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Employees' Manual
Title 14
Chapter J

EPPICTM ELECTRONIC BENEFIT TRANSFER SYSTEM



Iowa Department
of Human Services

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EPPIC™ System Overview

EPPIC™ is the computer system through which Iowa delivers Food Assistance via electronic benefit transfer (EBT). The EPPIC™ system:

- ◆ Maintains Food Assistance issuance data.
- ◆ Tracks all Food Assistance account activities.
- ◆ Authorizes Food Assistance purchase transactions at retailers' point of sale devices.
- ◆ Provides customer service support for cardholders and retailers 24 hours a day, 7 days a week.
- ◆ Allows Department central office to specify a password (called "multifactor authentication") for extra account security, upon client request.
- ◆ Provides the Department with real-time access to Food Assistance account information, benefit availability, and account transaction histories.
- ◆ Allows the Department to add authorized representatives and secondary cardholders to Food Assistance accounts when those actions cannot or should not be performed through the Automated Benefit Calculation System (ABC).
- ◆ Allows the Department to deactivate any Iowa EBT card immediately.
- ◆ Reconciles daily all Food Assistance activities between the state, the federal government and retailers.
- ◆ Provides DHS and the USDA Food and Nutrition Service (FNS) the ability to monitor the following facilities to ensure that Food Assistance program violations do not occur:
 - FNS-authorized meal services that provide substance abuse treatment.
 - Drug and alcohol treatment centers that use Food Assistance through authorized representative Iowa EBT cards.
 - Group living arrangements.
- ◆ Generates financial and other types of reports for DHS and FNS Food Stamp Program administration staff.

The ABC system transfers information on cardholders and their benefits to the EPPIC™ system in an overnight batch process. When ABC processes an approval for a household for Food Assistance for the first time, the EPPIC™ system:

- ◆ Sets up an EBT Food Assistance account for the household, and
- ◆ Initiates the mailing of an Iowa EBT card to each person authorized on ABC as an Iowa EBT cardholder.

The EPPIC™ system draws down Food Assistance benefits from the federal government and transfers payments to retailers as each purchase takes place. EPPIC™ keeps track of all Iowa EBT card transactions and other types of transactions used for program administration.

Department staff use the EPPIC™ on-line system to access EBT account information. This chapter describes the EPPIC™ system screens and functions that are used to handle ongoing tasks specific to Food Assistance Program policy.

- ◆ A few of the functions described in this chapter can be accomplished only through direct entries to the EPPIC™ system, and not through the ABC batch process.
- ◆ Some EPPIC™ functions described in this chapter are to be used only in an emergency, or their use is restricted to Central Office.
- ◆ Some EPPIC™ screens and functions are solely for the use of Food Assistance Program administrators and the EBT service provider and are deliberately not mentioned in this chapter.

The term “recipient” as used in the EPPIC™ system means “cardholder.” EPPIC™ contains limited information on Food Assistance household members who are not authorized Iowa EBT cardholders.

EBT Customer Service

The EBT customer service call center provides Iowa EBT cardholders and retailers with support 24 hours per day, 7 days a week. Toll-free access numbers are:

- ◆ For Iowa EBT cardholders: 1-800-359-5802.
- ◆ For retailers: 1-800-414-1422.

Calls are answered by a recorded voice response system (ARU). Callers need a touch-tone telephone to access information through the ARU. Callers can receive customer service assistance in English or Spanish. Callers have the option to transfer from the ARU and speak to a customer service representative at various times during a call.

When information on an account or any other action is requested, the ARU or a customer service representative will verify that the caller is an Iowa EBT cardholder on the account. To verify a cardholder, customer service requires the caller to enter the following data using the telephone number keys:

- ◆ The 19-digit EBT card number (PAN),
- ◆ The last four digits of the cardholder's social security number,
- ◆ The cardholder's date of birth, and
- ◆ A multifactor authentication password, if applicable.

The information given by the caller must match the information that the ABC system transmitted to EPPIC™. The EBT customer service will not provide account information if a caller gives information inconsistent with EPPIC™ records. The customer will be told to contact the IM Customer Service Center to update the information.

Through the ARU

The ARU prompts callers to select options using their telephone keys. The ARU can provide:

- ◆ Current account balance information.
- ◆ Account transaction history.
- ◆ PIN selection and PIN changes.
- ◆ EBT retailer locations.

At various points in the call, the ARU offers the option to transfer to a live customer service representative. When a caller selects the option "Report of lost, stolen, or damaged cards" from the ARU menu, callers are transferred to a customer service representative.

Through the EBT Customer Service Representative

EBT customer service representatives provide the following services:

- ◆ Current account balance.
- ◆ Account transaction history.
- ◆ Assistance to cardholders who have difficulty in selecting their PINs.
- ◆ Deactivation and replacement of lost, stolen, or damaged Iowa EBT cards.
- ◆ The point of contact for transaction disputes when retailer or third party processor equipment problems cause an incorrect debit or credit to an account.
- ◆ Manual voucher authorizations and subsequent “holds” on benefits for the amount of purchase.
- ◆ Answers to general questions about EBT, using a standardized list of most frequently asked questions and standard answers. Callers are referred to their local DHS office for all other inquiries, including questions about benefit issuance amounts or availability.

When the caller reports a lost, stolen, or damaged EBT card, the customer service representative verifies the identity of the cardholder. Then:

- ◆ When the customer service representative can validate the cardholder’s identity, the card is deactivated and a replacement card is simultaneously mailed.
- ◆ When the customer service representative cannot identify the caller as the cardholder, the card will be deactivated but a replacement card will not be mailed.

For example, if the caller gives an address different from the address showing on EPPIC™, a replacement card will not be initiated. The customer service representative will instruct the caller to contact the IM Customer Service Center to update information as appropriate. An IM worker must update the ABC system and issue the replacement card.

Through the EBT Client Portal

The EBT client portal is located at <https://www.ebt.acs-inc.com/>. There is no charge for the on-line access. The portal provides the following services:

- ◆ Current account balance.
- ◆ Account transaction history.
- ◆ PIN changes.
- ◆ English and Spanish card mailers
- ◆ Information page on lost or stolen cards.
- ◆ Frequently asked questions.
- ◆ Farmers Market information.

Using EPPIC™

A security clearance is required in order to access the EPPIC™ system. There are different levels of security clearance. The level of clearance determines what functions a user can perform in the EPPIC™ system.

NOTE: Whenever possible, changes to the EPPIC™ system must be made through the ABC batch process. Entries made directly to the EPPIC™ system **do not update ABC**. If it is necessary to make changes to EPPIC™, a corresponding change must be made to the Department's ABC system as soon as possible in order to protect the integrity of ABC data.

Login and Logout Procedures

When you receive your security clearance, you will be given a temporary password. Your User ID is your network login ID, and is case-sensitive.

When you log in to the EPPIC™ system for the first time, you must change your password immediately after logging in. See [User Password and Password Changes](#) before you log in to EPPIC™ for the first time.

The following action steps guide the user through logging in to the EPPIC™ system:

STEP	ACTION
1	Click on the EBT Login link on the DHS Field Intranet site.
2	The EPPIC™ "Iowa EBT Card" Login screen will appear. 
3	Enter your EPPIC™ user identification number in the USER ID box.
4	Enter your EPPIC™ password in the PASSWORD box.
5	Click on the LOGIN button.
6	When you have logged in to EPPIC™, your user name and the date and time you logged in appear on left side of the screen under USER INFO. Example of the EPPIC™ menu: 

The following action steps guide the user through logging off of the EPPIC™ system.

STEP	ACTION
1	<p>You can log out of EPPIC™ from any screen. To log out, click on the LOG OUT button on the EPPIC™ menu.</p>  <p>The screenshot shows the EPPIC™ logo at the top. Below it is a 'User Info' section with the following details: Name: eppic1, Login: 03/20/2003 11:10:19, and Act.: 03/20/2003 11:10:19. Below the user info are several menu items: Recipient Account, Financial Accounting, Reconciliation, Voucher Management, UIT User Management, Retailer Management, Password Change, and Log out. The 'Log out' button is highlighted in a darker blue color.</p>
2	<p>The “Iowa EBT Card” Login screen will reappear when you are logged off of the EPPIC™ system.</p>

Setting the Security Question

The first time you log into EPPIC™, you will be prompted to select a security question and answer. This security question will enable you to change your password if you are later unable to remember your password.

