



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #10-107-SYS

CA POS RELEASE NOTES VERSION 14.3

Date: October 13, 2010	Subtopic(s): POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on October 18, 2010. Descriptions of the changes can be found in POS Release Notes Version 14.3 (Attachment A), Desk Guide – Introduction to POS Portal: Appendix A (Attachment B), and ACCIS Clearances Window: Appendix B (Attachment C).</p> <p>These release notes can also be found on the HRA Intranet at: http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective October 18, 2010</i></p> <p>Related Items:</p> <p>PD #10-31-ELI PB #10-90-OPE</p> <p>Attachments:</p> <p>Attachment A POS Release Notes Version 14.3 Attachment B Desk Guide – Introduction to POS Portal: Appendix A Attachment C ACCIS Clearances Window: Appendix B</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

POS Release Notes

Version 14.3 October 18, 2010

These Release Notes contain descriptions of changes in POS Release 14.3 scheduled for October 18, 2010. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. Prior Release Notes may also be found on the HRA Intranet at http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Advantage Program Changes

The Advantage Program is coordinated between HRA and the Department of Homeless Services (DHS) to provide eligible shelter residents with rental assistance in securing and establishing permanent housing. The new Advantage Program began on August 1, 2010, and is open to:

- households with children residing in a DHS-funded or DHS-operated shelter/hotel for a minimum of 60 days or an HRA-operated domestic violence shelter for a minimum of 42 days, or New York City Children's Services (ACS) youth in group settings aging out of foster care;
- adult households (couples) without minor children residing in a shelter for a minimum of 60 days; and
- single adults residing in shelters for a minimum of 60 days.

New Housing Advantage Indicator (HAI) Codes

When a household enters the Advantage Program, the Food Stamp (FS) actual shelter expense will be the family's contribution amount and will remain the same for the first year of the lease agreement. In addition, because the Advantage Program rental supplement may exceed the maximum CA shelter allowance, the household will not receive a CA shelter allowance in their needs calculation. To prevent staff from entering a CA shelter allowance and to identify the different Advantage programs, the following new HAI Codes have been developed:

- W – Work Advantage 1st year
- F – Fixed Income Advantage 1st year
- 9 – New Housing Advantage 1st Year (used by ODVEIS)

These new codes will be added to the POS rent expense and budget windows.

Previous HAI Codes:

The previous HAI codes will remain on cases still under year one of the old Advantage Program.

FS shelter allowance must equal \$50:

- 1 (Work Advantage [Shelter is \$50 or less])
- 5 (HRA Work Advantage [Shelter is \$50 or less])

FS shelter allowance must equal \$0:

- 2 (Fixed Income Advantage [Shelter is \$0])
- 3 (Children Advantage [Shelter is \$0])
- 4 (HRA Advantage [Shelter is \$0])
- 6 (HRA Fixed Income Advantage [Shelter is \$0])
- 7 (HRA Children Advantage [Shelter is \$0])

Program Confirmation

POS receives a file with clients enrolled in the Advantage programs. In the CA Application Interview, POS will confirm whether the applicant is in the Advantage Program using the lease start date, the lease end date and the client's issuance history.

Rent Expense window edits

In the rent expense window in the CA Application Interview, POS will display the following message when the system finds that the applicant is enrolled in a new Advantage program:

"This case was found to be an Advantage Rental Assistance Housing Program case where the rent is pre-paid to the landlord. The shelter type code for this case must be '01'. A contribution amount of 30% or 40% of the income must be entered in the FS Actual shelter amount and the PA shelter amount must be '0' and there must be a proration indicator of 'O' (Letter).

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2. Changes to M-384 OCSE Appointment Notice

The **M-384 (OCSE Appointment Notice)** was updated to add an applicant signature. In order to allow capture of the electronic signature, the printing of the form will be moved from the OCSE Referral window to the **Print Forms** window when the OCSE Referral Recommendation is **Make a Referral** and the applicant will be scheduled for an in-office OCSE appointment via NYCWAY Action Code **940A** (OCSE Referral).

OCSE Referral Appointment window

Printing the revised M-384 Form

After booking the OCSE appointment, the Worker must access the **Print Forms** window, select the **M-384 OCSE Appointment Notice** and click on the **Print** button. The M-384 form will be printed and the **eForm Signature** window will appear.

The Worker must retrieve the form from the printer and allow the applicant to review the information on the printed form. Once the information is confirmed and the applicant is ready to sign, the Worker must place the signature space of the **M-384** on the electronic signature pad. The Worker must then click on the **Sign** button.

The signature capture window will appear. The applicant must sign the form using the electronic and ink pen. The Worker must then verify that the signature was successfully captured and click **Accept** to save the signature.

The Worker will then click on the **Next** button. POS will save the M-384 (OCSE Appointment Notice) to the HRA One Viewer, along with the captured signature.

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Print Forms

Version 14.3 - Paperless Office System - [Print Forms] 9:33:19 PM Tuesday, September 28, 2010

File Edit Tools Window Help

Form No	Form Description	Copies	Forms
EXP_76R	Documentation Receipt		e-form
EXP83H	Declaration of Application for a Social Security Number		e-form
M15	Inquiry Regarding Veterans' Benefits and Servicemen's Allotments		e-form
M186RR	Mandatory Dispute Resolution Action Taken Form		
M186TT	Mandatory Dispute Resolution No Action Taken Form		
M30M	Referral for Social Security Number Application		
M327E	Sixty-Month Time Limit Checklist		e-form
M384	DCSE Appointment Notice		e-form
M3G	Notice to Report to Center		e-form
M3MM	Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance)		e-form
M40K	Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits		e-form
M42Q	Certification for Retroactive Medicaid Coverage		
M42V	Medicaid Choice/Managed Care Referral		
M528N	Request for Child Care Assistance or Request to Close My Cash Assistance (CA) Case		e-form
M858C	Notice of Intent to Restrict Home Energy Allowance for Family Assistance Cases (Timely)		e-form
M858D	Utility Guarantee		e-form
M858FF	Notice of Intent to Restrict Home Energy Allowance		e-form
M858M	Utility Arrears/Emergency Heating		e-form

Next Print Previous

E-Form Signature window

Version 14.3 - Paperless Office System - [eForm Signature Window] 9:33:34 PM Tuesday, September 28, 2010

File Edit Tools Window Help

Signature - Form Number: M384

Instructions

Retrieve the form from the printer and place the page on the signature pad. Click on the **Sign** button. The signature capture window will appear. Ask the client to sign and click on the **Accept** button to save the signature. Click on the **Next** button to continue. The signed form will be saved in the electronic case record.

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 on the **OK** button. The POS signature capture fields will be disabled. You must print the form by clicking on the **Print** button. The printed form will not be saved in the electronic case record.

Give the printed form to the client to sign. After the client signs the form, scan and index it into POS.

Signature
DCSE DCSE

Unable to Capture Signatures

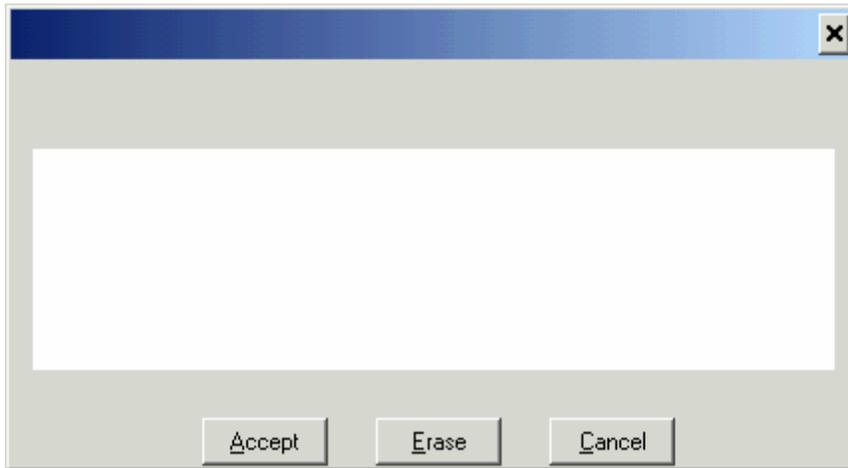
<< Sign

Next Re-Print Previous

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Signature Capture window



3. POS Portal Citywide Implementation

The web-based **POS Portal** provides a centralized point of access to the Food Stamp Paperless Office System and several other applications regularly used by FIA Center staff. The user will have one central location to assist them in accessing, reviewing and processing cases.

