



FAMILY INDEPENDENCE ADMINISTRATION

Matthew Brune, Executive Deputy Commissioner



James K. Whelan, Deputy Commissioner
Policy, Procedures, and Training

POLICY BULLETIN #10-108-SYS

FS POS RELEASE NOTES VERSION 4.3

Date: October 14, 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 Non Cash Assistance Food Stamp (NCA FS) 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 FS POS Release Notes Version 4.3 (Attachment A), Food Stamp Single Issue and Printing Queue: Appendix A (Attachment B), Desk Guide – Introduction to POS Portal: Appendix B (Attachment C), and FS Recertification Log: Appendix C (Attachment D).</p> <p>These release notes can also be found on the HRA Intranet at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective October 18, 2010</i></p> <p>Related Item: PD #09-17-ELI</p> <p>Attachments:</p> <p>Attachment A FS POS Release Notes Version 4.3 Attachment B Food Stamp Single Issue and Printing Queue: Appendix A Attachment C Desk Guide – Introduction to POS Portal: Appendix B Attachment D FS Recertification Log: Appendix C</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

FS POS Release Notes

Version 4.3 October 18, 2010

These Release Notes contain descriptions of changes in FS POS Release 4.3 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

Table of Contents

1. FOOD STAMP SINGLE ISSUANCE	2
2. POS PORTAL CITYWIDE IMPLEMENTATION.....	6
3. EMPLOYABILITY CODE DETERMINATION IN APPLICATION AND RECERTIFICATION.....	7
4. NEW QUESTIONS AND UPDATED WINDOWS IN APPLICATION AND RECERTIFICATION.....	9
5. TALX INFORMATION WINDOW ENHANCEMENT.....	12
6. REQUEST TO CLOSE CASE WINDOW UPDATE IN FS RECERTIFICATION INTERVIEW	13
7. UPDATE TO CASE MEMBER INFORMATION WINDOW IN FS APPLICATION INTERVIEW.....	13
8. DEFAULT MAILING ADDRESS FOR UNDOMICILED APPLICANTS AND PARTICIPANTS	14
9. UPDATES TO THE FS RECERTIFICATION LOG	14
10. SPECIAL AUTHORIZATION NUMBER FOR N66 CLOSINGS	15
11. WMS 2010.3 CHANGE: NEW BVI INDICATOR (INFORMATIONAL ONLY FOR FS CASES).....	15
12. DOCUMENT RE-USE EXPANSION	15
13. E-FORM UPDATES	16
14. REMINDER: APPROVE FS RECERTIFICATION DEFERRAL ACTIVITY	16
15. REMINDER: TAD TRANSMISSIONS PREVENTED FOR AN INACTIVE CASE.....	16
16. REMINDER: APPENDICES	16

FS POS Release Notes

Version 4.3 October 18, 2010

1. Food Stamp Single Issuance

The Food Stamp Single Issuance windows and transactions will be upgraded to allow direct transmission of grants from the Food Stamp Paperless Office System (FS POS) to the Welfare Management System (WMS). The upgrade will also centralize printing of grant authorization forms and help eliminate errors in data entry.

Process prior to upgrade

Prior to this upgrade, the Eligibility Specialist (ES) would complete the following steps to process a FS grant:

- review the benefit issuance history in WMS to attempt to prevent duplication;
- prepare the DSS-3574 grant authorization forms for FS grants in the **FS Single Issuance Benefit** window; and
- print the form using the **Print Forms** window.

The ES would then submit the case to the Supervisor and manually deliver the DSS-3574 forms to the Supervisor.

The Supervisor would review the case action in FS POS, manually review and sign the DSS-3574 form. The authorization form would be delivered to the data entry area/control unit, where it would be data entered into WMS.

Benefits of Upgraded Process

In the upgraded process, the following changes will be implemented:

- business rules will be added to prevent duplication and data entry errors;
- benefit issuance history will be available on-screen;
- the ES will no longer need to print the Single Issue authorization form (DSS-3574) form;
- FS grants will be transmitted to WMS by the supervisor, once transmission is turned on for the center;
- when printing of the DSS-3754 form is required, it will be centralized to Print Queues in designated areas;
- the status of grant transactions will be tracked and error corrections will be scheduled when the grant errors out in WMS; and
- reports will be available for grant tracking and form printing in the Management Console.

Grant Form Printing and Transmission

Upon completion of the activity, the grants will be sent to the Print Queue in the designated area or transmitted to WMS.

On October 18, only the East End Food Stamp Center (F02) will be turned on for transmission. This pilot will help ensure that the grant transactions are working properly. For other centers, these grants will initially go to the Print Queues for data entry. Additional centers will be turned on for transmission once the transaction results are verified.

When an Eligibility or Undercare transaction is required, FS POS will transmit the TAD to WMS prior to the grant.

FS POS Release Notes

Version 4.3 October 18, 2010

Grant Summary window

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

Code	Description	From / To	Created	Amount	Next Month Amount	Special	Status
------	-------------	-----------	---------	--------	-------------------	---------	--------

Grant Issuance History

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

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

FS POS Release Notes

Version 4.3 October 18, 2010

Benefit Data Entry Window

The benefit data entry window will allow entry of multiple grants at a time. Business rules will verify the entered grants against WMS benefit issuance history and display error messages, if appropriate.

Supervisory Review

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

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

FS POS Release Notes

Version 4.3 October 18, 2010

Benefit approval window

Single Issue Printing Queue

Designated staff will monitor the Print Queues and print out grant authorization forms.

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Caseload
<input type="checkbox"/>			FS Recert Interview	9/16/10 7:17 pm		
<input type="checkbox"/>			FS Application Interview	9/14/10 2:26 pm		

Sel	Form Name	Form Description	Date Printed
<input checked="" type="checkbox"/>	DSS3574	Food Stamps Single Issuance	0

Error Correction

POS will keep track of the grant status in WMS and will schedule error correction activities if the grant errors out. When the TAD transaction errors out along with the grant, the error correction activity for the interview will be scheduled and an alert of "SI Grants" will appear in the queue. If only the grant errors out, an "EC – FS Change Case Data" activity will be scheduled.

FS POS Release Notes

Version 4.3 October 18, 2010

Management Console Reports

Two reports in the Management Console will track SI grants and the Print Queues

Re-Printing Grant Forms

To reprint SI grant forms that were printed using the **Single Issue Printing Queue**, the worker must access the **Review Case** activity.

Appendix

For additional details, please see **Appendix A: Food Stamp Single Issue and Printing Queue**.

2. 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).

POS Portal Home Page Window



FS POS Release Notes

Version 4.3 October 18, 2010

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**.

3. Employability Code Determination in Application and Recertification

All Food Stamp participants between the ages of 16 and 59 who are deemed employable (non-exempt) must comply with the Food Stamp (FS) Program work requirements as a condition of FS eligibility.

To help ensure compliance with these requirements, a new window will be added to the FS Application Interview, EC – FS Application Interview, FS Recertification Interview and EC – FS Recertification Interview activities to automate the determination of the employability code for FS cases.

The window will be added to the Education and Training window and will appear below the Education and Training Information question.

FS POS will retrieve the following information in order to determine the employability code for each household member:

- Household composition;
- Age for all household members;
- Disability status;
- Employment and self-employment;
- Unearned income received;
- Unemployment insurance application;
- Drug and alcohol treatment;
- Eligibility outcome for noncitizens;
- Caretaker of incapacitated person;
- Education; and
- Pregnancy.

When FS POS identifies a child under the age of 18 in the household, all adults in the household will be marked with the **Employability Code WA** (Work Required under Regular FSET Work Registration Rules; not under ABAWD Requirements).

The window will list the name of the household member, their employability code and the reason for the code.

FS POS Release Notes

Version 4.3 October 18, 2010

Possible Reasons in the window for Employability Codes WE and WA:

Reason for Exemption	Employability Code
Ineligible Alien	WE
Age-younger than 16 or age 60 or older	WE
In drug or alcohol treatment program for at least 16 hrs per week	WE
Medical Reasons	WE
Domestic Violence	WE
Caretaker of a child under age 6	WE
Caretaker of an incapacitated person	WE
Age between 16 and 17 and in school at least half-time	WE
Student enrolled at least half-time in school or training	WE
In receipt of Unemployment Benefits (UIB)	WE
Applicant for Unemployment Benefits (UIB)	WE
In receipt of SSI	WE
Applied for SSI	WE
Refugee within exemption period	WE
Employed 30 hrs per wk or earning at least \$217.50/week	WE
Pregnant	WA
Children under 18 years old in the household	WA
Age-between ages 16 and 18 and not in school	WA
Age- 50 Years or older	WA

For additional information, please read the Food Stamp Rules and Exemptions Desk Guide ABAWD Work Requirements (Form **W-138G**).

Employability Code Determination Window

Response to Question

Instructions

The system has determined the employability status codes for the household members based on the answers entered on the interview. Please click on the 'Run Rules' button to see the system determined codes. These codes will be entered by the system on the TAD. If you disagree with system determinations, you must go back to the appropriate question and make the necessary updates. Click on the 'Run Rules' button upon return to the window in order for the changes to take effect.

Who	Employability Code	Reason
[Redacted Content]		

FS POS Release Notes

Version 4.3 October 18, 2010

4. New Questions and Updated Windows in Application and Recertification

Updates to the interview section will be made in the FS Application Interview, EC – FS Application Interview, FS Recertification Interview and EC – FS Recertification Interview activities.

