Administrative Terminal

User's Manual

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Section I

Use of the Administrative Terminal

Chapter 1

Beginning

Introduction

This chapter explains how to access and exit the ***WEB*** based program of the EBT Administrative Terminal. The Administrative Terminal program is an application ***WEB*** that uses the protocol *HTTP* to communicate with the application and uses links to bring the ***Browser*** pages or portions of pages. **The *WEB*** or **World Wide *Web*** infrastructure is a way of accessing information using **Internet**. It uses *HTTP* protocol to communicate applications and ***Browsers*** to access documents (called pages) in ***WEB***. You need the Internet Explorer version 6.0 ***Browser*** to use the Administrative Terminal program and access to the Internet.

How to Access the EBT Program

1. To access the Administrative Terminal program you must enter in the ***Browser*** the ***WEB*** address (URL) corresponding to your agency (See illustration 1.1).
2. The EBT access page will appear in the ***Browser*** (See illustration 1.1).

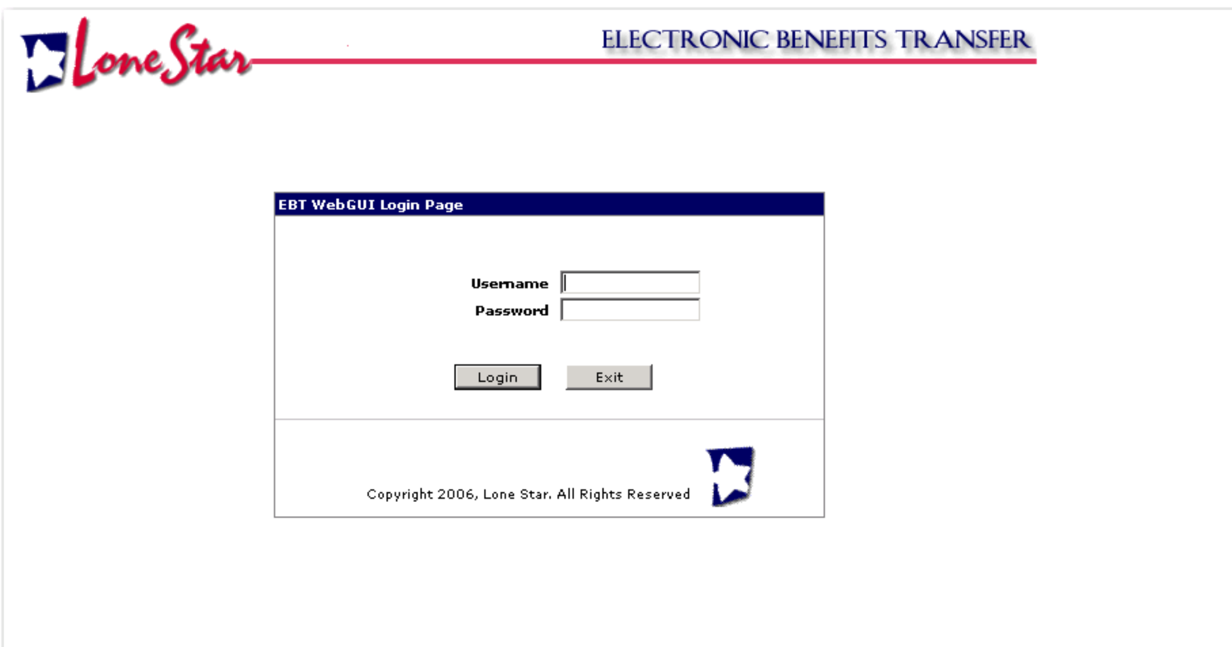

Illustration 1.1.

Access to the Administrative Terminal page

1. Enter the username assigned in the ***Username*** area. (The username must have up to nine (9) characters and is case sensitive).

Note.

> *The username and password used in the* ***EBT*** *system are* **case sensitive**. *To access the system, you must enter correctly the capital and small letters. This means that if its key of access is* **"jandoe"** *the system will not accept* **"JANDOE"** or "**janDOE**".

2. Press [TAB] to move the cursor to the next data entry field.
3. Enter your password in the ***Password*** field. (The password may have nine characters and can include capital letters, small letters and numbers). For security reasons, the characters that you enter will not be displayed.

1. If you wish to exit the ***EBT Login*** page without entering, press the ***EXIT*** button with the mouse or press the ' x' in the upper right side of the ***Browser***.
2. To enter the application, ***Press*** the ***Login*** button or ***Press*** [ENTER] on the keyboard.
3. The EBT page that contains the main menu with the connections to the different sub-menus will be displayed and you will be able to begin to work with the program.

How to Exit the Administrative Terminal Program

To exit the Administrative Terminal, select ***Log Out*** on the menu.

Note.

This manual describes all the options and functions of the Administrative Terminal program. Each one of these functions and options could not be available for you. Permissions are based on your privileges within the system. When you enter the system, it automatically offers access to the pages and functions that you need to carry out your work.

This manual assumes that you already know how to use your computer and Microsoft Windows, that you received or are ENTERing to receive an independent training, that will show how to open menus, how to use the keyboard, mouse and how to navigate in the Internet.

Chapter 2

How to Navigate Through the WEB-Based Administrative Terminal Program

Introduction

This section provides an introduction to the program of the ***EBT*** Administrative Terminal. It describes how to navigate in the ***WEB*** application in order to carry out the necessary tasks.

The EBT Administrative Terminal program provides access to different pages or documents, which allows performing the different administrative functions from the EBT system. To get to these functions press on buttons in the menu and links or connections in the different pages.

The ***Browser*** is an application or program used to locate and display ***WEB*** pages. You will enter the ***WEB*** address or ***URL*** (uniform resource locator) in the ***Browser*** to access the EBT Administrative Terminal program. Available menus will appear in the top part of the work area or ***Browser***. You may use the ***Browser*** functions to move from and to previously open pages using the ***forward*** and ***back*** buttons, print the contents of a page to document a problem, etc.

Once you enter the ***username*** and ***password***, the main menu is displayed in the ***Browser*** (Illustration 2.1). Each button of the menu has a connection to a sub-menu that once selected, it displays the options underneath the main menu. Each button of the sub-menus connects to a page and when it is pressed it brings the page to a frame in the ***Browser***.

Some fields contain connections or links that have the capacity to bring to the ***Browser*** other pages related to the information contained in them. The text of the fields that contain connections or links is blue to identify that you may access another page or function by pressing on that text.

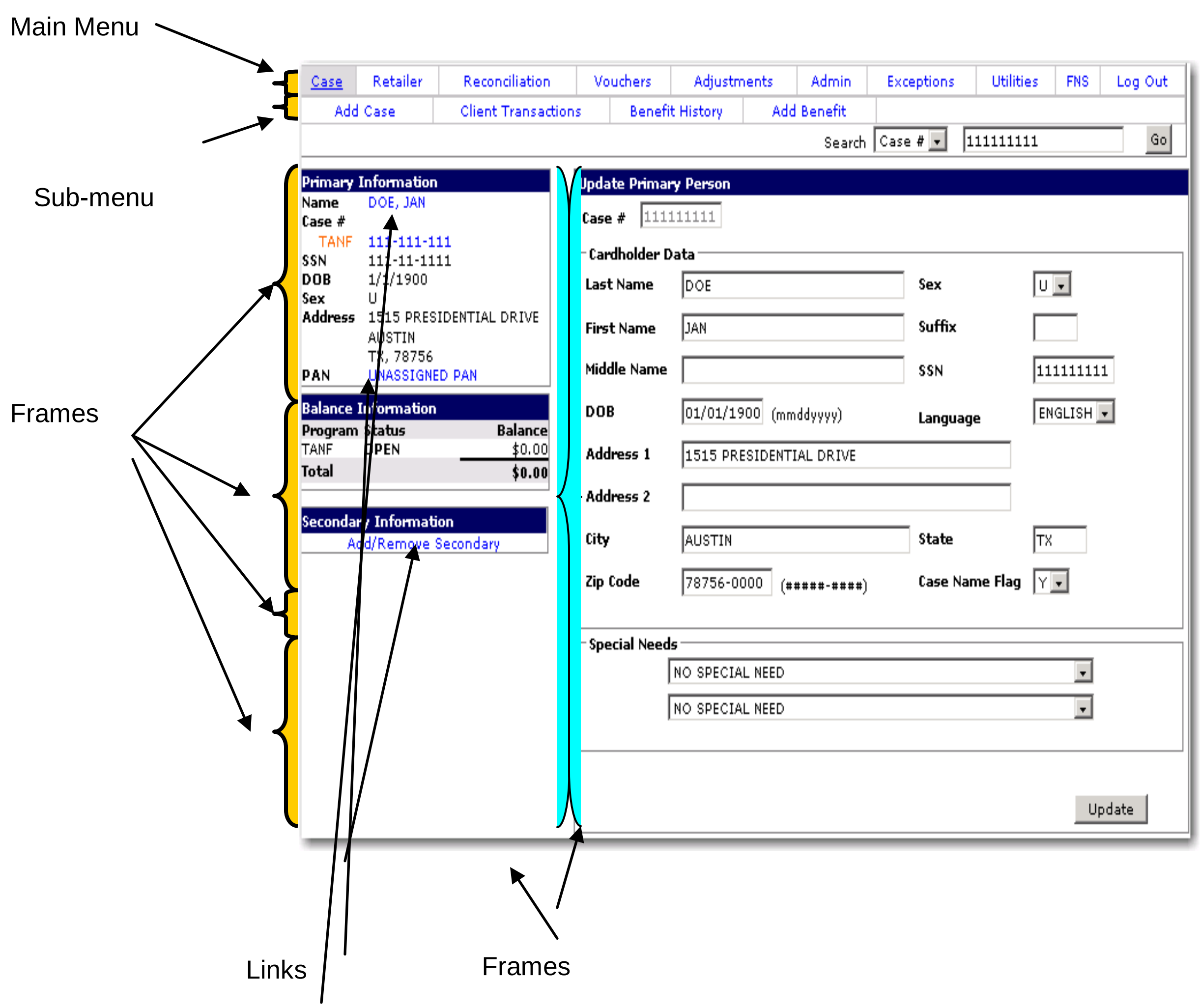

Illustration 2.1.

Primary Cardholder Page

Most of the pages work as electronic forms, which you can use to see and to enter data. Through the pages on the ***Browser,*** you can perform different Administrative Terminal functions. In the top part of each page, the title will indicate the function of that page.

Navigating within the WEB based EBT Program

When entering the Administrative Terminal program (URL) press the left button of the mouse and the ***WEB*** page access to the Administrative Terminal program will be displayed. Once you enter ***username*** and ***password*** the page that contains the main menu bar that gives access to the different functions will be displayed.

Menu Bar

The ***menu*** bar contains options that are connections or links to the sub-menus available in the ***EBT*** Administrative Terminal as well. Select an option of the main menu to display the sub-menu corresponding to that option.

Sub Menus

The Administrative Terminal program groups related functions in sub-menus. Functions related with the case management are connected to the ***CASE*** sub-menu, functions related to retailers are connected to the sub-menu of ***Retailer***, those related to adjustments are in the ***Adjustment*** sub-menus, those related to the administration of equipment, groups, offices and users are in the ***Admin*** sub-menu and the change of ***password*** is in the ***Utilities*** sub-menu.

To access the different sub-menus you must place the cursor in the option of the main menu corresponding to the sub-menu that you wish access. When you press the mouse with the cursor on the selected option, it will get darker and another bar with the options of the corresponding sub-menu underneath the main menu will be displayed. In order to navigate to another sub-menu select with mouse the option corresponding in the main menu.

Access Functions

In order to perform related functions to a sub-menu, you need to first access the record and select the function. The links to the different functions are in the sub-menu bar or in the text of the different pages.

Section II

Case Management

Chapter 3

Setup Primary Cardholder

Introduction

This Chapter explains how to establish a new Primary Cardholder.

The primary cardholder files are to be established through the agency's eligibility system whenever it is possible. That way the eligibility system and the EBT system have the same information. The primary cardholder files are to be established through the EBT Administrative Terminal only in cases of emergency.

Case Sub-Menu

The ***CASE*** sub-menu allows accessing the functions related to the creation and maintenance of a case. The functions to establish new files and to add programs to the cardholder are accessed by selecting the ***Add CASE*** option in the sub-menu. Other maintenance functions require to first access the record and then the function from the sub-menu or connections in the text of the page of the file of the cardholder, according to the case.

In order to access the case sub-menu, place the cursor on the ***CASE*** option of the main menu and press it. It will display the bar with the ***CASE*** sub-menu underneath the bar of the main menu (Illustration 3.1).

Illustration 3.1.

Sub-Menu Case

Setup Primary Cardholder

This page establishes the primary cardholder record, ***Setup Primary Cardholder***, and (Illustration 3 .2) allows adding programs to an existing cardholder.

The ***Add CASE*** option on the sub-menu brings up the ***Setup Primary Cardholder*** page to establish a primary cardholder record.