The POS Portal will allow access to the Food Stamp Paperless Office System, POS Management Console and the POS release notes. In addition; the portal will also provide access to the following Non-Cash Assistance Logs: Application Log, Recertification Log, Deferral Log and the NCA FS calendars. The web-based Front Door Reception (FRED) application will also be included in the portal.

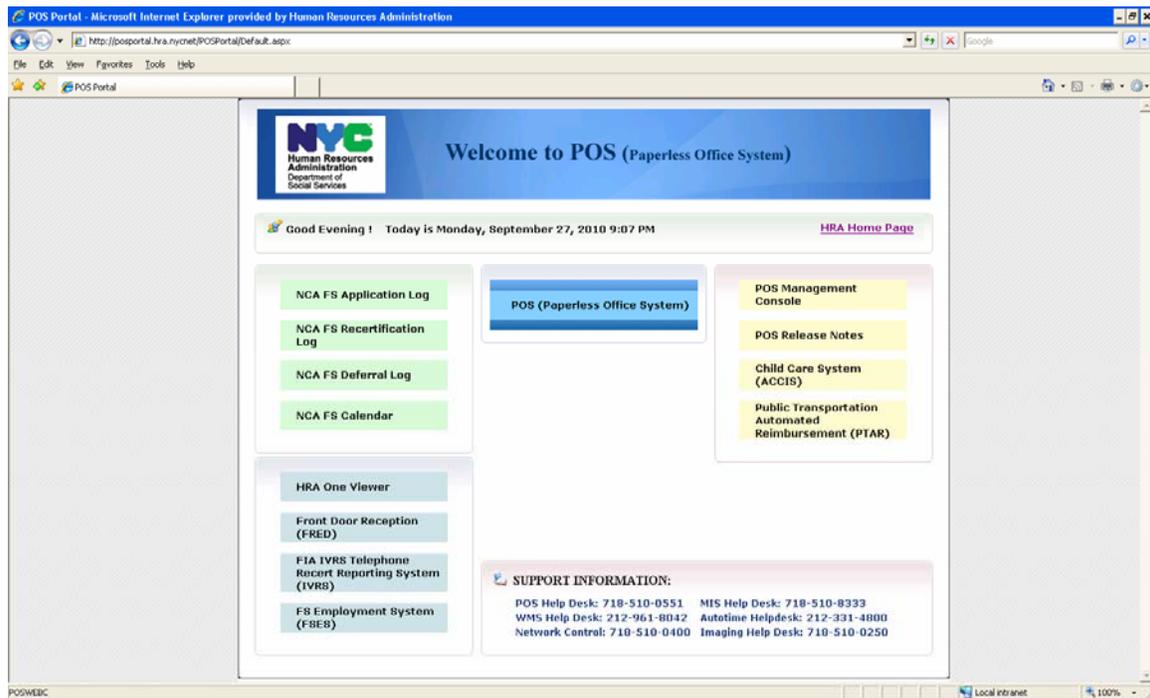
The POS Portal also provides access to other applications outside of the Paperless Office System. The following links are available to the user from the POS Portal Home Page:

- HRA Home Page
- HRA One Viewer
- FIA Telephone Recertification Reporting System (IVRS)
- Food Stamp Employment Tracking System (FSE)
- Automated Child Care Information System (ACCIS)
- Public Transportation Automated Reimbursement System (PTAR).

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POS Portal Home Page Window



Removal of POS Primary and POS Secondary Icons

The POS Primary and POS Secondary icons will be removed from the desktop. Staff must access POS through the POS Portal icon. To view the **POS Sign-On Site**, staff must click on the POS (Paperless Office System) link on the POS Portal.

Appendix

For additional information, please see **Appendix B: POS Portal**.

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4. Single Issuance for FS Separate Determination Cases

The FS Single Issuance windows and transactions will be upgraded to allow direct transmission of grants from POS to WMS for FS Separate Determination cases at Job Centers. The upgrade will also centralize printing of back-up grant authorization forms and help eliminate errors in data entry.

Grant Summary window

The Grant Summary window integrates business rules to help ensure accuracy and reduce grant issuance errors and duplication.

The Worker can view the current case number, the re-use case number (if any), the current center, grant issuance history and any grants in progress.

To enter a new grant, the Worker will click on the **New Grant** button. To edit a grant in progress, the Worker will select the grant and click on the **Grant Details** button.

Grant Summary window

The screenshot shows a software window titled "Grant Summary window". At the top, there is a menu bar with "File", "Edit", "Tools", "Window", and "Help". Below the menu bar, there are several input fields: "Case Number:" with a blacked-out value, "Case Name:" with a blacked-out value, "Re-Use Case Number:" with an empty field, and "Center:" with the value "Melrose Food Stamp Center". A "View Grant Issuance History" button is located to the right of the "Center:" field. Below these fields is a table with the following columns: "Code", "Description", "From / To", "Created", "Amount", "Next Month Amount", "Special", and "Status". The table body is currently empty. At the bottom of the window, there are four buttons: "Grant Details", "New Grant", "Next", and "Previous".

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Grant Issuance History

To view the grant issuance history, the Worker will click on the **Grant Issuance History** button. They may view up to 12 months of past grants.

Code	Description	From / To	Amount
------	-------------	-----------	--------

Benefit Data Entry Window

The benefit data entry window will allow entry of multiple grants at a time. Initially, one grant space will be available. Once the Worker enters information for the first grant, a second row will appear. After entering the grants, the Worker will click 'Done'. Business rules will verify the entered grants against WMS benefit issuance history and display error messages, if appropriate.

After the business rules pass, the Worker will return to the Grant Summary window.

Deleting a grant

The Worker can delete a grant that was mistakenly entered by:

- selecting the grant in the **Grant Summary** window;
- clicking on the **Grant Details**; and
- clicking on the **Delete Grant** button.

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Single Issue Benefit Data Entry Window – no grants entered

File Edit Tools Window Help

Case Number: [redacted] Case Name: [redacted] Suffix: 1

Re-Use Case Number: [redacted] Center: Melrose Food Stamp Center

Total grant amount: [redacted]

FS Single Issue Grant Information

1.

Issuance Code: [redacted] POS Rule Status: [redacted]

Amount	From	To	Routing Location	Replaces Benefit	Authorization Number	Check #
0	00/00/0000	00/00/0000				

Is this a back-up grant? Yes No

Delete Grant Message: [redacted]

Done Cancel

Single Issue Benefit Data Entry Window – one grant entered

File Edit Tools Window Help

Case Number: [redacted] Case Name: [redacted] Suffix: 1

Re-Use Case Number: [redacted] Center: Melrose Food Stamp Center

Total grant amount: \$27

FS Single Issue Grant Information

1.

Issuance Code: Code 22 - Daily Retroactive Benefits POS Rule Status: Passed

Amount	From	To	Routing Location	Replaces Benefit	Authorization Number	Check #
\$27	08/01/2010	08/31/2010				

Is this a back-up grant? Yes No

Delete Grant Message: [redacted]

FS Single Issue Grant Information

2.

Issuance Code: [redacted] POS Rule Status: [redacted]

Amount	From	To	Routing Location	Replaces Benefit	Authorization Number	Check #
\$	00/00/0000	00/00/0000				

Is this a back-up grant? Yes No

Delete Grant Message: [redacted]

Done Cancel

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Submission to Supervisor

Once the activity is ready for submission to the supervisor, the Worker will access the Approval Elements window or will select the Close menu.

Approval Elements window

The screenshot shows a software window titled "Approval Elements" with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main area contains three sections, each for a "Disapproved Element":

- Address Information:** Includes an "Approval" checkbox, an "Edit" button, and an "Add Comment" button.
- Suffix Information:** Includes an "Approval" checkbox, an "Edit" button, and an "Add Comment" button.
- Identity, Citizenship, Relationship, Residence & SSN:** Includes an "Approval" checkbox, an "Edit" button, and an "Add Comment" button.

Below these sections are buttons for "Next", "Xmit.", "Previous", and "Refer Back to Worker". At the bottom right, there is a field "Activity Includes Ready SI Grants:" with the value "Yes".

The Approval Assignment window will appear and indicate whether there are ready grants for the activity. The Worker will submit the case to the supervisor for approval.

