warning: Clicking before clears the information entered and closes the current window without saving.

To delete a form information record, perform the following steps:

On the List of INS Forms screen (Exhibit 14–26), click in the box to the left of the Form Number to select the record to be deleted.

Click the (Edit) toolbar button to access the INS Form Data—By Location window (Exhibit 14–28).

Click the (Delete) toolbar button.

When the confirmation box appears, click to confirm the deletion.

When the message box indicating that the record has been deleted successfully appears, click . The List of INS Forms window appears. The deleted form no longer appears on the list.

To exit from the List of INS Forms screen, click .

Tables

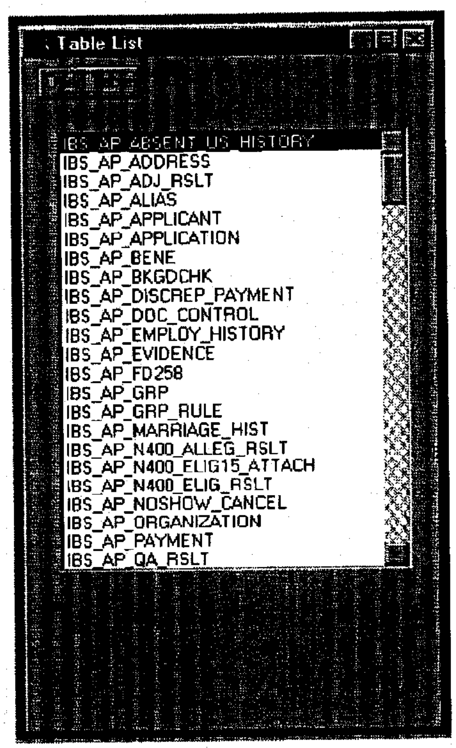
The Tables menu is used to access the CLAIMS 4.0 database list of tables. A table can be opened or closed from the Tables menu. A record can be added, edited, or deleted from an open table. The windows for the Tables option contain the following toolbar buttons:

- **Add** —Adds a new record
- **Edit** —Edits a record
- **Save** —Saves a record
- **Delete** —Deletes a record

To open a table, perform the following steps:

Select Open Table List from the Tables menu to access the Table List window (Exhibit 14–28, Table List). This may take 30 seconds or longer.

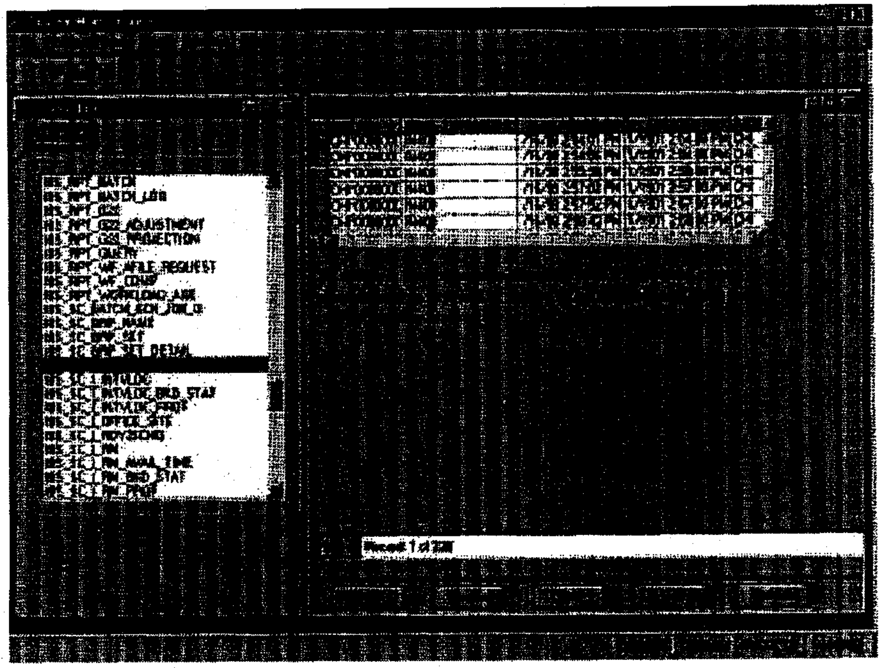
Exhibit 14–28: Table List



Scroll through the list, and click on the table to be opened.