STEP	ACTION
1	<p>Select a question from the drop down and enter an answer in SECURITY ANSWER. You will be required to confirm the answer before you can click SAVE.</p> 
2	<p>The following pop-up box will appear to indicate the security question and answer were successfully set. Click OK.</p> 

Using the Security Question

If you forget your password:

STEP	ACTION
1	<p>Click on the Forgot Password link on the Login screen.</p> 

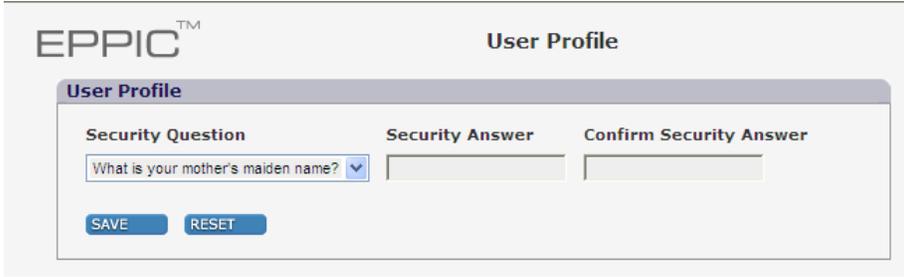
STEP	ACTION
2	<p>The User Security Question screen will open. Enter your user ID and click SUBMIT.</p> 
3	<p>Select your question and type your answer in SECURITY ANSWER. Click SUBMIT.</p> 
4	<p>If the question and answer match your selected question, the User Reset Password screen will open. Type your new password in the NEW PASSWORD and CONFIRM PASSWORD fields and click SUBMIT.</p> 

STEP	ACTION
5	A pop-up box will appear to indicate your password was successfully changed. Click OK. 
6	You will be returned to the Login screen to log into EPPIC™ with your new password.

Changing the Security Question

If you forget your security question:

STEP	ACTION
1	Select the USER PROFILE button on the main toolbar. 

STEP	ACTION
2	<p>The Security Question screen will open. Select a question from the drop down and enter an answer in the SECURITY ANSWER field. You will be required to confirm the answer before you click SAVE.</p> 
3	<p>A pop-up box will appear to indicate your question was successfully changed. Click ok.</p> 

User Password and Password Changes

An EPPIC™ password is eight characters in length. An EPPIC™ password is case-sensitive. You cannot log on to EPPIC™ if your password is not entered exactly as set up, using the correct upper-case and lower-case letters.

You should change your EPPIC™ password when:

- ◆ You are a new EPPIC™ user logging in to the EPPIC™ system for the first time. The temporary password assigned to new users is good for only the **first** login.
- ◆ You are prompted to do so by EPPIC™.
- ◆ A change is needed for security purposes.
- ◆ You want to make a change.

An action step chart followed by a screen print of the user password changes message shows you how to change your EPPIC™ password:

STEP	ACTION
1	Click on the PASSWORD CHANGE button on the EPPIC™ menu. 
2	Enter your current password in the OLD PASSWORD box.
3	Enter your new password in the NEW PASSWORD box, and enter it again in the CONFIRMATION box.
4	Click the CHANGE button on the bottom of the screen. A message will appear: "Successfully changed password." Click OK . 

Cardholder Search and Viewing Account Balance

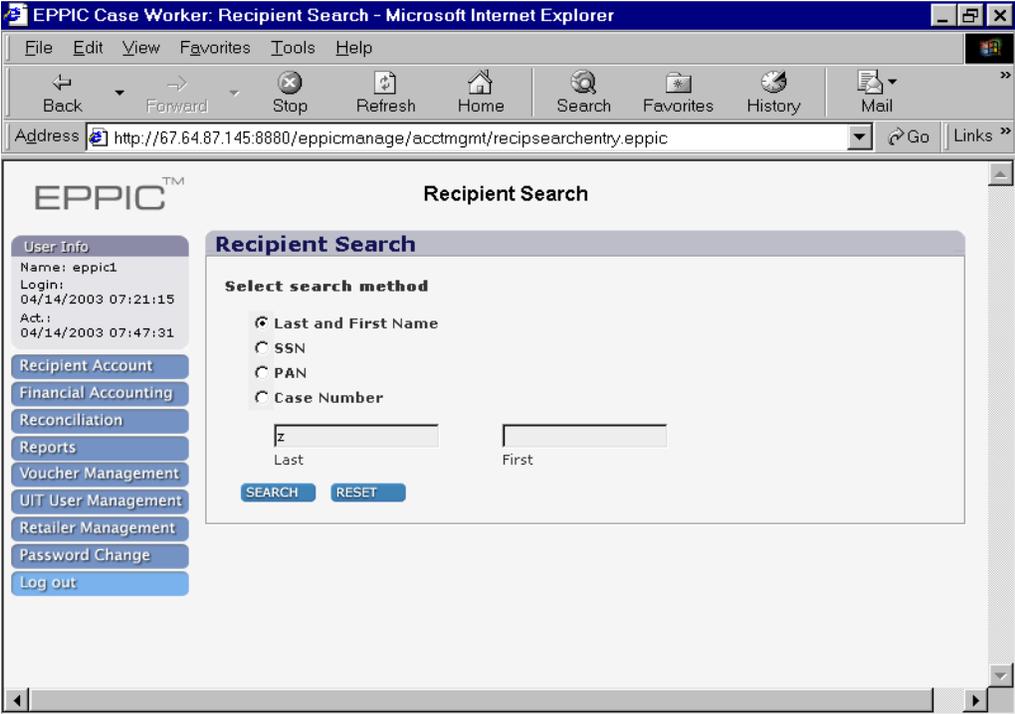
The EPPIC™ user can view the balance on any EBT food account. The **Recipient Case Management** screen displays the BALANCE and AVAIL BAL fields.

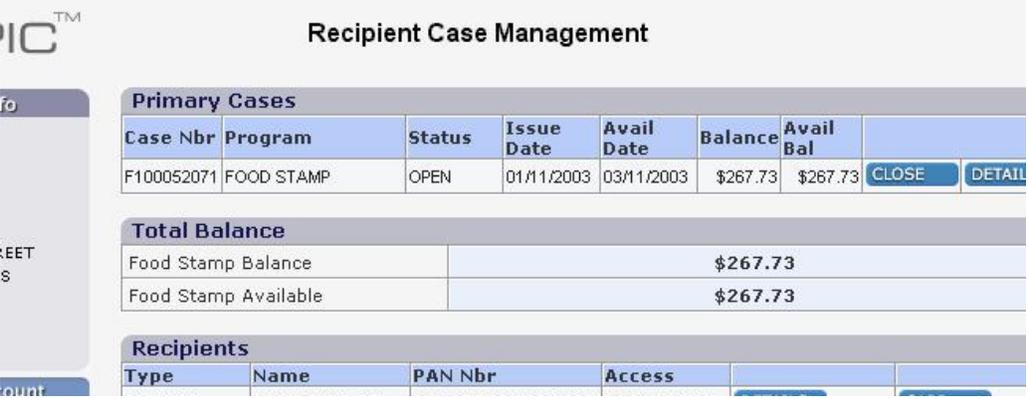
- ◆ BALANCE is the total amount of assistance available plus all benefits posted to the account, not what is available for use.
- ◆ AVAIL BAL shows the amount of benefits that is available for use.

The cardholder search function (RECIPIENT ACCOUNT) allows the user to search for a specific cardholder or account information. You may search by the cardholder's name, Iowa EBT card number (PAN), social security number, or DHS case number.

The following screen prints and action-step charts show how to perform a search for a specific cardholder and to view the EBT account balance.

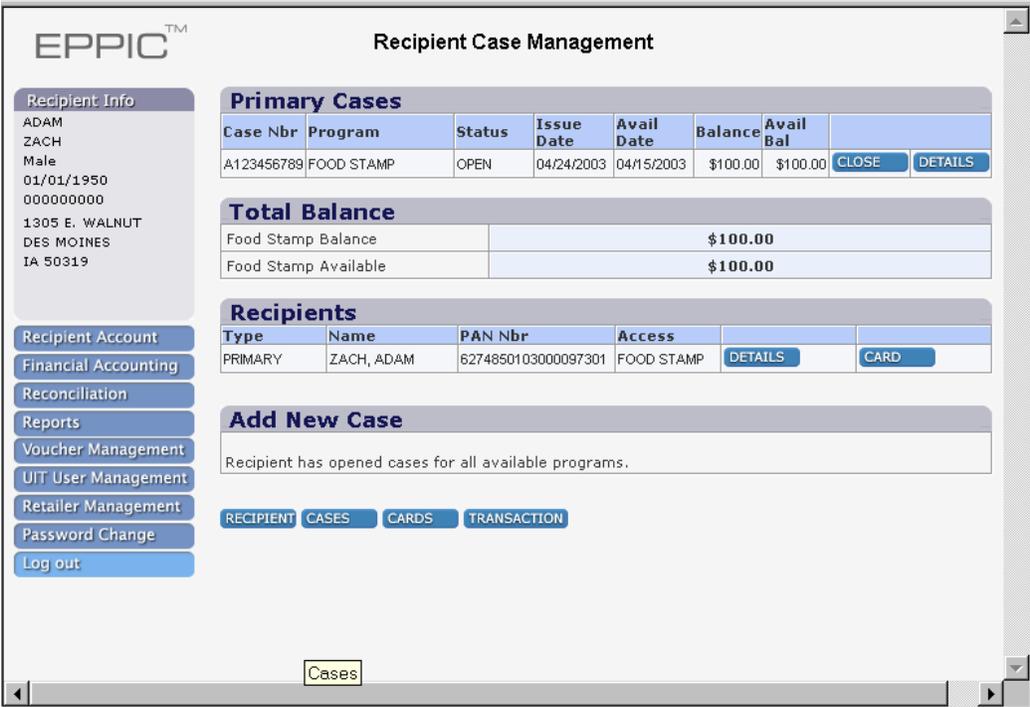
STEP	ACTION
1	<p>Click on RECIPIENT ACCOUNT button on the EPPIC™ menu.</p>  <p>The screenshot shows the EPPIC™ logo at the top. Below it is a 'User Info' section with the following details: Name: eppic1, Login: 03/20/2003 12:31:13, Act.: 03/20/2003 12:37:52. The 'Recipient Account' button is highlighted in blue. Below it are two sub-menus: 'Account Setup' and 'Account Maintenance', both with blue square icons. Further down are buttons for 'Financial Accounting', 'Reconciliation', 'Voucher Management', 'UIT User Management', 'Retailer Management', 'Password Change', and 'Log out'.</p>

