



# POS Release Notes

Version 9.3.1, February 13, 2006

These Release Notes contain descriptions of changes in POS Release 9.3.1, scheduled for February 13, 2006. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact Patrick Casey. These and prior Release Notes may also be found on the HRA Intranet at [http://hrwebapps/HRAintranet/CMT\\_page\\_template.cfm?page\\_id=79](http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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### 1. Change to LDSS-2921 Signature Capture window

Two new checkboxes have been added to the LDSS 2921 Signature Capture window:

- Applicant refused to sign withdrawal page
- Applicant refused to sign application

If either box is checked, signature capture will be disabled and the “Next” button will be enabled.

**Note:** Follow current procedures if applicant refuses to sign the application or refuses to sign the withdrawal page.

The name of the “Not Present at Interview” checkbox has been changed to “Unable to capture signatures”. When the worker clicks on this checkbox, POS will display the “Unable to capture signatures” pop-up window. The “Unable to capture signatures” pop-up displays the message: “Please select the reason that the electronic signature(s) cannot be captured:”

The worker should select one of the reasons displayed:

- The signature pad is not working.
- Husband or wife is not present at the interview.
- Homebound casehead.

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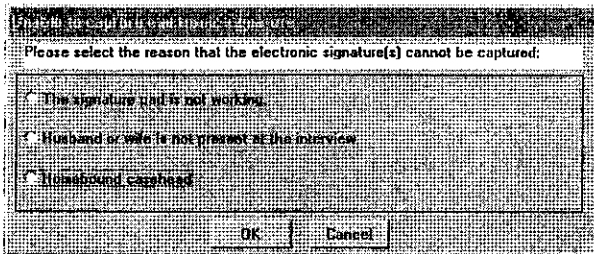


