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POS RELEASE NOTES VERSION 14.1

Date: February 11, 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 February 16, 2010. Descriptions of the changes can be found in POS Release Notes Version 14.1 (Attachment A).</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 February 16, 2010</i></p> <p>Attachment A POS Release Notes Version 14.1</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) 639-029

POS Release Notes

Version 14.1 February 16, 2010

These Release Notes contain descriptions of changes in POS Release 14.1 scheduled for February 16, 2010. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and 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. New Language Access Indicators Window

A new Tracking Language Access Indicators screen has recently been added to POS. This new screen allows POS to track the servicing of LESA applicants/participants. The Tracking Language Access Indicators screen will capture the following applicant/participant information:

- Type of interview (in-person or via telephone);
- Preferred language for speaking;
- Preferred language for receiving written notices;
- Interpreter services needed (yes or no); and
- Type of interpreter services being used.

If the Worker answers “Yes” to the question “Do you require Free Interpreter Services?”, a drop-down menu in the “Which type of Interpreter Services is being used?” section, will be enabled with the following options:

- Bilingual Worker provided interpretative services;
- HRA’s On-Site Interpreter Contract was used;
- HRA’s Telephone Interpreter Contract was used;
- Client brought his/her own interpreter; and
- Client refused interpretative services.

Tracking Language Access Indicators Window

The screenshot shows a window titled "Tracking Language Access Indicators". It contains the following fields:

- Is the Applicant/Participant Present for the Interview? Yes No
- Is the Applicant/Participant on the Phone for the Interview? Yes No
- Preferred Language for Speaking: Spanish (dropdown)
- Preferred Language for Written Notices: Spanish (dropdown)
- Do You Require Free Interpreter Services? Yes No
- Which Type of Interpreter Services is being Used? Bilingual Worker provided interpretative services (dropdown)
- Continue button

The **Tracking Language Access Indicators** window will appear whenever a Worker conducts an initial application intake/interview. The window will also appear if POS lists the applicant’s/participant’s preferred language for speaking (**Lang SP**) or for receiving written notices (**Lang Read**) is blank or listed as a language other than English or if no preferred language is listed in POS and the Worker accesses one of the following activities:

- CA Application Intake;
- CA Application Interview;
- CA Change Case Data;
- CA Recertification Interview;
- Case Member Addition;
- Non-Food Emerg/Special Grant;
- Client Intake and D&C Referrals
- Document Intake;
- IN/EFS Issuance (CA/FS Case); or
- Application Modification.

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If both the **Lang Read** and **Lang SP** indicators are listed as English in POS, the **Tracking Language Access Indicators** screen will not appear.

The Worker must ensure that the language of the applicant/participant is documented in the case record and on form **W-680FF** so that an interpreter can be scheduled for future appointments. Form **W-680FF** must be included in all Cash Assistance (CA) Application/Recertification kits and NCA FS Application/Recertification kits.

Form **W-680FF** allows applicants/participants to identify their preferred spoken language. It also allows applicants/participants to choose from one of the seven New York City (NYC) local law languages to receive written correspondence.

At application and recertification, Workers must ensure that the language selected in the POS primary language fields corresponds with the applicant's/participant's preferred spoken language selected on form **W-680FF**.

Policy

For additional information, please refer to the policy directive for **Servicing Individuals with Limited English-Speaking Ability (LESA)**.

2. New Budget Messages for Workers and Supervisors

A new message will appear for Workers in the beginning of the **CA Recertification Interview, Error Correction (EC) – CA Recertification, CA Change Case Data** and **EC – CA Change Case Data** activities when an updated authorized budget is found in WMS:

- “A new budget has been imported into POS. It contains information that differs from that currently in the interview question set. To see the differences, select the WMS Budget Icon on the Toolbar or Current Active Budget under Tools on the menu bar. The differences will be highlighted in yellow.”

A new message will appear for Supervisors in the beginning of the **Approve CA Recertification** and **Approve EC – CA Recertification** activities for a case that will continue active when an updated authorized budget is found in WMS after the Worker completed the interview activity:

- “The budget has been synchronized because a change has been made in WMS since the Worker completed the activity. Please send this case back to the Worker to prepare a new budget that must be transmitted to WMS. Failing to update the budget will result in errors.”

