Human Resources Administration
Department of Social Services

FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #10-11-SYS

POS RELEASE NOTES VERSION 14.1

Date: February 11, 2010	**Subtopic(s):** POS
💻 This procedure can now be accessed on the FIAweb.	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**). These release notes can also be found on the HRA Intranet at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79 *Effective February 16, 2010*
💻 Please use Print on Demand to obtain copies of forms.	**Attachment A** POS Release Notes Version 14.1

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*

Distribution: X

Attachment A

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://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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Attachment A

POS Release Notes

Version 14.1 February 16, 2010

1. New Language Access Indicators Window

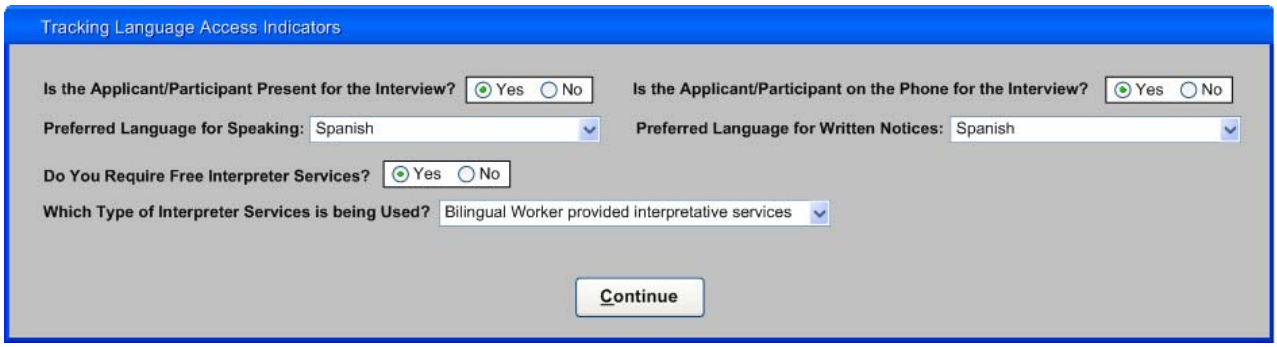
A new Tracking Language Access Indicators screen has recently been added to POS. This new screen allows POS to track the servicing of LESA applicants/participants. The Tracking Language Access Indicators screen will capture the following applicant/participant information:

- 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 **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.

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."

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

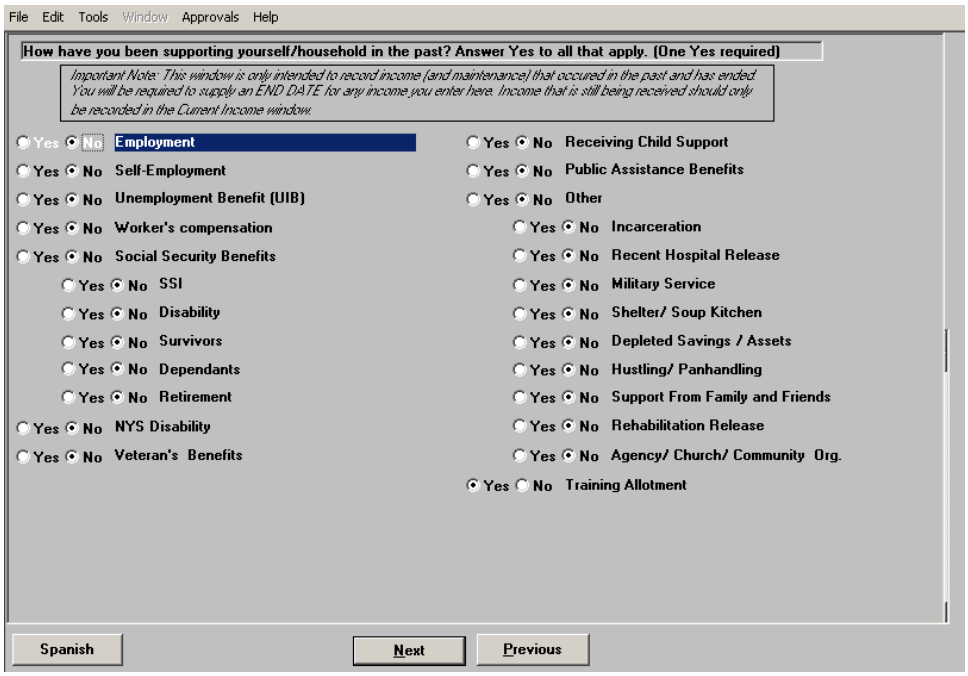
- "A new budget had been authorized on WMS since the last POS saved budget. You must return to the budget window and click on the 'New Budget' button to create a new budget that will include your recent changes and build on the changes made in WMS."