Figure 1 Unable to capture electronic signature pop-up

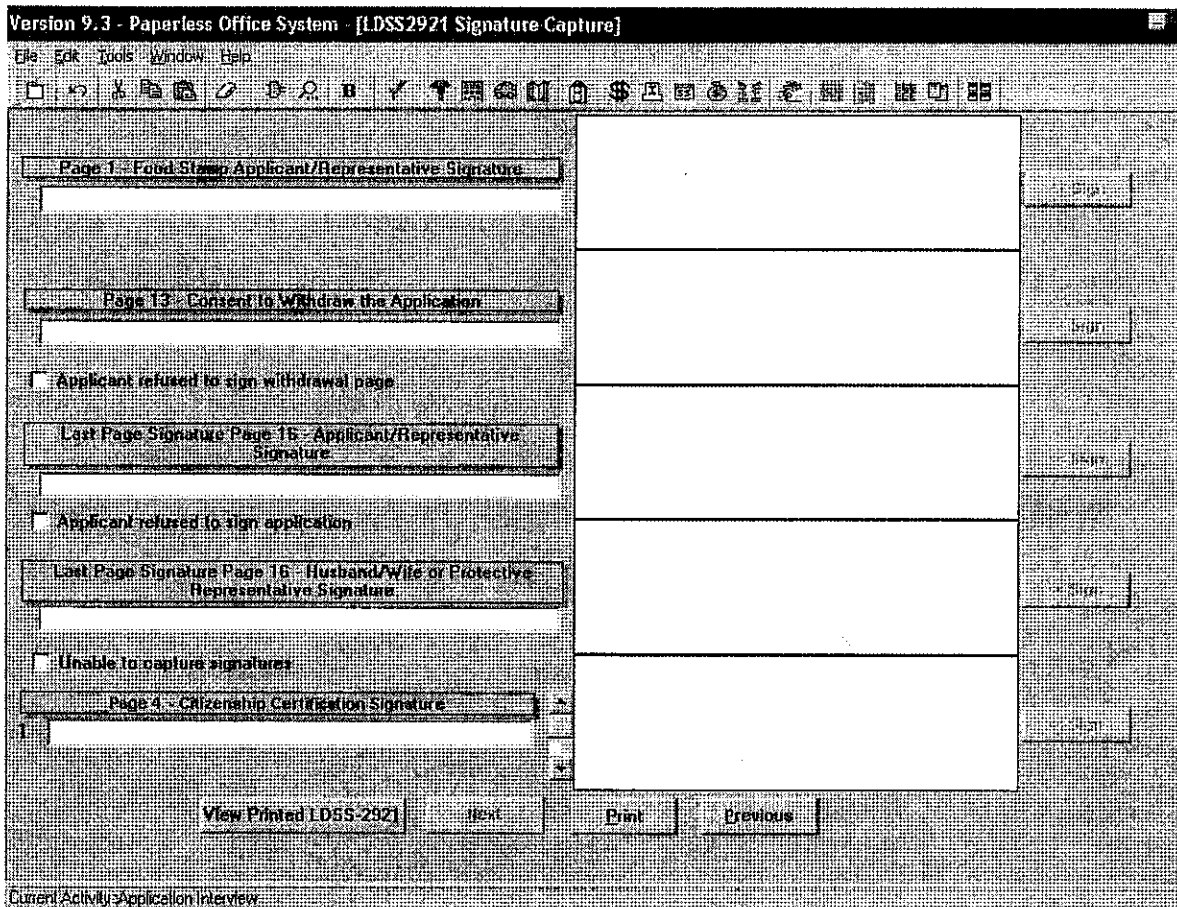


Figure 2 Revised LDSS-2921 Signature Capture Window

If the worker clicks "OK" without selecting a reason, the following error message will appear: "You must select the reason that the electronic signature cannot be captured."

If the worker attempts to leave the LDSS 2921 Signature Capture window without capturing a signature, the following message will appear: "Warning --The signature was not captured. Please check the Unable to capture signatures checkbox and select the reason that the electronic signature cannot be captured."

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The following revised text will appear in the "Instructions" data window that appears on top of the LDSS-2921 Signatures window when the worker first opens the window:

## Instructions

If there are 8 or less individuals in the household and all required adults are present at the time of the interview, the POS signature capture fields will be enabled. Please click the **Print** button to print the LDSS-2921 application. Retrieve the application from the printer, take out the signature pages from the printed packet and place the first page on the signature pad. Click the **Sign** button for the first signature and ask the applicant to sign. Once an acceptable signature is captured, click the **Accept** button. Place the next signature page and repeat the signature capture steps until all required signatures are captured. Click **Next** to continue. The signed LDSS-2921 will be saved in the POS Image Browser.

## Husband/Wife or Protective Representative Not Present at Interview or Homebound Casehead

If the husband/wife who lives in the household or the protective representative is not present at the interview or there is a homebound casehead and their representative is not present at the interview, please check the "Unable to capture signatures" checkbox. In the pop-up window that appears, select "Husband or wife is not present at interview" or "Homebound casehead" as the reason that the electronic signature cannot be captured and click OK. The POS signature capture fields will be disabled. You must print the LDSS-2921 by clicking on the Print button on the LDSS-2921 Signatures window. The printed LDSS-2921 will **not** be saved in the POS Image Browser. Give the printed LDSS-2921 to the applicant and ask them to return with the required signatures. **You must continue the Application Interview for this case in POS.** Once the applicant submits the signed LDSS-2921, scan and index it into POS.

## More than 8 individuals living in the household

If there are more than 8 individuals living in the household, the POS signature capture fields and the **Print** button will be disabled. You must give a paper LDSS-2921 application to the applicant, ask them to complete and submit it with all required signatures. **You must continue the Application Interview for this case in POS.** Once the applicant submits the completed and signed LDSS-2921, scan and index it into POS."

## Signature pad is not working

If the signature pad is not working, please check the "Unable to capture signatures" checkbox and select "Signature pad is not working" in the pop-up window and click OK. The POS signature capture fields will be disabled. You must print the LDSS-2921 by clicking on the Print button on the LDSS-2921 Signatures window. The printed LDSS-2921 will not be saved in the POS Image Browser. Give the printed LDSS-2921 to the applicant to sign. You must continue the Application Interview for this case in POS. After the applicant signs the LDSS-2921, scan and index it into POS.

## Applicant refuses to sign the application or withdrawal

If the applicant refuses to sign the application, please check the "Applicant refused to sign application" checkbox. The POS signature captures will be disabled and the Next button will be enabled.

If the applicant refuses to sign the withdrawal page, please check the "Applicant refused to sign withdrawal page" checkbox. The POS signature captures will be disabled and the Next button will be enabled.