Three new questions will be added to the FS Application Interview, EC – FS Application Interview, FS Recertification Interview and EC – FS Recertification Interview activities so that all possible exemptions are captured prior to a system determination of the individual employability code:

- Is or was drug or alcohol dependent?
- Is anyone in the household needed in the home to care for a child under the age of 6 years or an incapacitated person?
- Could You Accept a Job Today?

Two windows will be updated in order to capture additional possible exemptions prior to the automated determination of the individual employability:

- Blind, Sick or Disabled?
- Is Employed?

New question: Is Drug or Alcohol Dependent?

This question will appear in the Medical window. The ES will click "Yes" if the applicant or participant is drug or alcohol dependent. The ES will then indicate the dependency period, the dependency type and whether the individual receives treatment. If the individual receives treatment, the ES must indicate the weekly number of hours spent in the program.

The screenshot shows a dialog box titled "Response to Question". It contains the following fields and controls:

- Who:** A dropdown menu.
- Dependency:** A dropdown menu.
- Drug or Alcohol:** Three radio buttons labeled "Addict", "Both", and "Alcohol".
- Receive Treatmt:** Two radio buttons labeled "Yes" and "No".
- Hours in Program:** A text input field with a spinner.
- Document...:** A text input field with a document icon.
- Scan:** A checkbox.
- CM Comment...:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

FS POS Release Notes

Version 4.3 October 18, 2010

New question: Is anyone in the household needed in the home to care for a child under the age of 6 years old or an incapacitated person?

This question will appear in the Employment window. The ES will click "Yes" for the question if an individual 16 years of age or older is needed in the home to care for a child under the age of 6 years old or an incapacitated person.

The ES will select the name of the individual, whether they are taking care of a child under 6 years old or a disabled person, whether the child/disabled person is part of the applying/active household. The ES will enter the name of child or disabled person.

The screenshot shows a dialog box titled "Response to Question". It contains the following fields and controls:

- Who (Caretaker):** A dropdown menu.
- Take Care For:** Radio buttons for "Child" and "Disabled Person".
- Is Child/disabled person part of the applying/active household?:** Radio buttons for "Yes" and "No".
- Child/Disabled Name:** A dropdown menu.
- Document...:** A text input field with a "Scan" button next to it.
- Comment...:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

New window: Could You Accept a Job Today?

This question will appear in the Other Information window. The ES will indicate whether the applicant/participant can accept a job today. If the individual cannot accept a job, the reason that the job cannot be accepted must be selected.

The screenshot shows a dialog box titled "Response to Question". It contains the following fields and controls:

- Applicant:** A dropdown menu showing "Perkins Judith".
- Who:** A dropdown menu showing "Perkins Judith".
- Could you accept a job today?:** Radio buttons for "Yes" and "No".
- What type of work would you like to do?:** Radio buttons for "Specify..." and "None".
- Reason (cannot start work today):** A dropdown menu.
- Other (details):** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

FS POS Release Notes

Version 4.3 October 18, 2010

Revised window: Has daily activity been limited because of an illness/temporary disability or is the individual blind, sick or disabled?

This window will be updated to the SSI Status field. When the individual has limited daily activity, is blind, sick or disabled, the ES must indicate whether the individual is receiving SSI, has a pending decision or is appealing the decision.

Updated window: Is Employed?

Two fields will be removed from the response window for the question “Is employed?”

- Taxes withheld
- Day paid

Updated windows: Employed – Reason for Leaving Drill Down window

This window opens when the end date for the job is the future. The following changes will be made in the window:

- The label “Received the Following Benefits:” will be changed to “Did Individual Receive Any of the Following Benefits?”
- The benefit fields will be moved to the left side of the window.
- Three new fields will be added:
 - **Date of the last paystub**
 - **Applied for UIB** – options of Yes or No.
 - **UIB Claim Status** (Pending, Approved or Denied) – this field will be enabled when the answer for Applied for UIB is Yes.

FS POS Release Notes

Version 4.3 October 18, 2010

Employed – Reason for Leaving Drill Down window

5. TALX Information Window Enhancement

The **TALX Information** window will be updated to automate entries when no TALX match is found. When the ES 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

FS POS Release Notes

Version 4.3 October 18, 2010

6. Request to Close Case Window Update in FS Recertification Interview

When the participant requests a case closing on the **Case Member Information** window in the **FS Recertification Interview**, the **Request to Close Case** window will be automatically prefilled with a disposition of **Recipient has requested case closing**, in order to prevent an error in this window.

7. Update to Case Member Information Window in FS Application Interview

When the ES from a change center starts a telephone interview, the **Telephone Interview** indicator in the **Case Member Information** window in the **FS Application Interview** will be set to **Yes**.

The 'Case Member Information' window lists the individuals who are currently on the case. Please ask the applicant/recipient whether anyone who lives with them is not listed in the 'Case Member Information' section.

Case Member Information

Suff Ln	CIN	Name	Relation	DOB	SSN	Val Sex	Citizen / National	FS	AFIS / ST
							✓	AP	AP
							✓	AP	AP
							✓	AP	AP

Household Composition

Is there anyone who lives with you who is not listed above? Yes No

Interview Disposition

Appointment Date: 7/20/2010 Appointment Time: 8:00 AM E-App: Yes No

Failed to Keep? Yes No

Telephone Interview? Yes No Telephone Number: (718) 555-4402 Extension:

Next Action

Please click the 'Next' button to continue.

FS POS Release Notes

Version 4.3 October 18, 2010

8. 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 participant 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	Bronx
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/	[None]	DELIVERY	Bronx
State:	NY	Zip Code:	10451 0000	Phone: - -

9. Updates to the FS Recertification Log

The **Food Stamp Recertification Log** will be updated as follows:

- the ES will be able to reschedule the recertification appointment up to the last business day of the final month in the certification period;
- the form **W-908F** (Notice of Rescheduled Food Stamp Telephone Recertification Interview) will be printed when a telephone interview appointment is rescheduled using the **Reschedule** button and **Interview Scheduler** window.
- The ES will be able to change the interview type in the **Interview Scheduler** window.

Interview Scheduler

This window will allow you to reschedule the recertification interview.
Please enter the new date and time. The appointment cannot be in the past.

Appointment Date:

Appointment Time:

Interview Type: Telephone In-Center

Appendix

For additional information, please see **Appendix C: FS Recertification Log**.

FS POS Release Notes

Version 4.3 October 18, 2010

10. Special Authorization Number for N66 Closings

For closings with code N66 (Duplicate Assistance, Non-AFIS Interstate), POS will send a special of authorization number **7777792**. This type of closing can only be completed by the Special Project Center (F25).

11. WMS 2010.3 Change: New BVI Indicator (Informational Only for FS cases)

A new indicator named BVI (Birth Verification Indicator) will be 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 and will be informational only for FS cases.

12. 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 alien documentation for noncitizen case members, the system will search the One Viewer to determine whether the document was previously scanned. Effective October 18, 2010 POS will also look for documentation pertaining to alien status for non-citizen case members.

Example: Documents Found window

Documents found for [Redacted]

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 re-usable 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.

FS POS Release Notes

Version 4.3 October 18, 2010

13. E-Form Updates

The following E-Forms will be updated:

- 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

14. Reminder: Approve FS Recertification Deferral Activity

A new activity was created to allow supervisor to approve the deferral for recertification cases. The ES prints the W-113K form (Documentation Requirements and/or Assessment Follow-Up) in the **Print Forms** window. Once the form is printed and saved, they click the **Next** button.

The **Approval Assignment** window appears. The ES selects the supervisor that will be reviewing the deferral and clicks the **OK** button. The ES must submit the printed W-113K to the Supervisor.

The **FS Recert Interview** activity remains in the ES queue. The supervisor will receive a new activity called **Approved FS Recert Deferral** in their queue.

The supervisor will decide based on a review of the case whether to approve or disapprove the deferral:

If the deferral is disapproved, it will be returned back to the ES for follow-up. If the deferral is approved, it will be moved to the deferral queue to await submission of the requested documentation and the Supervisor will arrange for mailing of the approved W-113K form.

In the event that the activity remains in the supervisor's queue for three business days without any supervisor decision, the FS Recert Interview will be automatically moved to the deferral queue and the Approve Recert Deferral activity will be removed from the supervisor's queue.

15. 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 FS case status in WMS and the FS case status selected in POS. The TAD transmission will not be posted if both the WMS FS and POS FS 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.**

16. Reminder: Appendices

- Appendix A, Food Stamp Single Issue and Printing Queue
- Appendix B, POS Portal
- Appendix C, FS Recertification Log

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Food Stamp Single Issue and Printing Queue

Overview

This desk guide will introduce the new **Food Stamp Single Issue process and the Single Issue Grant Printing Queue** (Print Queue).

Implementation

The Food Stamp Single Issuance windows and transactions will be upgraded to allow direct transmission of grants from the Food Stamp Paperless Office System (FS POS) to the Welfare Management System (WMS). The upgrade will also centralize printing of grant authorization forms and help eliminate errors in data entry.

In the initial implementation of the Single Issue functionality, direct transmission from POS to WMS for EBT Next-Day Food Stamp grants (**FS**) will be turned on for the East End Food Stamp Center.

For all other centers, FS grants will be sent to the Print Queues for printing of the DSS-3574 forms. Once direct transmission from POS to WMS for single issue is turned on for the other centers, EBT Next-Day FS grants will be transmitted directly to WMS, with the exception of back-up grants, which will continue to print from the Print Queue and will be placed in the appropriate tickler folder.