Click to display the selected table. (An example of a selected table window appears in Exhibit 14–29, Table List With Selected Table).

Exhibit 14–29: Table List With Selected Table



To navigate through the table, perform one of the following:

- Click on the scroll bars at the right and bottom of the table to view the contents of the table.
- Click to go to the first record.
- Click to go to the previous record.
- Click to go to the next record.
- Click to go to the last record.
- Click to rewrite the table and return to the first record.
- Click at the bottom of the window to view the first record.
- Click to view the previous record.
- Click to view the next record.
- Click to view the last record.

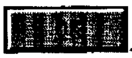
Note: The field at the bottom of the selected table window displays the number of the currently selected record in relationship to the total number of records listed.

To reduce the number of table records displayed, double click on a column heading in the table. The Table Look-Up Scan dialog box (Exhibit 14–30, Table Look-Up Scan) appears.

Exhibit 14–30: Table Look-Up Scan

Click one of the following radio buttons in the Operator section to direct the search:

- Click on the Equal To operator to display all rows in the table containing a value equal to the value in the selected column.
- Click on the Not Equal To operator to display all rows in the table containing a value different than the value in the selected column.
- Click on the Less Than operator to display all rows in the table containing a value lower than the value in the selected column.
- Click on the Greater Than operator to display all rows in the table containing a value greater than the value in the selected column.
- Click on the Less Than or Equal To operator to display all rows in the table containing a value equal to or lower than the value in the selected column.
- Click on the Greater Than or Equal To operator to display all rows in the table containing a value equal to or greater than the value in the selected column.

Click .

To close the selected table window, click the  control button.

To close the Table List window, select Close Table List from the Tables menu.

To add a record to an open table, perform the following steps (**Note:** Only authorized users can add, update, and delete records from the look-up and profile database tables using this option. All other users may only browse. Only look-up database tables with the prefixes IBS_LK or IBS_LP may be modified.):

Select Open Table List from the Tables menu to display the Table List window (Exhibit 14–28). This may take 30 seconds or longer.

Scroll to a table with a prefix of either IBS_LP or IBS_LK, and click on the table name.

Click to display the selected table.

Click the (Add) toolbar button to access the Insert a New Record window (Exhibit 14–31, Insert a New Record).

Exhibit 14–31: Insert a New Record

Enter the appropriate information in each field.

Click to accept the new record or to close the Insert a New Record window without saving.

When the confirmation box appears, click to confirm the add.

When the message box indicating that the record has been added successfully appears, click .

To close the selected table window, click the control button in the upper right corner of the window.

To close the Table List window, select Close Table List from the Tables menu.

To edit a record in an open table, perform the following steps (**Note:** Only authorized users can add, update, and delete records from the look-up and profile database tables using this option. All other users may only browse. Only look-up database tables with the prefixes IBS_LK or IBS_LP may be modified.):

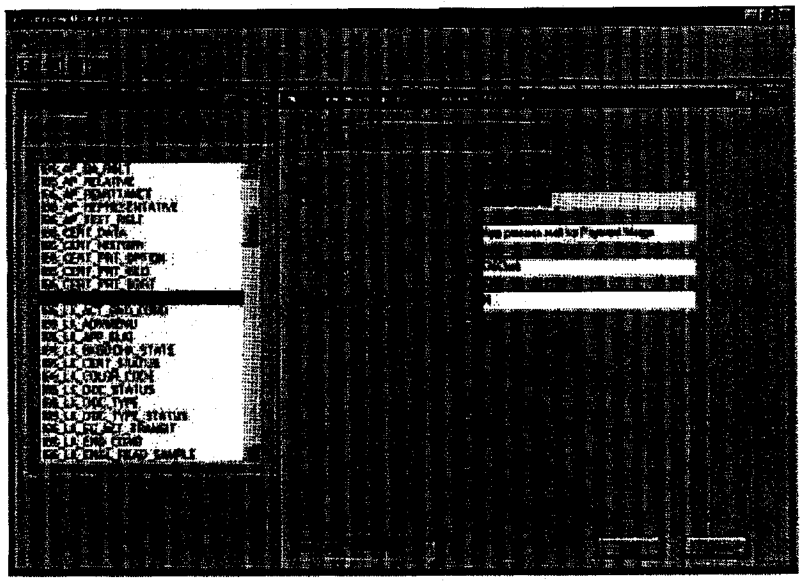
Select Open Table List from the Tables menu to access the Table List window (Exhibit 14–28). This may take 30 seconds or longer.