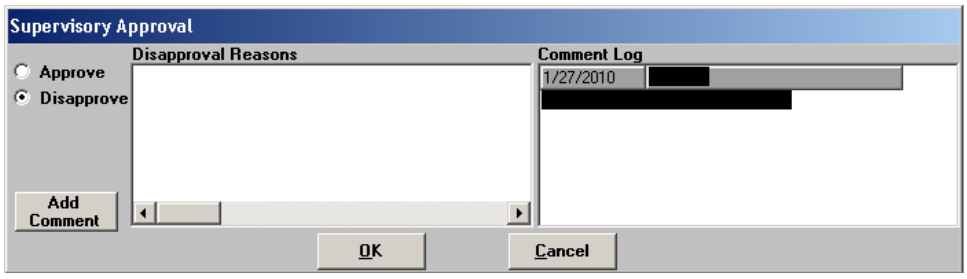
3. New Approval Windows in Approve CA Eligibility Decision

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

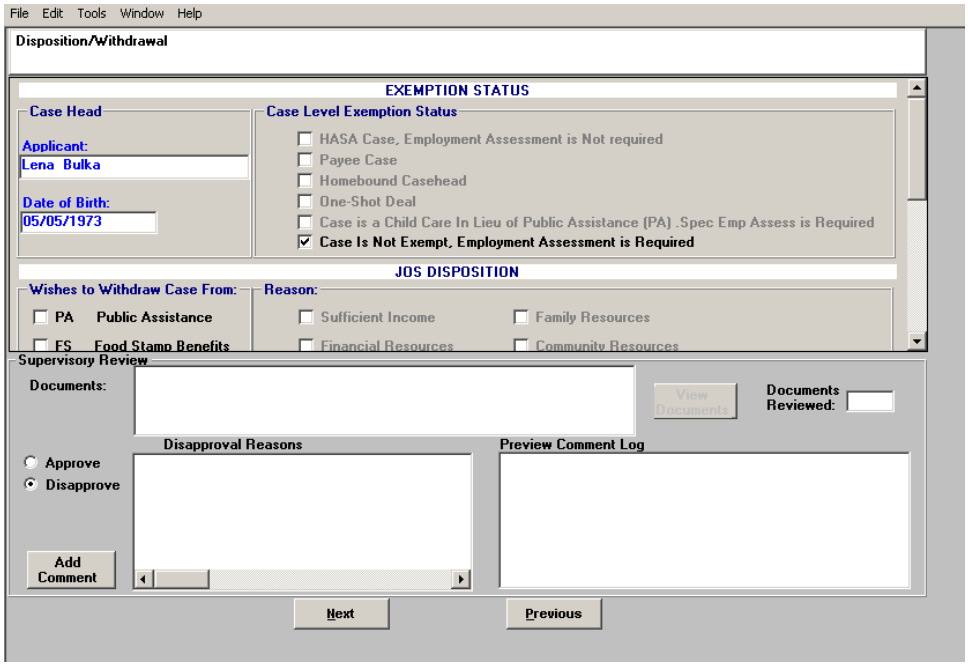
- Past Maintenance
- Disposition/Withdrawal
- Pre-Referrals