Process prior to upgrade

Prior to this upgrade, the Eligibility Specialist (ES) would complete the following steps to process a FS grant:

- review the benefit issuance history in WMS to attempt to prevent duplication;
- prepare the DSS-3574 grant authorization forms for FS grants in the **FS Single Issuance Benefit** window; and
- print the form using the **Print Forms** window.

The ES would then submit the case to the Supervisor and manually deliver the DSS-3574 forms to the Supervisor.

The Supervisor would review the case action in FS POS, manually review and sign the DSS-3574 form. The authorization form would be delivered to the data entry area/control unit, where it would be data entered into WMS.

FS Single Issuance Benefit window prior to upgrade

Case Name	Case Number	Reuse Case Number	Suffix	Date Form Prepared	FS Office
		1		09/25/2010	F40

Issuance Code	Amount	From	To	Back-Up Grant	Check/CD#	Routing Location	Replaces Benefit	Authorization Number	Payee
1	00/00/0000	00/00/0000							

Total Amount \$

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Benefits of Upgraded Process

In the upgraded process, the following changes will be implemented:

- business rules will be added to prevent duplication and data entry errors;
- benefit issuance history will be available on-screen;
- the ES will no longer need to print the Single Issue authorization form (DSS-3574) form;
- FS grants will be transmitted to WMS by the supervisor, once transmission is turned on for the center;
- when printing of the DSS-3754 form is required, it will be centralized to Print Queues in designated areas;
- the status of grant transactions will be tracked and error corrections will be scheduled when the grant errors out in WMS; and
- reports will be available for grant tracking and form printing in the Management Console.

Grant Form Printing and Transmission

Upon completion of the activity, the grants will be sent to the Print Queue in the designated area or transmitted to WMS.

On October 18, only the East End Food Stamp Center will be turned on for transmission. This pilot will help ensure that the grant transactions are working properly. For other centers, these grants will initially go to the Print Queues for data entry. Additional centers will be turned once the transaction results are verified.

When an Eligibility or Undercare transaction is required, FS POS will transmit the TAD to WMS prior to the grant.

Grant Summary window

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

The Eligibility Specialist (ES) 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 ES will click on the **New Grant** button. To edit a grant in progress, the ES will select the grant and click on the **Grant Details** button.

Grant Summary window

FS POS 4.3 - [Single Issue Grant Summary] 10:31:57 PM Wednesday, September 15, 2010

File Edit Tools Window Help

Case Number: [REDACTED] Case Name: [REDACTED]

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

View Grant Issuance History

Code	Description	From / To	Created	Amount	Next Month Amount	Special	Status

Grant Details New Grant

Next Previous

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Grant Issuance History

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

Grant Issuance History

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

3 Months of History Show FS Grants
Grant code [REDACTED]

Code	Description	From / To	Amount

Grant Details Close

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 ES enters information for the first grant, a second row will appear. After entering the grants, the ES 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 ES will return to the Grant Summary window.

Deleting a grant

The ES 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.

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Single Issue Benefit Data Entry Window – no grants entered

FS POS 4.3 - [Single Issue Benefit Data Entry Window] 10:32:42 PM Wednesday, September 15, 2010

File Edit Tools Window Help

Case Number: [] Case Name: [] Suffix: 1
 Re-Use Case Number: [] Center: Melrose Food Stamp Center

Total grant amount: []

FS Single Issue Grant Information

1.

Issuance Code: [] POS Rule Status: []

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: []

Done Cancel

Single Issue Benefit Data Entry Window – one grant entered

FS POS 4.3 - [Single Issue Benefit Data Entry Window] 10:33:58 PM Wednesday, September 15, 2010

File Edit Tools Window Help

Case Number: [] Case Name: [] Suffix: 1
 Re-Use Case Number: [] 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: []

FS Single Issue Grant Information

2.

Issuance Code: [] POS Rule Status: []

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

Is this a back-up grant? Yes No

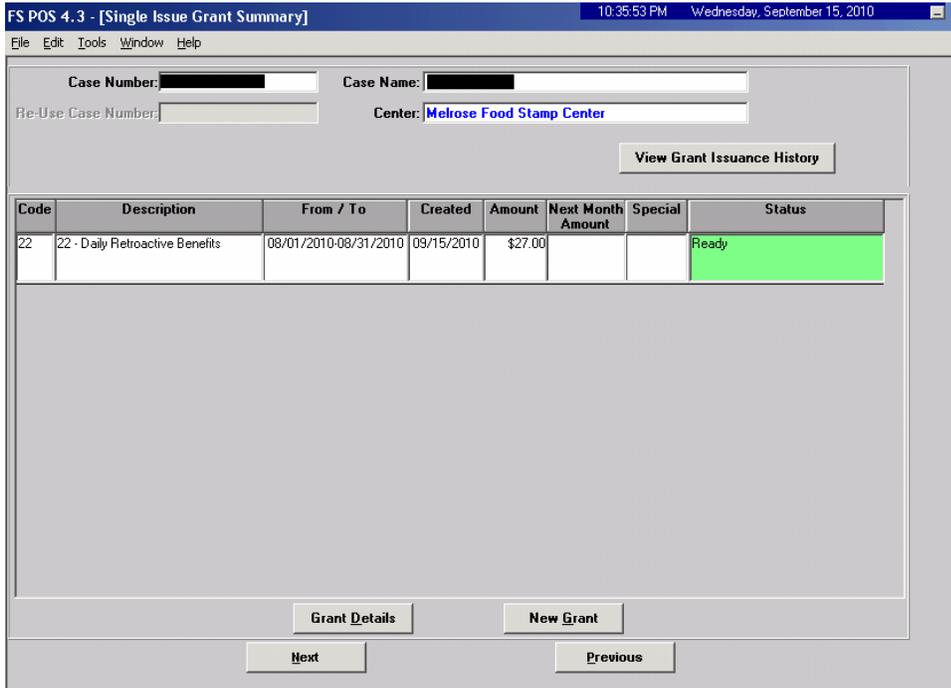
Delete Grant Message: []

Done Cancel

FS POS Release Notes: Appendix A

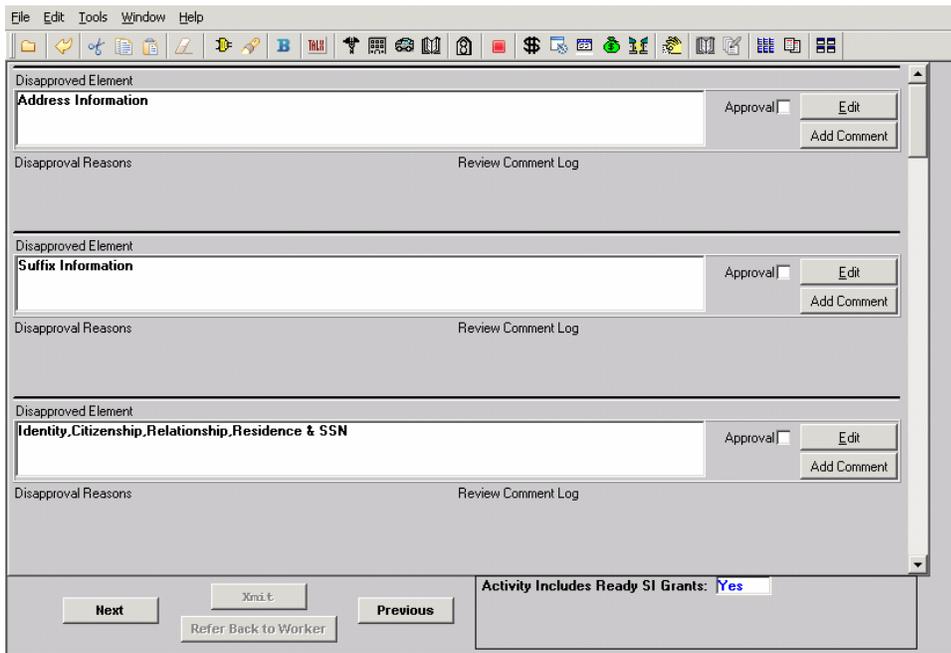
Version 4.3 October 18, 2010

Grant Summary Window after running the business rules



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

Approval Elements Window



FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

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

Approval Assignment Window

After the ES 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 ES.
- 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

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Benefit approval window

Grant Details window

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Grant Form Printing and Transmission

Upon completion of the activity, the grants will be sent to the Print Queue in the designated area or transmitted to WMS.

On October 18, only the East End Food Stamp Center will be turned on for transmission. This pilot will help ensure that the grant transactions are working properly. For other centers, these grants will initially go to the Print Queues for data entry.

When an Eligibility or Undercare transaction is required, FS POS will transmit the TAD to WMS prior to the grant.

Grants Returned to the ES

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

Disapproved Elements window

FS POS 4.3 - [Disapproved Elements] 11:02:35 PM Wednesday, September 15, 2010

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

Activity Includes Ready SI Grants: No

Next Submit Previous Refer Back to Worker

Error Correction

POS will keep track of the grant status in WMS and will schedule error correction activities if the grant errors out. When the TAD transaction errors out along with the grant, the error correction activity for the interview will be scheduled and an alert of "SI Grants" will appear in the queue. If only the grant errors out, an "EC – FS Change Case Data" activity will be scheduled.

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Management Console Reports

A report in the Management Console will track SI grants.