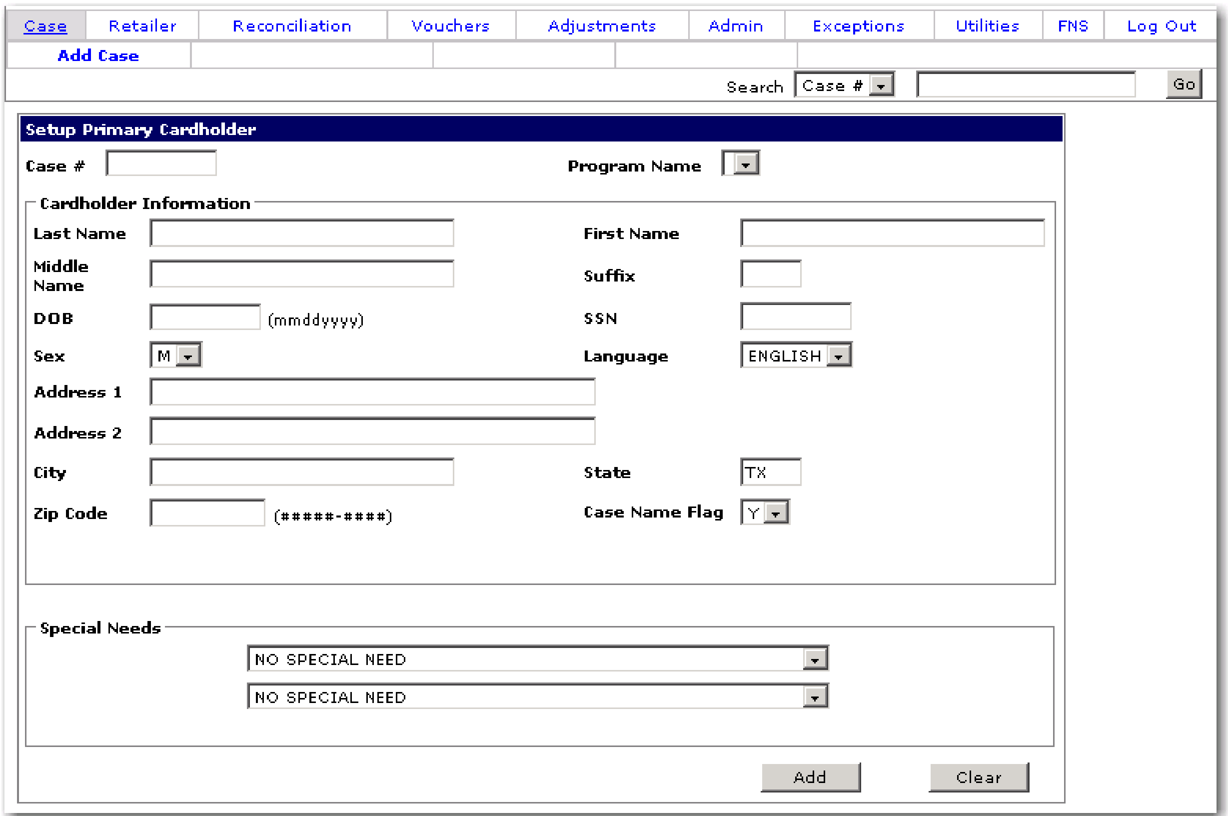

Illustration 3.2.

Setup Primary Cardholder

Data Entry To Establish Primary Cardholder	
Case #	Enter the case number for the new primary cardholder. If it already exists, when you press **tab** to move to the following field, it will display the content of the existing file in the ***Setup Primary Cardholder*** page. Required field.
Program Name	Select from the list the appropriate program for the new primary cardholder. (The "default" is "None", but it is always necessary to select a program). Required field.
Last Name	Enter the last name of the primary cardholder. Required field.
First Name	Enter the first name of the primary cardholder. Required field.
Middle Name	Enter the middle name of the primary cardholder. Required field.
Suffix	Enter Sr., Jr, etc.
DOB	Enter the date of birth of the primary cardholder. The format to be used is Month/Day/Year. For example, for July 14, 1963, you must enter 07/14/1963. Required field.
SSN	Enter the social security number of the primary cardholder. Required field.
Sex	Enter the gender of the primary cardholder. (M= Male; F= Female). If you do not know the gender, enter U for unknown. Required field.
Language	Enter the language of the primary cardholder or select one from the list by pressing the arrow.
Address 1	Enter the mailing address of the primary cardholder**.** Required field.

Data Entry To Establish Primary Cardholder	
Address 2	Enter additional information of the mailing address of the primary cardholder.
City	Enter the city in which the primary cardholder receives mail. Required Field.
State	Enter the state in which the primary cardholder receives mail. Required field.
Zip Code	Enter postal code corresponding to the primary cardholder address. Required field.
Case Name Flag	Enter the case name flag corresponding to the primary cardholder. Required Field.
Special Need	Select the appropriate special need for the primary cardholder from the listing of special need. The default is NON Special NEED. Other options are blind, deaf and handicapped, among others.

Buttons	
Add	It registers the data when you have completed the data entry.
Clear	It eliminates the data in all the fields from the ***Setup Primary Cardholder*** page.

How to Setup Primary Cardholder

1. Select ***Add CASE*** option from the ***CASE*** sub-menu. The ***Setup Primary Cardholder*** page will display in the ***Browser*** under the main menu bar.
2. Enter the appropriate data for each field.
3. Press ***ADD*** to establish the primary cardholder file. A message indicating that the file was added will appear.
4. Press ***OK***.
5. If you wish to eliminate the entered data and to create another primary cardholder, press ***Clear***.

Chapter 4

EBT Client Search

Introduction

This chapter explains how to access information related to an existing cardholder using the Administrative Terminal (AT) ***WEB*** base program. Once a record for the cardholder is created, the maintenance functions require accessing the cardholder record and selecting the corresponding function.

EBT Client Search

The ***Search*** bar allows accessing previously created records. It is located under the bar of the ***Case*** sub-menu (Illustration 4.1). The ***Search*** provides the capacity to look for a record using: social security number, account number, PAN or name.

Illustration 4.1.

Search Option

When you enter the identifier, if there is one file that fulfills the criteria, the page of the case record will be displayed in the left panel of the ***Browser.*** If there are several files that fulfill the selection criteria, for example, have the same name, the ***EBT Client Select*** page will display a list of files that fulfill the criteria on the right side of the Browser.

Search by SSN:

1. Position the cursor in the data entry area of ***Search***.
2. Search options will be displayed.
3. Select ***SSN***.
4. Enter the social security number.
5. Press ***Enter*** in the keyboard.
6. If the search locates more than one file that matches the entered data, the ***EBT Client Select*** page will display a list of files that fulfill the criteria search (See the procedure to select a cardholder ahead).

Search by CASE number:

1. Position the cursor in data entry area of data of ***Search***.
2. Search options will be displayed.

3. Select ***CASE*** number**.**
4. Enter the ***CASE*** number.
5. Press ***Enter*** in the keyboard. The file of the client (***Primary Information, Information Balance*** and ***Secondary Information***) will be displayed in the left frame of the ***Browser***.

Search by PAN

1. Position the cursor in the ***Search*** data entry area.
2. Search options will be displayed.
3. Select ***PAN***.
4. Enter the card number.
5. Press ***Enter*** in the keyboard. The record of the client (***Primary Information, Information Balance*** and ***Secondary Information***) will be displayed on the left frame of the ***Browser*** .

Search by Name

1. Position the cursor in the data entry area of ***Search***.
2. Search options will be displayed.
3. Select Name**.** Must enter the last name, the first name is optional.
4. If there are, many files that fulfill the criteria a "TOO MANY FOUND, NEED BETTER SEARCH CRITERIA" message will be displayed. You may use part of the name with the symbol % or the complete name. If still gives back the message, must use another selection criteria.
5. Press ***Enter*** in the keyboard. The file of the client (***Primary Information, Information Balance*** and ***Secondary Information***) will be displayed on the left frame of the ***Browser.***
6. If the search locates more than one file that matches the entered data, the ***EBT Client Select*** page with the list of files that fulfill the criteria search will appear (See the procedure to select a cardholder in the next page).

EBT Client Select

The ***EBT Client Select*** (Illustration 4.2) allows selecting a cardholder from those that fulfill the criteria specified in the ***Search*** page.

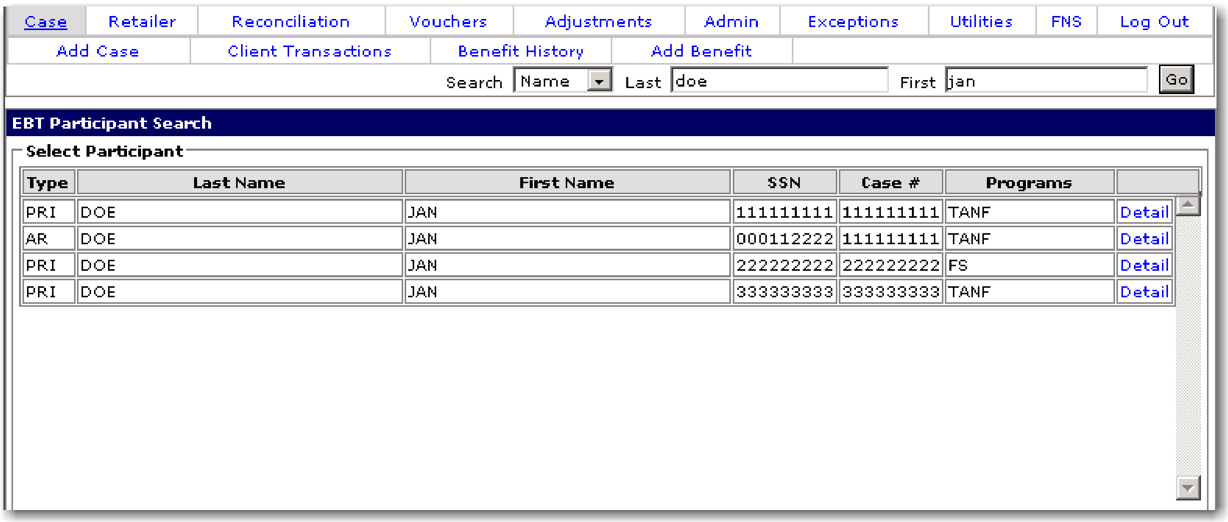

Illustration 4.2.

EBT Client Select Page

When there are several Clients with the same search criteria the ***EBT Client Select*** page will be displayed after ***ENTER*** have been pressed in the ***Search*** option.

Each line of the ***EBT Client Select*** page contains the data of the file that fulfills the criteria specified in the option search. There is a link ***Detail*** text in the last column of the file of that Client. When you press the text ***Detail,*** the page with the file selected will appear at the left side of the ***Browser***.

How to Select a Client

1. If the search locates more than one file that matches the entered data, it displays the data of all files that fulfill the search criteria on the of ***EBT Client Select*** page.
2. The vertical bar that appears right alongside of the page indicates that more files exist that fulfills the search criteria. Press the arrows in the bar to see all the files in the listing.

3. Position the cursor in the ***Detail*** field of the line corresponding to the record that you like to see and press with the mouse or press the ***Enter*** key. The page of the selected file (***Primary Information, Information Balance*** and ***Secondary Information***) will be displayed in the left frame of the ***Browser***.

Primary Information Page

The page with the record of the cardholder (Illustration 4.3) contains several panels. The ***Primary Information*** panel includes the demographic data and the numbers of cards or PAN numbers, the ***Balance Information*** panel includes a list of the programs that the cardholder has and the corresponding status and balance, the ***Secondary Information*** panel contains the demographic information of the secondary cardholder and a link to the ***Add/Remove Secondary*** page to add a secondary cardholder.

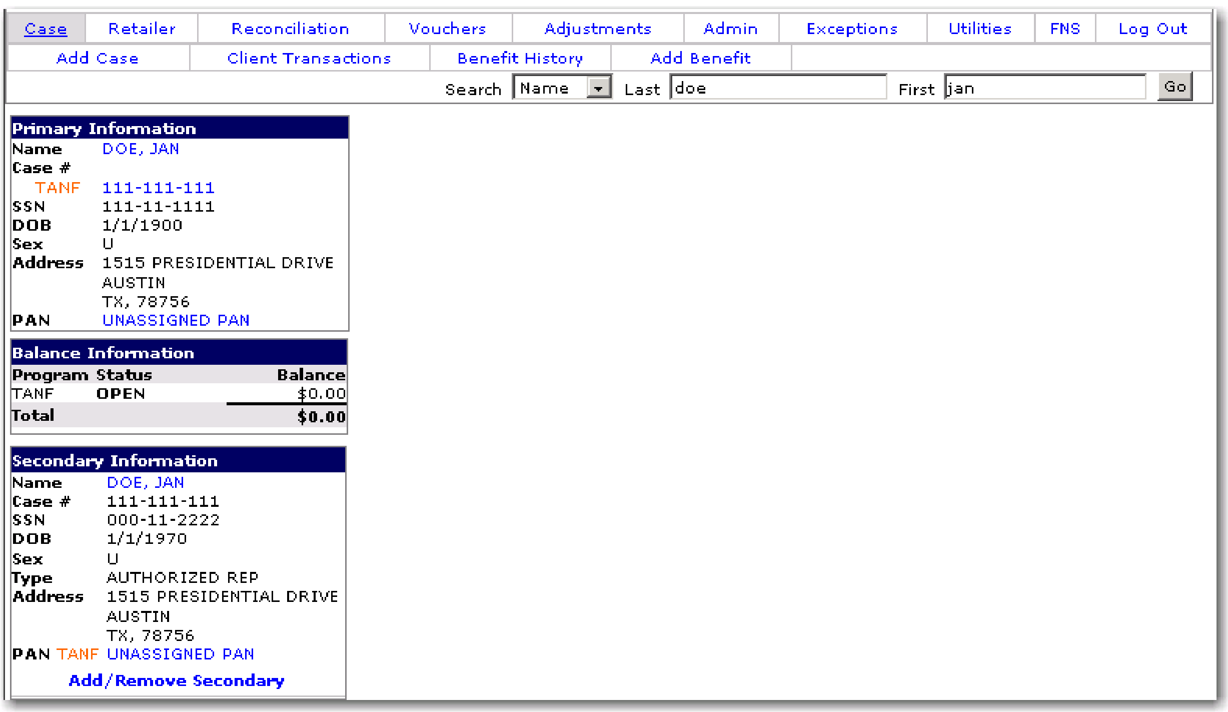

Illustration 4.3.

Primary Information Page

In the page of the the cardholder there are connections or links to other functions or pages related to the record of the cardholder. The texts on the fields that are links are blue; to identify that another page or function can be accessed by pressing on that text.

Chapter 5

Update Primary Person

Introduction

This chapter explains how to update the demographic information of the cardholder through the Administrative Terminal. This function should be use only in emergency cases, because the file for the primary cardholder is due to update through the eligibility system to guarantee that both systems contain the same information.