STEP	ACTION
2	Click on the ACCOUNT MAINTENANCE button on the EPPIC™ menu.
3	<p>The Recipient Search screen will appear.</p> 
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN OR CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. Enter the entire ABC case number, including the last digit.</p>
5	<p>Enter information in the boxes that appear according to the search method chosen.</p> <p>If you are searching by name and the spelling of the name is uncertain, you can enter the first letter or part of the last name in the LAST box. You can also enter the part of the last name and part of the first name.</p> <p>Click on the SEARCH button.</p>

STEP	ACTION
6	<p>The Recipient Search Results screen will appear.</p> 
7	<p>Click on the CASES button next to the correct cardholder.</p>
8	<p>The Recipient Case Management screen will appear.</p> 
9	<p>The available balance shows under the PRIMARY CASES: AVAIL BAL field, and TOTAL BALANCE: FOOD STAMP AVAILABLE field.</p>

Checking the Status of an EBT Card

The following action steps show how to check the status of an EBT card.

STEP	ACTION
1	Perform a cardholder search as directed under Cardholder Search and Viewing Account Balance .
2	<p>Click on the CARDS button on the bottom of the Recipient Case Management screen. The Recipient Cards Management screen will appear.</p>  <p>The screenshot displays the 'Recipient Case Management' interface. On the left is a sidebar with navigation buttons: Recipient Account, Financial Accounting, Reconciliation, Reports, Voucher Management, UIT User Management, Retailer Management, Password Change, and Log out. The main content area includes: <ul style="list-style-type: none"> Recipient Info: ADAM ZACH, Male, 01/01/1950, 000000000, 1305 E. WALNUT, DES MOINES, IA 50319. Primary Cases: A table with columns Case Nbr, Program, Status, Issue Date, Avail Date, Balance, Avail Bal, and buttons CLOSE/DETAILS. One row shows Case Nbr A123456789, Program FOOD STAMP, Status OPEN, Issue Date 04/24/2003, Avail Date 04/15/2003, Balance \$100.00, and Avail Bal \$100.00. Total Balance: A table showing Food Stamp Balance and Food Stamp Available, both at \$100.00. Recipients: A table with columns Type, Name, PAN Nbr, Access, and buttons DETAILS/CARD. One row shows Type PRIMARY, Name ZACH, ADAM, PAN Nbr 6274850103000097301, and Access FOOD STAMP. Add New Case: A message stating 'Recipient has opened cases for all available programs.' Navigation: Buttons for RECIPIENT, CASES, CARDS, and TRANSACTION. The 'CARDS' button is highlighted. </p>

STEP	ACTION														
3	<p>The PAN section of the screen shows the numbers of all cards issued on the account.</p> <p>The ACCESS section of the screen shows whether each card was issued to a primary or a secondary cardholder. Authorized representative cardholders will appear as secondary cardholders.</p> <p>The STATUS section shows whether each card is “registered” (active) or another status other than active.</p> <p>The ISSUE DATE section shows the date the card was mailed.</p> <p>The EXPIRE DATE is the card expiration date.</p> <p>The FREEZE DATE is the date the card was deactivated.</p>  <p>The screenshot displays the 'EPPIC™ Recipient Cards Management' interface. On the left, there is a 'Recipient Info' section with details for ADAM ZACH, including gender (Male), date of birth (01/01/1950), ID number (000000000), and address (1305 E. WALNUT, DES MOINES, IA 50319). Below this are buttons for 'Recipient Account', 'Financial Accounting', and 'Reconciliation'. The main area is titled 'Cards' and contains a message: 'The cards with status "ALLOCATED" are temporary; they need issuance.' Below the message is a table with the following data:</p> <table border="1"> <thead> <tr> <th>PAN</th> <th>Access</th> <th>Status</th> <th>Issue Date</th> <th>Expire Date</th> <th>Freeze Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>6274850103000097301</td> <td>PRIMARY</td> <td>REGISTERED</td> <td>04/14/2003</td> <td>12/31/2049</td> <td></td> <td>DETAILS</td> </tr> </tbody> </table> <p>At the bottom of the interface are navigation buttons: RECIPIENT, CASES, CARDS, and TRANSACTION.</p>	PAN	Access	Status	Issue Date	Expire Date	Freeze Date		6274850103000097301	PRIMARY	REGISTERED	04/14/2003	12/31/2049		DETAILS
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Deactivating and Replacing an Iowa EBT Card

EPPIC™ users can immediately deactivate a card and issue a replacement card.

Cardholders can deactivate and replace their own Iowa EBT cards by calling EBT customer service. When the customer service representative **can** identify the caller as the cardholder, the caller will be mailed a replacement card at the same time the old card is deactivated. See [EBT Customer Service](#) for more information about replacement of lost, stolen, or damaged cards.

When the EBT customer service **cannot** identify that it is the cardholder making the replacement request, an IM worker must replace the card through EPPIC™ or ABC entries.

Use EPPIC™ entries to deactivate and replace a card when:

- ◆ The case is closed on ABC.
- ◆ The card was lost or stolen.

Use EPPIC™ entries to deactivate, but not replace, a card when:

- ◆ The primary cardholder requests deactivation of a card belonging to a secondary cardholder or authorized representative.
- ◆ The only person on a Food Assistance case passes away.

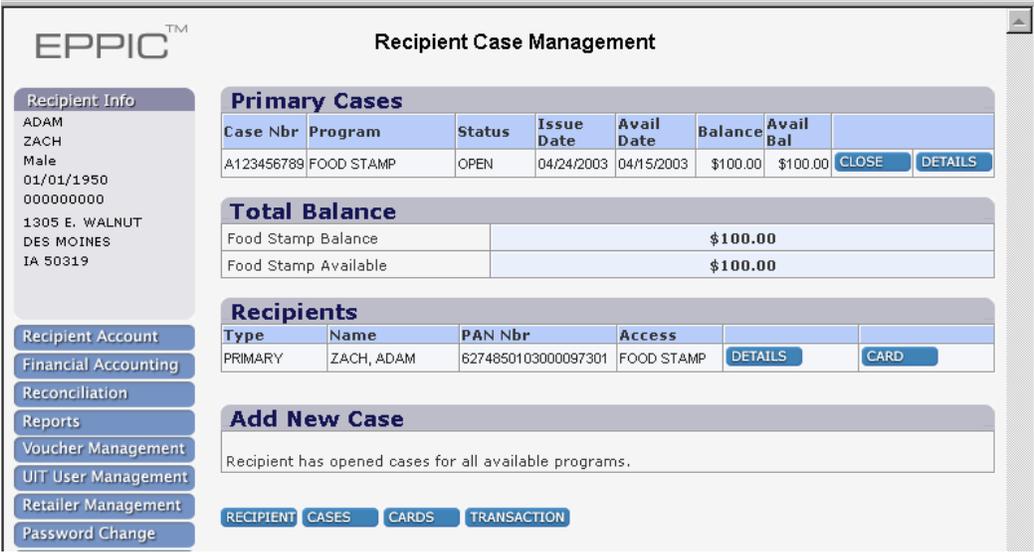
NOTE: If benefits are returned due to death or because a household no longer wants the benefits, check to see if an overpayment claim exists against the household.

- ◆ If so, process the return as a claim repayment. Benefits returned in excess of the claim amount should be processed as returned benefits.
- ◆ If no overpayment claim exists, complete form 470-2574, *EBT Adjustment Request*, to document the return. See [6-Appendix](#) for instructions. Make an entry to ABC as instructed in 14-B(5), [Recording Returned Food Assistance](#).