Scroll to a table with a prefix of either IBS_LP or IBS_LK, and click on the table name.

Click on the drop-down menu to display the selected table.

Click the (Edit) toolbar button to access the Update a Record window (Exhibit 14–32, Update a Record).

Exhibit 14–32: Update a Record



Edit the information.

Click to accept the updated record or to close the Update a Record window without saving.

When the confirmation box appears, click to confirm the edit.

When the message box indicating that the record has been updated successfully appears, click .

To close the selected table window, click the control button.

To close the Table List window, select Close Table List from the Tables menu.

To delete a record from an open table, perform the following steps (**Note:** Only authorized users can add, update, and delete records from the look-up and profile database tables using this option. All other users may browse only. Only look-up database tables with the prefixes IBS_LK or IBS_LP may be modified.):

Select Open Table List from the Tables menu to access the Table List window (Exhibit 14–28). This may take 30 seconds or longer.

Scroll to a table with a prefix of either IBS_LP or IBS_LK, and click on it.

Click to display the selected table.

Click the (Edit) toolbar button to access the Update a Record window (Exhibit 14–32). Verify that this is the record you want to delete.

Click , and then click the (Delete) toolbar button.

In the Delete Confirmation dialog box, click to delete the table, or click to cancel the deletion.

Note: Table records cannot be deleted if they are in use at the current site.

To close the selected table window, click the control button.

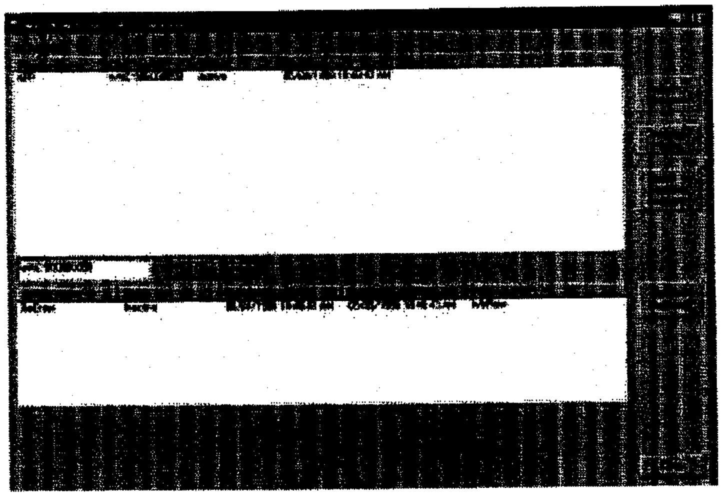
To close the Table List window, select Close Table List from the Tables menu.

Status

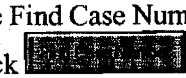
The Status option is used to view/determine the status of cases in CLAIMS 4.0. When the Workflow Case Status—By Case screen is opened, a table of application IDs in use within the last hour at the selected location appears. The table lists the present status of each case and its start and end times. To determine the status of a case, perform the following steps:

Select Workflow from the Status menu to access the Workflow Case Status—By Case screen (Exhibit 14–33, Workflow Case Status—By Case).