Update Primary Person

The ***Update Primary Person*** page (Illustration 5.1) allows changing the demographic information of the cardholder through the Administrative Terminal instead of doing it in the eligibility system. The ***Name*** field has a link with the ***Update Primary Person*** page, which allows updating the primary cardholder information.

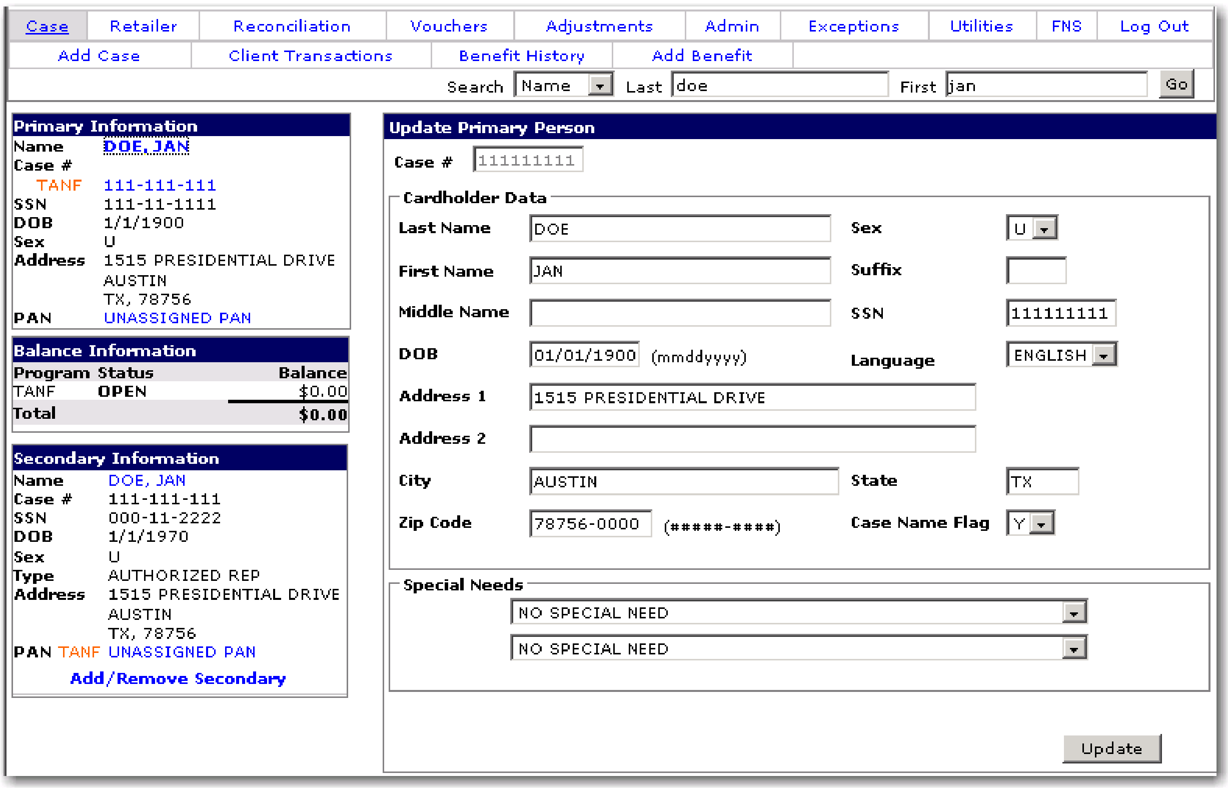

Illustration 5.1.

Update Primary Person page

In order to update the primary cardholder information through the Administrative Terminal, you must use the ***Search*** option. The page with the cardholder record displayed basic information of the record to confirm that the file is the one you need. When you press the name in the ***Primary Information*** panel, the page will display the ***Update Primary Person*** within the right framework of the page.

Data Entry To Update Primary Cardholder	
CASE #	Enter the case number for the primary cardholder (the information of the primary cardholder will appear).
Last Name	Enter the paternal last name of the primary cardholder.
Sex	Enter the gender of the cardholder (m/f/u). If you do not know the gender enter "U" for U*nknown*.
First Name	Enter the first name of the primary cardholder.
Suffix	Enter Sr, Jr, etc.
Middle Name	Enter the middle name of the primary cardholder.
DOB	Enter the date of birth of the primary cardholder; the format of the date of birth is mm/dd/yyyy. For example, July 14, 1963 would be 07/14/1963.
SSN	Enter the social security number of the primary cardholder. Required field.
Language	Enter the language of the cardholder or select from the list by pressing the arrow.
Address 1	Enter the postal address for the primary cardholder.
Address 2	Enter additional information of the postal address, like apartment number.
City	Enter the city where the primary cardholder receives correspondence.
State	Enter the state where the primary cardholder receives correspondence.
Zip Code	Enter the postal code where the primary cardholder receives mail.

Data Entry To Update Primary Cardholder	
Case Name Flag	Enter the case name flag corresponding to the primary cardholder. Required Field.
Special Need	Select from the list of cateENTERries the special need that corresponds. If you do not choose a special need, the selection that will appear will be "***NON SPECIAL NEED***". Other options include: "***BLIND, DEAF***, ***HANDICAPPED***", etc.

Buttons	
Update	Update cardholder demographic information.

How to Update Primary Cardholder's Information

1. Access the cardholder file by selecting the ***Search*** option.
2. When the name is pressed in the ***Primary Information*** page, it will display the ***Update Primary Person*** page.
3. Enter the data that you need to change.
4. Press ***Update*** in order to update the primary cardholder file.
5. A message will appear indicating that the file has been updated.
6. Press ***OK*** in order to clear this message.

Chapter 6

Card Management

Introduction

Cardholders will be able to receive assigned cards through the Administrative Terminal.

The procedure to issue cards through the Terminal Administrative is the following, one: once confirmed the identity of the cardholder, the new card is assigned and the cardholder chooses the PIN number.

Cards reported as lost, stolen or damaged will be replaced through the Administrative Terminal from the Call Center. The new card will have a new PAN number. It is necessary to change the ***status*** (lost, stolen, etc.) of the current card before issuing a new card. The number of replaced cards will remain registered in ***EBT***.

The personnel of the agency can access that information through the Administrative Terminal.

Card Management

The ***Card Management*** page (Illustration 6.1) allows updating the primary and secondary cardholder card information through the Administrative Terminal.

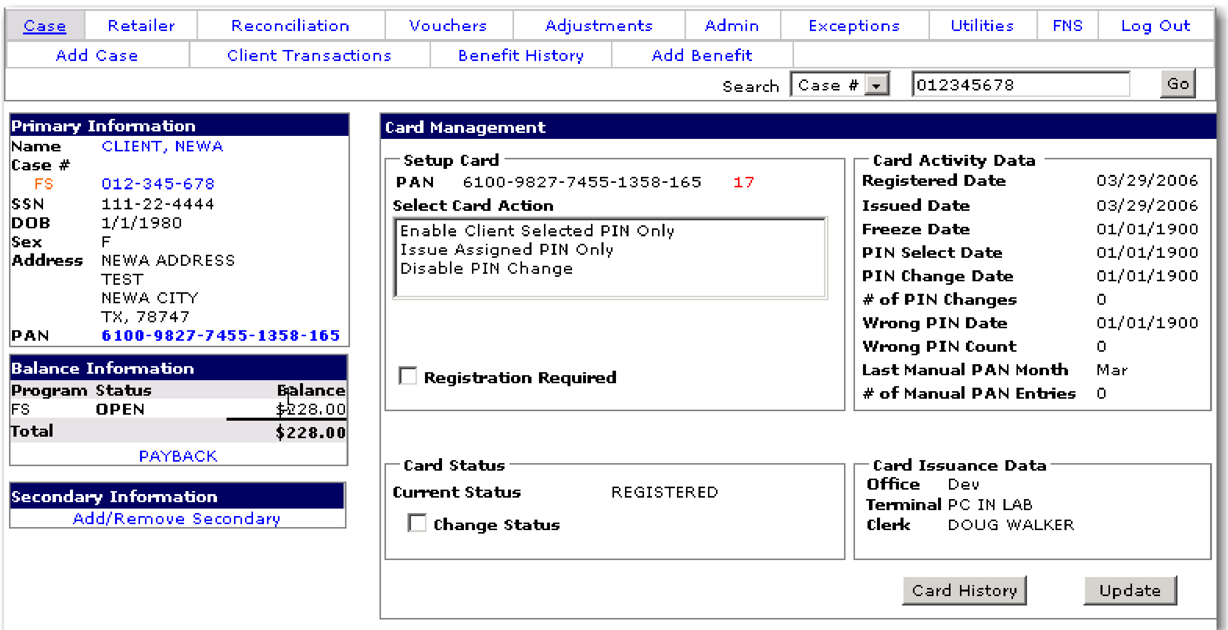

Illustration 6.1.

Card Management Page

In the ***Primary Information*** panel appears a list of the most recent cards of the cardholder. The ***PAN*** field in the ***Primary Information*** page has a link to the ***Card Management*** page, which once established the case, allows to issue cards and PIN number. It also allows browsing the card information and status of ***PIN*** and access the ***Card History*** page.

To access the ***Card Management*** page you must access the cardholder record. From the ***Primary Information*** page, select the ***PAN*** field corresponding to the card that you need to access and the ***Card Management*** page will be displayed in the right side of ***the Primary Information*** page. The ***Card Management*** page has a link to the ***Card History*** page.

To access the ***Card Management*** page you first you must access the cardholder file. From the panel of ***Primary Information***, select the ***PAN*** that corresponds to the card that you wish to access and the ***Card Management*** page will be displayed within the right frame of the ***Primary Information*** page.

Data Entry to Card Management	
PAN	Card number.
Select Card Action	*(Select an option from the list)*
• ***Issue New Card and Enable Client Selected PIN***	Issue a new card and allow the client to choose the ***PIN*** number**.**
• ***Issue Replacement Card and Enable Client Selected PIN***	Issue a replacement card and allow the client to choose a ***PIN*** number**.**
Enable Client Selected PIN Only	Allow the client to choose the ***PIN*** only.
• ***Issue New Card and Assign PIN***	Issue a new card and assigned the ***PIN*** number**.**
• ***Issue Replacement Card and Assign PIN***	Issue a replacement card and assign the ***PIN*** number**.**
Card Status	*(Select a status from the list)*
• ***Registered***	The card is Registered.
• ***Returned to DHS***	The card returned to the agency.
• ***Stolen***	The card was stolen.
• ***Lost***	The card was lost.
• ***Damaged***	The card was damaged.
• ***Defective***	The card was defective.

Buttons	
Card History	Link to the page with the card's history.
Update	Updates the information entered.

How to Issue New Card and Enable Cardholder to Select PIN

1. To assign a new card to the primary cardholder, you must first access the primary cardholder record using the ***Search*** option.
2. The page will display the cardholder file; verify the information of the cardholder and the programs.
3. Select the ***PAN*** that corresponds to the card that you wish to access and click, the ***Card Management*** page will be displayed within the frame to the right of the ***Primary Information*** page.
4. Select ***Issue New Card and Enable Client Selected PIN*** option. The ***PAN*** field will be opened.
5. Enter the PAN number. The PAN has 19 digits in the front part of the card.
6. Press ***Update*** to register PAN number.
7. A window will appear confirming the update, press ***OK.***
8. A message will appear indicating that a new card has been issued. Press ***OK*** to erase this message.

How to Assign a Replacement Card and Allow the Cardholder to Select PIN

1. Access the cardholder record using the ***Search*** option.
2. The page with the cardholder record will be displayed, verify the cardholder information and the programs.
3. Select the ***PAN*** corresponding to the card that you wish to access and click, the ***Card Management*** page will be displayed in the right frame of the ***Primary Information*** page.

4. Select the ***Issue Replacement Card and Enable Client Selected PIN*** option. The PAN and Send by Mail option will be activated.
5. Enter the ***PAN***. If the card will be send by mail (24 hours service), select the Send by Mail.
6. Press ***Update*** to register the information entered.
7. A window asking if you wish to replace the card will appear. Press ***OK.***
8. A message will be displayed indicating that a new replacement card has been issued. Press ***OK*** *to* clear this message.

How to Assign a New Card and Assign PIN

1. To assign a new card to the primary cardholder, you must first access the primary cardholder record using the ***Search*** option.
2. The page with the cardholder record will be displayed, verify the cardholder information and the programs.
3. Select the ***PAN*** that belongs to the card you wish to access and click.
4. The ***Card Management*** page will be displayed in the right frame of the ***Primary Information*** page.
5. Select ***Issue New Card and Assign PIN*** *option*. The PAN field will be opened.
6. Enter ***PAN*** number; it has 19 digits. If the card will be send by mail (24 hours service), select ***Send by Mail.***
7. Press ***Update*** to register the information entered.
8. A window asking if you wish to replace the card will appear. Press ***OK***
9. A message confirming that the card was issued will appear. Press ***OK*** *to* clear this message.

How to Change Card Status

(Be sure to have the right card before changing the status).

1. To change the card status, you must first access the cardholder record using the ***Search*** option.

2. The page with the cardholder record will be displayed, verify the cardholder information and the programs.
3. Select the ***PAN*** corresponding to the card that you wish to access and click, the ***Card Management*** page will be displayed in the right frame of the ***Primary Information*** page.
4. Select the ***Change Status*** field in the ***Card Status*** section in the ***Card Management*** page.
5. Select the status from the list.
6. Press ***Update*** to register the change.
7. A window asking if you wish to change the card status will appear. Press ***OK.***
8. A message will be displayed confirming that the card *status* has been updated. Press ***OK*** to clear this message.

How to Inactivate PIN and Reset Count of PIN Entered Incorrectly

(Make sure that you have the correct card to reset the wrong PIN count).