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## 2. Supervisory Approval of Alien Determinations

The following new windows will appear in Supervisory Approval activities when an Alien Determination is completed in the Worker's activity:

- **Alien Summary Checklist**-shows alien type determined and PA, FS and MA eligibility determinations
- **Additional Information**-shows alien number and date of entry
- **Alien FS Eligibility Summary**-shows which documents support selected alien type
- **Battered Alien**-shows if alien was determined battered based on question set
- **Disability Details**-shows on which disability alien was determined disabled

## 3. Changes to Program Status tab in EFS Interview

The Program Status tab in the IN/EFS Eligibility Determination window has been updated with two new fields to allow display of non-financial reasons for ineligibility or being unable to issue EFS. The fields are "EFS Eligibility Determination" and "Reason."

The EFS Eligibility Determination field displays one of the following statuses:

- Eligible
- Ineligible
- Unable to Issue EFS

The following message will appear in the Reason field when everyone applying on the case is ineligible due to alien status:

- The household is ineligible for Expedited Food Stamps due to alien status.

The following messages will appear in the Reason field when the Expedited Food Stamps benefit cannot be issued due to a reason that applies to the applying casehead:

- You are financially eligible for Expedited Food Stamps, but benefits cannot be issued at this time because the casehead refused to be finger imaged without good cause.
- You are eligible for Expedited Food Stamps, but benefits cannot be issued at this time because your identity cannot be verified

One of the following messages will appear in the Reason field when the Expedited Food Stamps benefit cannot be issued due to a reason that applies to everyone applying on the case:

- All household members are ineligible for Expedited Food Stamps because they are under intentional program violation, under work sanction, are ineligible student(s) and/or the casehead refused to be finger-imaged without good cause.
- You are financially eligible for Expedited Food Stamps but cannot participate in the Food Stamp Program because all applying individuals are known to be ineligible students.
- You are financially eligible for Expedited Food Stamps, but benefits cannot be issued at this time because all applying individuals are under FS Intentional Program Violation
- You are financially eligible for Expedited Food Stamps, but benefits cannot be issued at this time because all applying individuals are under FS work sanction.
- The last time we gave you Food Stamp Benefits was on an expedited basis pending outstanding documentation. You cannot receive any further FS benefits until you fully verify/document your eligibility.

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## 4. Display/Print M-40k and LDSS-3152 in Approve IN/EFS Activity

In the eligibility determination process for expedited Food Stamps if the applicant is determined eligible for expedited Food Stamps the (LDSS-3152) Action Taken on your Food Stamp Case must be given to the applicant. If the applicant is determined ineligible for expedited Food Stamps or if the EFS can't be issued due to a non-financial reason the (M-40K) Denial of Expedited Food Stamps must be given to the applicant. If the applicant is determined ineligible for expedited Food Stamps POS will display a window named "EFS Decision Form" with the relevant information shown in the window. If the applicant is determined eligible for expedited Food Stamps a preview window of the LDSS-3152 will display.

## 5. Rules updates

### M3E Indicator Rule

A new TAD business rule will help prevent an M3E Indicator error in WMS. If reason codes N10 (Failure to Keep/Complete Appointment) or V21 (Failure to Provide Verification) are used to reject the FS suffix and the Worker fails to select "A" (Adequate, Manual Notice) or "T" (Timely, Manual Notice) in the M3E Indicator field, the following error message will appear: "Entry of "A" or "T" is required in the 'M3E Indicator' field when FS is rejected with reason codes "V21" or "N10".

### LDSS-4013 Form Suppress Rule

WMS Release 2005.3 converted all non CNS PA Reject codes to CNS codes. When a case is rejected for PA and FS at the same time, a CNS notice is now generated, which eliminates the need to print form LDSS-4013 (Notice of Action Taken on Your Application) from POS, except in some instances. This rule update is to ensure that when PA or FS reason "Y99" is used, the LDSS-4013 is not suppressed.

### Validation Rule For Foster Care Payments on Current Income Window

If the worker attempts to leave the Current Income window when "Other" is selected for the Foster Child in the second Response to Question window for the question, "Foster Care Payments (Received)?" the following message will appear: "Please revisit the "Foster Care Payment (received)" question and select a child from the "Foster Child" drop-down menu. If the child is not listed in the drop-down menu, then suspend the activity and add the child to the case, even if the child is not applying."