Approval Assignment Window

The screenshot shows a software window titled "Approval Assignment" with a blue title bar. It contains the following sections:

- Selected Case:** Fields for Case No (00010006858E), Case Name (LOPIL POLK), Casehead, Case Suf (1), Caseload (FSPOS), CIN, and SSN.
- Refer Case To:** A table with columns: Title, Unit, Last Name, First Name, U/W, and Phone Number. The table lists five "FS Supervisor" entries, with the last one selected.
- Enter Comments If Any:** A text area for entering comments.
- Activity Includes Ready SI Grants:** A field with the value "Yes".
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

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Supervisory Review

After the Worker completes their activity, the Supervisor must review the activity, including the Grant Summary window, and approve or disapprove the processed grants:

- The Grant Summary window will track the status of the approval/disapproval.
- The supervisor can view benefit issuance history and the detailed entries made by the Worker.
- If the supervisor disapproves the grant, a comment will be required.

Grant Summary window in approval activity

Code	Description	From / To	Amount	Next Month Amount	Grant Status	Approval Status
22	22 - Daily Retroactive Benefits	08/01/2010-08/31/2010	\$27.00		Ready	Incomplete

Benefit approval window

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Grant Form Printing and Transmission

Upon completion of the activity, the grants will be transmitted to WMS, with the exception of back-up grants with FS grant code 16, which will be submitted to the Single Issue Printing Queue.

Grants Returned to the Worker

If the activity is returned to the Worker, the Disapproved Elements window will display grants that were disapproved by the Supervisor.

Disapproved Elements window

File Edit Tools Window Help

Disapproved Element

Single Issuance (requests and special grants) Approval Edit

Add Comment

Disapproval Reasons

Review Comment Log

09/15/10 J. Breton, Fs Supervisor: Comment Example for Disapproved Grant

Disapproved Grants Edit

Code	Description	From / To	Special
08	08 - Prorated/Partial NPA	01/15/2011-01/31/2011	

View Grant History

Next Previous

Refer Back to Worker

Activity Includes Ready SI Grants: No

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5. TALX Information Window Enhancement

The **TALX Information** window will be updated to automate entries when no TALX match is found. When the Worker clicks **No** for “**TALX Match Found**”, the system will automatically set the following fields:

- the **Ready to TALX Record Outcome** field will be set to “Ready”;
- the **TALX Outcome** field will be set to “TALX was unable to find a Social Security Number match”;
- the **Hit** field will be set to “No”; and
- the **Resolution** field will be set to “Nothing to Resolve.”

TALX Information Window

Instructions For Applicants: Click on the TALX link, located at the top of the TALX information Window. If a match exists, print, scan and index the document. Close the TALX link. If no match exists, close the TALX link. Proceed to answer questions on the TALX Information Window.
 Instructions For Participants: Click on the 'System Match' checkbox. If the participant is known, TALX will display information from the latest TALX table. If no information is displayed, proceed to answer question on the TALX information window.

Existing information	Who <input type="text"/>	www.TALX LINK	System Match <input type="checkbox"/>
Name	TALX		
Date of Birth	TALX Match Found? <input type="radio"/> Yes <input checked="" type="radio"/> No	Is Client disputing employment information? <input type="radio"/> Yes <input type="radio"/> No	Client Still Employed? <input type="radio"/> Yes <input type="radio"/> No
Relationship to Case Head	Is there an RFI Hit? <input type="radio"/> Yes <input type="radio"/> No		
Social Security Number	TALX Employment		
Status (PA/FS)	Employer Name	Employer Address	City State Zip Code
	Employment Start Date	00/00/0000	Pay Cycle Gross
	TALX Medical		
	Medical Insurance Coverage? <input type="radio"/> Yes <input type="radio"/> No	Employee Enrolled? <input type="radio"/> Yes <input type="radio"/> No	Provider Name
	TALX Results		
	Ready to Record TALX Outcome? <input checked="" type="radio"/> Ready <input type="radio"/> Not Ready		
	TALX Outcome	TALX was unable to find a Social Security Number matc	Hit? <input type="radio"/> Yes <input checked="" type="radio"/> No
	Resolution	Nothing to Resolve	Comment
	Recertification		
FIA-3A Available? <input type="radio"/> Yes <input type="radio"/> No	Is JDS/Worker initiating a Recoupment? <input type="radio"/> Yes <input type="radio"/> No	If Yes, amount	Recoupment Applicable Program <input type="radio"/> CA <input type="radio"/> FS
Last FS Grant Benefit			Last CA Grant Benefit
Amt. of CA BudgetChange			Amt. of FS Budget Change

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6. Document Re-Use Expansion

In many instances, case documents required for eligibility are already available in the HRA One Viewer. The Document Reuse process facilitates the reuse of existing documents for eligibility factors that do not require new documentation for each application or recertification, thus reducing the need for workers to duplicate scanning and indexing of existing documentation.

Whenever a document is required in POS for identity, citizenship or relationship, POS searches the One Viewer to determine whether the document was previously scanned. Effective October 18, 2010 POS will also look for documentation for resources, absent parent information and alien status for non-citizen case members.

Example: Documents Found window

Documents found for

Client information in POS

Case Number [REDACTED] CIN [REDACTED] Name [REDACTED] SSN [REDACTED] SEX [REDACTED] DOB [REDACTED]

Instructions

Displayed below is a list of all Documents found for each individual on the case. View the document by double clicking on each row. Once you find a document that can be re-used, check the 'Re-use (Document is Accurate and Readable)' check box and click Next ONLY if the document viewed matches the description and the image is readable. You cannot proceed until at least one document has been selected as reusable OR until all documents have been viewed.

Images Found in POS Browser/HRA Viewer

Question	CIN	Name	SSN	Sex	DOB	Indexed Date	Documentation	Re-Use (Document is Accurate & Readable)
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>						
[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>						

New Search

Next > Previous

This window lists all documents found in the image repository related to the individual(s) and eligibility factors for which documents can be reused. Workers have the ability to view the documents and to use them as necessary. This window appears prior to the Individual detail window in the POS interviews.

7. New Edit for Homebound Question in POS

A new edit will be added to the Medical window to prevent Workers from removing the homebound indicator for an individual in POS. If the Worker attempts to change the answer for the question "Is any Adult in the Household Homebound" from 'Yes' to 'No' and there is at least one individual with a homebound indicator, the system will prevent the change from happening and will display the following error message: **"The homebound indicator can only be removed by designated FIA staff."**

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8. Homebound Data Retrieval in Schedule CA Recertification Appointment

The **Calendar** window in the **Schedule CA Recertification Appointment** currently retrieves data from POS and NYCWAY to determine whether a participant should be scheduled for a home visit appointment. Additional edits in the window will ensure the retrieval of the homebound indicators from POS and NYCWAY each time the window opens, if the Worker suspends the activity and returns to it at a later time.

Reminder: Home Visit Settings in the Calendar window

When the Calendar window opens, POS will make an OpenTI call to retrieve action codes from NYCWAY to determine whether the client qualifies for a travel accommodation or flexible appointment hours. The following action codes will be retrieved:

- 16TE (WeCARE Temporary Employment Call-In Exemption)
- 16TT (WeCARE Para-Transit Services Needed)
- 16TH (WeCARE Flexible Appointment Hours)

If NYCWAY action code 16TE or 16TT is found for the casehead, the case will be scheduled for a home visit. If NYCWAY action code 16TH is found, NYCWAY will provide day and time ranges for which the client is not available for the recertification appointment.

For Cash Assistance cases that are not in center 052 (RTSC) and do not have action codes 16TE or 16TT, POS will determine whether the casehead is homebound using POS and NYCWAY data.

If the casehead is homebound, the question “Does this case require a home visit for face-to-face (FFR)?” will be prefilled with an answer of “Yes”. The Worker must then select the date and time of the appointment. The appointment must be at least 10 days in the future.

If the casehead is not homebound, the Worker must indicate whether s/he is an R.E.D. (Returning Eligibility Determination [BEV]) Worker and whether the case requires a home visit for FFR.

If the case requires a home visit for FFR, the Worker must indicate whether an FFR home visit appointment was arranged by phone and the date of the phone conversation, if applicable. The Worker must then select the date and time of the appointment. The appointment must be at least 10 days in the future.

9. Expansion of High-Performance Review Pilot to Dyckman and Fordham

The **High-Performance Review** (HPR) pilot will be expanded from the Linden Job Center to the Dyckman and Fordham Job Centers. This implementation includes the following functionality:

- Full supervisory review of a percentage of selected cases and for cases under HPR exceptions
- Disapproval reason selection menu in the supervisory approval windows;
- Direct transmission from POS to WMS for non-selected cases;
- Implementation of the Notice Selection window;
- Implementation of the Notice Printing Queue for centralized printing of client notices at the HPR Job Centers;
- Printing and mailing of six client notices by MIS (EBT-23, LDSS-3152, LDSS-4013, LDSS-4753 and M-3mm); and
- Implementation of the Worker-Only Activity and AJOS 2 Review reports in the Management Console.