A new message will appear for Supervisors in the beginning of the **Approve a CA Case Action** and **Approve EC – CA Change Case Data** activities for a case that will continue active when an updated authorized budget is found in WMS after the Worker completed the change action activity:

- “The budget has been synchronized because a change has been made in WMS since the Worker completed the activity. If the activity contains a budget, please send this case back to the Worker (a new budget must be created). Failing to update the budget will result in errors”.

A new message will appear in the **POS TAD** window for Workers in the **CA Recertification Interview, EC – CA Recertification, CA Change Case Data** and **EC – CA Change Case Data** and for Supervisors in the **Approve CA Recertification, Approve EC – CA Recertification, Approve a CA Case Action** and **Approve EC – CA Change Case Data** activities for a case that will continue active when an updated authorized budget is found in WMS:

- “A newer budget has been authorized on WMS. A new budget is required or there will be errors on the case.”

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If the Worker double-clicks on the message, they will be able to see additional text:

- “A new budget had been authorized on WMS since the last POS saved budget. You must return to the budget window and click on the ‘New Budget’ button to create a new budget that will include your recent changes and build on the changes made in WMS.”

3. New Approval Windows in Approve CA Eligibility Decision

New approval windows will be added for the following sections in the **Approve CA Eligibility Decision** (approval of application interview) activity:

- Past Maintenance
- Disposition/Withdrawal
- Pre-Referrals

Approval window for Past Maintenance

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Approval window for Disposition/Withdrawal

File Edit Tools Window Help

Disposition/Withdrawal

EXEMPTION STATUS

Case Head

Applicant: Lena Bulka

Date of Birth: 05/05/1973

Case Level Exemption Status

- HASA Case, Employment Assessment is Not required
- Payee Case
- Homebound Casehead
- One-Shot Deal
- Case is a Child Care In Lieu of Public Assistance (PA) .Spec Emp Assess is Required
- Case Is Not Exempt, Employment Assessment is Required

JOS DISPOSITION

Wishes to Withdraw Case From: Reason:

- PA Public Assistance
- Sufficient Income
- Family Resources
- FS Food Stamp Benefits
- Financial Resources
- Community Resources

Supervisory Review

Documents: View Document Documents Reviewed:

Approve
 Disapprove

Add Comment

Disapproval Reasons

Preview Comment Log

Next Previous

Approval window for Applicant's Task List (W-680F)

File Edit Tools Window Help

Applicant's Task List(W680F)

Who: Lena Bulka

	Specify Condition/Limitation
Sit <input type="radio"/> Yes <input checked="" type="radio"/> No	
Balance <input type="radio"/> Yes <input checked="" type="radio"/> No	
Bend Sometimes <input type="radio"/> Yes <input checked="" type="radio"/> No	
Bend often <input type="radio"/> Yes <input checked="" type="radio"/> No	
Squat <input type="radio"/> Yes <input checked="" type="radio"/> No	
Climb <input type="radio"/> Yes <input checked="" type="radio"/> No	

Supervisory Review

Documents: View Document Documents Reviewed:

Approve
 Disapprove

Add Comment

Disapproval Reasons

Preview Comment Log

Next Previous

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Approval Window for Alcohol and Substance Abuse Screening

File Edit Tools Window Help

Alcohol and Substance Abuse Screening

POS Alcohol and Drug Abuse Screening

Who

1. If you have received temporary assistance in the last two (2) years, did you have problems in complying with work rules? Yes No

2. Have you lost a job or gotten into trouble at work within the last two (2) years? Yes No

3. Have you had any legal problems within the last two (2) years? Yes No

4. Have you ever attempted to cut down on your alcohol or drug use? Yes No

5. Have you felt the need to take a drink or use drugs when you awoken? Yes No

6. Have you ever been annoyed by people making comments about your drinking or drug use? Yes No

7. Have you ever been treated for the following medical problem: *Hepatitis C, Liver Disease or Tuberculosis?* Yes No

8. Have you ever felt guilty about your drinking or drug use? Yes No

9. Have you ever been in treatment for alcohol and/or substance abuse? Yes No

10. Would you like information about alcoholism and/or substance abuse? Yes No

Supervisory Review

Documents: Documents Reviewed:

Approve
 Disapprove

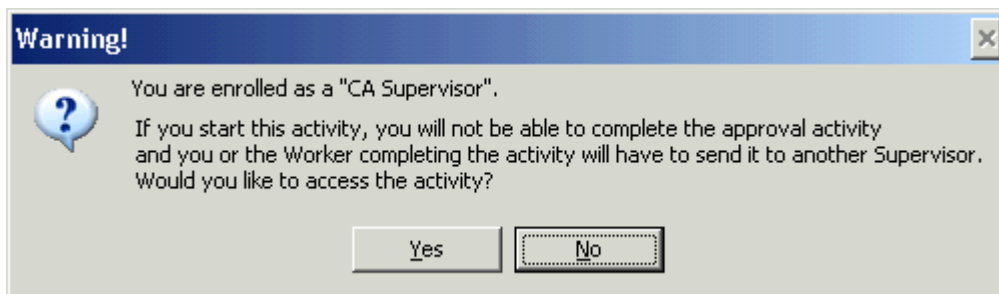
4. Auto-Removal of Utility Liaison Review (ULR) Activities

In order to allow faster loading of the Utility Liaison Queue, ULR activities that have not been started will be automatically removed from the queue after 5 business days and the Utility Liaison's review of completed ULR activities will be limited to 5 business days.

Please note that pending ULR activities are removed after 21 calendar days.

5. New Warning Message for Supervisor

Supervisors are not allowed to approve a case activity that they have worked on. A new warning will appear for Supervisors when they attempt to start a Worker activity, to remind them that if they start a Worker activity, they will not be able to complete the approval for this activity:



If the Supervisor clicks "Yes", the Worker activity will begin. If the Supervisor clicks "No", they will be returned to their queue.

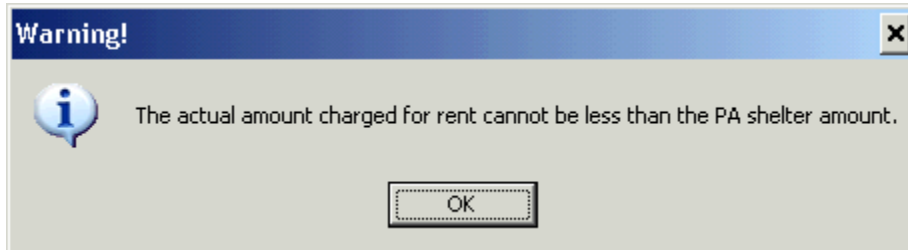
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6. New Validation in Rent Expense Window

A new validation in the **Rent Expense** window will help ensure that the actual amount charged for rent is more than or equal to the PA shelter amount entered in the window:

Warning Message



Shelter Expense Window

Response to Question

Shelter Information		Actual amount charged for Rent/Mortgage		Frequency	Verified
Shelter Type Apt pvt house...	Shelter Code 01	Change Shelter type? <input checked="" type="radio"/> Yes <input type="radio"/> No	\$256.00	M	<input checked="" type="radio"/> Yes <input type="radio"/> No
Click to View/Update Details of the Current Shelter Type		Housing Advantage Indicator(HAI)	Rent Charged To Secondary Tenant	Frequency	
			.00		

Landlord Information		Restriction Information	
Landlord Type Landlord	SSN/Tax Number	Has The Household Requested A Rent Restriction Exemption? <input type="radio"/> Yes <input checked="" type="radio"/> No	
Name Landlord Name	Phone	Rent Restriction Type Direct Involuntary (PA level)	PA Shelter Amount \$215.00
House/PO Box Number 123	Apt/Suite Number Land	Is the restriction information the Same As The Landlord Information? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Street Dir Landlord	Street Name Str	Name Landlord Name for Client	
City Landlord City	State New York	House Number or PO Box 123	Apt/Suite Land
Zip 10025		Street Dir Landlord	Street Name Str
		City Landlord City	State New York
		Zip 10025	
Excess Rent Monthly Excess Rent \$0.00		Routing Number	
Document... Landlord Letter Statement from Non-Relative Landlord		Comment...	