### Exclude Employed/Self-Employed Case Members from the "Is Unemployed?" Question

Any case members selected in the "Is Employed?" and "Is Self-Employed" questions will be excluded from the "Who" drop down menu in the Response to Question window for "Is Unemployed?"

## 6. Fixes/Updates

In the Disposition/Withdrawal window if there is more than one Casehead/Payee or the Casehead/Payee cannot be determined, POS will display a message instructing the worker to return to the Individual Detail window and select the correct casehead or payee.

## 7. Addition of Lifeline Program Field to Recertification Interview Activity

The Lifeline field was added to the "Additional Suffix Level Data" window in POS version 9.2 in July 2005 for several activities. The field has been added to the "Additional Suffix Level Data" window in the Recertification Interview activity. The Lifeline checkbox will be blank when the "Additional Suffix Level Data" window is opened in the Recertification Interview activity. The Worker must click on the checkbox, read the script and question to the participant and record the participant's response to the

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question. This will provide participants with an opportunity to opt out of the program if they were previously enrolled in Lifeline.

## 8. Use Of Suffix Level Closing Code On New Case Types.

"M88 - Failure to comply with automated Finger Imaging Requirements" This code previously was available only for SNA cases. This code is now being made available for FA and EAA/EAF cases also.

## 9. No Budgets found for this case message.

When the worker or supervisor is in the Review Case activity or in an Approval activity and goes to the budgeting window on a case with no prior budgets in POS, the following message will appear: "No budgets found for the case." The supervisor should follow current procedures if the processing of a case requires a budget.

## 10. Update to SUA Allowance:

The SUA allowances increase effective 02/01/06 POS has been updated with the new SUA amounts as shown in the following table:

Level	Allowance	Amount
I	Combined Heat, Utility & Phone Allowance	\$577.00
II	Utility & Phone Allowance	\$256.00
III	Telephone Allowance	\$33.00

## 11. Individual income budget window and Income Source Code 59 Foster Payments

Since the Foster Care payments (income source code 59) are no longer budgetable, in the Response to Question window where the foster care payment details are recorded, the "Program" field has been removed. POS will not carry the Foster Payment information to the Budget window. Also, in the Budget - Individual window, if income source code 59 is entered, the message "WMS doesn't currently accept Income Source Code 59 Foster Care Payments. Please remove." will appear.

## 12. Resources – Other Resources

The text entry field for "Type of Resource", in the Response to Question window for the "Has Resources Other than Those Listed Above?" question in the Resources window has been changed to a combination drop down selection box and text entry field. The selections available in the drop-down menu are:

- Children's Resources
- Lump Sum
- Boats
- Campers
- Snowmobiles
- Income Tax Refund
- Individual Development Account (IDA)
- Exempt Vehicles

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If the other resource is not listed in this drop down, the worker may type in a text entry of up to twenty characters for the type of resource.

## 13. Other Expenses – Child Support

The Response to Question window for the "Pays child support" question in the Other Expenses window has had one data entry field renamed, new data entry fields added and one data entry field removed.

The "Who" drop down box has been renamed to "Who Has the Expense". The "Is Payment For" field and associated radio buttons have been removed and replaced. The replacement field asks "Legally Obligated" with radio buttons for "Yes" and "No". The worker is to click on the appropriate radio button. There are two new sections below the first line. They are:

- "Who Receives the Payments" section with two text entry boxes
  - The first text entry box is for the last name and can be up to 30 characters
  - The second text entry box is for the first name and can be up to 25 characters
- "For Which Child" section:
  - "Is child in the FS household?" question with a radio buttons for "Yes" and "No"
  - Child In FS Household drop down list
  - Child Not in FS Household with two text entry boxes, both of which can be up to 30 characters. They are for the last and first names of the child in that order.

If "Yes" is selected in the "Is child in the FS household?" question then the drop down list in the "Child in the FS household" field is enabled and the text entry boxes in the "Child Not in FS Household" are disabled.

If "No" is selected in the "Is child in the FS household?" question then the text entry boxes in the "Child Not in FS Household" are enabled and the drop down list in the "Child in the FS household" field is disabled.

