

HOW TO SEARCH FOR FINANCIAL METRICS

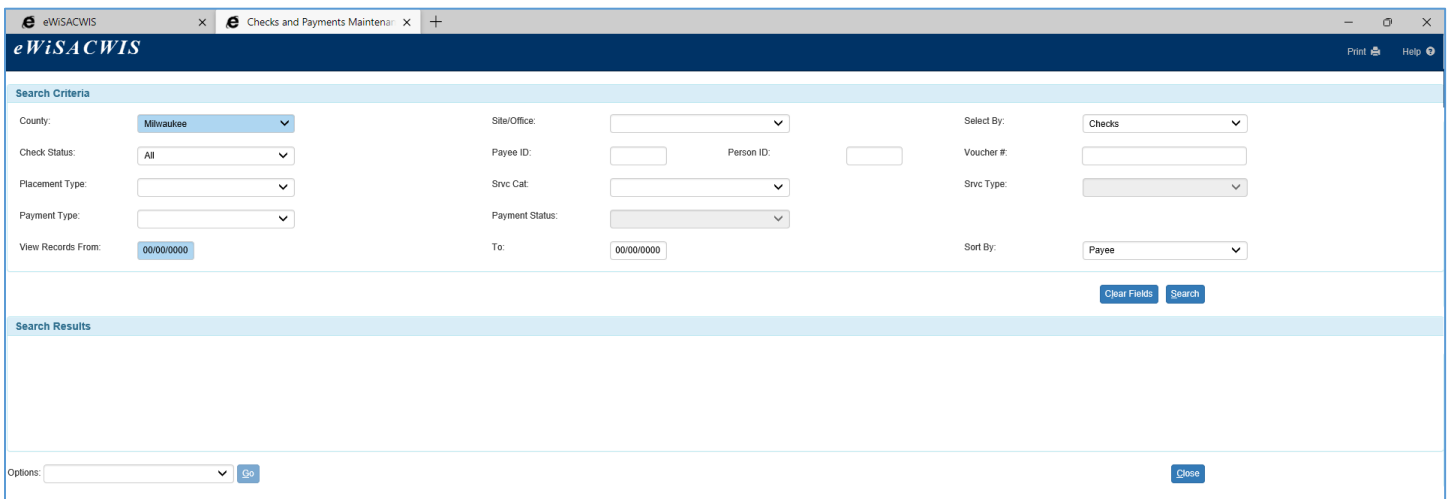
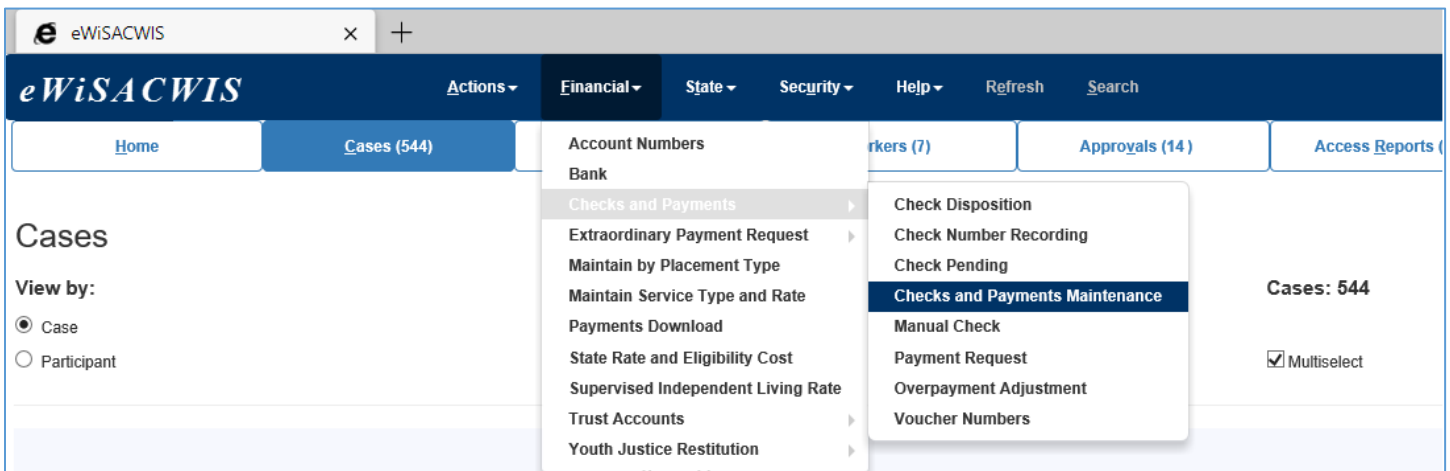
Introduction

The Checks and Maintenance page and the Trust Account Maintenance page were created to provide you with an area to search out and work with your county financial data. There are several common searches which can be done through these pages, however this guide will highlight the following:

- In Process Checks
- Outstanding Overpayments
- Over Limit Trust Accounts (Trust Account Maintenance Page)

Accessing the Checks and Payments Maintenance Page

From the desktop Financial menu, select Checks and Payments > Checks and Payments Maintenance to open the Checks and Maintenance Page.