Approval window for Past Maintenance

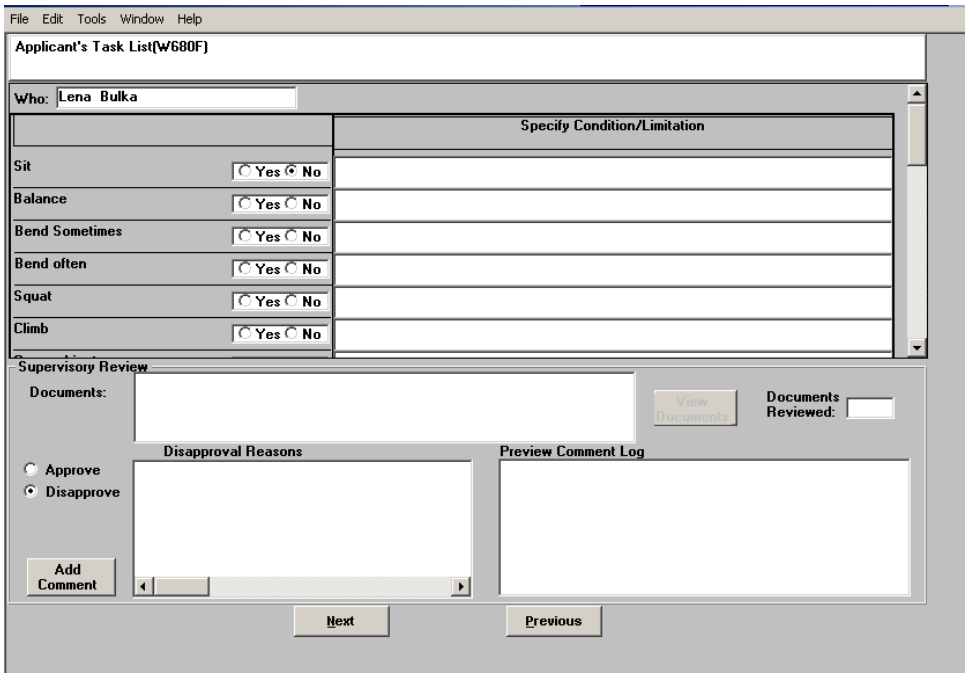




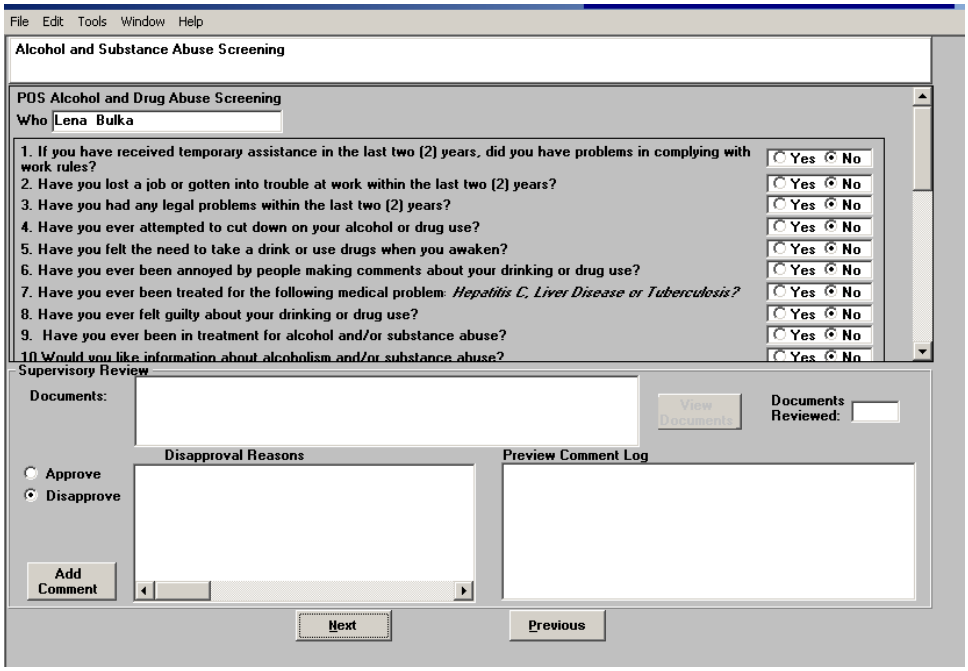
Approval window for Disposition/Withdrawal