The screenshot shows a dialog box titled "Response to Question". It contains several fields and sections:

- Who Has The Expense:** A dropdown menu.
- Amount:** A text entry field.
- Frequency:** A dropdown menu with "M" selected.
- Verified:** Radio buttons for "Yes" and "No".
- Legally Obligated:** Radio buttons for "Yes" and "No".
- Who Receives the Payments?:** A section with two text entry fields: "Last Name:" and "First Name:".
- For Which Child:** A section with a radio button for "Is Child in the FS Household?" (set to "Yes").
- Child in FS Household:** A dropdown menu.
- Child not in FS Household:** A section with two text entry fields: "Last Name:" and "First Name:".
- Document:** A text entry field.
- Scan:** A checkbox.
- Comment:** A large text area.

At the bottom of the dialog box are "OK" and "Cancel" buttons.

Figure 3 Revised Pays Child Support Response to Question



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## 14. Employment Information – Participating in a Strike

The Response to Question window for the "Participating in a Strike?" question in the Employment Information window has had one data entry field added. The new field is "Start Date" with a corresponding field for entry of the start date of the strike in the format: mm/dd/yyyy.

Response to Question

Who:  Client (not covered by employer)  
 Client unable to work because of striking employees  
 Client not part of striking union but fear's personal injury or death if he/she crosses the picket line  
 Client terminated by the company because of the strike action  
 None of the Above

Monthly Total Pre-Strike Income: \$.00 Start Date: 00/00/0000

Document:  Scan:  Comment: \_\_\_\_\_

OK Cancel

Figure 4 Participating in a strike Response to Question with new Start Date field.

## 15. Medical – Insurances

The drill down for clicking on the "Yes" radio button in the TPHI question in the Response to Question window for the "Has Any Type of Health/Hospital/Accident Insurance or Receives Assistance in Paying Medical Expenses?" question in the Medical window has two new fields added and a change to how the "Who" box works. The who drop down list box in the drill down has been replaced with a text box which POS fills in with the name from the who drop down list box in the Response to Question window. The first new field is "Through Employer" and has text entry fields for "Policy or ID#" and "Insurance/Carrier/Company Name". Both of those fields allow entry of up to twenty characters. The text entry fields in the "Through Employer" field are enabled if the "Yes" radio button and disabled if the "No" radio button for the question "Is This Insurance Through Your Employer?" is clicked. The second new field is "Through Other Than Employer" and has text entry fields for "Policy or ID#" and "Insurance/Carrier/Company Name". Both of those fields allow entry of up to twenty characters. The text entry fields in the "Through Other Than Employer" field are enabled if the "No" radio button and disabled if the "Yes" radio button for the question "Is This Insurance Through Your Employer?" is clicked.

TPHI Drill Down

Who: \_\_\_\_\_  Yes  No  Don't know

Is This Insurance Through Your Employer?  Yes  No

Through Employer:

Policy or ID#: \_\_\_\_\_  
Insurance/Carrier/Company Name: \_\_\_\_\_

Through Other Than Employer:

Policy or ID#: \_\_\_\_\_  
Insurance/Carrier/Company Name: \_\_\_\_\_

OK Cancel

Figure 5 TPHI drill down for Medical Insurance question

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## 16. Budget – Individual Income/Needs

The POS Budget window has been updated with several changes affecting navigation through the window. The changes are:

- Business rules run when the "Income or Results" button is clicked in the Household Needs Budget window.
  - If the case passes the business rules in the Household Needs window for a new budget then:
    - the Worker is given the option to go to the Individual Needs window.
  - If the case passes the business rules in the Household Needs window for an old budget then:
    - the Worker is given the option to use the existing budget or create a new one and then:
      - the Worker is given the option to go to the Individual Needs window.
  - If the case fails the business rules in the Household Needs window, a pop-up window appears with a list of errors which must be corrected on the Household Needs window before the worker can go on to the next window.