The following action steps and screen prints show how to deactivate and replace cards.

STEP	ACTION
1	<p>Click on RECIPIENT ACCOUNT on the EPPIC™ menu. Example of the EPPIC™ menu:</p> 
2	Click on ACCOUNT MAINTENANCE on the EPPIC™ menu.
3	<p>The Recipient Search screen will appear.</p> 

STEP	ACTION																					
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN or CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. The entire 10-digit case number must be entered.</p>																					
5	<p>Enter information in the boxes that appear according to the search method chosen.</p> <p>If you are searching by name and the spelling of the name is uncertain, you can enter the first letter or part of the last name in the LAST box. You can also enter part of a last name and part of a first name.</p> <p>Click on the SEARCH button.</p>																					
6	<p>The Recipient Search Results screen will appear.</p>  <table border="1" data-bbox="597 1073 1370 1241"> <thead> <tr> <th>Type</th> <th>Name</th> <th>SSN</th> <th>Address</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>PRIMARY</td> <td>ZACH, ADAM</td> <td>000000000</td> <td>1305 E. WALNUT</td> <td>DES MOINES</td> <td>IA</td> <td>CASES</td> </tr> <tr> <td>PRIMARY</td> <td>ZACH, EVE</td> <td>111111111</td> <td>100 MAIN</td> <td>DES MOINES</td> <td>IA</td> <td>CASES</td> </tr> </tbody> </table>	Type	Name	SSN	Address				PRIMARY	ZACH, ADAM	000000000	1305 E. WALNUT	DES MOINES	IA	CASES	PRIMARY	ZACH, EVE	111111111	100 MAIN	DES MOINES	IA	CASES
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7	<p>Click on the CASES button next to the correct cardholder.</p>																					

STEP	ACTION
8	<p>The Recipient Case Management screen will appear.</p> 
9	<p>Click the CARD button in the RECIPIENTS section of the screen and the Recipient Cards Management screen will appear.</p> 
10	<p>Use the drop-down arrow to select the applicable reason for deactivation in either the STATUS CARD or the STATUS AND REPLACE CARD section.</p> <p>If a replacement card should not be issued, click on the STATUS button in the STATUS CARD section to deactivate the card without issuing another.</p> <p>If a replacement card should be issued, click on the CONTINUE button in the STATUS AND REPLACE CARD section to simultaneously deactivate and replace the card. (Used in this example.)</p>

STEP	ACTION
11	<p>Message: "Proceed with Card replacement including statusing Card to LOST?" (The actual card status will show in the message as the reason selected for deactivating the card.) Click ok to complete the action.</p> 
12	<p>The Account Management – Card Replace screen will appear.</p> 
13	<p>Click the REPLACE button in the Account Management – Card Replace screen.</p>
14	<p>A message will appear: "Card has been successfully replaced."</p>
15	<p>Click ok. EPPIC™ transmits information to the card processor to produce and mail the Iowa EBT card.</p> 

Adding Secondary Cardholders and Authorized Representatives

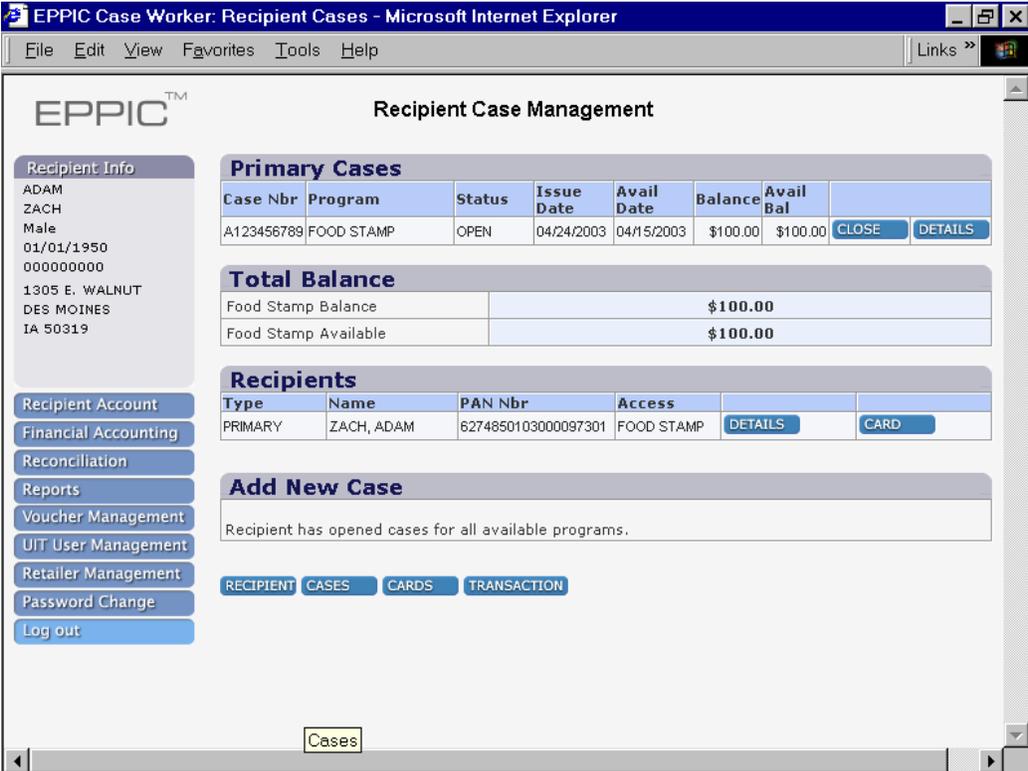
When possible, all designated EBT food account cardholders must be authorized to receive an Iowa EBT card through the ABC system. ABC has the capability of authorizing two cardholders – one primary cardholder and one additional cardholder as an authorized representative or a secondary cardholder.

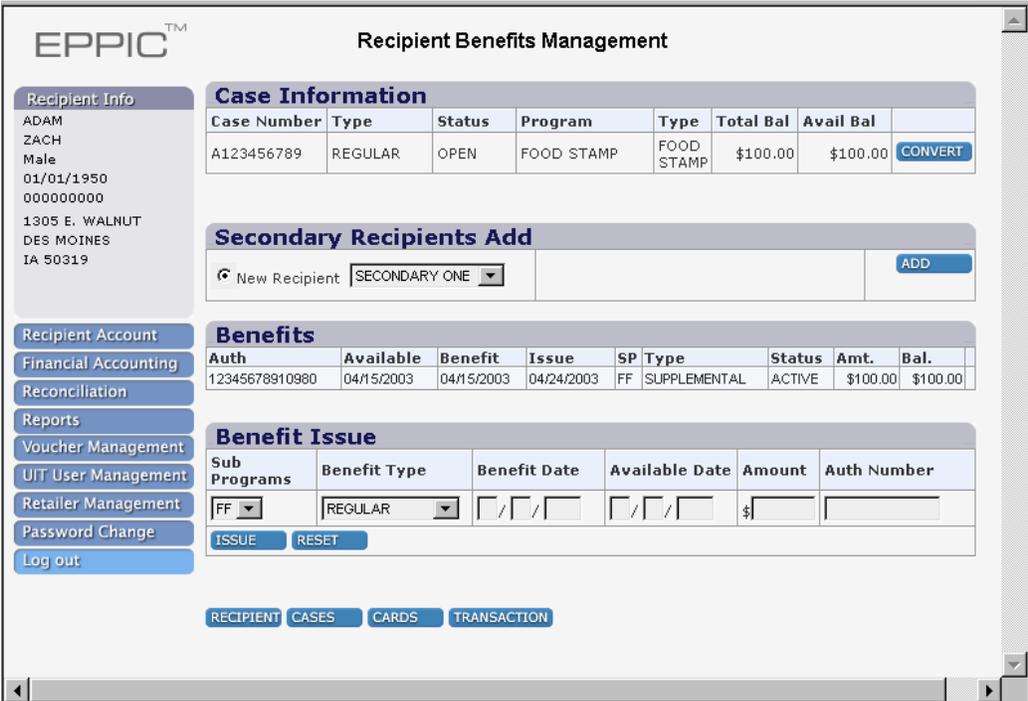
If a third cardholder needs to be added on a case without removing the existing cardholders, or if a cardholder needs to be added on a case that is closed in ABC, the cardholder must be added through EPPIC™.