OK Cancel

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7. Update in Alien Type Determination Script for Alien Type D

Individuals with an alien/citizenship indicator value of “D” (Victims of Trafficking and Violence Protection Act of 2000) were previously assigned a value of “D” in POS, but a value of “R” was transmitted to WMS.

Beginning with WMS version 2010.1, WMS will accept the value of “D” and the POS transmission rules will be updated accordingly and the following updated business rules will be applied in the **Additional Information** window:

- The **Alien Number** field will be optional; and
- The same dates must be entered in the “Date the Individual Physically Entered the US” and the “Certification (Initial Eligibility) Date (Alien Type D only)” fields.

Additional Information window

Category	Field Name	Value / Options
1. Initial Summary	Name	[redacted]
2. North American Indian Born in Can.	Type	[redacted]
3. Hmong or Highland Laotian	SSN	[redacted]
4. Victims of Trafficking and Violence	Date of Birth	[redacted]
5. Cuban/Haitian Entrants	Date of Status (DOS) from WMS	[redacted] Link to the Entry Date Procedure
6. Refugees or Amerasian Immigrants	Date Entered Country (DEC) from WMS	[redacted]
7. Asylee	Instructions Please Read This Before Entering the Dates listed below! For immigrants who were determined to be Battered Aliens (B) enter the Date of Application when determination for alien status 'B' was made, in the 'Date of Application when alien status 'B' was Determined'. For Legal Permanent Residents (K) who have their Legal Permanent status for less than 5 years, you must investigate if they had other qualified status prior to becoming an LPR. If prior status can be verified, you must enter the date when original status was obtained. Legal Permanent Residents (K), Parolees for at	
8. Deportation or Removal Withheld	Alien Number	[redacted]
9. Conditional Entrant	Does the Individual Have Employment Authorization Document I-688B or I-766?	<input type="radio"/> Yes <input checked="" type="radio"/> No
10. Legal Permanent Resident	Does the Individual Have Social Security Card Authorizing Employment (card doesn't say 'Not Valid for Employment')?	<input type="radio"/> Yes <input checked="" type="radio"/> No
11. Parolee for at Least One Year	Dates	
12. Battered (Abused) Spouse and/or I	Date of Entry (Alien Type R or F)	00/00/0000
13. Parolee for Less than One Year	Date Status Granted (Alien Type A, H, L, Z, K, T or G)	[redacted]
14. PRUCDL (PA)	Date of Application when alien status 'B' was Determined	00/00/0000
15. PRUCDL (MA)	Date Deportation/Removal Withheld (Alien Type J only)	00/00/0000
16. Undocumented immigrant or non-im	Certification (Initial Eligibility) Date (Alien Type D only)	00/00/0000
17. Additional Information for Mdsaoonm	Did the Individual Have Other Qualified Status Prior to Becoming an LPR?	<input type="radio"/> Yes <input checked="" type="radio"/> No
	Prior Status [dropdown] Do you have documents to verify prior status?	<input type="radio"/> Yes <input checked="" type="radio"/> No
	Documented Date of Prior Status	00/00/0000
	Date the Individual Physically Entered the US (help?)	00/00/0000
	Does the individual have documents to verify U.S. residence prior to 8/22/96?	<input type="radio"/> Yes <input checked="" type="radio"/> No
	Was this individual out of US since that date for 30 consecutive days (help?) or a total of more than 90 days?	<input type="radio"/> Yes <input checked="" type="radio"/> No

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8. Display of Re-Use Case Number in Grant Data Entry Windows

For applicants, the re-use case number will be displayed in the grant data entry windows.