1. To disable the ***PIN*** number change, you must first access the cardholder record using the ***Search*** option.
2. The page with the cardholder information file will be displayed, verify the cardholder information and the programs.
3. Select the ***PAN*** that you wish to access and click; the ***Card Management*** page will be displayed in the right frame of the ***Primary Information*** page.
4. Select the ***Disable PIN Change*** field to block the ***PIN*** change.
5. Select the ***Reset PIN Count*** field to reset count to zero.
6. Press ***Update*** to register the information entered.
7. A window asking if you like to update the information will appear. Press ***OK.***
8. A message confirming the action taken will appear. Press ***OK*** to clear this message.

Chapter 7

Exceptions

Introduction

This chapter explains how to merge or split client accounts by the card.

Merge Card Accounts

The ***Merge Card Accounts*** page (Illustration 7.1) allows merging cardholder accounts.

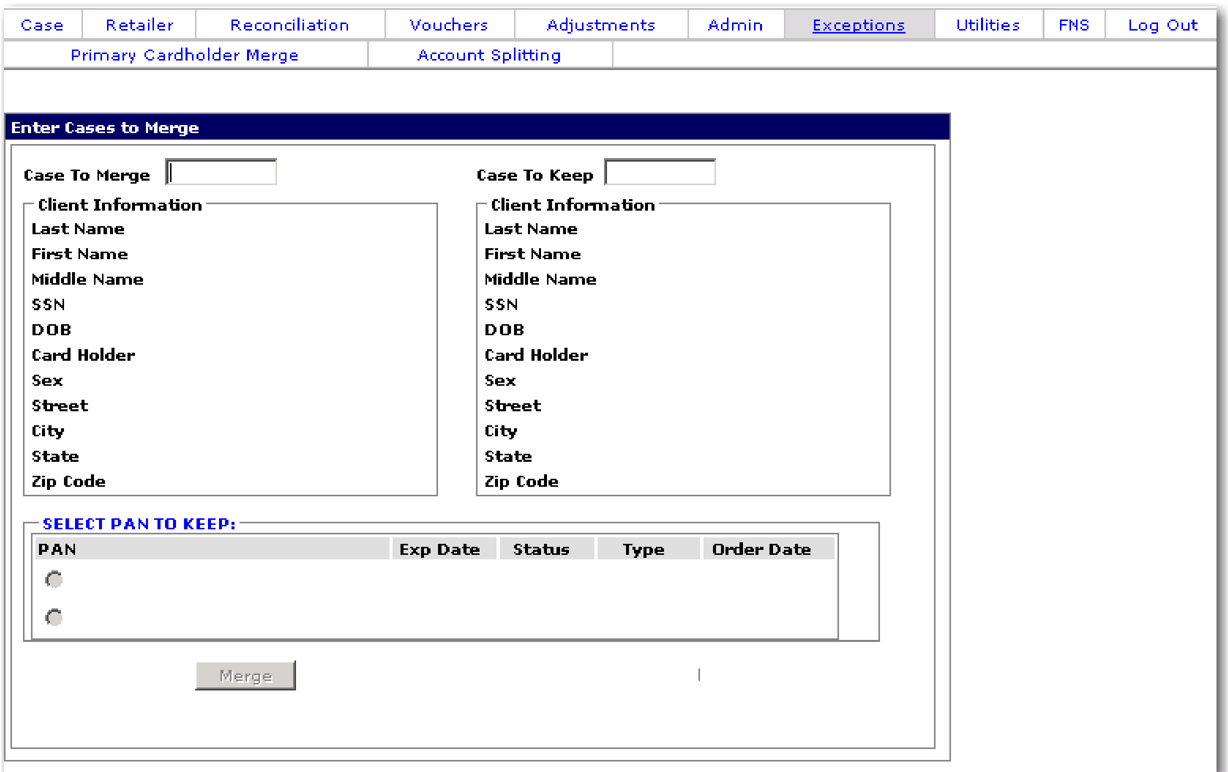

Illustration 7.1.

Enter Cases to Merge

BEFORE merging cases, perform ATA Inquiry to determine the status of the cards and accounts you are ENTERing to merge. Refer to the procedures in this reference guide for Displaying Card History.

How to Merge Card Accounts

1. To merge card accounts, you must first access the primary cardholder record using the ***Search*** option.
2. The page with the cardholder record will be displayed, verify the cardholder information and the programs. Select **Exceptions.**

3. Select the **Primary Cardholder Merge** option.
4. Enter the case number of the two (2) primary cardholder (PCH) records you want to merge in the **Case to Merge** and **Case to Keep** data entry fields.
5. A window asking if you like to merge accounts will appear. Press ***OK.***
6. A window stating to select the card to keep will appear. Press ***OK*** to clear this message.
7. Select the **PAN** to keep. Press ***MERGE.***
8. A message confirming the action taken will appear. Press ***OK*** to clear this message.

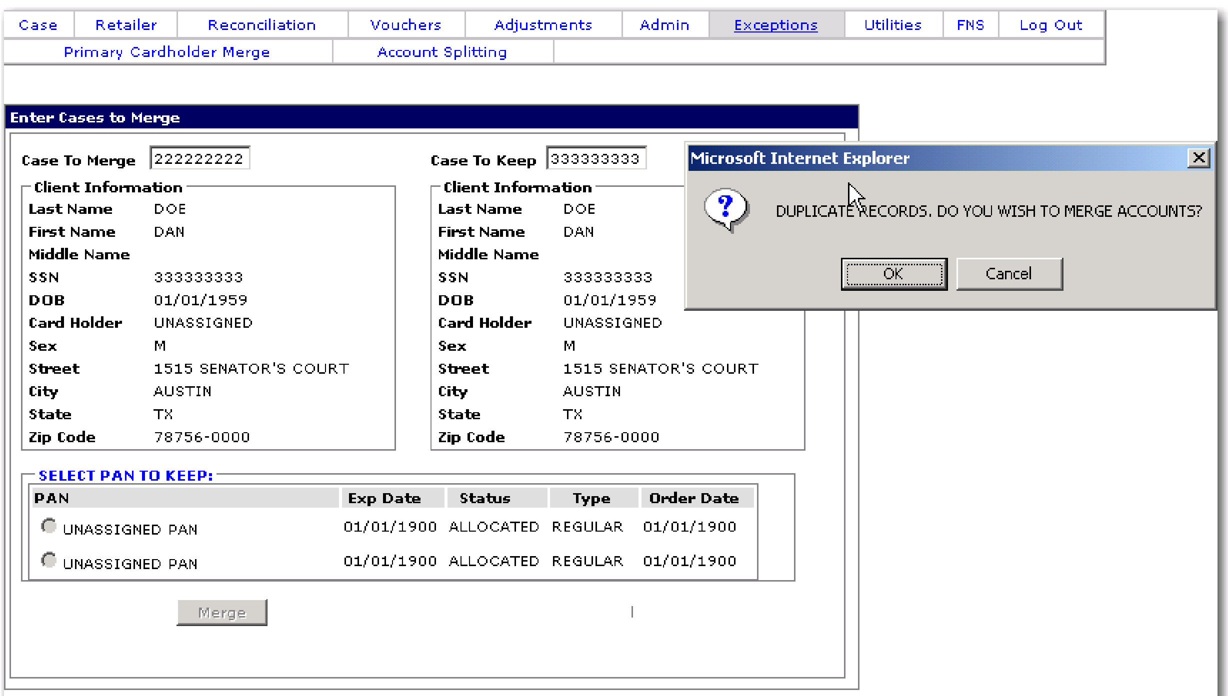

Illustration 7.2.

Merge Cases

Split Card Accounts

The ***Split Card Accounts*** page (Illustration 7.3) allows merging cardholder accounts.

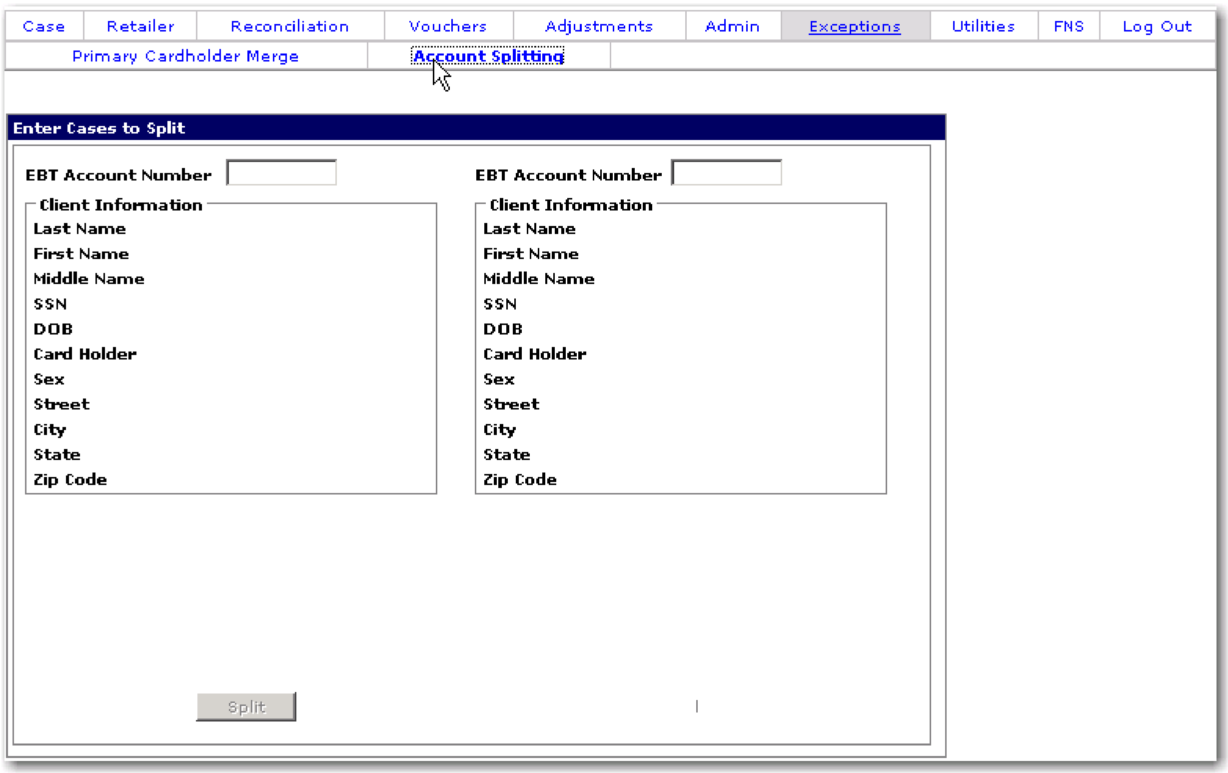

Illustration 7.3.

Enter Cases to Split

How to Split Card Accounts

1. To split card accounts, you must first access the primary cardholder record using the ***Search*** option.
2. The page with the cardholder record will be displayed, verify the cardholder information and the programs.
3. Select **Exceptions.**
4. Select the **Account Splitting** option.

5. Enter the case numbers of the two (2) accounts you want to split in the data entry fields provided and select the program type for each case.
6. A window asking if you like to split accounts will appear. Press ***OK.***
7. A window stating to select the case to be linked to card will appear. Press ***OK*** to clear this message.
8. Select the **PAN** to keep. Press ***SPLIT.***
9. A message confirming the action taken will appear. Press ***OK*** to clear this message.

Note: The *Update Primary Cardholder* window for the case that was split displays default information that includes:

- the word, "DEFAULT, in the Name and Address fields,
- "01/01/1900" in the Date of Birth field,
- "U" in the Sex field, and
- "000-00-000" in the Social Security Number field.

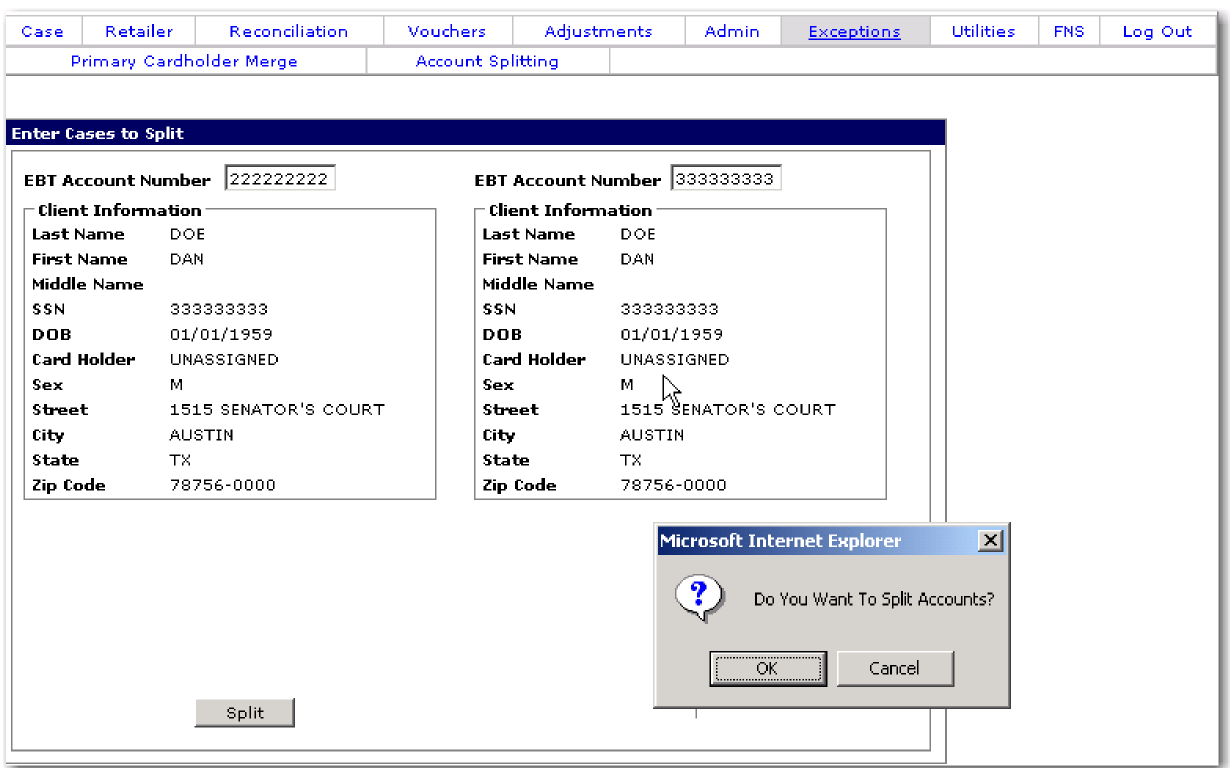

Illustration 7.4.