Version 9.3.1 - Paperless Office System - [Individual Income / Needs]

Window

Case No & Suffix: 0000000000A | Line: 1 | Bdy: 3 | Client Name: | Hours Worked: 152 | Tax FICA30: | Pregnancy: | Emplmt: | Spec: | Rel: |

Employa: | EBY: | Status: | PA Status: ACTIVE | FS Status: ACTIVE | Date of Birth: 1/1/1970 | Aged / Disabled: | Involvement: | CIN: |

Income	Line	Source	Frequency	Gross	Program	Usage	Inc. Exemption	PA	FS
	1								
	1								
	1								

Deductions and Medical	Line	Type	Amount	End Date
	1			
	1			

Daycare Needs	Line	Type	Amount	Date of Birth	Disabled?
	1			00/00/0000	
	1			00/00/0000	

Special Needs	Line	Type	Amount
	1		
	1		

Calculate Budget / View Result | Household Needs

Current Activity: Application Interview

Figure 6 Budget -- Individual Income/Needs Window with New Scroll Bars

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The navigation in the Individual Income/Needs window has been changed to add scroll bars to each section. The scroll bars in each section work independently of each other.

- o The Demographics section allows you to scroll between each line on the case.
- o The Income section has lines for entry of up to three different incomes for each line on the case.
- o The Deduction and Medical Bills section has lines for entry of up to two deductions and/or medical bills for each line on the case.
- o The Daycare Needs section has lines for entry of up to four daycare expenses for each line on the case.
- o The Special Needs section has lines for entry of up to three special needs expenses for each line on the case.
- o The image below illustrates the scroll bars being able to scroll independent of each other. The line numbers and scroll bars are outlined in red boxes.

Figure 7 Budget -- Individual Income/Needs Window with Line Numbers and Scroll Bars boxed

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- The worker should ensure that all sections display the same line number as shown below by scrolling all sections to the same line number before making any changes.

Version 9.3.1 - Paperless Office System - [Individual Income / Needs]

Window

Case No & Suffix	Line No.	Bdgt No.	Client Name	Hours Worked	Tax	PICA30 & Pregnancy	Exemption	Spec	Rel
0000000000GA	1	2	3	152		1/3	Due Date Training?		
Employability Status	PA Status	FS Status	Date of Birth	Aged / Disabled	Involvement	CIN			
Employed Full Time and P.	ACTIV	ACTIVE	7/5/1977						
Income	Line	Source	Frequency	Gross	Program	Usage	Inc. Exemption	PA	FS
	2								
	2								
	2								
Deductions and Medical Data	Line	Type	Amount	End Date					
	2								
	2								
Dependents	Line	Type	Amount	Date of Birth	Disabled?				
	2			00/00/0000					
	2			00/00/0000					
Special Needs	Line	Type	Amount						
	2								
	2								

Calculate Budget / View Result      Household Needs

Current Activity: Application Interview

Figure 8 Budget Individual Income/Needs Window with the Same Line in Each Section

- NOTE: Workers should make changes affecting the budget by answering or updating the interview questions and then reviewing the changes in the Budget windows.

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## 17. Forms

The following forms will be added to POS:

- **M-186rr (S)** Mandatory Dispute Resolution Action Taken Form (Spanish)
- **W-132N (S)** Referral to On-Site MAP Liaison (Spanish)
- **W-147 (S)** Letter to Landlord-Request for Residence Verification (Spanish)
- **W-163 (S)** Assignment of Security Deposit (Spanish)

The following forms will be revised to match changes in the paper forms:

- **LDSS-4198** Third Party Data Sheet
- **M-186rr** Mandatory Dispute Resolution Action Taken Form
- **M-40K** Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits
- **M-40K (S)** Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits (Spanish)
- **M-528n** Request for Child Care Assistance or Request to Close My Public Assistance (PA) Case
- **W-132N** Referral to On-Site MAP Liaison
- **W-138TT** How to Prepare for Your Application Interview
- **W-145HH** Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (For Applicants Only)
- **W-147** Letter to Landlord-Request for Residence Verification
- **W-163** Assignment of Security Deposit
- **W-299A** Request for Payment of Third Party Health Insurance Premiums
- **W-908CC** Notice of Rescheduled Appointment for Recertification Interview
- **W-908CC (S)** Notice of Rescheduled Appointment for Recertification Interview (Spanish)

The following forms will be removed from the **Print Forms** window:

- **M-42f** Referral from Public Assistance for Separate Determination of Medical Assistance (This removal is temporary until the form is updated.)
- **IP** Interview Printout (This removal is temporary until the form is updated.)
- **W-147G** Repayment Worksheet (This removal is temporary until the form is updated.)
- **W-25H** Alien Status History Sheet