Grant Data Entry Windows

Version 13.3 - Paperless Office System - [PA Single Issuance Benefit] 1:07:27 AM Friday, January 22, 2010

File Edit Tools Window Help

Case Name	Case Number	Reuse Case Number	Suffix	Date Form Prepared	IS Center	Category
MMAD MDSAONMD	0000012248B	0000012249A	1	01/22/2010	099	SNCA

Benefit Type: PA FS

1

Pick-Up Codes: [Dropdown]

Issuance Category: [Dropdown]

Issuance Code: [Dropdown]

Amount	From	To	Routing Location	Replaces Check Number	Restricted Indicator	Authorization Number
\$0.00	00/00/0000	00/00/0000				

Total Amount: \$0.00

Next Previous

Version 13.3 - Paperless Office System - [FS Single Issuance Benefit] 1:07:54 AM Friday, January 22, 2010

File Edit Tools Window Help

Case Name	Case Number	Reuse Case Number	Suffix	Date Form Prepared	IS Center	Category
MMAD MDSAONMD	0000012248B	0000012249A	1	01/22/2010	099	SNCA

Benefit Type: PA FS

Issuance Code	Amount	From	To	Back-Up Grant	Check/CD#	Routing Location	Replaces Benefit	Authorization Number	Payee
[Dropdown]	\$	00/00/0000	00/00/0000						

Total Amount: \$

Next Previous

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9. Default Frequency for Various Income Windows

In order to save data entry time, the default frequency will be set to "Monthly" when the Worker answers "Yes" for the following income questions:

- Alimony/Support (Received)?
- Boarders/Lodgers Income (Received)?
- Contributions/Gifts (Received - NOT Excess Rent, Tuition or Household Expenses)?
- Child Support Payments (Received)?
- Education Grants or Loans?
- NYS Disability Benefits?
- Retirement Benefits (Pensions)?
- Social Security Dependent Benefits?
- Social Security Disability Benefits?
- Supplemental Security Income (SSI) Benefits?
- Social Security Retirement Benefits?
- Social Security Survivor's Benefits?
- Veteran's Pensions or Benefits?
- Worker's Compensation?
- Has Other Income?

The default frequency will be set to "Weekly" when the Worker answers "Yes" for the following income question:

- Unemployment Insurance Benefits?

10. M-858v Form Printing Update

Workers will be able to print separate M-858v (Notice to Utility Company) form when they have separate utility accounts.

Data Entry Window for Form M-858v

The screenshot shows a software window titled "Response to Question" with a tab labeled "Notification to Utility Company". The window contains two identical forms. Each form starts with a "Utility Account Number" field. Below this are three main sections:

- Emergency assistance only:** Includes a checkbox for "Arrears Payment" with an "Amount" field and a "Period" section with "From date" and "To date" fields. Below this is a "Change in status case" section with checkboxes for "Recipient to pay bills directly" (with "Effective date" field) and "Guarantee Payment" (with "Effective date" field).
- Public assistance or SSI:** Includes a checkbox for "Arrears Payment" with an "Amount" field and a "Period" section with "From date" and "To date" fields. Below this are checkboxes for "Vendor Case" (with "Effective date" field), "Guarantee Case" (with "Effective date" field), "Rejected for PA" (with "Other" field), "Moved Date" (with "Effective date" field), and "New Address" field.
- Reopened with no arrears:** Includes a checkbox and a "Reopen date" field, and another checkbox with an "Effective date" field.

At the bottom of the window are "OK" and "Cancel" buttons.

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11. E-Form Updates

The following forms will be revised:

- W-153P, Rental Assistance Unit (RAU) Case Documentation Transmittal; and
- W-153R, Rental Assistance Unit (Applicant/Participant Data Sheet).

The obsolete W-532F (Financial Institution Inquiry) form will be removed from the **Print Forms** window. This form was rendered obsolete in Policy Bulletin # 08-19-OPE (Safeguarding Federal Tax Information).

12. Updates to Match WMS Version 2010.1

The following changes will be made to match the updates in the Welfare Management System (WMS) version 2010.1, which will be released on February 16, 2010:

- Addition of Single Issuance code W7 (Housing Development Cooperative Unit);
- Addition of Income Source Code 75 (Census Income); and
- Addition of Closing Code N67 (Duplicate Assistance in NYS [System Generated]).

Income Source Code 75 (Census Income)

Income Source Code 75 will be added to the response window for the question "Has Other Income?" For Cash Assistance (CA) cases, the income will be budgeted as earned income for CA and exempt for FS. POS will enter a "P" in the program area of the **Budget Individual Income and Needs** window. For FS-only cases, the income will be marked as exempt.