Split Cases

Chapter 8

Secondary Cardholder

Introduction

This Chapter explains how to add and update secondary cardholders to records using the ***WEB*** program through the Administrative Terminal (AT). An ***EBT*** cardholder may designate a person to be an authorize representative, a person which that primary cardholder allows access to his/hers benefits. Under the ***EBT*** system there is no difference between an authorize representative and a secondary cardholder.

Cardholders may have a ***Protective Payee*** assigned to their account to help handle cash benefits. Once a ***Protective Payee*** is assign, the cardholder losses access to the cash benefits.

It is very important to know that a legal authority assigns the Protective Payee, whereas an authorized representative is somebody selected by the cardholder.

The process of creating a record for the authorize representative is different from the process of creating a record for the primary cardholder. The creation and modification of the authorize representative has to be done through the Administrative Terminal and not through the eligibility system.

Setup Secondary Cardholder

The ***Secondary Cardholder*** page (Illustration 8.1) allows adding and removing secondary cardholders and updating the demographic information of the secondary cardholder.

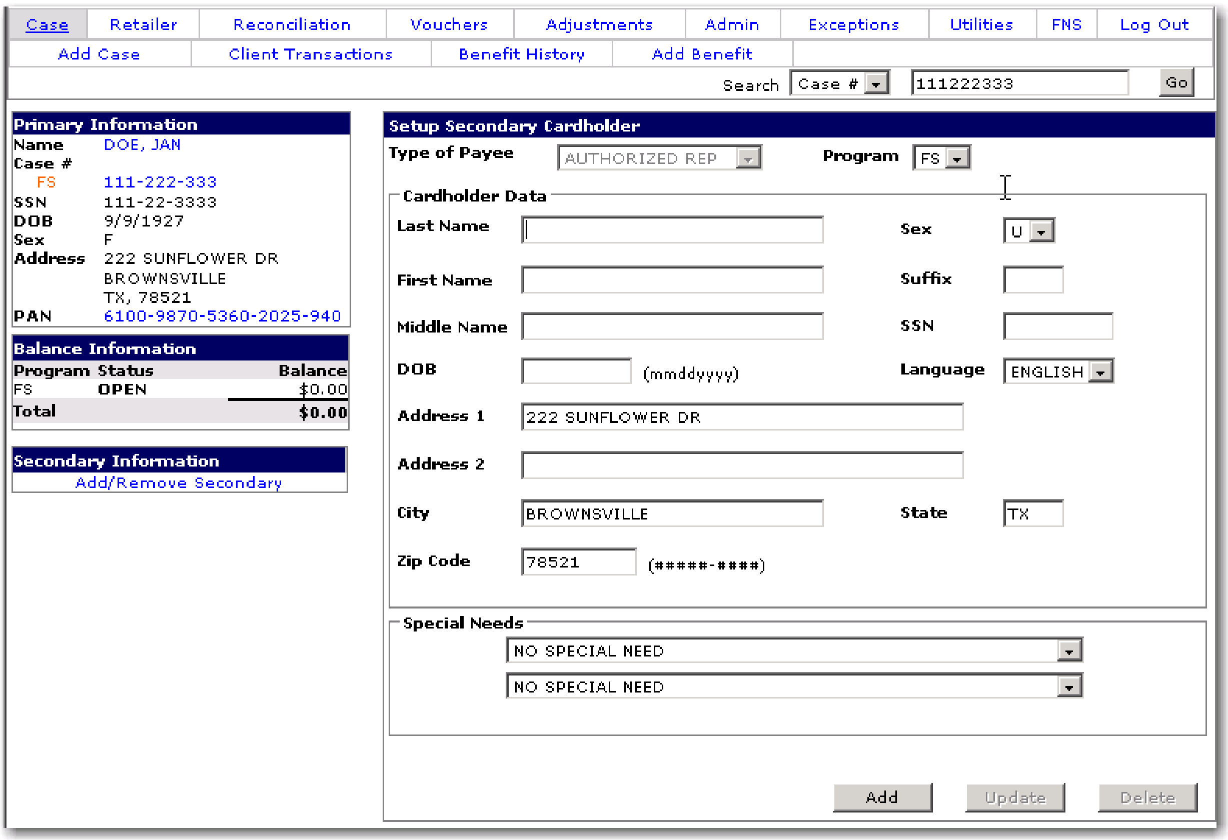

Illustration 8.1.

Setup Secondary Cardholder page

To add a new secondary cardholder, access the ***Setup Secondary Cardholder*** page (Illustration 8.2) and select ***Add/Remove Secondary*** in the ***Secondary Information*** panel. The cardholder page has two links that allows adding and updating the secondary cardholder information through the ***Setup Secondary Cardholder*** panel in the ***Secondary Information*** page.

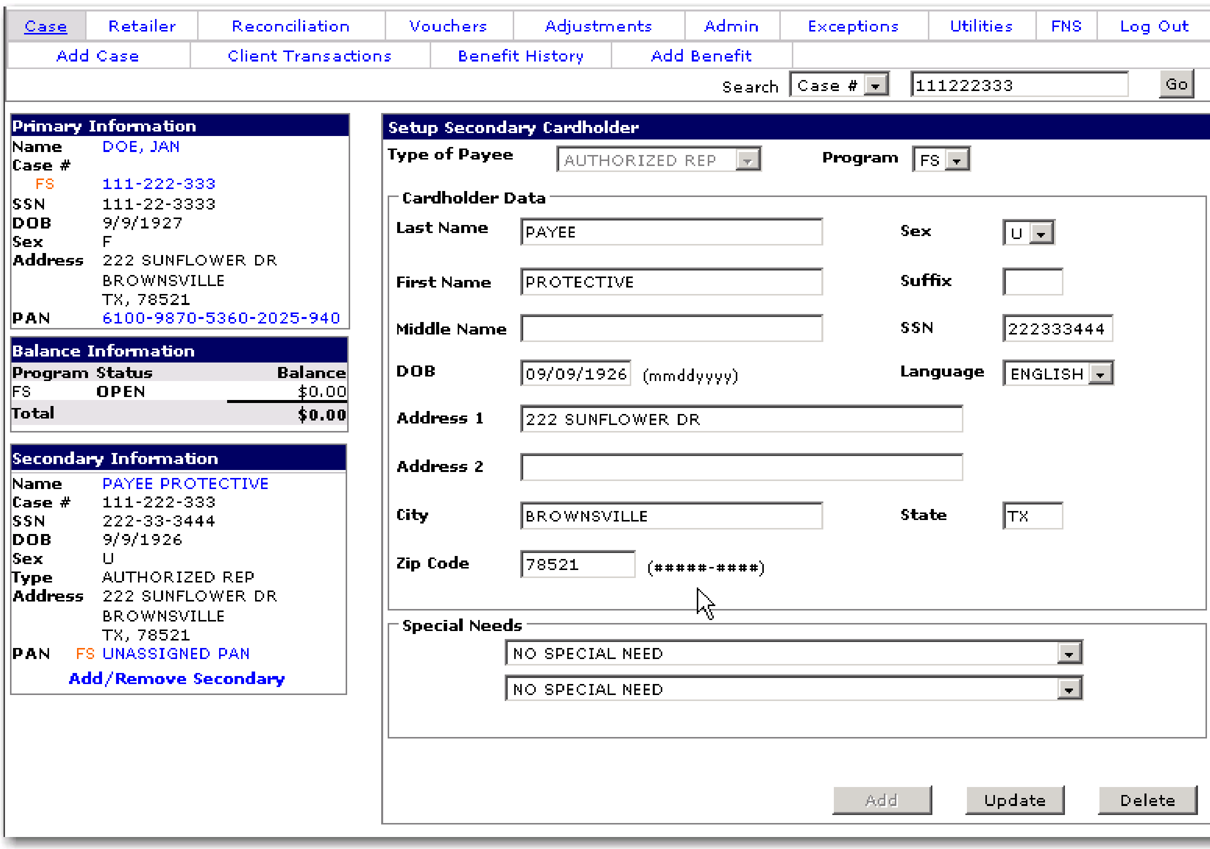

Illustration 8.2.

Add/Remove Secondary Cardholder Page

To update the demographic information or delete an existing secondary cardholder, you must access the primary cardholder record using the ***CASE #*** in the search option. Press the ***Name*** field on the ***Secondary Information*** panel. The ***Setup Secondary Cardholder*** page will display the demographic information of the secondary cardholder selected where changes can be made.

Data Entry to Add Secondary Cardholder	
Last Name	Enter last name of the new secondary cardholder.
Sex	Enter the gender (m-male, f-female, u-unknown).
First Name	Enter the secondary cardholder name. Required field.
Suffix (i. e. Jr., Sr.)	Enter senior, junior, etc.
Middle Name	Enter the middle name of the new secondary cardholder.
SSN	Enter the social security number of the secondary cardholder.
DOB	Enter the date of birth of the secondary cardholder. The format is mm/dd/yyyy. For example July 14, 1963 enter 07/14/1963.
Language	Enter the language of the secondary cardholder or select from the list by pressing the arrow.
Address 1	Enter the postal address.
Address 2	Enter any additional information, such as apartment number.
City	Enter the city where the secondary cardholder receives mail.
State	Enter the state where the secondary cardholder receives mail.
Zip Code	Enter the postal code where the secondary cardholder receives mail.
Type of Payee	Select ***protective payee*** (cash) or ***Authorized Representative*** (FS) from the list.
Special Needs	Select any special need for the secondary cardholder from the list.

Buttons	
Add	Saves secondary cardholder information.
Update	Updates the secondary cardholder information.
Delete	Deletes the secondary cardholder.

How to Setup a Secondary Cardholder

1. Access the secondary cardholder using the ***Search*** option.
2. Verify the cardholder's information and the programs in the ***Primary Information*** page.
3. Press the ***Add/Remove Secondary*** text.
4. The ***Setup Secondary Cardholder*** page will be displayed in the right frame of the ***Primary Information*** page.
5. Add the information required in each field.
6. Press ***Add*** to establish the secondary cardholder record.
7. A message will appear indicating that the record has been added.
8. Press ***OK*** to close this message. The secondary cardholder information will be displayed in the ***Secondary Information*** panel on the left side of the ***Browser*** in the cardholder page.
9. If you wish to register the information of the secondary cardholder card, press the ***PAN***. (For details, please refer to the ***Card Management*** chapter).

How to Assign Card for a Secondary Cardholder

1. Press ***PAN*** in the ***Add Secondary Information*** page. The ***Card Management*** page will be displayed.
2. Select the corresponding option. (Example: ***Issue New Card and Enable Client Selected PIN***).
3. Register the information required in the page.

4. Press ***Update***.
5. A window indicating that the card has been assigned will appear. Press the ***OK*** button.

How to Update a Secondary Cardholder

1. Access the secondary cardholder using the ***Search*** option.
2. Verify the cardholder information and the programs.
3. Select the cardholder name to update. The ***Setup Secondary Cardholder*** page will be displayed in the right frame of the ***Primary Information*** page.
4. Add the information requested in each field.
5. Press the ***Update*** button to update the record of the secondary cardholder.
6. A message indicating that the record has been updated will appear.
7. Press ***OK*** to clear this window.

How to Delete a Secondary Cardholder

1. Access the cardholder's record using the ***Search*** option.
2. The page with the cardholder record will be displayed, verify the cardholder information and the programs.
3. Select the name to delete.
4. The ***Setup Secondary Cardholder*** will be displayed in the right frame of the ***Primary Information*** page.
5. Press the ***Delete*** button to delete secondary cardholder's record.
6. A message confirming that the record has been deleted will appear.
7. Press ***OK*** to close this window.

Chapter 9

Client Transactions

Introduction

This chapter shows how to see transactions in the cardholder's account. These transactions are cash withdrawals and purchases using a point of sale (POS). Voids and returns are included too.

There are four options to choose in the Client ***Transaction Summary*** *page:* transactions between two specific dates, Today, Past Week and Past Month.

Client Transaction Summary

The ***Client Transaction Summary*** page (Illustration 9.1) allows the user to see the cardholder's transactions for a specific period. In this page, the user may see transactions such as purchases, withdrawals, returns and credits.