The screenshot shows three filter panels:

- Timeframe Selection:** Radio buttons for Today, Yesterday, Past 7 Days, Past 4 Weeks, A Month (dropdown), and Specify Range (00/00/00 to 00/00/00).
- Area Filter:** Radio buttons for Center-Wide, CMU (dropdown), UMW (dropdown), and Case (text input).
- Disposition:** Checkboxes for Grant Status and Issuance Code, each with a dropdown menu.

A report in the Management Console will track the Print Queues

The screenshot shows four filter panels:

- Timeframe Selection:** Same as the previous screenshot.
- Area Filter:** Radio buttons for Center-Wide, CMU, UMW, Supervisor, and Case.
- Type:** (None Means Select All) with checkboxes for Grants (checked) and Notices.
- Status:** (None Means Select All) with checkboxes for Printed (checked) and Pending.

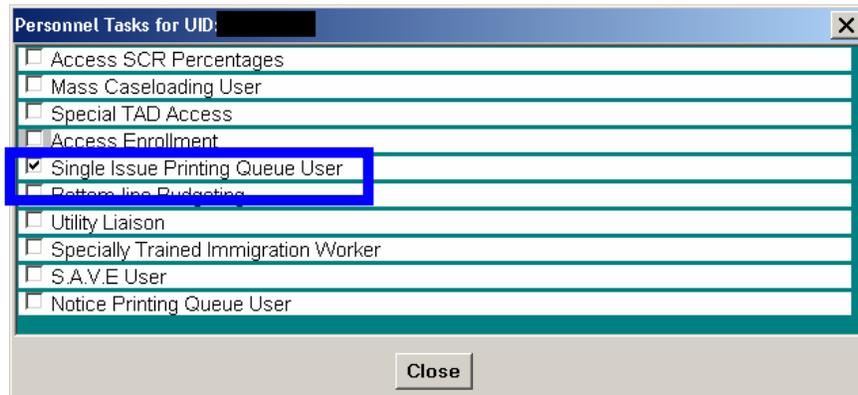
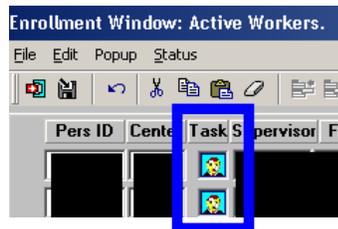
 Below the filters is a table header:

Case Number	Suf	Case Name	Worker	Start Date-time	End Date-time	Type
-------------	-----	-----------	--------	-----------------	---------------	------

Enrollment and Access for Print Queues

The Print Queues will be activated for all centers on October 18, 2010. Staff designated to use the Print Queue must be given access via POS Enrollment. Center Management must decide who will have access to the queue and be responsible for printing the grants forms throughout the day.

The Center Enrollment Coordinator must select the special task called “Single Issue Printing Queue User” for those selected to have access to the queue.



FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Single Issue Printing Queue

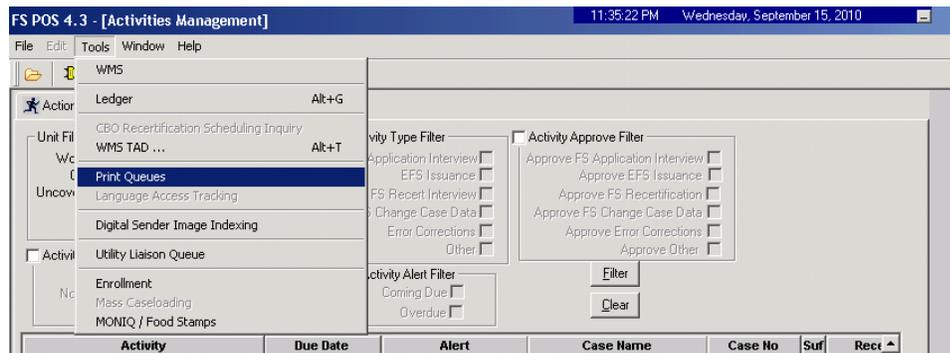
Designated staff will monitor the Print Queues and will print grant authorization forms.

The staff will access the Print Queue by selecting **Print Queues** in the **Tools** menu. They will select the case and click on the **Print Selected Forms** button. The DSS-3574 form will be printed. Once the form is printed, they will click on the **Complete** checkbox and click on the **Refresh** button.

Tools Menu

The designated staff will access the Print Queues by clicking on the **Tools** menu and selecting **Print Queues**.

Accessing the Print Queue

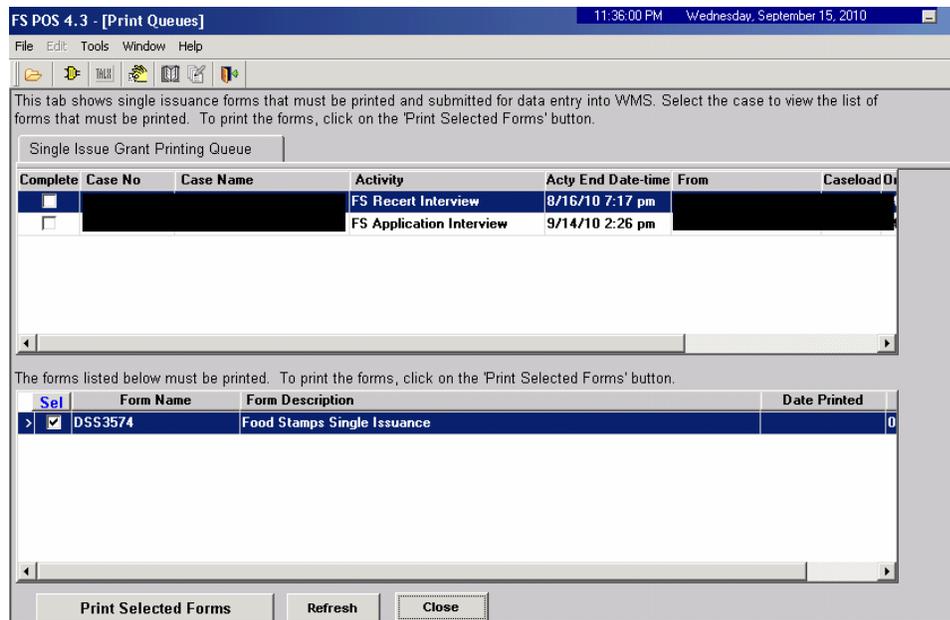


Print Queue

The **Print Queue** window will appear. The window includes the following instructions:

“This tab shows single issuance forms that must be printed and submitted for data into WMS. Select the case to view the list of forms that must be printed. To print the forms, click on the ‘Print Selected Forms’ button.”

Single Issue Grant Print Queue



FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Window Fields

The top section of the window includes the list of cases with single issue grant forms that must be printed. This case list includes the following fields:

- **Complete** – this checkbox allows designated staff to complete the printing activity once the forms are printed.
- **Case No** – this field indicates the case number for which the forms will be printed.
- **Case Name** – this field indicates the case name for which the forms will be printed.
- **Activity** – this field indicates the activity in which the JOS/Worker prepared the grants.
- **Acty End Date-time** – this field indicates the end date and time of the activity in which the JOS/Worker prepared the grants.
- **From** – this field indicates the name of the JOS/Worker who prepared the grants.
- **Caseload** – this field indicates the caseload for the case.
- **Orig Ctr** – this field indicates the center of the JOS/Worker who prepared the grants.
- **Start Date-time** – this field indicates the start date and time for the printing activity.
- **End Date-time** – this field indicates the start date and time for the printing activity.

Case List

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Caseload Or
<input type="checkbox"/>						01

The bottom section of the window includes the following instructions: "The forms listed below must be printed. To print the forms, click on the 'Print Selected Forms' button." This section includes the following fields:

- Sel (Select)
- Form Name
- Form Description
- Date Printed

Form List

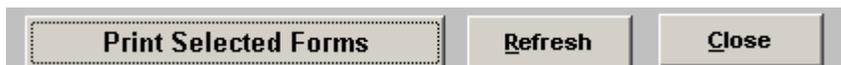
The forms listed below must be printed. To print the forms, click on the 'Print Selected Forms' button.

Sel	Form Name	Form Description	Date Printed
> <input checked="" type="checkbox"/>	DSS3574	Food Stamps Single Issuance	

The window will include three buttons:

- **Print Selected Form** – this button prints the selected form(s).
- **Refresh** – this button removes the case from the case list once the printing activity is marked as completed.
- **Close** – this button closes the Print Queue.

Buttons



FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

Printing Forms

To print the form, the designated staff will click on the case on the top of the window. The selected case will be highlighted in a darker color.

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Caseload Or
<input type="checkbox"/>						01

The designated staff will then click on the **Sel** (select) checkbox for the form(s) listed in the bottom section. The selected form(s) will be highlighted in a darker color.

The forms listed below must be printed. To print the forms, click on the 'Print Selected Forms' button.

Sel	Form Name	Form Description	Date Printed
> <input checked="" type="checkbox"/>	DSS3574	Food Stamps Single Issuance	0

Once all forms are selected, the designated staff clicks on the **Print Selected Forms** button.



After the form(s) is (are) printed, the designated staff will select the **Complete** checkbox, followed by the **Refresh** button to complete the activity. In addition, the case name will be removed from the case list.



POS will ensure that all required forms are printed before the case is complete. If the designated staff attempts to complete the printing activity before printing all required forms, the following error message will appear.



FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

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**
- Documents Alt+D
- Comments Alt+M

FS POS Release Notes: Appendix A

Version 4.3 October 18, 2010

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 Your Application	00000000		2/13/2004 12:18 pm
CA Application Interview	2/13/2004	3/5/2004	Shepard Michele	(citizenc)Certification of Citizenship	00000000		2/13/2004 12:01 pm

Preview Re-Print Close

FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 October 18, 2010

Overview

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).