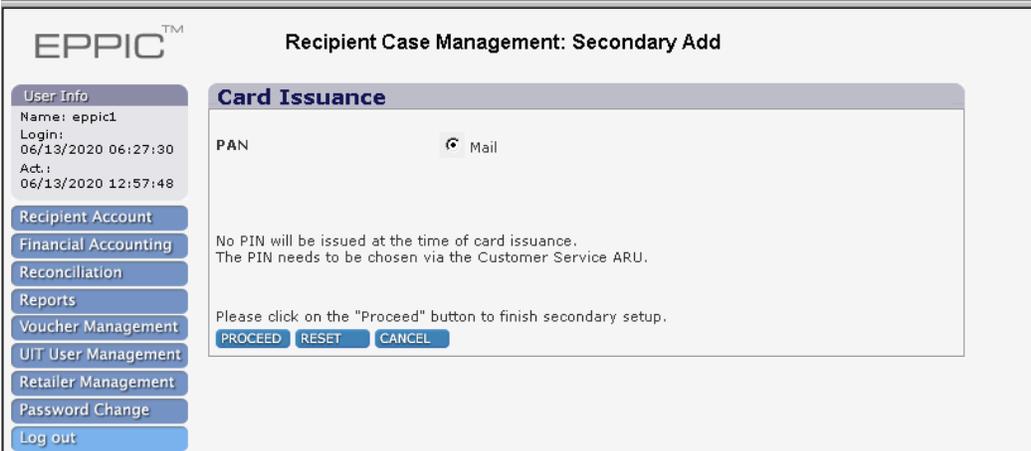
The following action steps show how to add a cardholder through EPPIC™ entries.

STEP	ACTION
1	Click on RECIPIENT ACCOUNT on the EPPIC™ menu. Example of EPPIC™ menu.  The screenshot shows the EPPIC™ logo at the top. Below it is a 'User Info' section with fields for Name (eppic1), Login (03/20/2003 12:31:13), and Act. (03/20/2003 12:37:52). The 'Recipient Account' section is expanded, showing a dropdown menu with options: Account Setup, Account Maintenance, Financial Accounting, Reconciliation, Voucher Management, UIT User Management, Retailer Management, Password Change, and Log out.
2	Click on ACCOUNT MAINTENANCE on the EPPIC™ menu drop down box.
3	The Recipient Search screen will appear.

STEP	ACTION																					
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN, or CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. You must enter the entire case number.</p>																					
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8	<p>The Recipient Case Management screen will appear.</p>  <p>Recipient Info ADAM ZACH Male 01/01/1950 000000000 1305 E. WALNUT DES MOINES IA 50319</p> <p>Primary Cases</p> <table border="1"> <thead> <tr> <th>Case Nbr</th> <th>Program</th> <th>Status</th> <th>Issue Date</th> <th>Avail Date</th> <th>Balance</th> <th>Avail Bal</th> <th></th> </tr> </thead> <tbody> <tr> <td>A123456789</td> <td>FOOD STAMP</td> <td>OPEN</td> <td>04/24/2003</td> <td>04/15/2003</td> <td>\$100.00</td> <td>\$100.00</td> <td>CLOSE DETAILS</td> </tr> </tbody> </table> <p>Total Balance</p> <table border="1"> <tbody> <tr> <td>Food Stamp Balance</td> <td>\$100.00</td> </tr> <tr> <td>Food Stamp Available</td> <td>\$100.00</td> </tr> </tbody> </table> <p>Recipients</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Name</th> <th>PAN Nbr</th> <th>Access</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>PRIMARY</td> <td>ZACH, ADAM</td> <td>6274850103000097301</td> <td>FOOD STAMP</td> <td>DETAILS</td> <td>CARD</td> </tr> </tbody> </table> <p>Add New Case</p> <p>Recipient has opened cases for all available programs.</p> <p>RECIPIENT CASES CARDS TRANSACTION</p> <p>Cases</p>	Case Nbr	Program	Status	Issue Date	Avail Date	Balance	Avail Bal		A123456789	FOOD STAMP	OPEN	04/24/2003	04/15/2003	\$100.00	\$100.00	CLOSE DETAILS	Food Stamp Balance	\$100.00	Food Stamp Available	\$100.00	Type	Name	PAN Nbr	Access			PRIMARY	ZACH, ADAM	6274850103000097301	FOOD STAMP	DETAILS	CARD
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STEP	ACTION
9	<p>Click on the DETAILS button in the PRIMARY CASES section of the screen and the Recipient Benefits Management screen will appear.</p> 
10	Under SECONDARY RECIPIENTS ADD , select SECONDARY TWO from the drop down box.
11	Click the ADD button.
12	<p>A message will appear: "Continue to create new recipient as secondary to this case?" Click OK. The Secondary Add: Secondary Recipient Info screen appears.</p> 

STEP	ACTION
13	Fill in recipient information. (All fields must be populated except for MI, SUFF, ADDRESS 2 and PHONE.)
14	Click CONTINUE. The Recipient Case Management: Secondary Add screen will appear. 
15	Click the PROCEED button.
16	Message: “Proceed with addition of secondary recipient?” Click ok. 
17	Confirmation message appears. Click ok. 

Emergency Removal of Cardholder or Authorized Representative

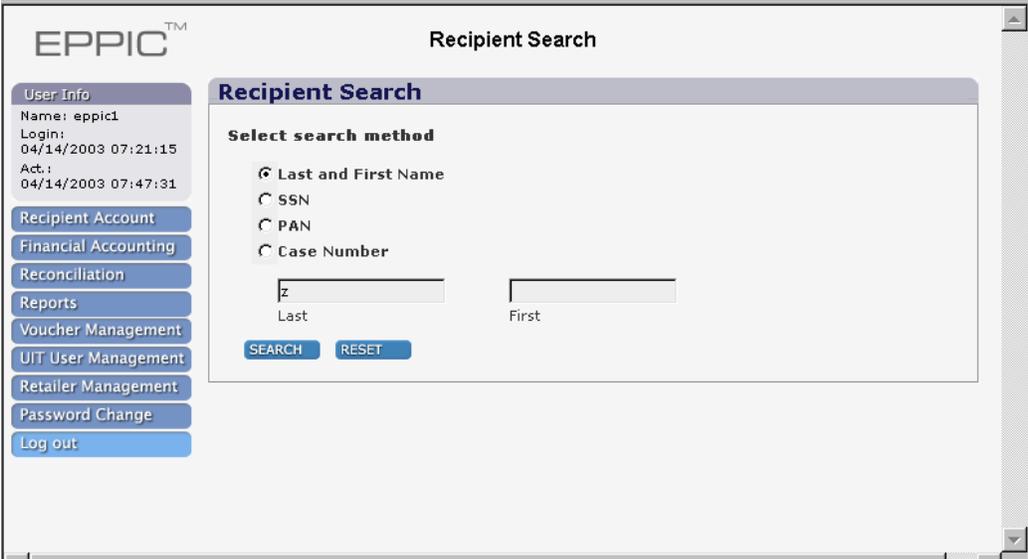
When a primary cardholder reports that an authorized representative or a secondary cardholder on the household’s account needs to be stopped immediately from having access to the food account, deactivate the person’s Iowa EBT card through EPPIC™ entries. Deactivation of an EBT card through entries made directly to EPPIC™ is immediate.

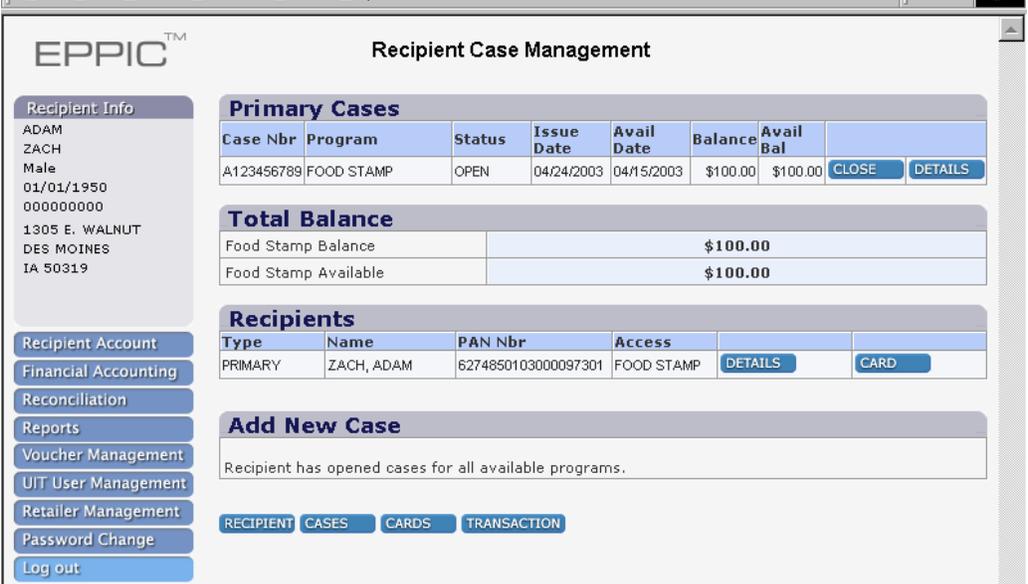
Removing a person through the ABC system delays the deactivation of the person’s Iowa EBT card. The person continues to have full access to the account until the ABC batch process is completed.