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10. Reminders: High Performance Review (HPR) Pilot

Selection of DSS-3574 and DSS-3575 forms in Notice Selection Window

The HPR pilot has implemented the Notice Selection window.

In this window:

- The DSS-3575 form will only be selected when there are CA grants that will not be transmitted to WMS (Pick-Up Code 4, 5 or 7) or that are back-up grants.
- The DSS-3574 form will only be selected when the FS grants are marked as back-up grants.

These forms will not be selected when all grants will be transmitted directly to WMS by the final level of approval.

Required WMS TTSS bits for Transmission of Grants

New staff members in a center with the HPR pilot require the following **WMS TTSS Bits** to transmit grants to WMS:

- **0158 – Expedited Food Stamps (EFS)**
- **0178 – Food Stamp Single Issue (FS SI)**
- **0229 – Public Assistance Single Issue (PA SI)**

Requests for these security bits must be submitted to the Office of Data Security Management (OSDM) via the Auto Paperless Access Request Transmission (APART) system.

11. Automated Medicaid Separate Determination (MSD)

If an applicant/participant is denied or becomes ineligible for Cash Assistance (CA), for a reason that does not apply to the eligibility requirements for Medical Assistance (MA), a separate Medicaid determination is required. An applicant may choose to apply for CA and Food Stamps (FS) and not apply for MA. In such cases, if the CA application is denied, a separate determination for MA is not required.

A new process will be created to automate processing for cases where Medicaid Separate Determination (MSD) is required. For cases requiring MSD, POS will submit MA-relevant data and documents entered on the CA case to the Eligibility Data and Image Transfer System (EDITS) for processing of the MA decision or deferral for required MA documentation.

Determination for MSD Required, MSD Not Required and Manual MSD Review Required

POS will receive nightly files from the NYC MAPPER system of individuals with eligibility decisions processed five business days earlier. These files will indicate whether the case was reopened since the initial decision and whether the individual was found in an open status (AP, AC, SI or IC) on a Cash Assistance or Medicaid case.

The cases found with an open status will be marked as not requiring MSD. For cases with a closed CA status, POS will verify whether the closing was a single issue closing. If the closing was not a single issue closing, the case will be marked as not requiring MSD because the closing code will determine if MA is continued.

If the CA eligibility transaction was completed outside of POS, the case will be marked as requiring manual MSD review.

POS will submit MA relevant data and documents to EDITS for processing of the MA decision or a deferral for required MA documentation.

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POS will update the case activity history for the CA case with the outcome of this system review for MSD.

Policy Directive

For additional information on the existing MSD policy and process, please see PD 10-23-ELI Separate Medicaid Determinations.

12. Posting of NYCWAY Action Code 11DU (No Longer a Childcare Provider)

When the applicant/participant answer is Yes for the question "Does the Applicant/Participant claim they stop providing childcare?" in the ACCIS Clearances window, POS will post action code 11DU (No longer a childcare provider) to NYCWAY. The code will be posted when the Worker clicks the Next button in the window.

Appendix

For additional information, please see Appendix B: ACCIS Clearances.

13. New Approved Amount Edit for Single Issue Grant Requests

A new business rule will compare the total grant amount entered for a grant request in the data entry window (SI Task 7) against the approved amount entered in the **Referral and Outcomes** section in SI Task 6. If the amounts differ, the following warning message will appear: "Approved amount in SI Task 6 does not match entered grants".

14. New Interview Data Edits for Single Issue Grants

New business rules will warn the Worker that an expense was not recorded in POS interview when they attempt to record certain grant types.

When the Worker enters CA grant codes **10** (Utility grant to prevent turn off/restore services [prior to PA]), **41** (Utility grant to prevent turn off or restore utility services [mismanagement]) or **50** (Non-recoupable utility grant [no mismanagement]) in the Data Entry window, but did not record a gas/electric expense and did not enter a heating bill expense, the following message will appear: "Gas/electric expense was not recorded and heating bill expense was not recorded in the interview."

When the Worker enters CA grant codes **09** (Rent only), **30** (Rent payments in excess of maximum), **31** (Pre-PA rent arrears), **39** (Rent in advance to secure apartment), **40** (Rent in advance to prevent eviction), **43** (Accrued rent while on PA), **59** (NYCHA rent arrears), **75** (Rent held in escrow) or **77** (Court ordered retroactive payment), but did not record the rent expense, the following message will appear: "Rent expense was not recorded in the interview."

When the Worker enters CA grant code **05** (Pregnancy allowance), but did not record the pregnancy and expected date of confinement (EDC) in the interview, the following message will appear: "Pregnancy was not recorded in the interview."

POS Release Notes

Version 14.3 October 18, 2010

15. Single Issue Reminders: Removing Grants Associated with a Grant Request

Occasionally, the Worker may mistakenly mark a grant request as accepted and begin the data entry of single issue grants.

To correct the decision and remove grants associated with a grant request that is not ready to receive grants, the worker must access SI Task 6 and mark the request as **Not Ready** in the **Grants** tab.

If the request will be denied or will be accepted without issuing a grant, the Worker must access SI Task 6 and:

- Select a decision of **Deny** and enter the denial reason; or
- Select a decision of **Accept**, select **Other Action** and enter the action taken on the case.

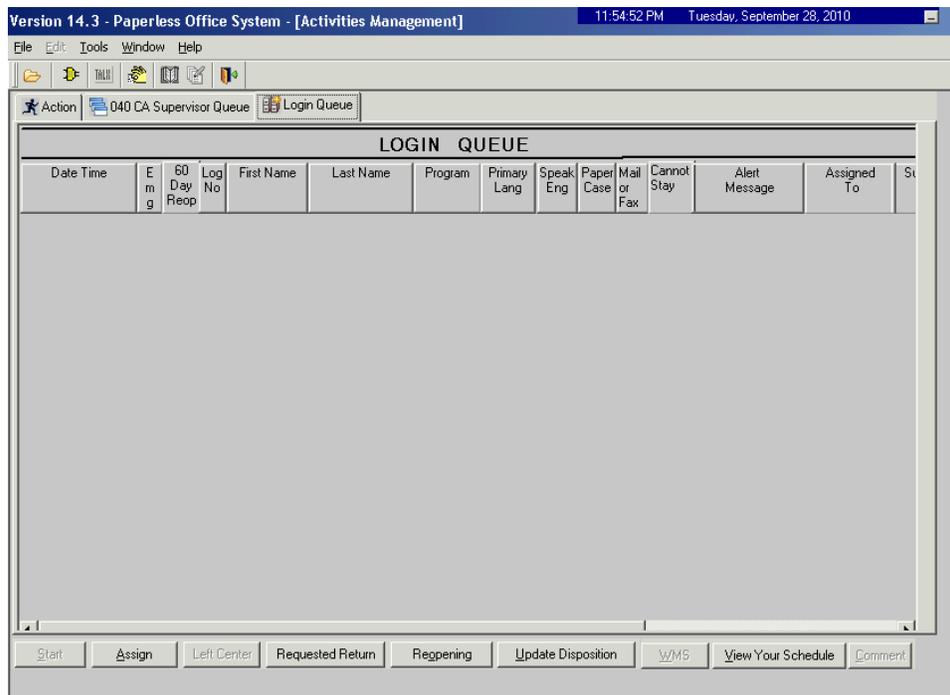
When these steps are completed, the grants will be deleted from the system.

16. Pre-filling Center in Case Transfer with Covering Center for Zip Code

In the **CA Case Transfer** activity, POS will prefill the **New Center** menu with the center covering the participant's residential zip code. The Worker can change the pre-filled value if the case will be transferred to a different center.

17. Sorting by Date and Time in CA Login Queue

Workers and Supervisors will be able to sort the Login Queue by the **Date** and **Time** columns.



POS Release Notes

Version 14.3 October 18, 2010

18. WMS 2010.3 Change: New BVI Indicator

New BVI (Birth Verification Indicator) field on WMS Inquiry Screens NQIN2A and NQCP03

A new indicator named BVI (Birth Verification Indicator) has been added to the WMS inquiry screens NQIN2A (Client Information) and NQCP03 (Pending Individual Data). This field will be used for citizenship verification on Medicaid cases.