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



Approval Window for Alcohol and Substance Abuse Screening



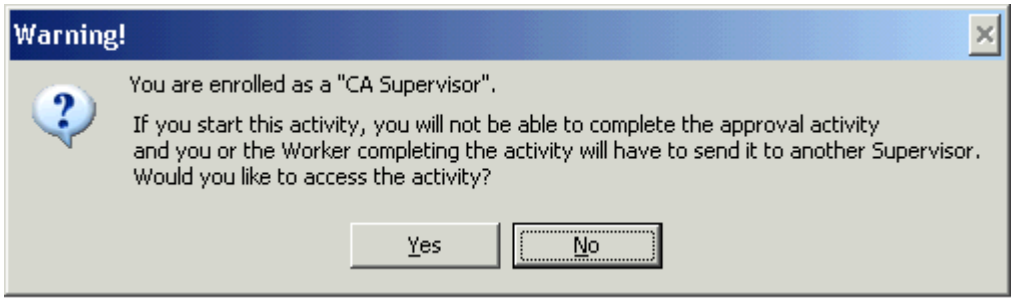
4. Auto-Removal of Utility Liaison Review (ULR) Activities

In order to allow faster loading of the Utility Liaison Queue, ULR activities that have not been not 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:

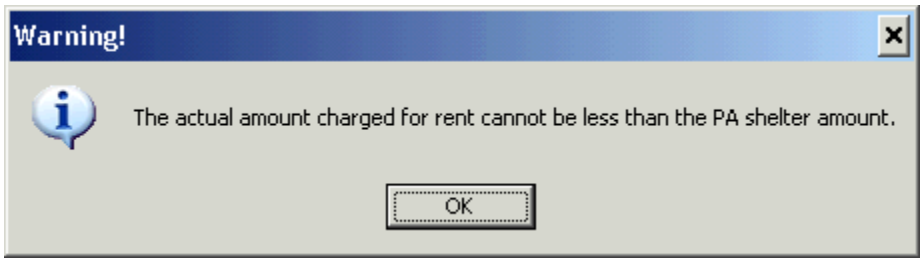


If the Supervisor clicks "Yes", the Worker activity will begin. If the Supervisor clicks "No", they will be returned to their queue.

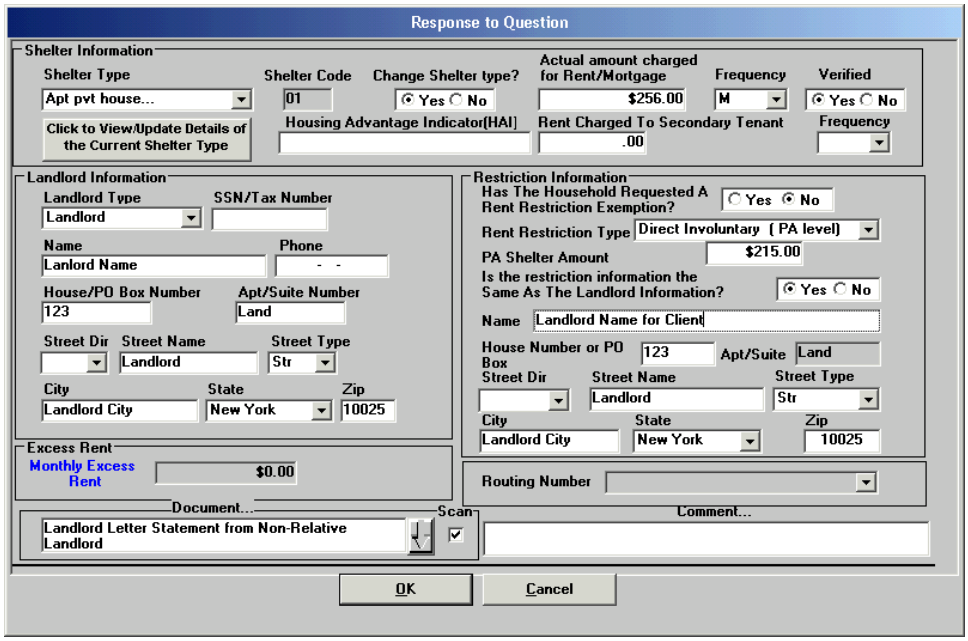
6. New Validation in Rent Expense Window