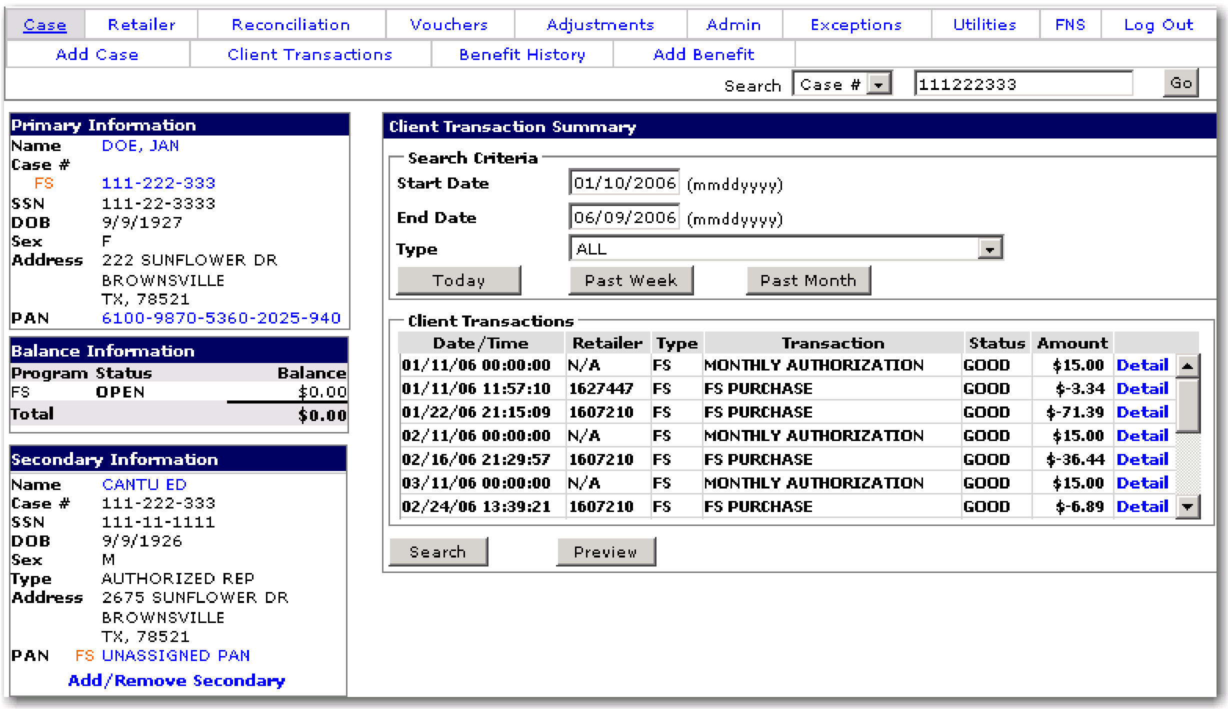

Illustration 9.1.

Client Transaction Summary Page

Search Client Transactions

To access the transactions history, the client must access the cardholder record either by ***SSN***, ***CASE #***, ***PAN*** or ***Name*** and select the ***Client Transactions*** option from the ***Case*** sub-menu. The Administrative Terminal will display the ***Client Transaction Summary*** page in the right side of the ***Browser***.

The ***Client Transaction Summary*** page allows searching transactions between two specific dates, for today, last week or last month. Once you select the period, the

Administrative Terminal will display the list of transactions that matches the search criteria. To see the transactions detail, press ***Detail*** and the ***Transaction Details*** page will be displayed with the transaction selected in the ***Browser***.

Transactions History Data Entry	
Start Date	Enter the initial date of the period that you would like to search.
End Date	Enter the end date of the period that you would like to search.
Type	Select the transaction type, for example: ***FS, Benefit Issuance, Cash Withdrawal***, etc

Buttons	
Today	Select this button if you wish to see the transactions of the current day.
Past Week	Select this button if you wish to see the transactions from last week.
Past Month	Select this button if you wish to see transactions from last month.
Search	Displayed transactions for the period selected.
Detail	Displayed the details of the transaction selected.

How to Display the Transaction Summary for a Cardholder

1. Access the cardholder's record using the ***Search*** option.
2. Verify the cardholder's information and the programs.
3. Select ***Client Transactions*** option from the ***Case*** sub menu. The ***Client Transaction Summary*** page will be displayed.
4. Select the period of time that you wish to search: ***Today, Past Week*** or ***Past Month*** or enter the information requested in the ***Start Date, End Date and Type of Transaction*** fields. A list of all transactions will be displayed in the ***Client Transactions*** page in the panel below the ***Client Transaction Summary*** page.

Transaction Details Page

The ***Transaction Details*** page (Illustration 9.2) allows seeing each transaction detail. From this page, the user may see the available balance and where the transaction took place.

To access the ***Transaction Details*** page**,** select the transaction from the ***Client Transaction Summary*** and press ***Detail.*** The ***Transaction Detail*** page will be displayed**.**

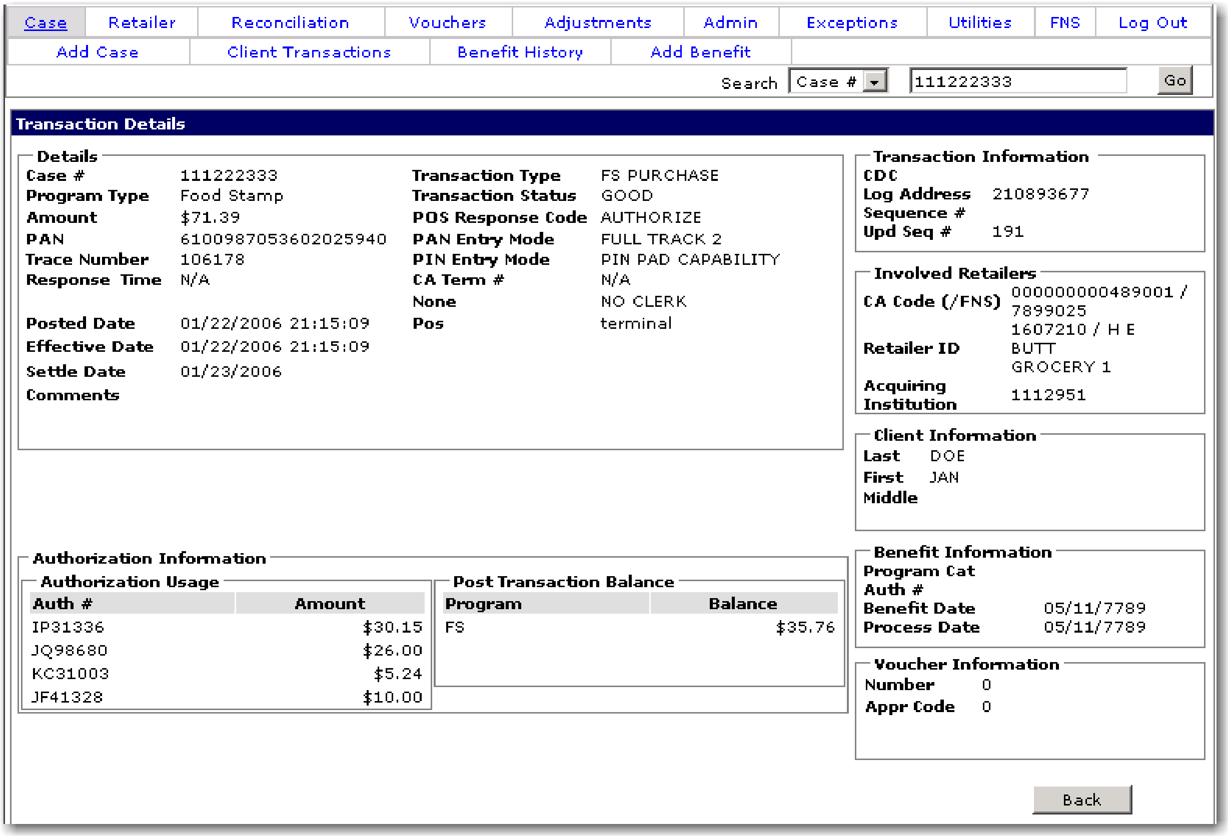

Illustration 9.2.

Transaction Detail Page

The ***Authorization Information*** panel will be displayed at the bottom of the page. The ***Authorization Usage*** panel will display the authorization or benefit number and the amount used. It also shows the balance by program after the transaction in the ***Post Transaction Balance*** panel.

Buttons	
Linked Transaction	If there is a transaction related to the selected transaction it will be displayed by pressing this button.
Back	Allows ENTERing to the previous page.

How to Display Transactions Detail

1. Access the cardholder record.
2. Select the ***Client Transactions*** option.
3. To see details select and press ***Detail***.
4. The ***Transaction Details*** page will be displayed.

Chapter 10

Benefit Management

Introduction

This chapter explains how to add benefits to the cardholder using the ***WEB*** program for the Administrative Terminal (AT). The function that adds benefits through the Administrative Terminal should be used in emergency cases only. To keep the reliability of the data and the procedures standardized, benefits should be given through the eligibility system whenever possible.

Authorize Benefits

The ***Authorize Benefits*** page (Illustration 10.1) allows adding benefits to the primary cardholder. Benefits will be available the day entered even though the date may be updated in the ***Access Date*** field.

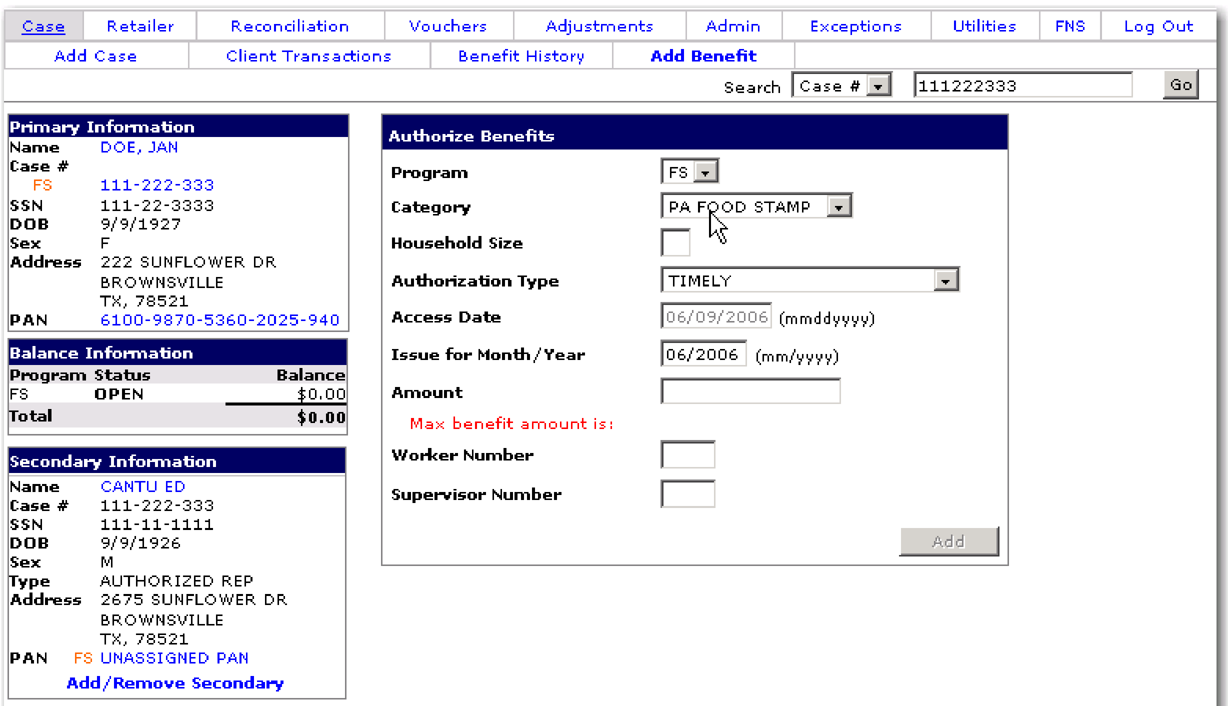

Illustration 10.1.

Authorize Benefits Page

To access the ***Authorize Benefits*** page to add benefits first search the cardholder's record by ***SSN***, ***CASE #***, ***PAN*** or ***Name*** and select the ***Add Benefit*** option from the ***Case*** sub-menu**.** The Administrative Terminal will display the ***Authorize Benefits*** page in the panel to the right of the ***Primary Information*** page.

Data Entry to Authorize Benefits	
Program	Select the program to add the benefits. (Please make sure that you choose the correct program before assigning the amount).

Category	Select the program category, if it applies.
Authorization Type	The default value for this field is ***Emergency Benefits***.
Access Date	Enter access date approved (MM/DD/YYYY). The default date is the current date. This is a required field.
Benefit Month/Year	Enter the benefits month and year (MM/YYYY). The default date is the current date. This is a required field.
Amount	Enter benefit amount**.** This is a required field.

Buttons	
Add	Establishes the benefit record based on the data entered.

How to Add Benefits to a Primary Cardholder

1. Access the cardholder's record using the ***Search*** option. Verify the cardholder information.
2. Press the ***Add Benefits*** option in the ***Case*** sub-menu. The ***Authorize Benefits*** page will be displayed.
3. Enter the necessary information.
4. Press ***Add*** to register the benefit.
5. A message asking if you like to add benefits will appear. Press ***OK***.
6. A message confirming that the authorization has been registered will appear.
7. Press ***OK*** to close this message. Once a benefit has been added, it can be seen in the ***Benefit History*** page.

Benefit History page

The ***Benefit History*** page (Illustration 10.2) displays the list of benefits, the date of the benefits, access date, amount and balance of each benefit. It also allows access detail information of the benefits assigned to the cardholder.

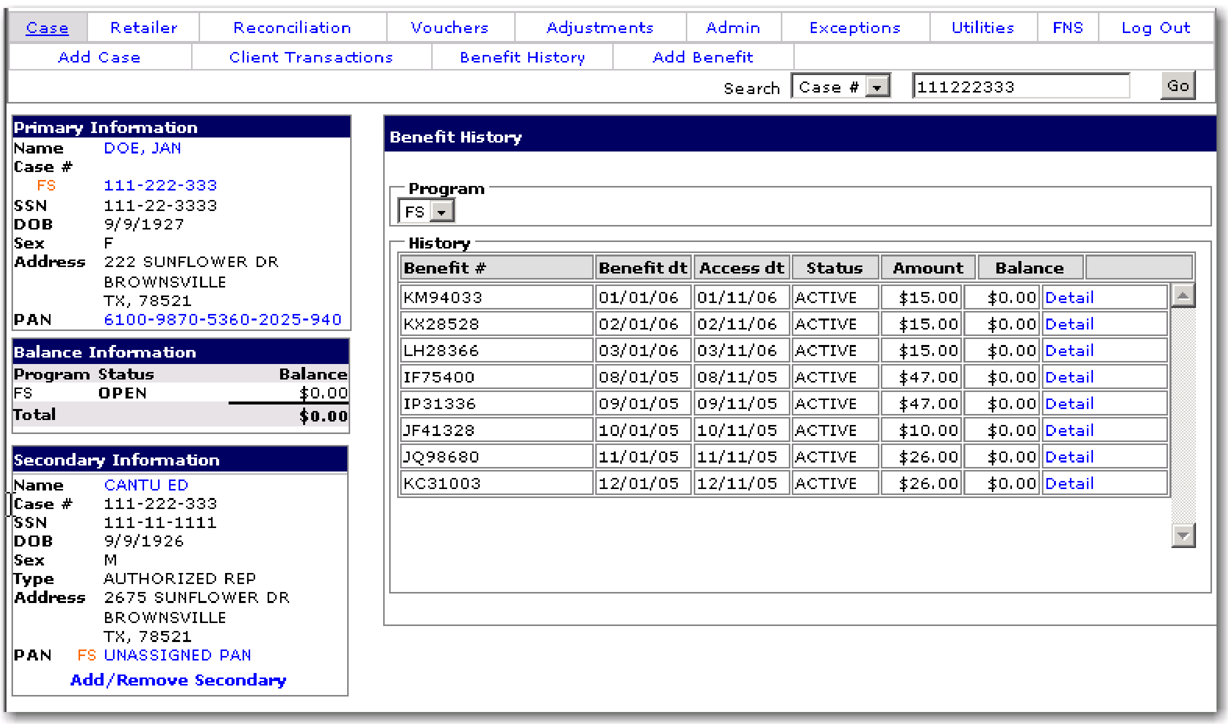

Illustration 10.2.