Update to POS TAD

The **BVI (Birth Verification Indicator)** field will also appear on the POS TAD next to the **DGC** field. For noncitizens who become naturalized citizens and who are active for MA, the Worker can enter a value of **3** (Verified by a worker) if the current value in WMS is **B** (Verified but not consistent with SSA data), **C** (Verified but deceased), **D** (Verified but deceased and not consistent with SSA data) or null. If the Worker attempts to input any value other than 3, the following error message will appear: "The BVI value can be replaced by '3' only"

If the current value for the field in WMS is **1** (Verified), **2** (Verified through automated newborn process), **4** (Verified via EDITS/POS) or **5** (Deemed Verified [System Generated]), the Worker will not be able to change the value for this field in POS.

The screenshot shows the 'TAD Data - Eligibility' window in the 'Paperless Office System' version 14.3. The window is divided into 'WMS Data' and 'POS Data' sections. The 'WMS Data' section includes fields for First Name, Last Name, Middle Name, Sex, Marital Status, Buy-In Indicator, and various demographic and identification fields. The 'BVI' field is highlighted with a blue box. Below the BVI field are fields for Birth Date, CHT, and TPI. The 'POS Data' section includes fields for STATE/FEDERAL Code, Date, Code, From Date, To Date, CBIC, CC, CDC, SSN, Number, Valid, Student ID, and various status codes like BCS, TASA, Emp Code, SSI, OTM, VET, Highest Degree Earned Code, Education Level, Individual Cat Code, Mother of Child, and Exemption Indicator. At the bottom, there are buttons for 'Next', 'Previous', 'Ignore Errors', 'Return to Case level Data', and 'Run Rules'.

Policy Directive

For additional information on the usage of this new indicator, please see the **Policy Directive for the WMS 2010.3 version**.

POS Release Notes

Version 14.3 October 18, 2010

19. Default Mailing Address for Undomiciled Applicants and Participants

An entry in the mailing address fields is required for undomiciled applicants and participants. If the applicant or participants does not provide a mailing address, the default General Post Office address for the borough is used for the case. At the request of the United States Postal Service, the street address for these default addresses will be changed to **GENERAL DELIVERY**. The word **GENERAL** will go in the **Street No** field and the word **DELIVERY** will go in the **Street Name** field.

Present Address		Is the applicant/participant undomiciled? <input checked="" type="radio"/> Yes <input type="radio"/> No	
St No/Dir/Name:	99 [None] Undomiciled	Type	Apt # City
State:	NY Zip Code: 10451 0000	Phone:	- -
Mailing Address		Does the applicant/participant have a mailing address? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Care of Name:	White C	Type	Apt # City
St No/Dir/Name:	GENE[R] [None] DELIVERY	Phone:	- -
State:	NY Zip Code: 10451 0000		

20. Fix for Flow for Failed to Keep Recertification Cases

When the case is marked as “failed to keep” in the **FTK FFR** window in the **CA Recertification Interview**, the activity for the **CA Recertification Interview** and **Approve CA Recertification** should be limited to the following windows:

- Household Screen
- FTK FFR
- TAD
- Approval Elements

When the Worker clicked on the “Previous” button on the TAD, POS mistakenly displayed the full window set for the activity, rather than the shortened flow. This issue will be fixed in the October 18 release.

21. E-Forms

The following E-Forms will be updated:

- M-384, OCSE Appointment Notice
- LDSS-3152-NYC, Action Taken on Your Food Stamp Case (NYC)
- W-34A, Referral/Information Form
- W-519, Finger Imaging Notice
- W-607A, Request for Identification Card/Temporary Medicaid Authorization/Update Existing CBIC

22. Reminder: TAD transmissions Prevented for an Inactive case

When the Supervisor clicks on the **Xmit** (Transmit) button in the **Approval Elements** window, POS will compare the current CA case status in WMS and the CA case status selected in POS. The TAD transmission will not be posted if both the WMS CA and POS CA case statuses are inactive.

In these instances the following message will be displayed:

- **This case is inactive in both WMS and POS TADs. No TAD or Grant transmission needs to be posted.**

POS Release Notes

Version 14.3 October 18, 2010

23. Single Issue Reminders: Re-Printing Grant Forms

Once the **Print Grant Forms** row is completed in the **Single Issue Printing Queue**, the form cannot be printed from this queue.

To reprint SI grant forms that were printed using the **Single Issue Printing Queue**, the worker must access the **Review Case** activity, click the **Next** button in the **Activities** window, select **Tools** and click on **Printed Forms**. The Worker can select the form and click on the **Preview** button to review the form(s) prior to printing. The **Re-Print** button will allow the Worker to re-print the form(s).

Activities window

The screenshot shows the 'Activities' window with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. Below the toolbar is a form with the following fields:

- No: 00007421939F
- Case Name: PERKINS SAM
- CIN: TB54379A
- Suffix: 1
- Casehead Name: Sam Perkins
- SSN: 055-88-3107

Below the form is a table with the following columns: Seq #, Activity Type, Reason For Removal, Parent, Start Date, End Date, and Em. The table contains the following data:

Seq #	Activity Type	Reason For Removal	Parent	Start Date	End Date	Em.
2046	System Removed		1936	4/24/10 5:30 am	4/24/10 5:30 am	SYSTEM
2045	Document Intake			4/12/10 1:14 pm	4/12/10 1:14 pm	
2043	System Removed		2040	2/11/10 5:30 am	2/11/10 5:30 am	SYSTEM
2042	Print a Form		2041	2/10/10 1:04 pm	2/10/10 1:04 pm	Edouard
2041	Print a Form			2/10/10 1:04 pm	2/10/10 1:04 pm	Edouard
2040	Waiting to See You				2/11/10 5:30 am	Jose Bre

At the bottom of the window are two buttons: **Next** and **Cancel**.

Tools > Printed Forms Menu

The screenshot shows the 'Tools' menu with the following items:

- WMS
- WMS Inquiry ... Alt+I
- Current Active Budget Alt+B
- Ledger Alt+G
- Activity Inquiry in NYCWAY
- Clearances
- TALX file
- RFI Data
- Reports
- WMS TAD ... Alt+T
- Print Queues
- Language Access Tracking
- Printed Forms** (highlighted)
- Documents Alt+D
- Comments Alt+M

POS Release Notes

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Printed Forms window

Activity	Start Date	End Date	Employee	Form	No. Copies Printed	CIN	Date/Time Stamp
				(dss3575)d_dss3575 1			
Non-Food Emerg/Special Grant	2/24/2004	3/5/2004	Shepard Michele	(dss3574)d_dss3574 1	00000000		2/24/2004 11:33 am
CA Application Interview	2/13/2004	3/5/2004	Shepard Michele	(w113k)Documentation Requirements	00000000		2/13/2004 12:21 pm
CA Application Interview	2/13/2004	3/5/2004	Shepard Michele	(m3)Action Taken on Our Application	00000000		2/13/2004 12:18 pm
CA Application Interview	2/13/2004	3/5/2004	Shepard Michele	(citizene)Certification of Citizenship	00000000		2/13/2004 12:01 pm

Preview Re-Print Close

24. Reminder: Appendices

- Appendix A, POS Portal
- Appendix B, ACCIS Matches Update with **New NYCWAY code 11DU**

Attachment B

POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

Overview

The web-based POS Portal provides a centralized point of access to the Paperless Office System and several other applications regularly used by FIA Center staff. The user will have one central location to assist them in accessing, reviewing and processing cases.

The POS Portal will allow access to the Paperless Office System, POS Management Console and the POS release notes. In addition; the POS portal will also provide access to the following Non-Cash Assistance Logs: Application Log, Recertification Log, Deferral Log and to the NCA FS calendars. The web-based Front Door Reception (FRED) application will also be included in the portal.

The POS Portal also provides access to other applications outside of the Paperless Office System. The following links are available to the user from the POS Portal Home Page:

- HRA Home Page
- HRA One Viewer
- FIA Telephone Recertification Reporting System (IVRS)
- Food Stamp Employment Tracking System (FSE)
- Automated Child Care Information System (ACCIS)
- Public Transportation Automated Reimbursement System (PTAR).