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



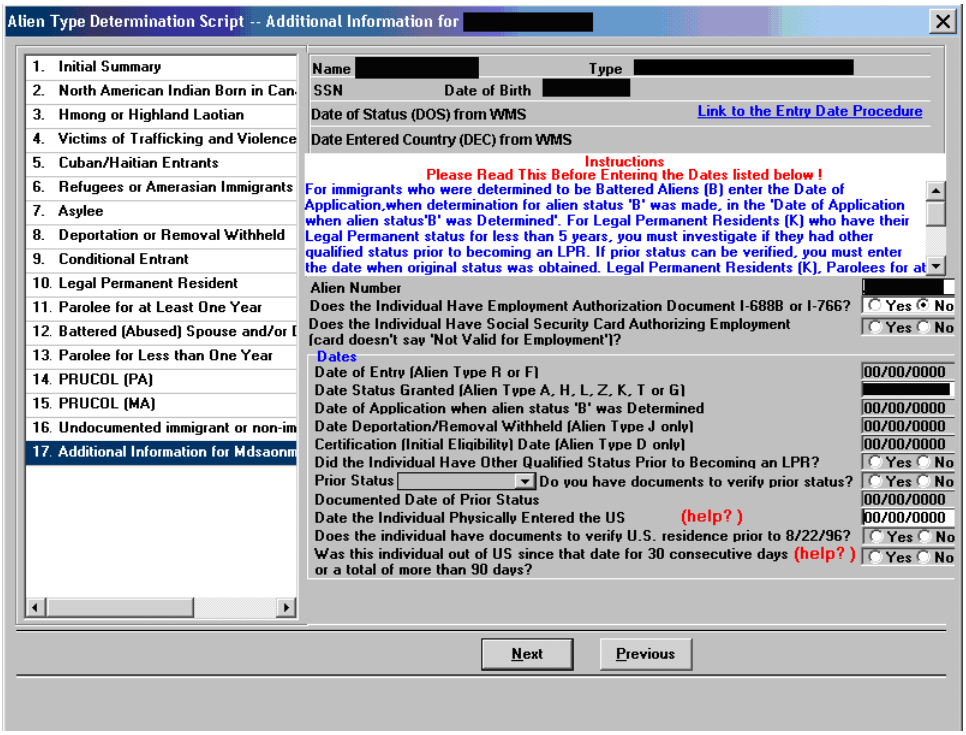
7. Update in Alien Type Determination Script for Alien Type D

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.