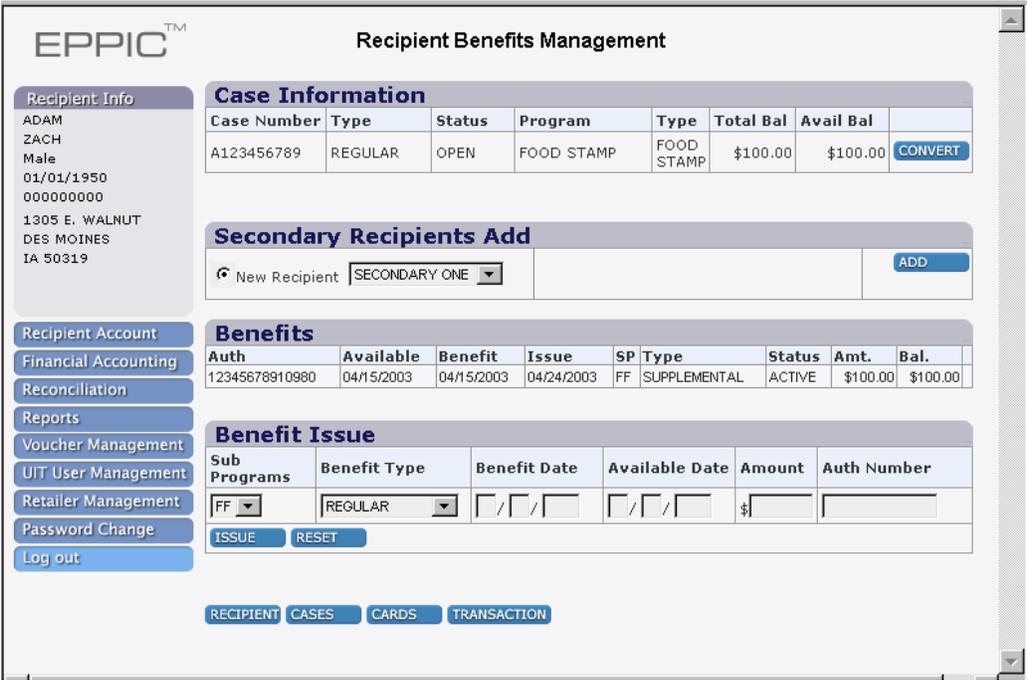
If the person’s information also appears on the ABC system, make corresponding entries to remove the person from ABC.

The following action steps show how to remove a secondary or authorized representative cardholder.

STEP	ACTION
1	Click on RECIPIENT ACCOUNT on the EPPIC™ menu. Example of the EPPIC™ menu: 
2	Click on ACCOUNT MAINTENANCE on the EPPIC™ menu drop down box.

STEP	ACTION
3	<p>The Recipient Search screen will appear.</p> 
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN or CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. You must enter the entire case number.</p>
5	<p>Enter information in the boxes that appear according to the search method chosen.</p> <p>If you are searching by name and the spelling of the name is uncertain, you can enter the first letter or part of the last name in the LAST box. You can also enter part of a last name and part of a first name.</p> <p>Click on the SEARCH button.</p>

STEP	ACTION
6	<p>The Recipient Search Results screen will appear.</p> 
7	<p>Click on the CASES button next to the correct cardholder.</p>
8	<p>The Recipient Case Management screen will appear.</p> 

STEP	ACTION
9	<p>Click the DETAILS button in the PRIMARY CASES section of the screen and the Recipient Benefits Management screen will appear.</p>  <p>The screenshot shows the EPPIC Recipient Benefits Management interface. On the left is a navigation menu with options like Recipient Info, Financial Accounting, and Log out. The main area displays recipient details for ADAM ZACH and a table of case information. The table has columns for Case Number, Type, Status, Program, Type, Total Bal, and Avail Bal. A 'CONVERT' button is next to the first row. Below the table are sections for 'Secondary Recipients Add' and 'Benefits' with various input fields and buttons like 'ADD', 'ISSUE', and 'RESET'.</p>
10	<p>Click the REMOVE button in the SECONDARY RECIPIENTS section for the person you want to remove. Message: "Proceed to remove secondary?" Click OK to complete the action.</p>  <p>The screenshot shows a standard Windows dialog box titled 'Microsoft Internet Explorer'. It contains a question mark icon and the text 'Proceed to remove secondary?'. At the bottom, there are two buttons: 'OK' and 'Cancel'.</p>

Cardholder Demographic Update

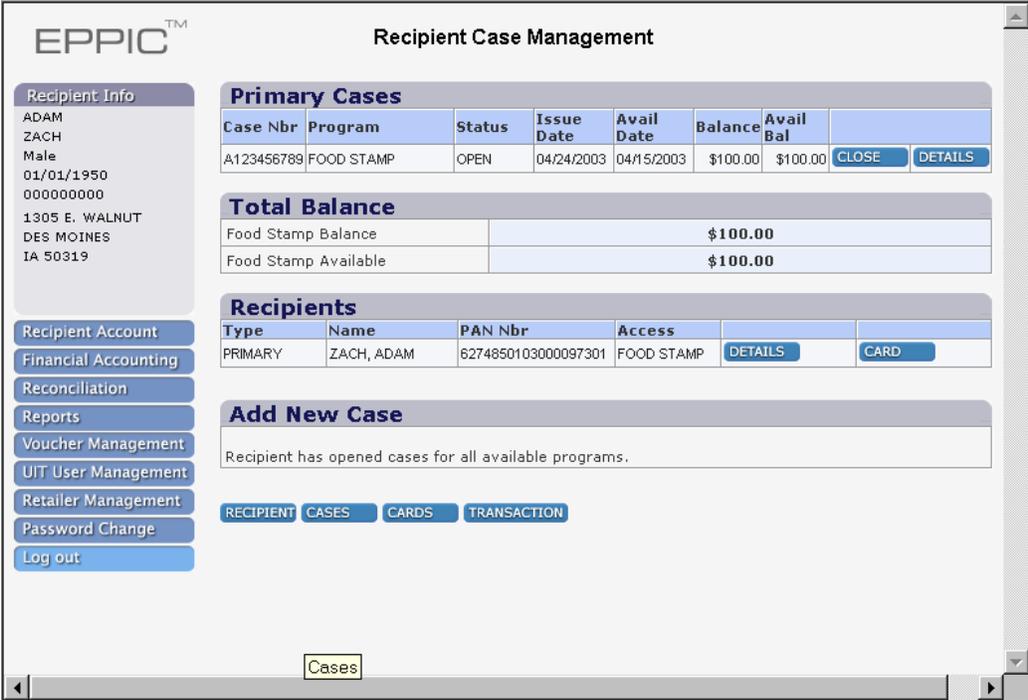
Never update demographic information directly in the EPPIC™ system if the update can be accomplished by updating EPPIC™ through the ABC batch process. You **must** update a cardholder's demographics in the EPPIC™ system when:

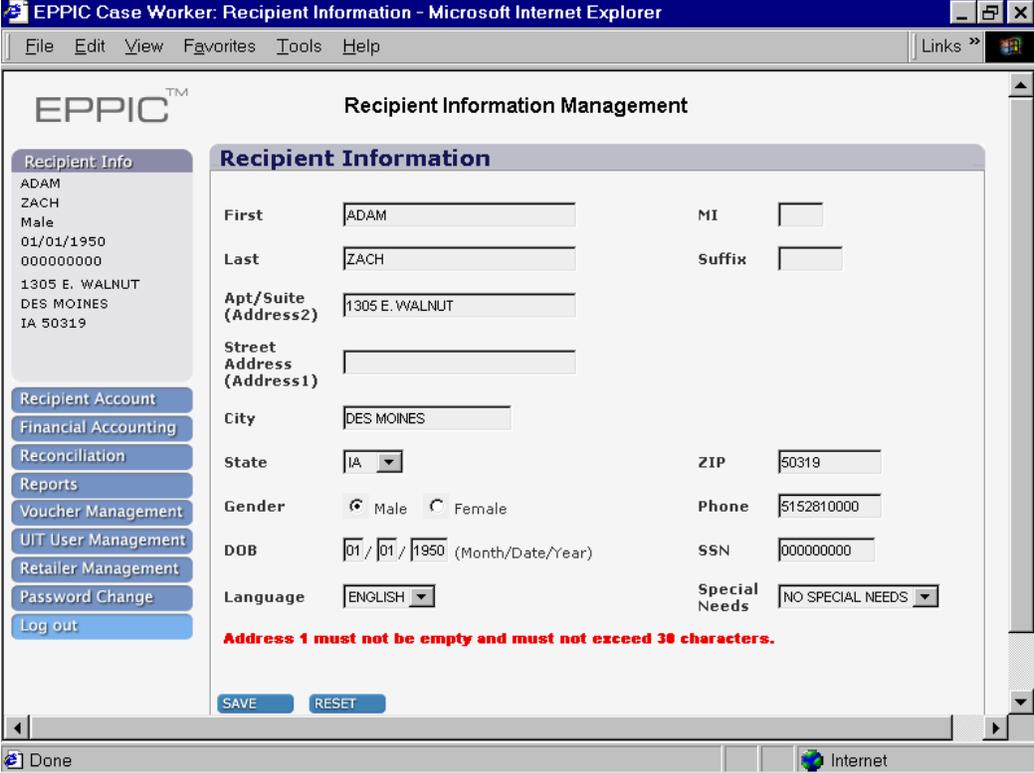
- ◆ The ABC case is in a closed status and a cardholder's address needs to be changed in order to issue a replacement Iowa EBT card. ABC will take an address change when a case is closed, but information will not be transmitted to EPPIC™ from a closed case. Update ABC and EPPIC™ **at the same time** to ensure the integrity of the ABC and EPPIC™ systems.
- ◆ The cardholder's information is not on ABC. Some cardholders are issued Iowa EBT cards directly through EPPIC™ entries. Examples include:
 - Emergency authorized representatives
 - A third cardholder on an account