Benefit History Page

How to Access Benefit History

1. Access the cardholder record using the ***Search*** option. Verify the cardholder information.

2. Select the ***Benefit History*** option from the ***Case*** sub-menu. The ***Benefit History*** page will be displayed.

Benefit Detail Page

To see benefits details, press ***Detail*** in the last column of the ***Benefits History*** page**,** the ***Benefit Detail*** page (Illustration 10.3) with the selected transaction will be displayed in the right side of the ***Browser***.

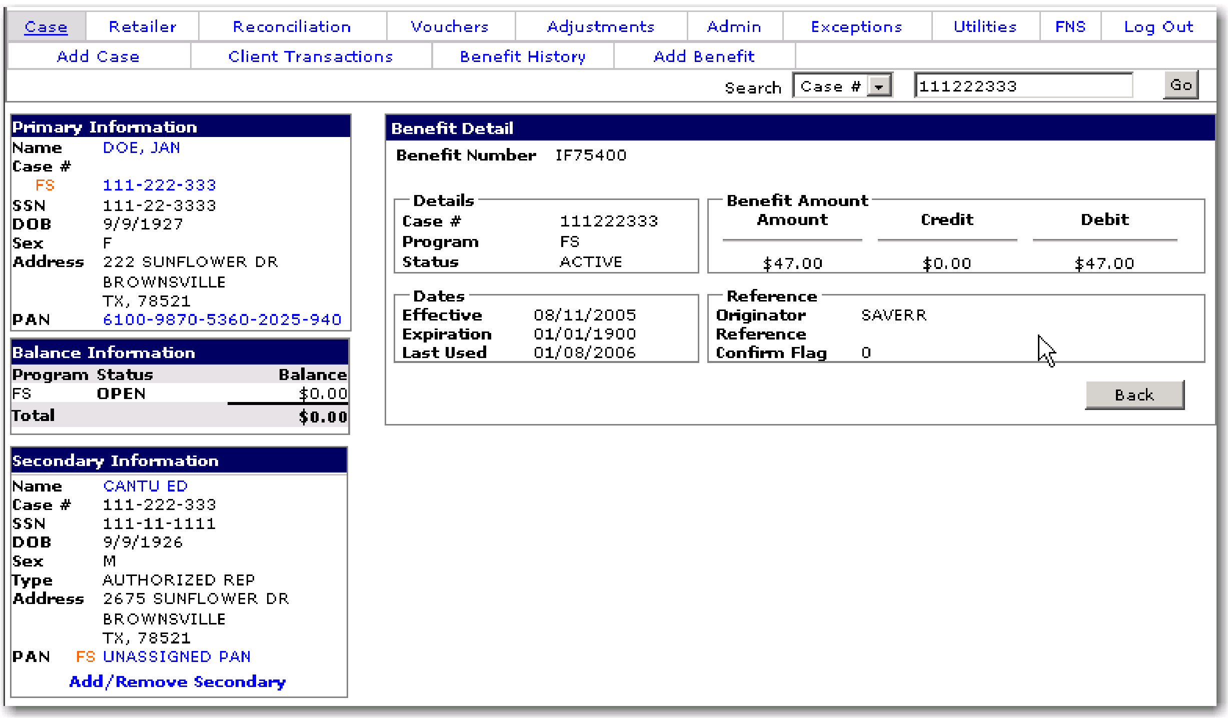

Illustration 10.3.

Benefit Detail Page

Section III

Administration

Introduction

The administration menu ***Admin*** allows adding and/or updating records by users, groups, offices and equipment that have access to the Administrative Terminal program.

Chapter 11

Admin User

Introduction

The ***User Administration*** page allows adding and/or updating Administrative Terminal users. Each individual record contains ***Password, Language, Status, Office & Group***. The user may be associated with other ***EBT*** applications and the different permission levels by selecting the groups in the different applications. To access the administration sub-menus select the ***Admin*** option from the main menu.

User Administration

The ***User Administration*** page (Illustration 11.1) allows adding, updating and deleting Administrative Terminal user's records. To add a new record, access the ***Admin*** sub menu, select the ***Admin User*** option and then ***Add User.***

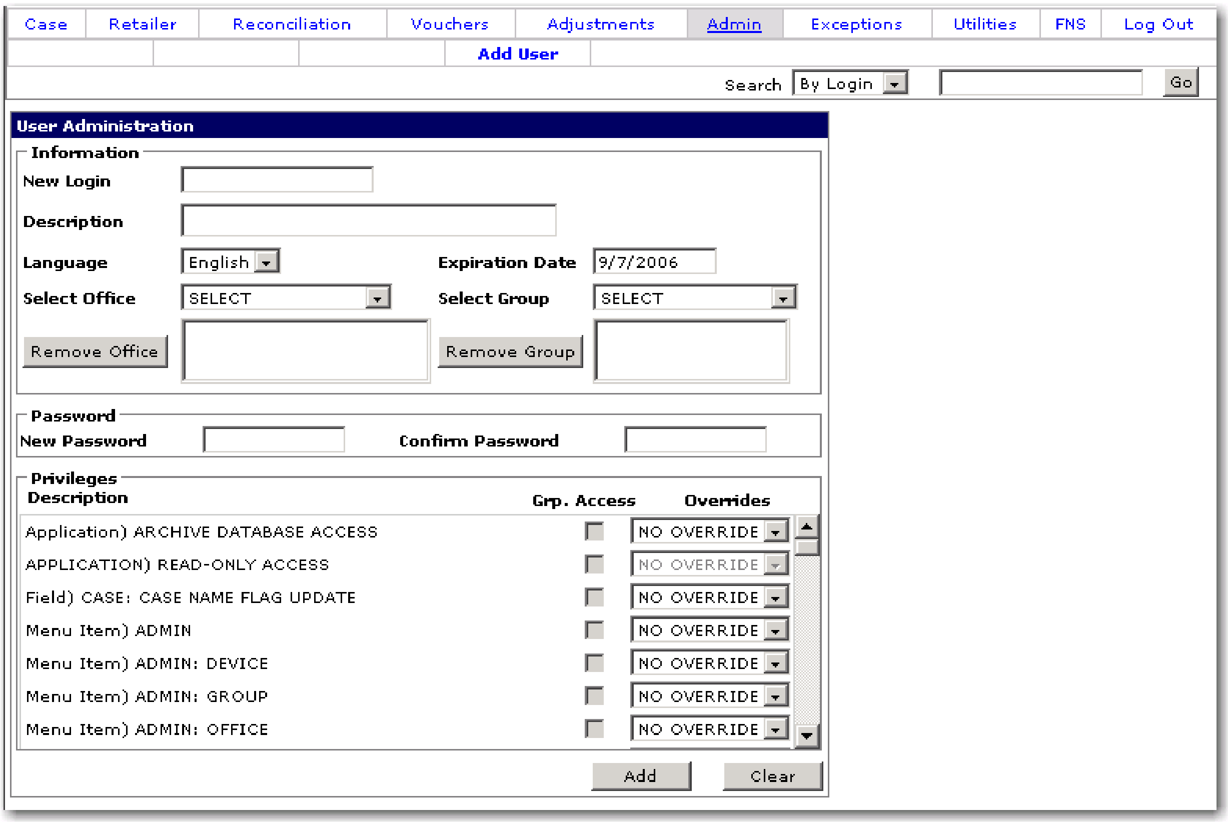

Illustration 11.1

User Administration Page

Data Entry to Add a New User	
New Login	Enter the ***User Login***.
Description	Enter user's description (*Name*).
Language	Select the language from the list for the new user. The default is ***ENGLISH***.
Expiration Date	The system will set the expiration date for the ***new login*** (ninety days).
Select Office	Select the office for the new user from the list. The System Administrator will keep the list.
Select Group	Select a group for the new user from the list. The System Administrator will keep the list.
New Password	Enter the password (up to nine characters) assign to the new user. This field is ***case-sensitive***.
Confirm Password	Enter the password again.
Privilege Description	Select the privileges available for this user.
Buttons	
Remove Office	Eliminates a user from an office.
Remove Group	Eliminates a user from a group.
Add	Saves new user information as a record.
Update	Saves modifications to an existing record.
Delete	Eliminates the information of the currently displayed record. A message confirming that the record has been deleted will be displayed.

Data Entry to Add a New User	
Clear	Eliminates the information in the ***User Administration*** page**.**

How to Add a New User

1. After accessing the ***Admin*** menu, select the ***Admin User*** option and the ***Add User*** option will be displayed.
2. To access the ***User Administration*** page, select the ***Add User*** option.
3. In the ***New Login*** field, enter user's identification.
4. Enter the name and description that will be used by the new user.
5. Enter the preliminary ***password*** (up to nine characters). This password may be changed later.
6. Select the language for the new user.
7. The system will set the expiration date.
8. Select the office, group and privileges from the lists.

Search User

The ***Search*** option (see Illustration 11.2) of the ***Admin*** sub menu allows searching a specific user by ***Login, Office, Description*** or ***Group,*** by selecting from the existing users list. The Search option of the Admin sub menu will be displayed beneath the sub menu bar.

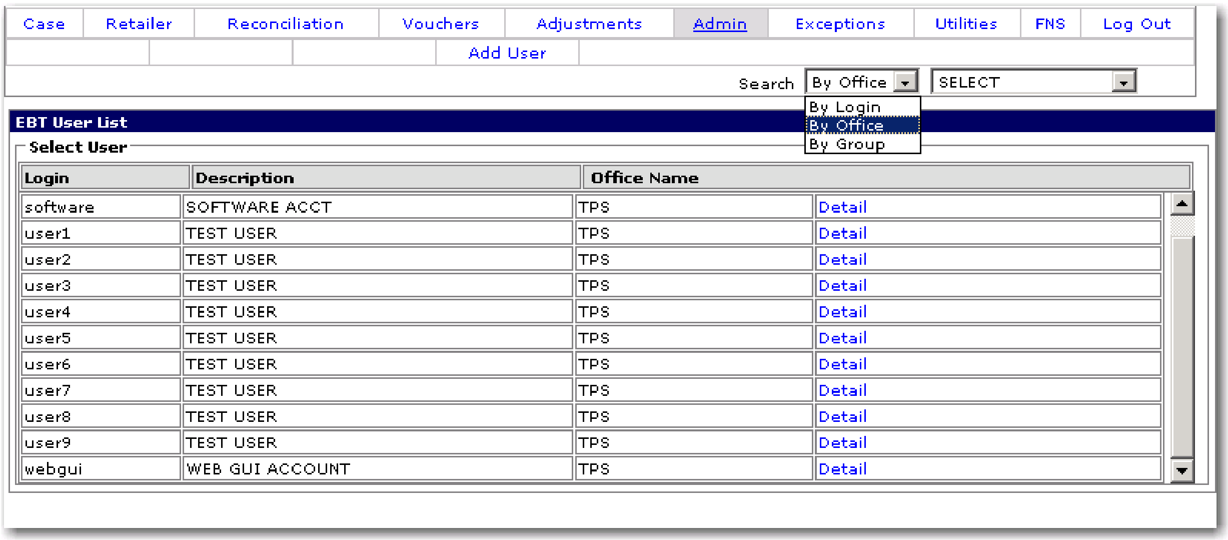

Illustration 11.2

Search User Page

How to Locate User

Select the search option, ***By Login, By Office, By Description*** or ***By Group*** and follow the search procedure.

Search by Login

1. Select this option and enter the ***login name*** for the user you wish to locate.
2. The ***User Administration*** page will be displayed including user's information.

Search by Office

1. Select this option and the word ***Select*** will be displayed next to the search option.
2. Press over the arrow in the ***Select*** field and a list of existing offices will be displayed.
3. Select the office where the person is associated and a list of all users will be displayed in the ***EBT User List*** page.
4. Select the user by pressing the link in the text ***Detail*** at the end of the row; the ***User Administration*** page with the record's information will be displayed.

Search by Description

1. Select this option and enter the user's description. The ***User Administration*** page with the user's information will be displayed.
2. You may also enter part of the description and a "wild card", with the % sign. The ***EBT User List*** page with the user's list will be displayed.
3. Select the user by pressing the word ***Detail***. The ***User Administration*** page with the information of the user will be displayed.

Search by Group

1. Select this option and the word ***Select*** will be displayed next to the search option field.
2. Press over the arrow in the ***Select*** field and the list of the existing groups will be displayed.
3. Select the group that the person to be located is associated and the page with the ***EBT User List*** page will be displayed.
4. Select the user by pressing the ***Detail*** link located at the end of the row and the ***User Administration*** page with the user information will be displayed.

How to Update a User

1. Locate the record. See ***Chapter 4- EBT Client Search***
2. Once the ***User Administration page*** is displayed, change the information field as needed.
3. Press the ***Update*** button to save changes.
4. A confirmation message will be displayed, press ***OK***.