Search for In Process Checks

As mentioned above, the Checks and Payments Maintenance page offers any number of combinations to filter and look at your financial data. However, the first combination this guide will focus on is how to search for checks that are in process. As highlighted in the screenshot below, focus on the following fields:

- **County:** your county will be pre-filled
- **Select By:** this field should be 'Checks'
- **Checks Status:** this field should be 'In process'
- **View Records From:** this field is required and will display data from that specific date

This search will provide you with the overall number of checks that are in process for your county. If you like, you can select additional fields to make your search more specific.

The screenshot shows the 'eWISACWIS' interface for 'Checks and Payments Maintenance'. The 'Search Criteria' section includes the following fields:

- County: Milwaukee (dropdown)
- Check Status: (dropdown)
- Placement Type: (dropdown)
- Payment Type: (dropdown)
- View Records From: 01/01/2022 (text box)
- Site/Office: (dropdown)
- Payee ID: (text box)
- Person ID: (text box)
- Svc Cat: (dropdown)
- Payment Status: Outstanding (dropdown)
- To: 00/00/0000 (text box)
- Select By: Overpayments (dropdown)
- Voucher #: (text box)
- Svc Type: (dropdown)
- Sort By: Payee (dropdown)

Buttons: Clear Fields, Search, Go, Close.

Search for Outstanding Overpayments

The second combination this guide will focus on is how to search for outstanding overpayments. As highlighted in the screenshot below, focus on the following fields:

- **County:** your county will be pre-filled
- **Select By:** this field should be 'overpayments'
- **Payment Status:** this field should be 'Outstanding'
- **View Records From:** this field is required and will display data since that specific date

Again, you are able to create a more specific search by filling in other fields.

The screenshot shows the eWiSACWIS search interface. The search criteria are as follows:

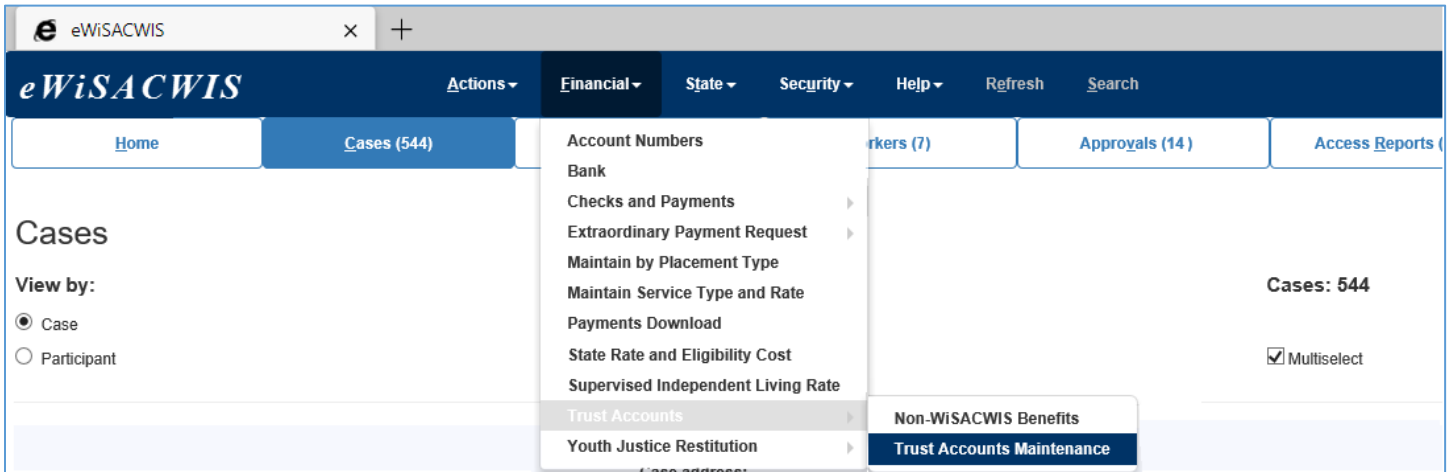
Field	Value
County	Milwaukee
Check Status	
Placement Type	
Payment Type	
View Records From	01/01/2022
Site/Office	
Payee ID	
Person ID	
Svc Cat	
Payment Status	Outstanding
To	00/00/0000
Select By	Overpayments
Voucher #	
Svc Type	
Sort By	Payee

Buttons: Clear Fields, Search, Options, Go, Close

Search for Over Limit Trust Accounts

The third combination this guide will focus on is how to search for Over Limit Trust Accounts. However, prior to that search, you will have to access the Trust Accounts Maintenance page.

From the desktop, go up to Financial > Trust Accounts > Trust Accounts Maintenance.



As highlighted in the screenshot below, focus on the following fields:

- **County:** your county will be pre-filled
- **Over Limit:** this field should be 'over limit'