The following screen prints and action steps show how to update demographics in the EPPIC™ system by direct EPPIC™ entries.

STEP	ACTION
1	<p>Click on RECIPIENT ACCOUNT on the EPPIC™ menu. Example of the EPPIC™ menu.</p> 

STEP	ACTION
2	Click on ACCOUNT MAINTENANCE on the EPPIC™ menu drop down box.
3	The Recipient Search screen will appear.
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN, OR CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. The entire case number must be entered.</p>
5	<p>Enter information in the boxes that appear according to the search method chosen. If you are searching by name and the spelling of the name is uncertain, you can enter the first letter or part of the last name in the LAST box. You can enter part of a last name and part of a first name.</p> <p>Click on the SEARCH button.</p>
6	<p>The Recipient Search Results screen will appear.</p> 
7	Click on the CASES button next to the correct cardholder.

STEP	ACTION
8	<p>The Recipient Case Management screen will appear.</p>  <p>The screenshot shows the EPPIC™ Recipient Case Management interface. On the left is a navigation menu with buttons for Recipient Info, Recipient Account, Financial Accounting, Reconciliation, Reports, Voucher Management, UIT User Management, Retailer Management, Password Change, and Log out. The main content area includes:</p> <ul style="list-style-type: none"> Recipient Info: ADAM ZACH, Male, 01/01/1950, 000000000, 1305 E. WALNUT DES MOINES IA 50319. Primary Cases: A table with columns Case Nbr, Program, Status, Issue Date, Avail Date, Balance, and Avail Bal. One row is shown: A123456789, FOOD STAMP, OPEN, 04/24/2003, 04/15/2003, \$100.00, \$100.00. Buttons for CLOSE and DETAILS are next to the row. Total Balance: A table showing Food Stamp Balance and Food Stamp Available, both at \$100.00. Recipients: A table with columns Type, Name, PAN Nbr, and Access. One row is shown: PRIMARY, ZACH, ADAM, 6274850103000097301, FOOD STAMP. Buttons for DETAILS and CARD are next to the row. Add New Case: A section with the text "Recipient has opened cases for all available programs." and buttons for RECIPIENT, CASES, CARDS, and TRANSACTION.
9	<p>Click the DETAILS button in the RECIPIENTS section of the Recipient Case Management screen.</p>

STEP	ACTION
10	<p>The Recipient Information Management screen will appear.</p> 
11	<p>Modify the applicable data fields on the Recipient Information Management screen. Click the SAVE button.</p>
12	<p>A message will appear: "Proceed with update of Recipient?" Click ok to complete the update.</p> 

Viewing Account Transaction History

EPPIC™ users can view all activities that occurred on an EBT account. The transaction history is a complete history of the account, including all transactions of all cards on the account. Each transaction record includes the PAN of the Iowa EBT card that was used to make the transaction.

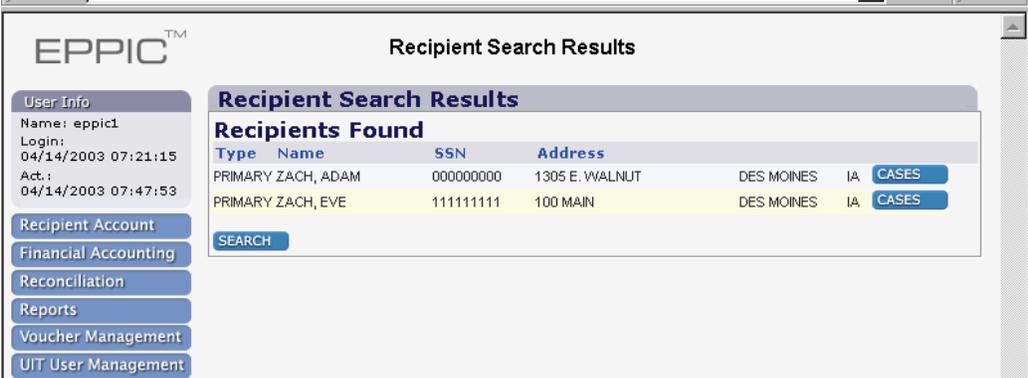
You can access the transaction history by searching for:

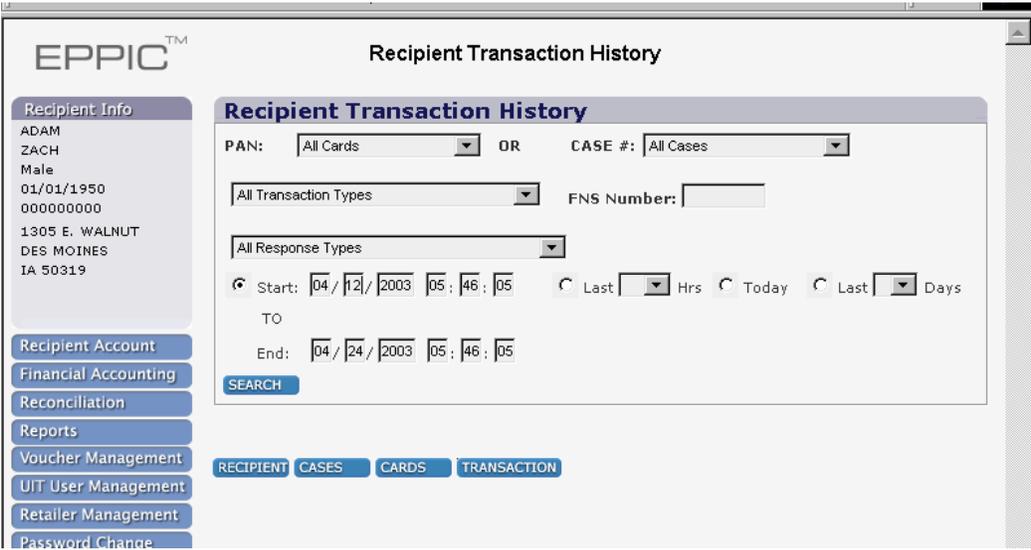
- ◆ Any cardholder's name that is on the account,
- ◆ Any cardholder's social security number,
- ◆ A specific PAN, or
- ◆ The ABC case number.