POS Portal Home Page Window

OsPortal/Default.aspx

NYC
Human Resources
Administration
Department of
Social Services

Welcome to POS (Paperless Office System)

Good Morning ! Today is Friday, May 28, 2010 10:27 AM [HRA Home Page](#)

NCA FS Application Log

NCA FS Recertification Log

NCA FS Deferral Log

NCA FS Calendar

POS (Paperless Office System)

POS Management Console

POS Release Notes

Child Care System (ACCIS)

Public Transportation Automated Reimbursement (PTAR)

HRA One Viewer

Front Door Reception (FRED)

FIA IVRS Telephone Recert Reporting System (IVRS)

FS Employment System (FSES)

SUPPORT INFORMATION:

POS Help Desk: 718-510-0551 MIS Help Desk: 718-510-8333
WMS Help Desk: 212-961-8042 Autotime Helpdesk: 212-331-4800
Network Control: 718-510-0400 Imaging Help Desk: 718-510-0250

POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

Definitions

NCA Food Stamp Application Log

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and allows the processing of failed to keep transactions by designated staff.

The screenshot shows the login interface for the NCA FS Application Log. At the top left is the NYC Human Resources Administration logo. The main heading is "NCA FS Application Log" in green. Below it, the instruction "Enter your WMS User ID and Password to login" is displayed. The login form includes three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "Fordham Food Stamp Center (F44)"). There are "LOGIN" and "CLEAR" buttons below the fields. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, a note states: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

NCA Food Stamp Recertification Log

The **Recertification Interview Log** allows Food Stamp (FS) Centers to view their past, current and future Recertification Interview appointments, to assign and reschedule their Recertification Interviews.

The screenshot shows the login interface for the NCA FS Recertification Log. It features the same NYC Human Resources Administration logo and heading as the previous page. The instruction "Enter your WMS User ID and Password to login" is present. The login form includes three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "Fordham Food Stamp Center (F44)"). There are "LOGIN" and "CLEAR" buttons below the fields. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, a note states: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

Attachment B

POS Release Notes: Appendix A
Desk Guide – Introduction to POS Portal
Version 14.3 October 18, 2010

NCA Food Stamp Deferral Log

The **Food Stamp Deferral Log** will allow Food Stamp Centers to close NCA FS cases in Single Issue (SI) status that were deferred for documentation and failed to return with the requested documentation.

The screenshot shows the login interface for the NCA FS Deferral Log. At the top left is the NYC logo and the text "Human Resources Administration Department of Social Services". The main heading is "NCA FS Deferral Log". Below this, it says "Enter your WMS User ID and Password to login". There are three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "North Brooklyn Food Stamp Center (F26)"). Below the fields are "LOGIN" and "CLEAR" buttons. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, a note says: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

NCA FS Calendar

The NCA FS calendar gives FS Site Managers and Assistant Site Managers the ability to create and maintain application appointment slots for designated NCA and CBO staff. In addition, FS Site Managers and Assistant Site Managers will have the ability to create new calendars as needed.

The screenshot shows the login interface for the NCA FS Calendar. At the top left is the NYC logo and the text "Human Resources Administration Department of Social Services". The main heading is "NCA FS Calendar". Below this, it says "Enter your WMS User ID and Password to login". There are three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "Fordham Food Stamp Center (F44)"). Below the fields are "LOGIN" and "CLEAR" buttons. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, a note says: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

Attachment B

POS Release Notes: Appendix A

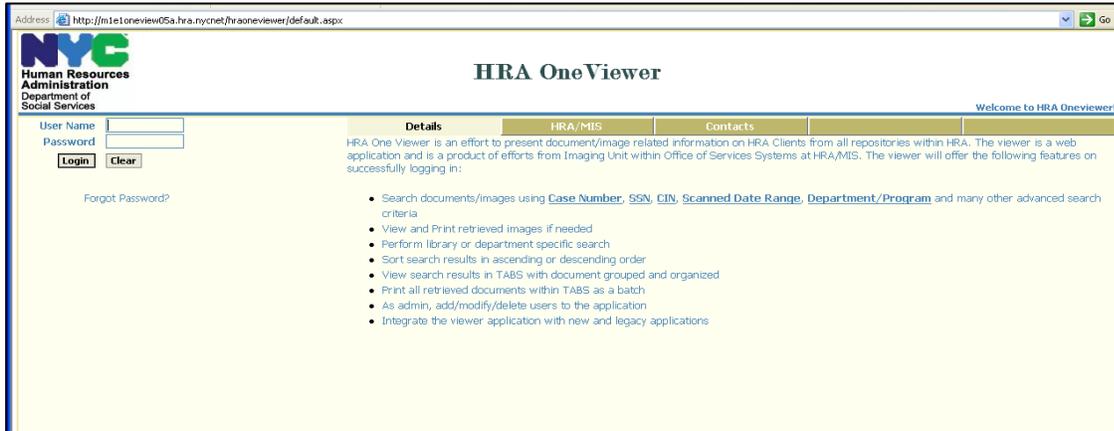
Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

The POS portal also provides external links to other HRA applications that assist the FIA managers and workers in maintaining, updating, processing and reviewing cases.

HRA One Viewer

Provides FIA staff with the ability to search and retrieve documents and document-related information.



Front-Door Reception (FRED)

Application assist the receptionist at Job Centers/NCA Sites in routing applying individuals and those in receipt of benefits to the correct location within the offices.



Attachment B

POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

Interactive Voice Response System

IVRS provides certain NCA FS households with the opportunity to recertify for benefits by use of an automated telephone response system.

The screenshot shows the login interface for the HRA Telephone Recert Reporting System. At the top left is the logo for the Human Resources Administration of the City of New York. The title "HRA Telephone Recert Reporting System" is displayed in a blue banner. Below the banner are three blue buttons: "First time user and need a User ID and Password? [Click here](#)", "Already have a User ID and Password, please sign in below", and "Forgot your User ID or Password? [Click here](#)". The central login area contains two input fields labeled "User ID" and "Password", followed by a "Login" button. At the bottom, the copyright notice "© City of New York, HRA" is visible.

Food Stamp Employment system (FSE)

This system facilitates the management, enrollment and tracking of FS participants who are potentially required to participate in work activities.

The screenshot displays the login page for the Food Stamp Employment System (FSE). The header includes the NYC logo and the title "Food Stamp Employment System". Below the header, it indicates the environment is "TEST". A prominent "Log In" button is centered. Underneath, a message reads "Already have a User ID and Password, please sign in below". There are two input fields for "User ID:" and "Password:", followed by an "Enter" button. At the bottom, there are links for "NYC.gov Home Page" and "Privacy Statement". A disclaimer states: "These computerized systems are legally confidential and proprietary to the State of New York, its offices of Temporary and Disability Assistance, and related agencies and may be accessed only by lawfully authorized entities. Federal, state, and local laws and regulations protect the confidentiality of the Human Resources Administration's clients. All clients' documents accessed by HRA staff and sponsoring programs are to be used solely for the purposes of providing services. Unauthorized access to or release of system data may entail both civil liability and criminal prosecution." The version number "FSES v1.92" is shown at the very bottom.

Attachment B

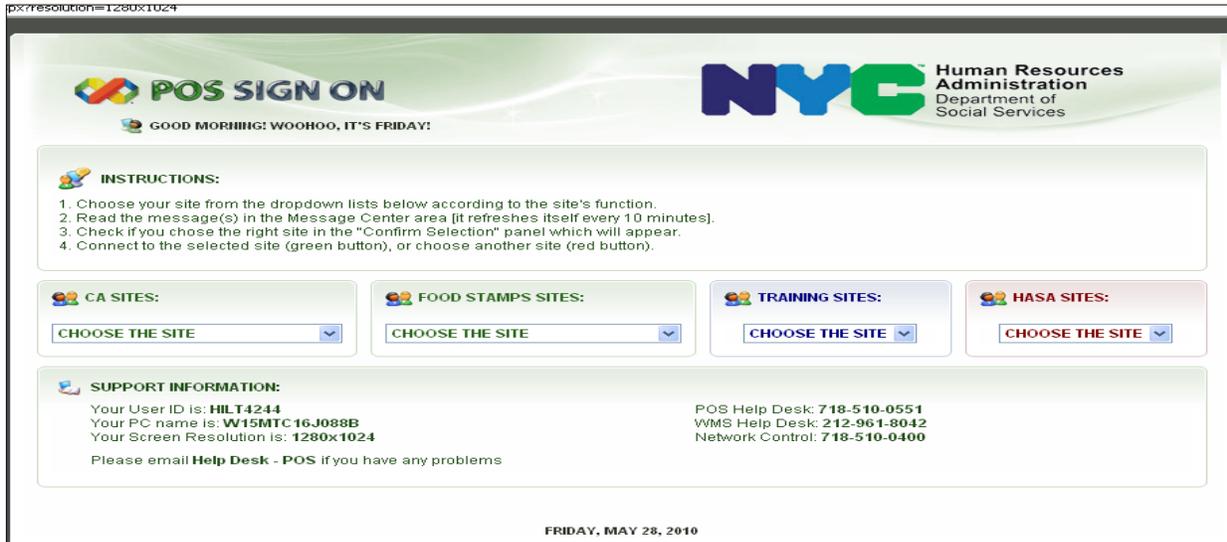
POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