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)

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

FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 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.

NYC Human Resources Administration
Department of Social Services

login

NCA FS Application Log

Enter your WMS User ID and Password to login

User ID

Password

FS Sites Fordham Food Stamp Center (F44) ▾

[POS Portal](#) [HRA Home](#) [Help](#)

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.

NYC Human Resources Administration
Department of Social Services

login

NCA FS Recertification Log

Enter your WMS User ID and Password to login

User ID

Password

FS Sites Fordham Food Stamp Center (F44) ▾

[POS Portal](#) [HRA Home](#) [Help](#)

If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov

FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 October 18, 2010

NCA Food Stamp Deferral Log

The **Food Stamp Deferral Log** will allow Food Stamp (FS) 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 Human Resources Administration logo. The page title is "NCA FS Deferral Log". Below the title, 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 is a helpdesk contact information: "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 Human Resources Administration logo. The page title is "NCA FS Calendar". Below the title, 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 is a helpdesk contact information: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

FS POS Release Notes: Appendix B

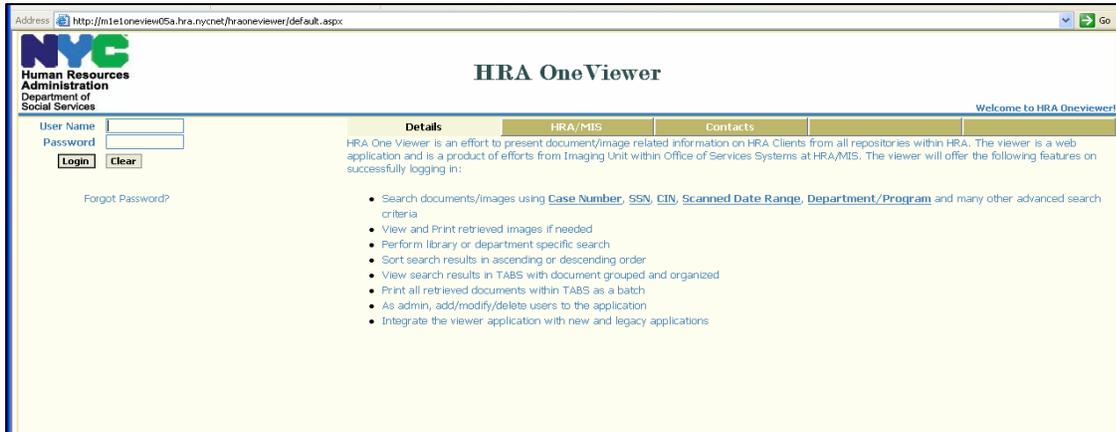
Desk Guide – Introduction to POS Portal

Version 4.3 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.



FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 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 HRA logo. 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", and a "Login" button. At the bottom, the text "© 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 shows the login interface for the Food Stamp Employment System (FSE). At the top left is the NYC logo. The title "Food Stamp Employment System" is displayed in a blue banner. Below the banner, the text "Environment: TEST" is shown. A large blue button labeled "Log In" is centered. Below it, the text "Already have a User ID and Password, please sign in below" is displayed. There are two input fields labeled "User ID:" and "Password:". Below the input fields is a blue button labeled "Enter". At the bottom, there are links for "NYC.gov Home Page" and "Privacy Statement". A disclaimer paragraph is located at the bottom of the page, and the version number "FSES v1.92" is displayed at the very bottom.

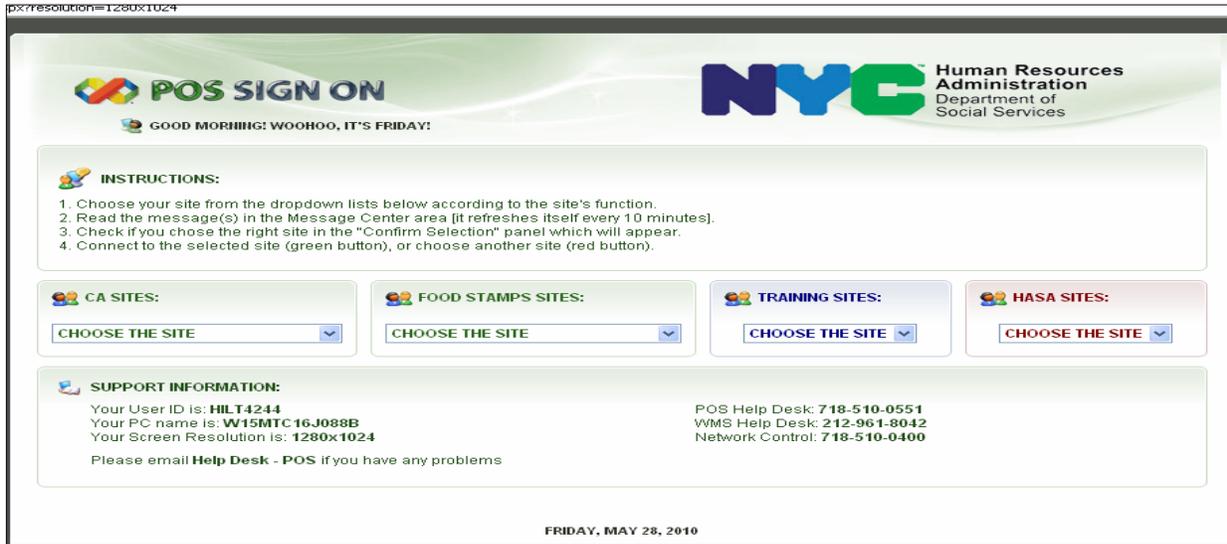
FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 October 18, 2010

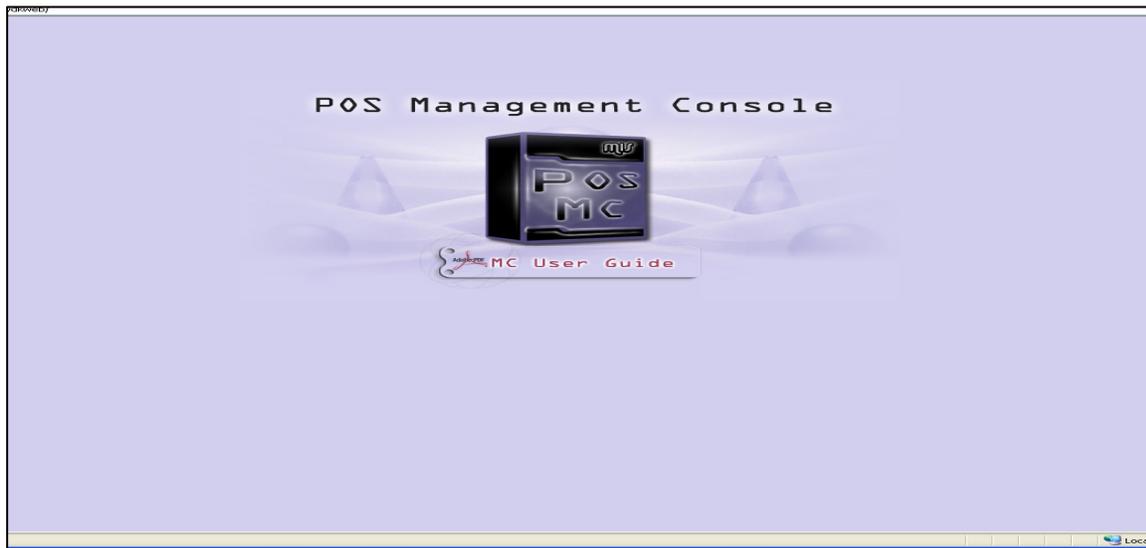
Paperless Office System

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.



FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 October 18, 2010

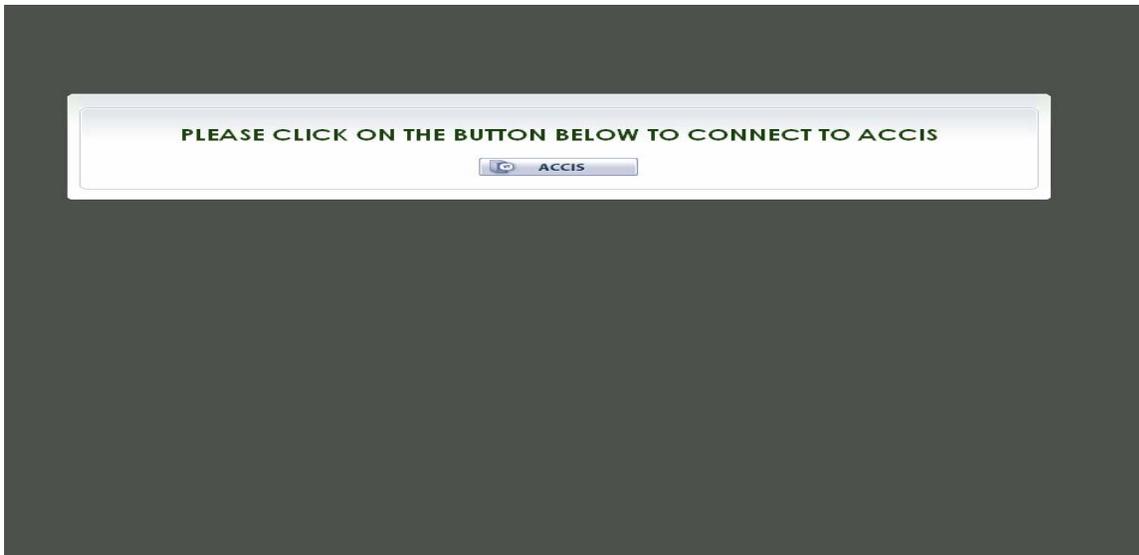
POS Release notes

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.