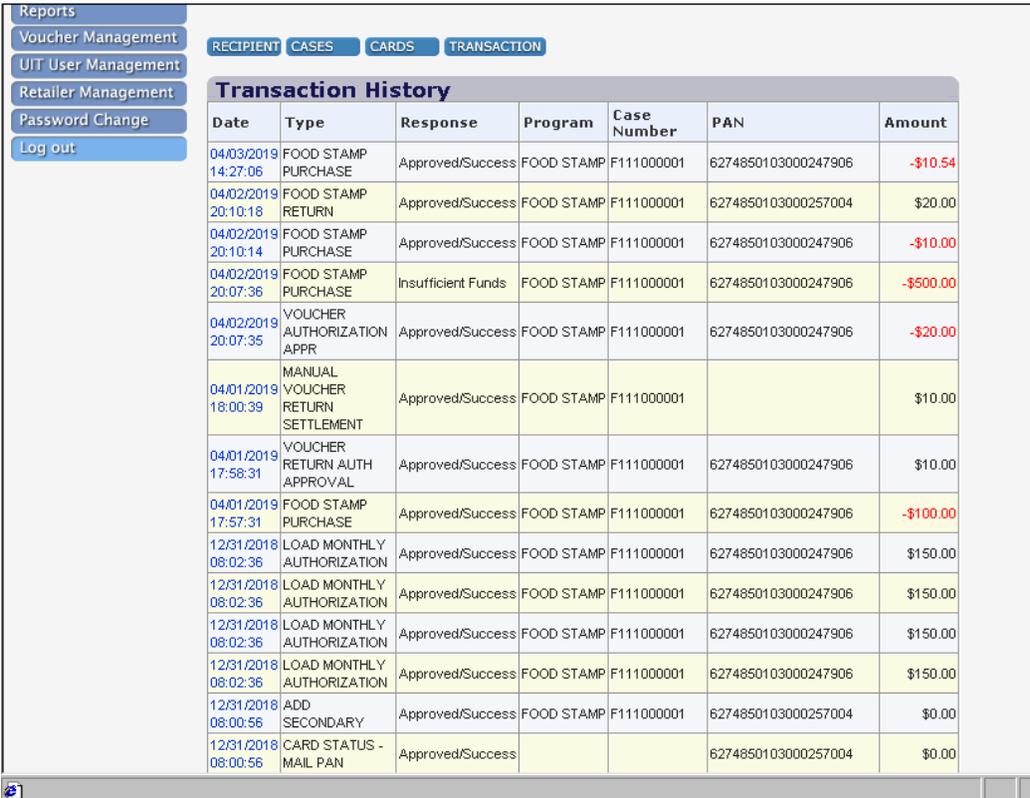
Transactions are listed in date and time in order from the newest to the oldest. The history starts with current real-time transactions and continues back in time to the setup of the account. Some of the transactions displayed on the transaction history are:

- ◆ Balance inquiries.
- ◆ PIN changes.
- ◆ Purchases, including where and when a purchase occurred, the amount of the purchase and which card was used to make the purchase. Click on the hyperlink in the DATE column next to the transaction to view:
 - Where the purchase occurred,
 - Whether it was a card swipe, manual entry, or manual voucher, and
 - Other details of the purchase.

STEP	ACTION
1	<p>Click on RECIPIENT ACCOUNT on the EPPIC™ menu. Example of EPPIC™ menu:</p>  <p>The screenshot shows the EPPIC™ logo at the top. Below it is a 'User Info' section with the following text: Name: eppic1, Login: 03/20/2003 12:31:13, Act.: 03/20/2003 12:37:52. Underneath is a 'Recipient Account' section with a blue bullet point next to 'Account Setup' and another blue bullet point next to 'Account Maintenance'. Below these are several other menu items: Financial Accounting, Reconciliation, Voucher Management, UIT User Management, Retailer Management, Password Change, and Log out.</p>
2	Click on ACCOUNT MAINTENANCE on the EPPIC™ menu.
3	The Recipient Search screen will appear.
4	<p>On the Recipient Search screen, use the SELECT SEARCH METHOD by clicking the bullet next to the item you want to search for: LAST AND FIRST NAME, SSN, PAN, or CASE NUMBER.</p> <p>PAN is the 19-digit number on the front of the Iowa EBT card. Each Iowa EBT card has its own unique PAN.</p> <p>CASE NUMBER is the ABC Food Assistance case number. You must enter the entire case number.</p>
5	<p>Enter information in the boxes that appear according to the search method chosen.</p> <p>If you are searching by name and the spelling of the name is uncertain, you can enter the first letter or part of the last name in the LAST box. You can also enter part of a last and first name.</p> <p>Click on the SEARCH button.</p>

STEP	ACTION
6	<p>The Recipient Search Results screen will appear.</p> 
7	<p>Click on the CASES button next to the correct cardholder.</p>
8	<p>The Recipient Case Management screen will appear.</p> 

STEP	ACTION
9	<p>Click on the TRANSACTION button at the bottom of the screen. The Recipient Transaction History search screen will appear.</p> 
10	<p>The Recipient Transaction History search screen is a powerful tool that provides multiple search options.</p> <p>A simple way to search for recent activity is to click the LAST bullet and select the 7 DAYS option in the drop down box. You can search for a specific period of time using the START TO END field.</p>
11	<p>Enter the period of time you wish to search in the applicable fields. Click on the SEARCH button.</p> <p>The Recipient Transaction History screen will appear with the transactions that meet the search criteria. A maximum of 100 transactions may be displayed. You may need to narrow your search to shorter periods of time.</p> <p>To keep your search results, you can use Ctrl+C to copy the history and then paste it into a Word document.</p>

STEP	ACTION																																																																																																									
	<p>Use Ctrl+P or the PRINT button that appears on the screen to print the history.</p>  <p>The screenshot shows a web interface with a navigation menu on the left containing: Reports, Voucher Management, UJT User Management, Retailer Management, Password Change, and Log out. At the top, there are tabs for RECIPIENT, CASES, CARDS, and TRANSACTION. The main content area is titled 'Transaction History' and contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Type</th> <th>Response</th> <th>Program</th> <th>Case Number</th> <th>PAN</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>04/03/2019 14:27:06</td> <td>FOOD STAMP PURCHASE</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>-\$10.54</td> </tr> <tr> <td>04/02/2019 20:10:18</td> <td>FOOD STAMP RETURN</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000257004</td> <td>\$20.00</td> </tr> <tr> <td>04/02/2019 20:10:14</td> <td>FOOD STAMP PURCHASE</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>-\$10.00</td> </tr> <tr> <td>04/02/2019 20:07:36</td> <td>FOOD STAMP PURCHASE</td> <td>Insufficient Funds</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>-\$500.00</td> </tr> <tr> <td>04/02/2019 20:07:35</td> <td>VOUCHER AUTHORIZATION APPR</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>-\$20.00</td> </tr> <tr> <td>04/01/2019 18:00:39</td> <td>MANUAL VOUCHER RETURN SETTLEMENT</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td></td> <td>\$10.00</td> </tr> <tr> <td>04/01/2019 17:58:31</td> <td>VOUCHER RETURN AUTH APPROVAL</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>\$10.00</td> </tr> <tr> <td>04/01/2019 17:57:31</td> <td>FOOD STAMP PURCHASE</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>-\$100.00</td> </tr> <tr> <td>12/31/2018 08:02:36</td> <td>LOAD MONTHLY AUTHORIZATION</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>\$150.00</td> </tr> <tr> <td>12/31/2018 08:02:36</td> <td>LOAD MONTHLY AUTHORIZATION</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>\$150.00</td> </tr> <tr> <td>12/31/2018 08:02:36</td> <td>LOAD MONTHLY AUTHORIZATION</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>\$150.00</td> </tr> <tr> <td>12/31/2018 08:02:36</td> <td>LOAD MONTHLY AUTHORIZATION</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000247906</td> <td>\$150.00</td> </tr> <tr> <td>12/31/2018 08:00:56</td> <td>ADD SECONDARY</td> <td>Approved/Success</td> <td>FOOD STAMP</td> <td>F111000001</td> <td>6274850103000257004</td> <td>\$0.00</td> </tr> <tr> <td>12/31/2018 08:00:56</td> <td>CARD STATUS - MAIL PAN</td> <td>Approved/Success</td> <td></td> <td></td> <td>6274850103000257004</td> <td>\$0.00</td> </tr> </tbody> </table>	Date	Type	Response	Program	Case Number	PAN	Amount	04/03/2019 14:27:06	FOOD STAMP PURCHASE	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	-\$10.54	04/02/2019 20:10:18	FOOD STAMP RETURN	Approved/Success	FOOD STAMP	F111000001	6274850103000257004	\$20.00	04/02/2019 20:10:14	FOOD STAMP PURCHASE	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	-\$10.00	04/02/2019 20:07:36	FOOD STAMP PURCHASE	Insufficient Funds	FOOD STAMP	F111000001	6274850103000247906	-\$500.00	04/02/2019 20:07:35	VOUCHER AUTHORIZATION APPR	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	-\$20.00	04/01/2019 18:00:39	MANUAL VOUCHER RETURN SETTLEMENT	Approved/Success	FOOD STAMP	F111000001		\$10.00	04/01/2019 17:58:31	VOUCHER RETURN AUTH APPROVAL	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	\$10.00	04/01/2019 17:57:31	FOOD STAMP PURCHASE	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	-\$100.00	12/31/2018 08:02:36	LOAD MONTHLY AUTHORIZATION	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	\$150.00	12/31/2018 08:02:36	LOAD MONTHLY AUTHORIZATION	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	\$150.00	12/31/2018 08:02:36	LOAD MONTHLY AUTHORIZATION	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	\$150.00	12/31/2018 08:02:36	LOAD MONTHLY AUTHORIZATION	Approved/Success	FOOD STAMP	F111000001	6274850103000247906	\$150.00	12/31/2018 08:00:56	ADD SECONDARY	Approved/Success	FOOD STAMP	F111000001	6274850103000257004	\$0.00	12/31/2018 08:00:56	CARD STATUS - MAIL PAN	Approved/Success			6274850103000257004	\$0.00
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