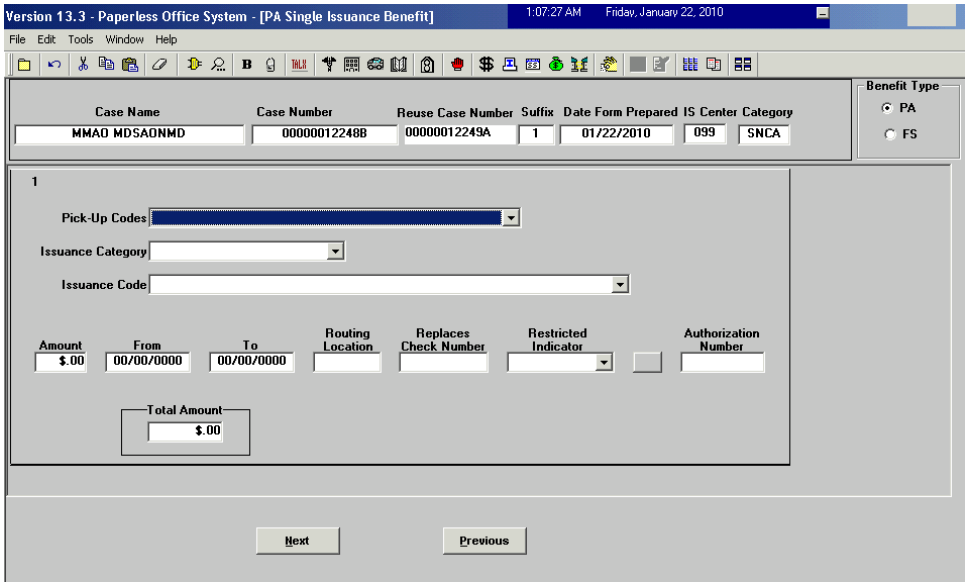
Additional Information window

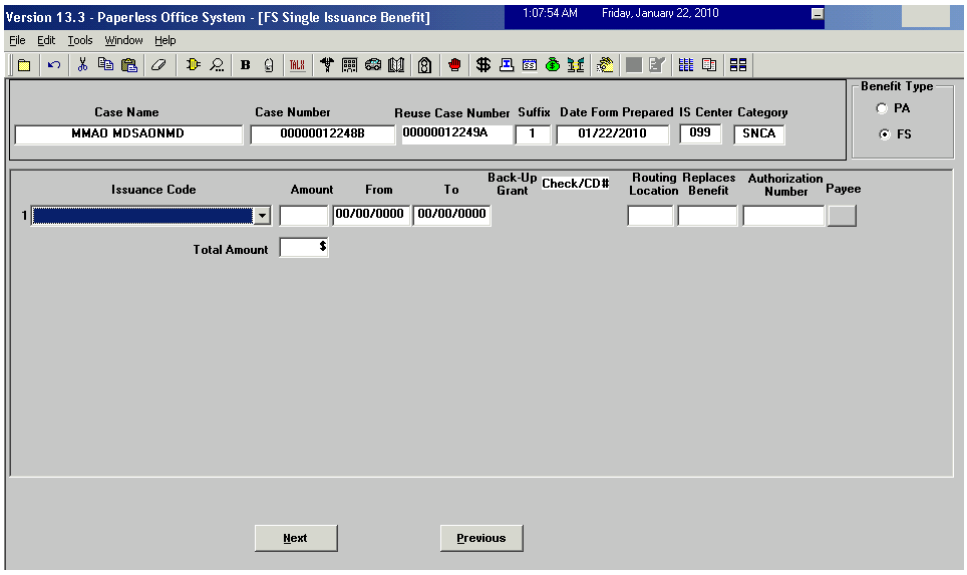


8. Display of Re-Use Case Number in Grant Data Entry Windows

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

Grant Data Entry Windows





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?

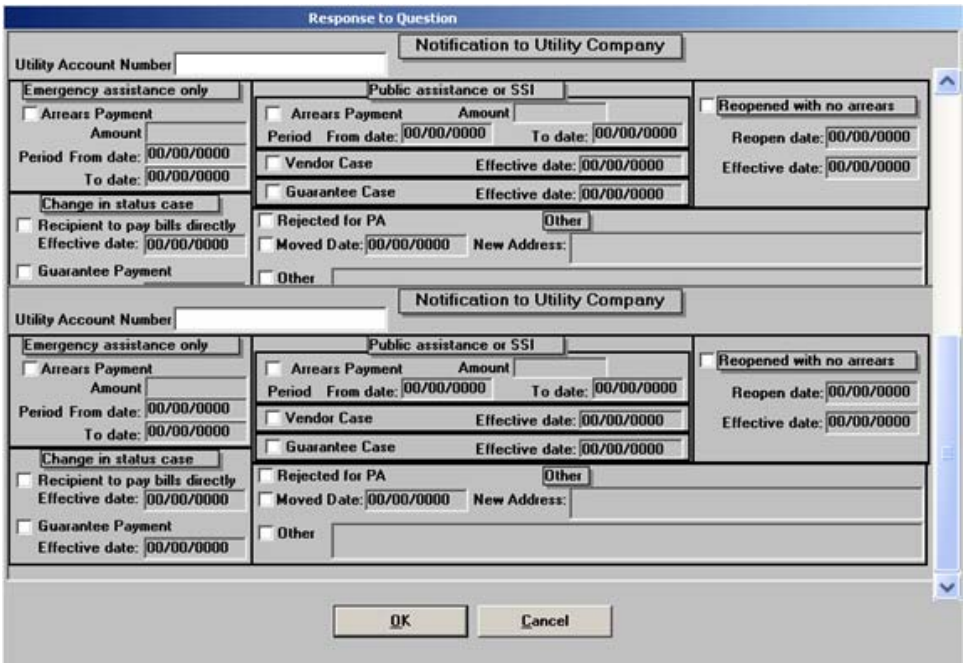
The default frequency will be set to “Weekly” when the Worker answers “Yes” for the following income question:

- 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



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.