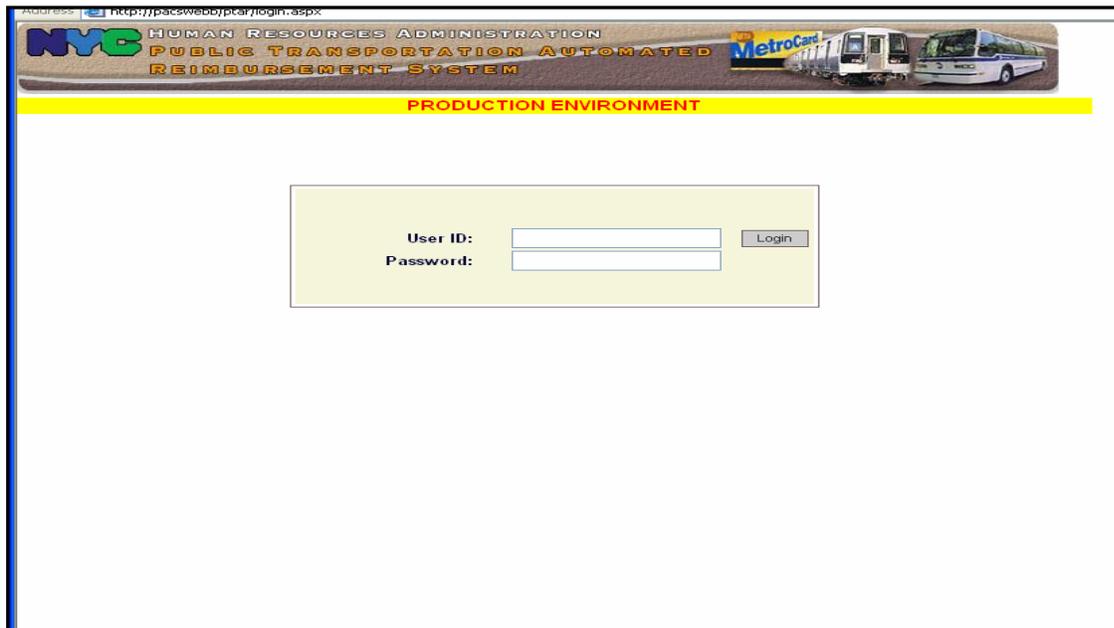
FS POS Release Notes: Appendix B

Desk Guide – Introduction to POS Portal

Version 4.3 October 18, 2010

Public Transportation Automated Reimbursement System (PTAR)

Metro card ordering system for FIA centers.



The FS 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 FS POS related applications will link back to the FS 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.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Overview

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 FS Recertification Log is available on the Intranet through the POS Portal.

The Recertification Interview Log and Failed to Keep Recertification Log windows will be updated with the following new functionality and features:

- Form **W-908F** for rescheduled telephone interviews

Login Page

Staff must enter their WMS User ID, password and select the FS site.

NYC Human Resources Administration
Department of Social Services

login **NCA FS Recertification Log**

Enter your WMS User ID and Password to login

User ID

Password

FS Sites

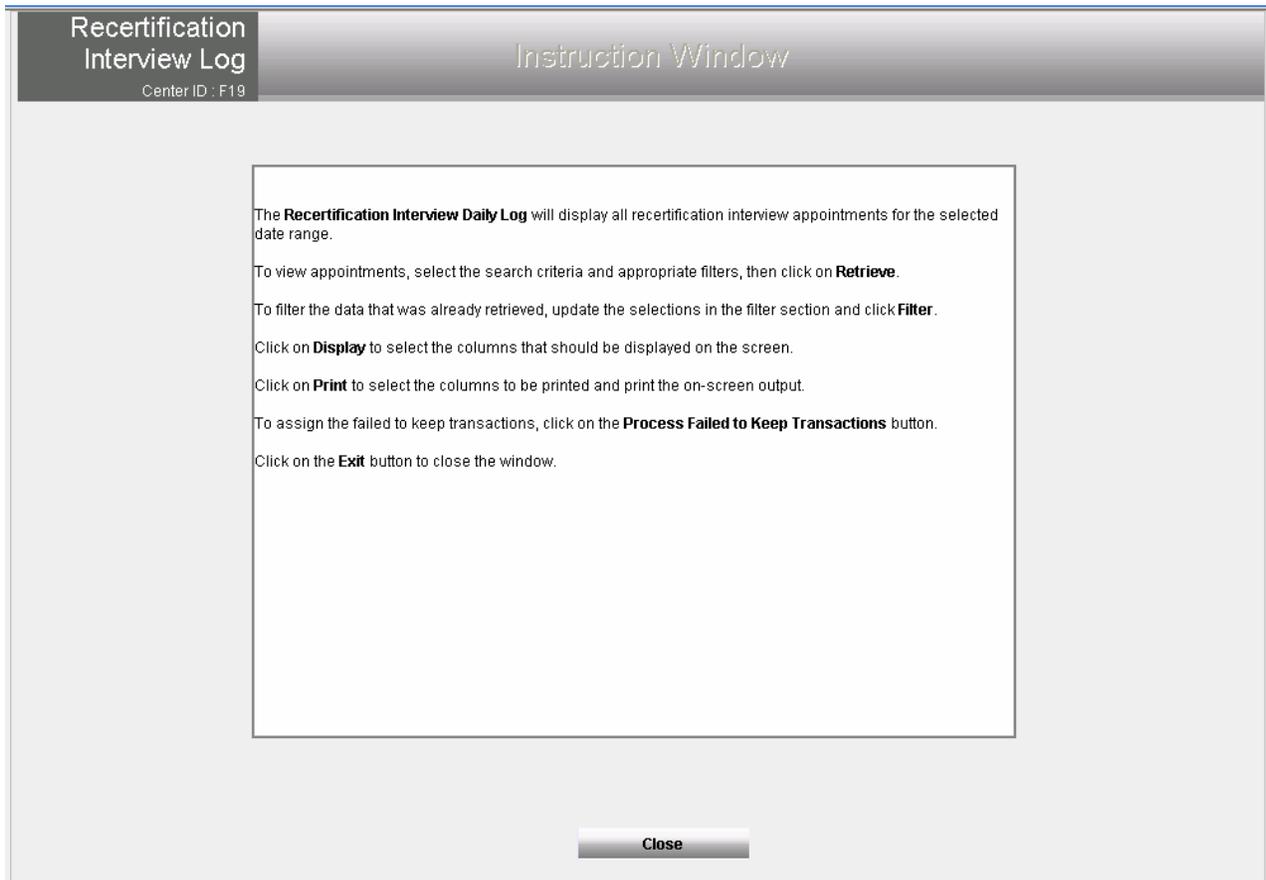
[POS Portal](#) [HRA Home](#) [Help](#)

If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Instructions



When the Worker clicks on the **Close** button, the **Recertification Interview Log** appears.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Updated Recertification Log

The screenshot shows the 'Recertification Interview Log' application window. At the top, there is a title bar with the text 'Recertification Interview Log' and 'Center ID : F19'. Below the title bar is a menu bar with icons for File, Retrieve, Print, Filter, Display, Summary, Change Center, and Help. The main area is divided into several sections: 'Search By' with radio buttons for 'Appointment Date', 'Selected Date', and 'Date Range' (with 'From' and 'To' fields); 'Case Number' and 'Last Name of Casehead or Payee' with input fields; 'Application Type Filter' with a list of checkboxes including Telephone Interview, In-Center Interview, Potential IVRS, No Change, Original Appointment Date, LDSS-4826 Received, Homebound, CBD, and Auth. Rep; and 'Appointment Status Filter' with checkboxes for Kept Appointment, Failed to Keep Appointment, and None. There is also an 'AFIS Reports' button. At the bottom, there are navigation buttons for 'Previous' and 'Next', a page indicator 'Page : 0 of 0', and a row of action buttons: Assign, LDSS-4826 Received, Reschedule, Contact, Kept Appointment, Failed To Keep, Process Failed to Keep, and Exit.