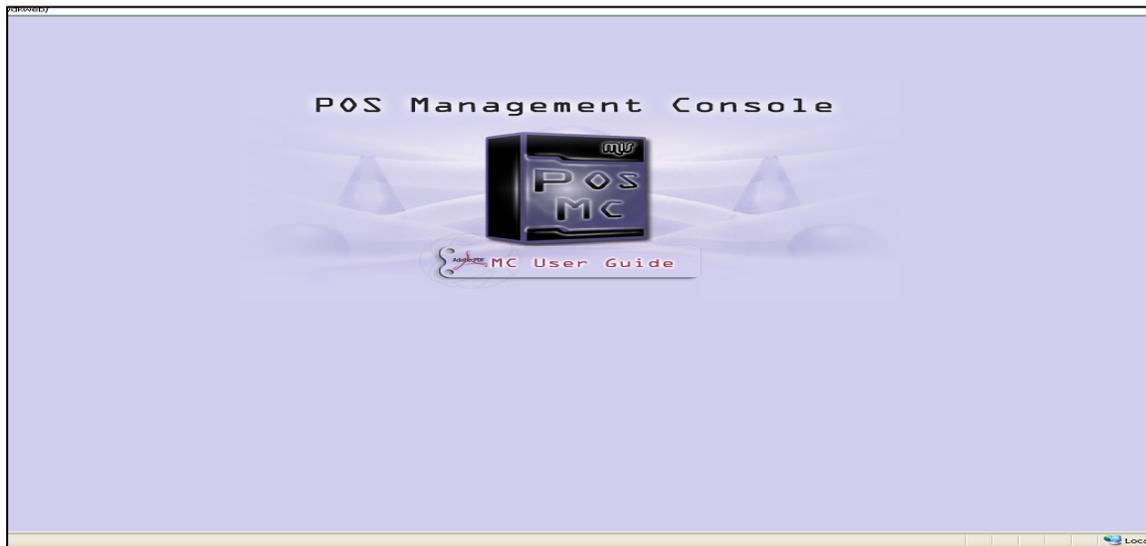
Paperless Office System

The Paperless Office system assists FIA staff in developing, processing and maintaining the NCA and Cash Assistance caseloads in an electronic case record.



Management Console

The management console houses reports designed to assist management and supervisory staff in their operational process.



Attachment B

POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

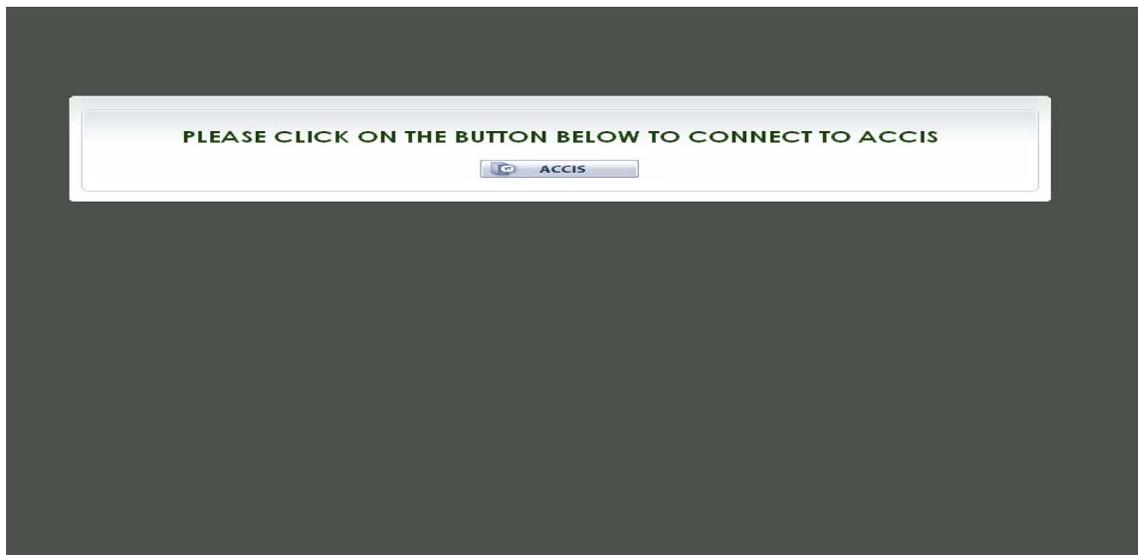
POS Release notes

Links to all published release notes located on the HRA Intranet.

Date	Summary	Detail
February 2010	N/A	POS release 14.1-detail
February 2010	N/A	FS POS release 4.1-detail
January 2010	POS release 13.3.1-summary	POS release 13.3.1-detail
January 2010	FS POS release 3.3.1-summary	FS POS release 3.3.1-detail
October 2009	POS release 13.3-summary	POS release 13.3-detail
October 2009	FS POS release 3.3-summary	FS POS release 3.3-detail
August 2009	POS release 13.2.1-summary	POS release 13.2.1-detail
August 2009	FS POS release 3.2.1-summary	FS POS release 3.2.1-detail
June 2009	POS release 13.2-summary	POS release 13.2-detail
June 2009	FS POS release 3.2-summary	FS POS release 3.2-detail
May 2009	N/A	Model Office 5.0 Release
February 2009	N/A	POS release 13.1-detail
February 2009	N/A	FS POS release 3.1-detail

Automated Child Care Information System (ACCIS)

ACCIS provides an integrated child care payment system that contains information on all active participants.



Attachment B

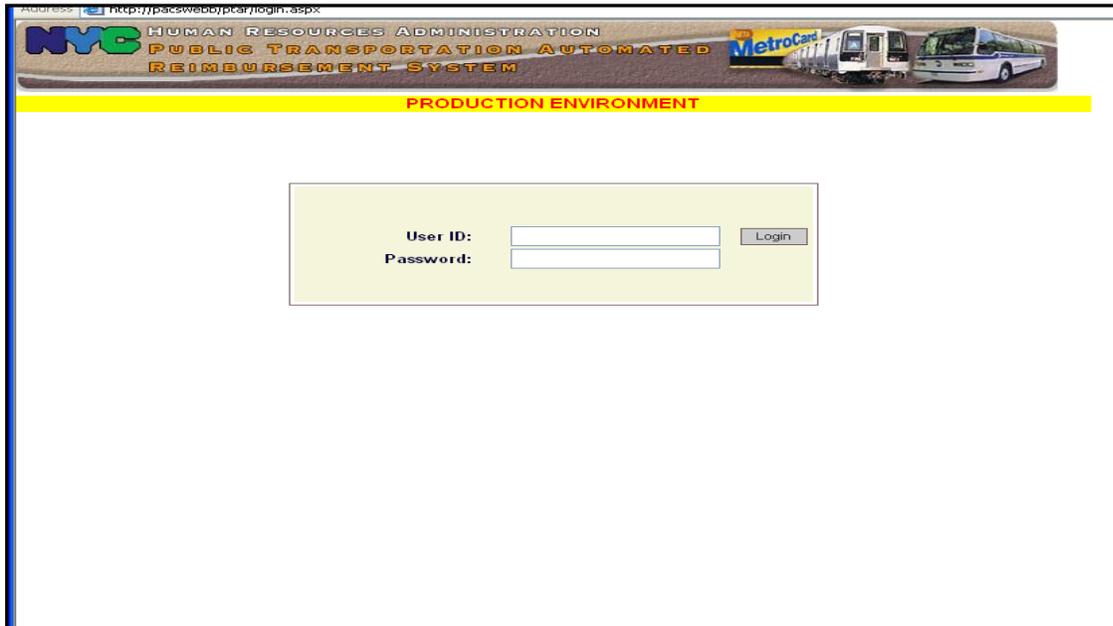
POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 14.3 October 18, 2010

Public Transportation Automated Reimbursement System (PTAR)

Metro card ordering system for FIA centers.