How to Delete a User

1. Locate the record using the ***Search*** option.
2. Once in the ***User Administration*** page make sure that the record displayed is the record that you wish to eliminate.
3. Press the ***Delete*** button to eliminate this record.

4. A confirmation message will be displayed, press ***OK*** if you wish to eliminate the user. Otherwise press ***Cancel***.
5. A second confirmation message will be displayed indicating the user has been eliminated. Press ***OK***.

Chapter 12

Admin Group

Introduction

The ***Group Administration*** page allows adding and updating group records. This page will activate specific ***EBT*** functions designed for specific groups, users, offices and others.

Group Administration

The ***Group Administration*** page (Illustration 12.1) allows adding and updating Administrative Terminal user's groups' records. To add a new group, once you have accessed the ***Admin Menu,*** select the ***Admin Group*** option and then the ***Add Group*** option. To access the ***Group Administration*** page select the ***Add Group*** option.

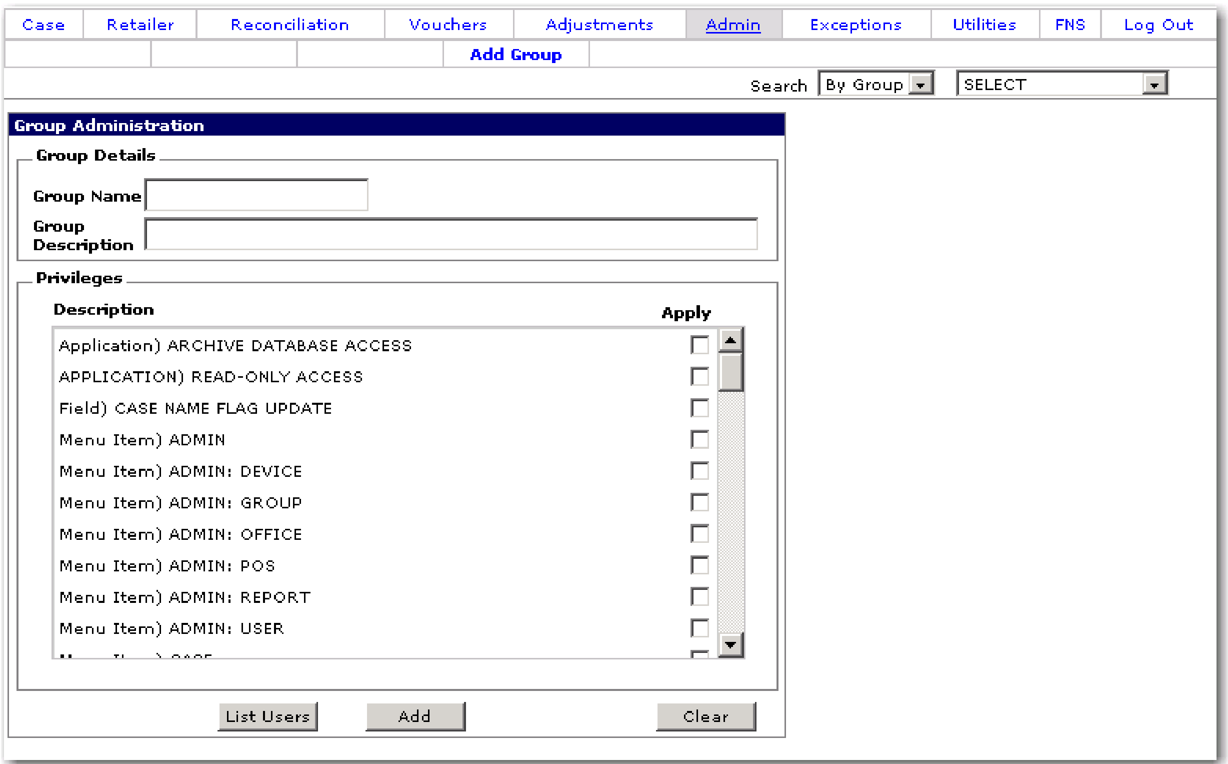

Illustration 12.1
Add Group Page

Data Entry to Add/Update a Group	
Group Name	Enter the group name.
Group Description	Enter the group description.
Privileges	Select the privileges or permissions appropriated for the group. This field allows specifying available functions for each member of the group. This field has a list of all the options. Not selected options will not be available in the menu for the group. If a group does not have a selected option, it will not appear in the list.

Buttons	
Add	Creates the groups and establishes permissions.
Update	Allows updating group information. This button only appears when the group already exists.
Clear	This button allows eliminating information already entered.

How to Add a Group

1. Once in the ***Admin Menu***, select the ***Group Admin*** option and the ***Add Group*** option will be displayed.
2. Select the ***Add Group*** option to access the ***Group Administration*** page.
3. Enter the ***Group Name***.
4. Enter the ***Group Description***.
5. Select the privileges that will be assigned to the group.
6. Press the ***Add*** button to establish a group record.
7. A confirmation message will be displayed. Press ***OK***.

Group Search

The ***Search*** allows updating the record by searching and selecting a group by selecting from the existing group list. The ***Search*** option of the ***Admin*** sub-menu will be displayed. See illustration 12.1.

Locate Group By Group

1. Select the ***Admin Group*** option from the ***Admin*** menu.
2. Press the arrow in the ***Select*** field and a list of existing groups will be displayed.
3. Select the group you wish to locate and the ***Group Administration*** page will be displayed with the group information.

How to Update a Group Record

1. Locate the record using the ***Search*** option.
2. Once in the ***Group Administration*** page, change the information as needed.
3. Press the ***Update*** button to save changes in the record.
4. A confirmation message will be displayed, press ***OK***.

Chapter 13

Admin Office

Introduction

The ***Admin Office*** allows creating and updating records of offices with demographic information, allowing the activation of different EBT functions to the group of offices.

Office Administration

The ***Office Administration*** page (Illustration 13.1) allows creating and updating a record by activating different EBT functions for that office.

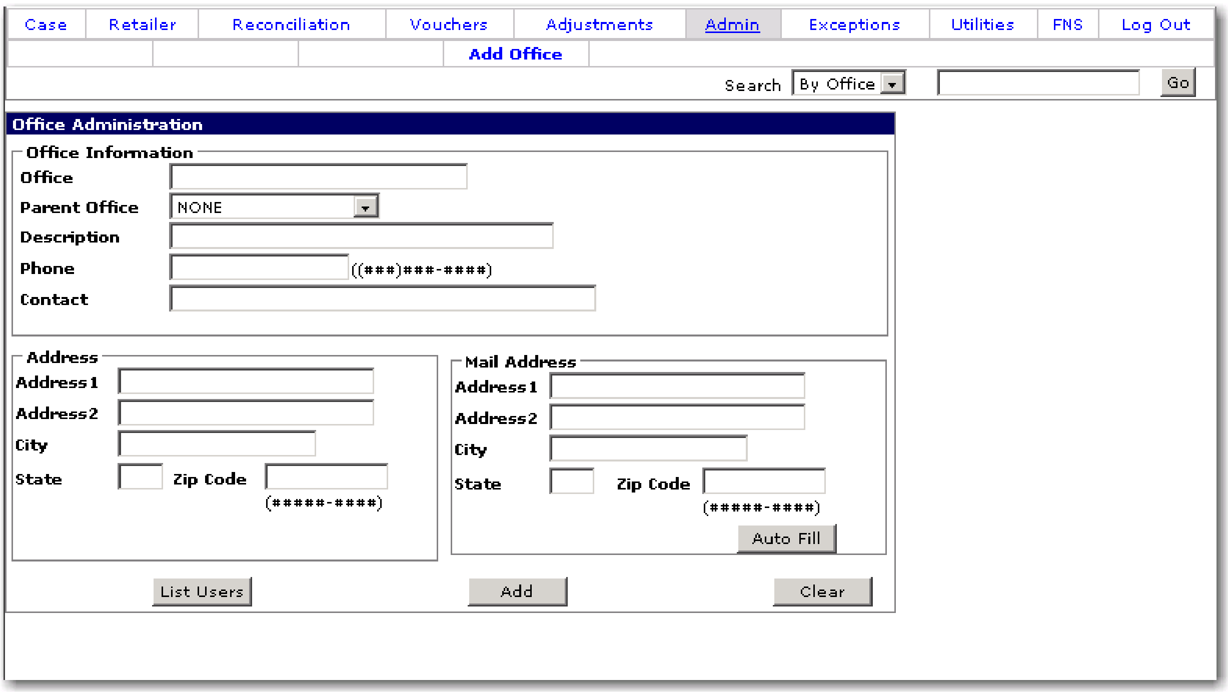

Illustration 13.1.

Office Administration Page

Data Entry to Add and Update a Record in an Office	
Office	Select an office from the list or enter a group if you like to add a new group.
Parent Office	Select the ***Parent Office*** from the list.
Description	Enter the description.
Phone	Enter the area code and the telephone number.

Data Entry to Add and Update a Record in an Office	
Contact	Enter the contact person.
Address	
Address 1	Enter the first line of the physical address.
Address 2	Enter the second line of the physical address.
City	Enter the city where the office is located.
State	Enter the country (Texas – "TX").
Zip Code	Enter postal code.
Postal Address	
Address 1	Enter the first line of the postal address.
Address 2	Enter the second line of the postal address.
City	Enter the city where the office is located.
State	Enter the country (Texas – "TX").
Zip Code	Enter the postal code.

Buttons	
Auto Fill	When you press this button, the physical address is copied to the postal address fields.
Add	Allows creating offices and assigning privileges to those offices.
Update	Allows updating office information.
Delete	Allows eliminating an office.

Data Entry to Add and Update a Record in an Office	
Clear	Eliminates the information entered in the fields of the ***Office Administration*** page.

How to Add an Office

1. Once you access the ***Admin*** sub-menu, select the ***Office Admin*** option and the ***Add Office*** option will be displayed**.**
2. Press over the ***Add Office*** to access the ***Office Administration*** page.
3. Enter the information belonging to the office.
4. Enter the name of the office.
5. Select the ***Parent Office*** (if applies) from the list.
6. Press the ***Add*** button.
7. A confirmation message will be displayed, press ***OK***.

How to Locate an Office Record

The ***Search*** option of ***Office Administration*** allows searching the office record by name.

1. To access an office record, enter the entire name or part of the name followed by the % sign and press ***ENTER.***
2. The ***EBT Office List/Select Office*** will be displayed.
3. Select the office by pressing ***Detail.***
4. This will take you to the ***Office Administration*** page.

How to Update an Office Record

1. Locate the office record using the ***Search*** option in the ***Admin Office*** sub-menu.
2. The ***Office Administration*** page will be displayed with the information of the office selected.
3. Make the changes required in each field.
4. Press the ***Update*** button to save changes in the record.

5. A confirmation message will be displayed, press ***OK***.

How to Delete an Office

1. Locate the record using the ***Search*** option from the ***Admin Office*** menu.
2. The ***Office Administration*** page with information of the selected office will be displayed.
3. Press the ***Delete*** button to delete the record.
4. A confirmation message asking if you are sure to delete the office will be displayed.
5. Press ***OK*** if you like to delete that office; otherwise press ***Cancel***.
6. A confirmation message will be displayed, press ***OK***.

Section IV

Utilities

Chapter 14

Change Password

Introduction

This chapter describes how to change the password used to access the ***EBT*** Administrative Terminal. The first time you access the ***EBT*** Administrative Terminal, a message indicating that the password must be changed will appear.

Change Password

The ***Change Password*** page (Illustration 14.1) allows changing the ***EBT*** Administrative Terminal password. Your password is very important for security and disables non-authorized persons to change records, to create, update or view. The Internal Security System and ***EBT*** Audit Division associates each transaction with the ***User Name*** and ***Password***. You will need to change the password as required by each agency.

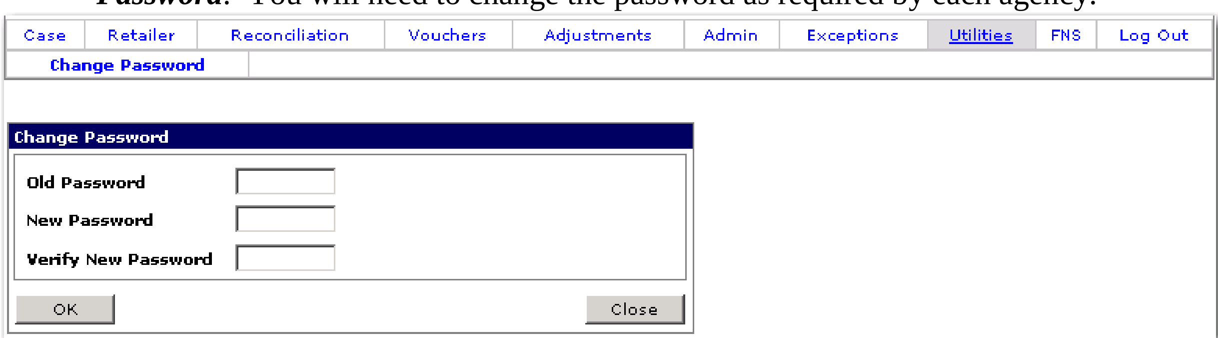

Illustration 14.1

Change Password Page

~~Data Entry to Change the Password~~	
Old Password	Enter your current password.
New Password	Enter your new password.
Verify New Password	Re-enter the new password.

To access the ***Change Password*** page select the ***Change Password*** option from the ***Utilities*** sub-menu and the ***Change Password*** option will be displayed.

Buttons	
OK	Press ***OK*** to accept the change.
Close	Press ***Close*** to exit the page where you updated the ***password***.

How to Change a Password

1. Select the ***Utilities*** option from the main menu. The ***Change Password*** option will be displayed.
2. Press ***Change*** P***assword***. The ***Change Password*** page will be displayed.
3. Enter your current password.
4. Enter your new password.
5. Re-enter your new password.
6. Press ***OK*** to accept changes.