Labels and Buttons

1. Recertification Log and Center Number
2. File
3. Retrieve
4. Print
5. Filter
6. Display
7. Summary
8. Change Center
9. Help

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Search Filters

3. Appointment date - Select Date OR Specify Range
4. Case Number
5. Last name of casehead or payee

Search By

Appointment Date

Selected Date

Date Range

From To

Case Number

Last Name of Casehead or Payee

Appointment Type Filter

1. Telephone Interview
2. In-Center Interview
3. Potential IVRS
4. No Change
5. Original Appointment date
6. LDSS-4826 Received
7. Homebound
8. CBO
9. Auth Rep

Application Type Filter

Telephone Interview

In-Center Interview

Potential IVRS

No Change

Original Appointment Date

LDSS-4826 Received

Homebound

CBO

Auth. Rep

Appointment Status Filter

1. Kept Appointment
2. Failed to Keep Appointment
3. None

Appointment Status Filter

Kept Appointment

Failed to Keep Appointment

None

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Data Columns

1. Case Number
2. Case Name
3. Spoken Language
4. Interpreter
5. Appointment Date
6. Appointment Time
6. LDSS-4826 Received
7. Appointment status
8. Telephone Interview
9. Phone

<input type="checkbox"/>	Case Number	Case Name	Spoken Lang.	Interpreter	Appt. Date	Appt. Time	LDSS-4826 Received	Appt. Status	Tel. Intv.	Phone.
<input type="checkbox"/>				No			No	KEPT APPT	No	
<input type="checkbox"/>				No			Yes	KEPT APPT	No	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			Yes	KEPT APPT	No	
<input type="checkbox"/>				No			Yes	KEPT APPT	No	
<input type="checkbox"/>				Yes			Yes	KEPT APPT	Yes	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			No		Yes	
<input type="checkbox"/>				No			No		Yes	

000123000000 PREMIER WENDOLETT

Page: 1 / 4

Previous Next

10. Assigned to
11. Number of contacts
12. Interview started on
13. Case status
14. IVRS
15. Previous Appt
16. No change
17. Requested closing
18. Homebound
19. Next recert date

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Assigned To	Number of Contacts	Interview Started On	Case Status	IVRS	Previous Appt.	No change	Requested Closing	Homebound	Next Recert Date
	1			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			Yes		Yes	No	No	
	0			No		No	No	No	
	0			No		No	No	No	
	0			No		No	No	No	

Page : 1 / 4

- 20. Original Date
- 21. Current center
- 22. CBO
- 23. Authorized representative
- 24. Authorized representative name

Orig. Date	Current center	CBO	Auth. Rep	Auth. Rep. Name
		No	No	

Page : 1 / 4

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Buttons in the Window

The following buttons also appear in the window:

1. Assign – See the *Assign procedure and Refer window* section below for additional details.
 2. Reschedule- Displays the Recertification Interview Scheduler window for updating with new appointment
 3. Kept Appointment- Will indicate that the appointment was kept
 4. Failed to Keep Appointment- Will indicate that the participant did not keep the appointment
 5. Process Failed to Keep Appointments- will display Fail to Keep Recertification Interview Log
 6. Exit
29. AFIS Reports



Assign procedure and Refer window

If the title of the person who clicks on the **Assign** button is 'FS Clerk' or 'FS Eligibility Specialist', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor

If the title of the person who clicks on the **Assign** button is 'FS CA III', 'FS Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

When the case is assigned to a FS Eligibility Specialist and the OK button is clicked in the Refer Action window, the caseload (unit worker value) will be updated in POS.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Refer Action window

The screenshot shows a 'Referral Window' dialog box. It is divided into several sections: 'Selected Case' with input fields for Case Number, Case Name, Casehead, Casehead Name, and a dropdown for Center; 'Refer Case To' with a large empty text area; and 'Enter comments, if any' with a text area. At the bottom are 'Ok' and 'Cancel' buttons.

CBO Recertification Filter

A filter allows staff to view recertifications that were submitted through the community-based organization (CBO) project.

AFIS Report

A report listing individuals that may require finger imaging is displayed.

Edits for Transferred Cases

Edits prevent changes to cases that have been transferred to another center.

Edit for Closed Cases

The log prevents the posting of the Y10 Closing if the case is not in an active (AC) status and warns the user about pending TAD transactions in WMS prior to the transmission of the Y10 closing.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Log Summary window

The screenshot shows a software window titled "Recertification Interview Log" with a subtitle "Center ID : F19". The main content area is titled "Summary Window" and contains a "Totals" box with the following data:

Totals :	
Total Kept Appointments :	0
Total Failed To Keep Appointments :	0
Total Appointments without Status :	63
Total Appointments :	63
Total Re-scheduled Appointments :	13

An "Ok" button is located at the bottom center of the window.

A new window (**Log Summary**) will summarize the kept, failed and re-scheduled appointments from the Application log.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

LDSS-4826 Received Window

The **LDSS-4826** Received window will appear when the **LDSS-4826 Received** button is clicked at the bottom of the **FS Recertification Log** window. This window allows the worker to indicate that the signed and completed recertification form (**LDSS-4826**) has been received, the specific interview type, record the date of receipt and any new contact information for the person.

LDSS-4826 Received window

The screenshot shows a dialog box titled "LDSS-4826 Received". The fields are as follows:

- Case Number: [Redacted]
- Case Name: [Redacted]
- Casehead Name: [Redacted]
- Mail Returned or Undelivered: Yes No
- Date: [Empty text box]
- Signed LDSS-4826 received?: Yes No
- Date LDSS-4826 Received: [Empty text box]
- Envelope Post-Mark Date:: [Empty text box]
- Interview Type: Telephone In-Center
- Contact: [Empty text box] Extension: [Empty text box]
- Did the applicant request a new call time?: Yes No
- Date: [Empty text box] Time: 07:00 am [Dropdown arrow]

Buttons: OK, Cancel

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Contact Attempted Window

The **Contact Attempted** window will appear when the **Contact** button is clicked at the bottom of the FS Recertification Log. This window allows the worker to record the number of attempted contacts with the client scheduled for a telephone interview. Each recorded contact and comment will be saved in the POS case activity history.

If there are two unsuccessful contacts recorded and no successful contact has been made, the appointment status will be automatically updated to "Failed to keep".

Contact Attempted window

Contact Attempted Window

1. Case Number
2. Case Name
3. Case head Name
4. Contact Number
5. Extension
6. Request call time

Contact Attempted 1

7. Did you successfully contact the client?
8. Date that the contact was attempted?
9. Time that the contact was attempted?

Contact Attempted 2

10. Did you successfully contact the client?
11. Date that the contact was attempted?
12. Time that the contact was attempted?

Contact Attempted 3

13. Did you successfully contact the client?
14. Date that the contact was attempted?
15. Time that the contact was attempted?

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Contact Attempted 4

- 16. Did you successfully contact the client?
- 17. Date that the contact was attempted?
- 18. Time that the contact was attempted?
- 19. Comments
- 20. Interview Type
- 21. New Contact Number
- 22. Contact Number
- 23. Extension
- 24. OK
- 25. Cancel

New Window: Select Columns to Print



A new window will allow the worker to decide which columns should be printed. This window will appear when the Worker clicks the Print option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks **OK**, the print job will be sent to the printer. If the worker clicks cancel, POS will return to the Log.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

New Window: Select Columns to Display



A new window will allow the Worker to decide which columns should be displayed. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected and protected.

When the Worker clicks OK, POS will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

AFIS Reports

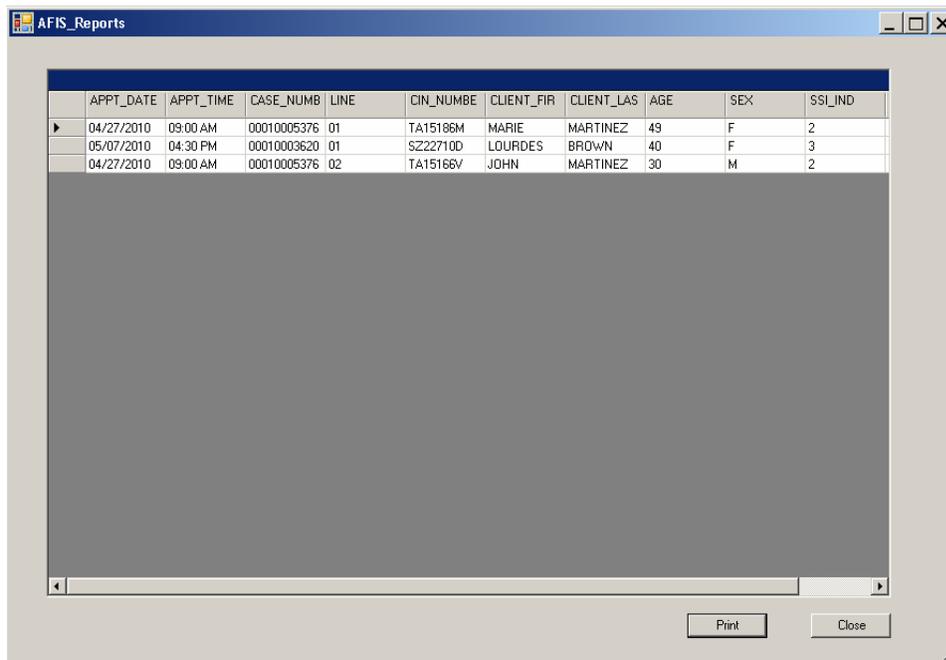
The AFIS report window will be available when the Worker selects an appointment date range and clicks on the **AFIS Reports** button.

The report will display individuals 18 years of age or older known to POS that have not been finger imaged, were marked as temporarily exempt from finger-imaging or whose finger imaging record was purged.