The POS Portal will provide direct links to all of the previous noted applications. The external applications outside of POS (HRA OneViewer, ACCIS, IVRS, etc.) will open in their own window allowing the worker the ability to access and navigate the application fully.

All POS related applications will link back to the POS portal which would save time by providing access to all the featured applications. This portal will be updated to include access to other applications as they become available in the future.

POS Release Notes

Version 14.3 October 18, 2010

Appendix B: ACCIS Clearances Window

ACCIS Clearances Window

POS will now identify applying or active individuals who are also identified as child care providers receiving payment via the Automated Child Care Information System (ACCIS). POS will launch an automated lookup to ACCIS using the applicant/participant social security number at the time of application and recertification.

If matches are found, a new **ACCIS Clearances** window will appear in the **CA Application Interview, EC – CA Application Interview, CA Recertification Interview** and **EC – CA Recertification Interview** activities after the Worker clicks the **Next** button in the **Absent/LRR** window.

If there are communication problems between POS and ACCIS, the following error message will appear:

- “The communication between POS and ACCIS has failed. Please try again later using the tool bar option under clearances.”

ACCIS Clearance Window

Version - POS - ACCIS Clearances

Instructions
The Clearance below represent a Social Security Match in the ACCIS system for the applicant/Participant, You must chose a resolution in order to complete an Activity before case is forward for supervisory Approval

Applicant/Participant Demographics in POS

Name	SSN	DOB
John Doe	111-22-3333	12/12/1980

Address information in POS

163 East 178th Street 4H
Bronx, NY 10453

Information from Childcare system (ACCIS)

Child Care Provider SS#	Child Care Provider #	Last Name	First Name	ACCIS Address	ACCIS Status
111-22-3333	746352	Doe	John	225 West 22nd street NY NY 10011	AC

Gross Income for the last five Months

January 09	February 09	March 09	April 09	May 09
	200.60	255.30		300.00

Is the Applicant/Participant disputing this Match? Yes No

Does the Applicant/Participant Claim they stopped providing childcare? Yes No

Resolution

Applicants

Was a FIA-3A initiated and Completed?
 Yes No Pending

Participants

Was this child care income previously budgeted with the correct amount? Yes No Pending

Was a recoupment initiated due to the child care income match? Yes No

Next **Previous**

Attachment C

POS Release Notes

Version 14.3 October 18, 2010

Appendix B: ACCIS Clearances Window

POS Information

The top section of the window will include the applicant/participant demographics and address information in POS.

Applicant/Participant Demographics in POS			Address information in POS
Name	SSN	DOB	163 East 178 th Street 4H Bronx, NY 10453
John Doe	111-22-3333	12/12/1980	

ACCIS Information

The middle section of the window will include the applicant/participant demographics and address information in ACCIS.

Information from Childcare system (ACCIS)					
Child Care Provider SS#	Child Care Provider #	Last Name	First Name	ACCIS Address	ACCIS Status
111-22-3333	746352	Doe	John	225 West 22nd street NY NY 10011	AC

ACCIS Gross Income Information

The lower section of the window will provide the gross income pay information from ACCIS for the last five months (if any).

Gross Income for the last five Months				
January 09	February 09	March 09	April 09	May 09
	200.60	255.30		300.00

Attachment C

POS Release Notes

Version 14.3 October 18, 2010

Appendix B: ACCIS Clearances Window

Client Match Dispute

The Worker will need to indicate whether the applicant/participant is disputing the match.

Is the Applicant/Participant disputing this Match? Yes No

If an applicant is disputing the match, the following message will appear: "You must make a proper referral to the Bureau of Eligibility Verification (BEV)" in the "Referrals" window".

If a participant is disputing the match, the following message will appear: "You must make a proper referral to Bureau of Fraud Investigation (BFI). Select the link in the Help Menu and submit Form BFI-14."

If the applicant/participant is not disputing the match, the Worker will need to indicate whether s/he claims that s/he stopped providing child care.

Does the Applicant/Participant Claim they stopped providing childcare? Yes No

If s/he claims that s/he stopped providing child care, the following message will appear:

"You must capture applicant/participant signature. If the signature pad is not working, you must print the form, have the applicant/participant sign it, then scan and index into the OneViewer. You must also, go to ACCIS and terminate childcare payments."

The signature capture for form W-274U (Attestation of Employment as a Childcare Provider) will appear. The Worker must capture the applicant/participant signature using the electronic signature pad or must have the applicant/participant sign the manual form and scan and index it into the OneViewer.

Resolution

The Worker will need to indicate a resolution for the ACCIS match information.

Resolution

Applicants

Was a FIA-3A initiated and Completed? Yes No Pending

Participants

Was this child care income previously budgeted with the correct amount? Yes No Pending

Was a recoupment initiated due to the child care income match? Yes No

For applicants, the Worker will need to indicate whether an FIA-3A was initiated and completed. There are three options under this menu:

- Yes
- No
- Pending

If the answer is **No**, a comment window will open and the Worker should provide a detailed explanation on why the FIA-3A was not initiated and completed.

For participants, the Worker will need to indicate whether the child care income was previously budgeted with the correct amount and whether a recoupment was initiated due to the child care income match.

POS Release Notes

Version 14.3 October 18, 2010

Appendix B: ACCIS Clearances Window

Completion Edit

If the Worker indicated a resolution of **Pending** and they attempt to complete the application or recertification activity, a completion edit will require answers in the resolution section. The ACCIS Clearances window will open and the following error message will appear:

- For applicants: “You must answer the question “Was an FIA-3A initiated and completed” of the resolution section of this window”
- For participants: “You must complete the participant’s questions” of the resolution section of this window”

NYCWAY Action Codes

When a match is found in ACCIS, POS will post the following action code to NYCWAY:

- **11DP** (Active CC provider review Pool)

When the Worker indicates that a recoupment was initiated due to the child care income match, POS will post the following action code to NYCWAY:

- **11DB** (Active CC provider recoup initiated)

When the applicant/participant answer for Yes for the question “Does the Applicant/Participant claim they stop providing childcare?” in the ACCIS Clearances window, POS will post the following action code to NYCWAY when the Worker clicks the Next button in the window:

- **11DU** (No longer a childcare provider)

Supervisory Approval

The **ACCIS Clearances** window will be added in the following approval activities and will appear when ACCIS matches are found:

- Approve CA Eligibility Decision
- Approve CA Recertification
- Approve EC – CA Application Interview
- Approve EC – CA Recertification

The Supervisor will need to approve or disapprove the Worker’s entries in this window. The Approval menu will be available under the **Window > Approval** menu option.

Attachment C

POS Release Notes

Version 14.3 October 18, 2010

Appendix B: ACCIS Clearances Window

Supervisory ACCIS clearance window

Version - POS - ACCIS Clearances

File Edit Tools Window Help

Screens F12
Withdrawal
Approval
ACCIS clearances

Instructions

The Client must not have a Social Security Match in the ACCIS system for the applicant/Participant, You must choose to complete an Activity before case is forward for supervisory Approval

Applicant/Participant Demographics in POS

Name	SSN	DOB
John Doe	111-22-3333	12/12/1980

Address information in POS

163 East 178th Street 4H
Bronx, NY 10453

Information from Childcare system (ACCIS)

Child Care Provider SS#	Child Care Provider #	Last Name	First Name	ACCIS Address	ACCIS Status
111-22-3333	746352	Doe	John	225 West 22nd street NY NY 10011	AC

Gross Income for the last five Months

January 09	February 09	March 09	April 09	May 09
	200.60	255.30		300.00

Is the Applicant/Participant disputing this Match? Yes No

Does the Applicant/Participant Claim they stopped providing childcare? Yes No

Resolution

Applicants

Was a FIA-3A initiated and Completed?
 Yes No Pending

Participants

Was this child care income previously budgeted with the correct amount? Yes No Pending

Was a recoupment initiated due to the child care income match? Yes No

Next Previous

Approval menu

Supervisory Approval

Approve
 Disapprove

Add Comment

Disapproval Reasons

Comment Log

OK Cancel

Attachment C

POS Release Notes

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Appendix B: ACCIS Clearances Window

Tools Menu Access to ACCIS Employment Clearances

In addition, a new option named **ACCIS Employment Clearances** will be added to the **POS Toolbar** menu under **Tools > Clearances** to allow the worker to do an ACCIS search at any other POS activity.