Exhibit 14–33: Workflow Case Status—By Case

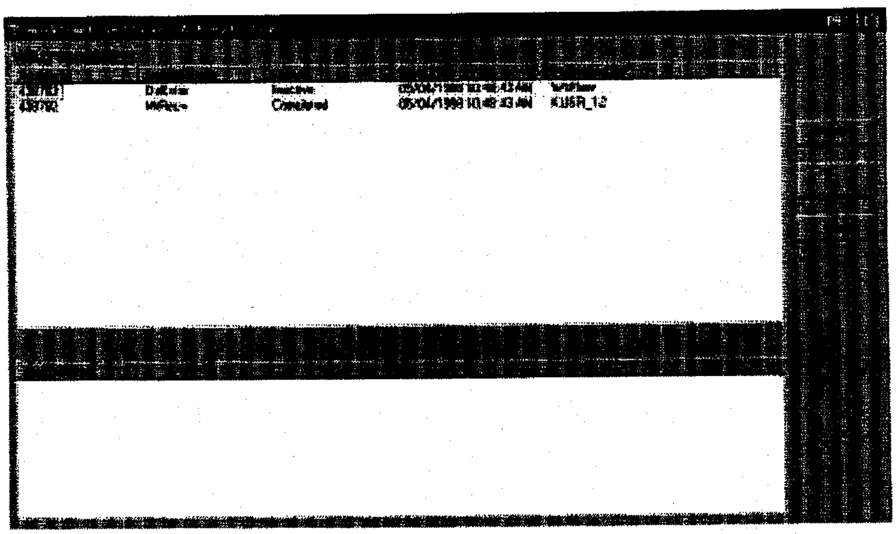


To access a case, perform one of the following:

- Scroll through the list to the desired case, and double click on the process name.
- In the field to the left of the Find Case Number button, enter the case number (application ID or payment ID), and click .

Click  to view the activity history of the selected case. The Workflow Case Status—Activity History screen appears (Exhibit 14–34, Workflow Case Status—Activity History).

Exhibit 14–34: Workflow Case Status—Activity History



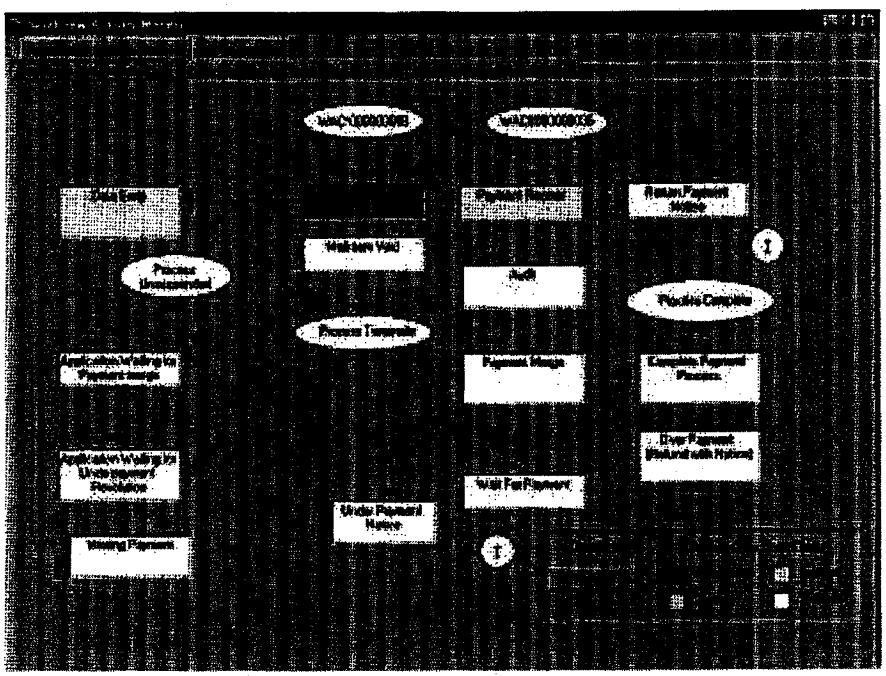
Click to verify that no changes have been made while you have been viewing the activity history.

To return to the Workflow Case Status screen, click .

Click to view a graphical illustration of the selected case workflow process. Click on the tabs in the Workflow Activity Monitor screen (Exhibit 14–35, Workflow Activity Monitor) to view the following workflow diagrams:

- MailRoom through Data Entry
Data Entry through Scheduling Interview
Interview through Adjudication
Adjudication through Close-out
- Ad Hoc Activities

Exhibit 14–35: Workflow Activity Monitor



Click to verify that no changes have been made while you have been viewing the workflow status.

To close the Workflow Activity Monitor screen, click the control button.

To exit the Workflow Case Status—By Case screen, click .