The following columns will be displayed:

Label	Description
APPT_DATE	Appointment Date
APPT_TIME	Appointment Time
CASE_NUMBER	Case Number
LINE	Line Number
CIN_NUMBER	Client Identification Number
CLIENT_FIRST_NAME	Client First Name
CLIENT_LAST_NAME	Client Last Name
AGE	Client's Age
SEX	Client's Sex
SSI_IND	Client's SSI Indicator
AFIS_IND	Client's AFIS Indicator

AFIS Reports



APPT_DATE	APPT_TIME	CASE_NUMB	LINE	CIN_NUMBE	CLIENT_FIR	CLIENT_LAS	AGE	SEX	SSI_IND
04/27/2010	09:00 AM	00010005376	01	TA15186M	MARIE	MARTINEZ	49	F	2
05/07/2010	04:30 PM	00010003620	01	SZ22710D	LOURDES	BROWN	40	F	3
04/27/2010	09:00 AM	00010005376	02	TA15166V	JOHN	MARTINEZ	30	M	2

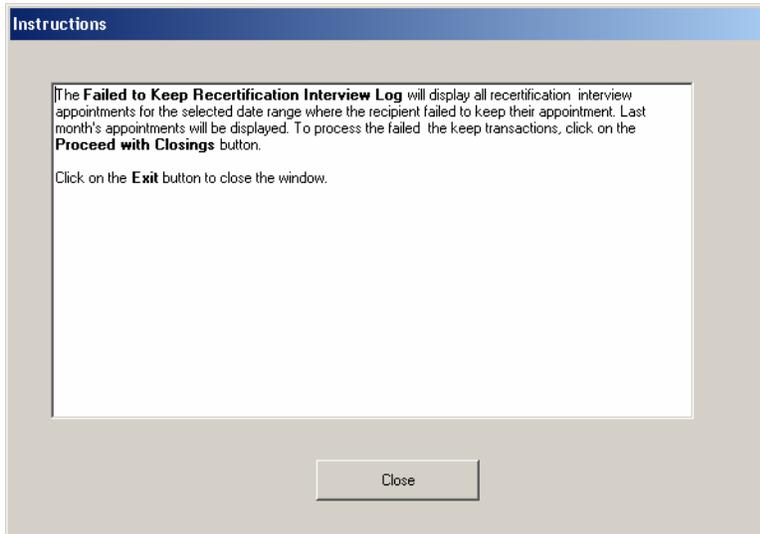
The Worker will be able to print the report for follow-up by clicking on the **Print** button. To close the window, the Worker will click on the **Close** button.

FS POS Release Notes: Appendix C

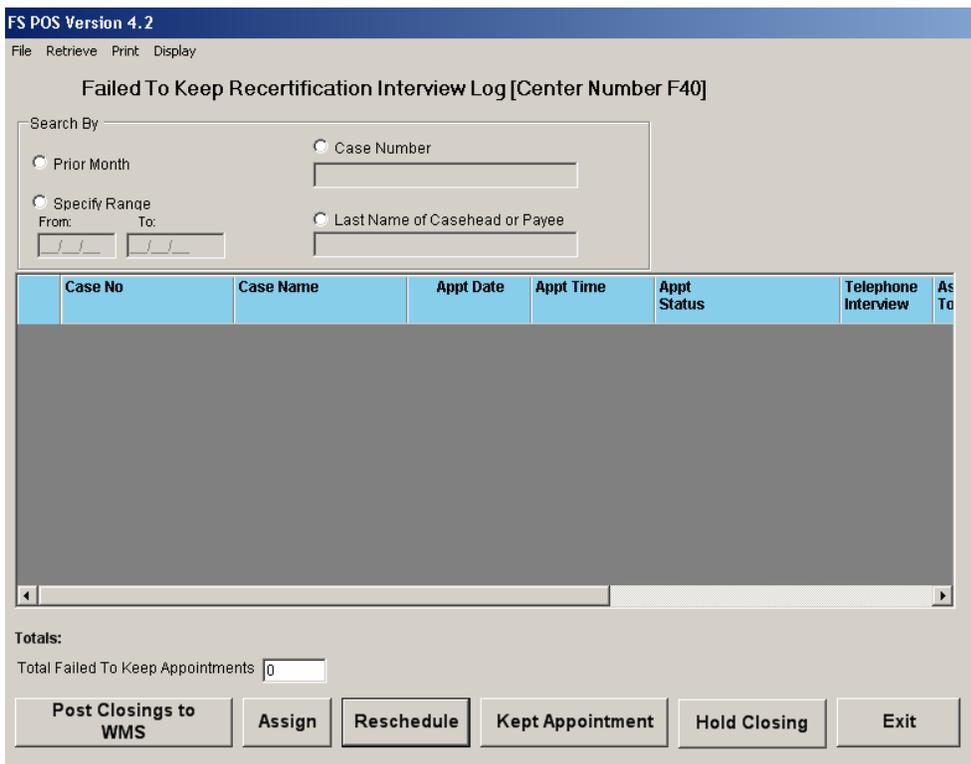
Version 4.3 October 18, 2010

Failed to Keep Recertification Interview Log

When the Worker clicks OK on the Instructions window for the **Failed to Keep Recertification Interview Log** window will display.



Updated Failed to Keep Recertification Interview Log



The list of the prior month's appointments where the client failed to keep will be displayed in this window beginning on the 16th day of the month.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

The following columns appear in the Fail to Keep Recertification Log:

1. File, Retrieve, Print and Display
2. Failed to Keep Recertification Log
 - i. Search by Feature
3. Prior Month
4. Specify Range
 - a. Case Number
 - b. Case Name
5. Case Number
6. Case Name
7. Appointment Date
8. Appointment Time
9. Appointment Status
10. Assigned to
11. Case Status
 - a. Originating Appointment
12. Total Failed to Keep Appointments- Read Only

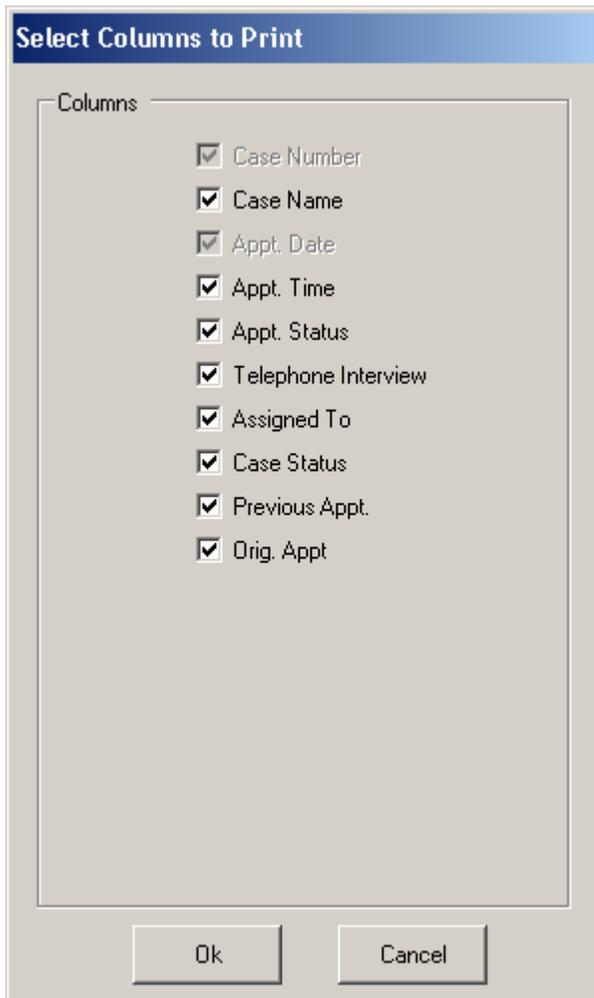
Buttons in Log

13. Post Closings to WMS-All closing will be processed Y10
14. Assign- Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
15. Reschedule-Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
16. Kept Appointment- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
17. Hold Closing- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
18. Exit

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Window: Select Columns to Print



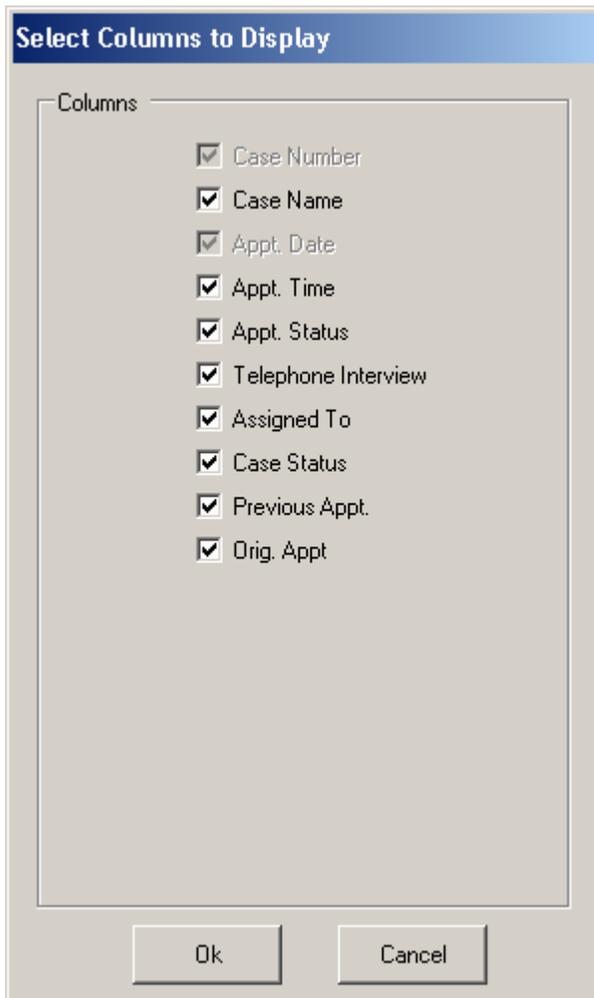
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks **OK**, the print job will be sent to the printer. If the Worker clicks cancel, POS will return to the Log.

FS POS Release Notes: Appendix C

Version 4.3 October 18, 2010

Window: Select Column to Display



This window allows the Worker to decide which columns should be displayed from the Failed to Keep Recertification Log. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected.

When the Worker clicks **OK**, the log will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.