



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #10-127-SYS

FS POS RELEASE NOTES VERSION 4.3.1

| Date: December 15, 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 December 20, 2010. Descriptions of the changes can be found in FS POS Release Notes Version 4.3.1 (Attachment A) and the Appendix A - User Guide for Deferral Log for NCA FS Centers (Attachment B).</p> <p>These release notes can also be found on the HRA Intranet at:</p> <p>http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective December 20, 2010</i></p> <p>Related Item:</p> <p>PB #10-105-ELI</p> <p>Attachments:</p> <p>Attachment A FS POS Release Notes Version 4.3.1</p> <p>Attachment B Appendix A - User Guide for Deferral Log for NCA FS Centers</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 4.3.1 December 20, 2010

These Release Notes contain descriptions of changes in FS POS Release 4.3.1 scheduled for December 20, 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

Table of Contents

| | |
|--|---|
| 1. DOCUMENT SUBSTITUTION | 2 |
| 2. ALTERNATE PAYEE REMOVAL..... | 3 |
| 3. VALIDATION RULE FOR THE SELECTION OF PUERTO RICAN BIRTH CERTIFICATES..... | 3 |
| 4. RESETTING THE YES/NO RADIO BUTTONS IN THE POS INTERVIEW WINDOWS | 5 |
| 5. MARU E-APPS UPDATES..... | 5 |
| 6. SPECIAL AUTHORIZATION NUMBER FOR N66 CLOSINGS | 6 |
| 7. EFS CBIC UPDATE | 6 |
| 8. REMINDER- APPENDIX A | 7 |

FS POS Release Notes

Version 4.3.1 December 20, 2010

1. Document Substitution

Currently when the system finds documents in the FileNet repository, POS will identify and insert a document intake activity into the POS case activity. When new documentation is scanned and indexed that was not selected during the interview by the worker, POS will update all document selection windows and Scan checkboxes based on the eligibility factors when the documents are acceptable.

For those **Document Selection** windows where another document was selected and the associated Scan checkbox is left blank, POS will substitute the selected document with the newly indexed acceptable document.

The new **Document Selection** window will update and substitute business rules in all worker activities in addition to the supervisor approval activities.

Example of Document Selection Window: No Document Selected

In the window below, no document was selected for Unemployment Insurance Benefits. If a document is indexed that is acceptable for this eligibility factor, POS will update the **Document Selection** window with the indexed document and select the associated **Scan** checkbox.

| Accepted Document | Scan | NewDoc |
|--|--------------------------|--------|
| UIB Monetary Determination Letters | <input type="checkbox"/> | |
| UIB Notice of Determination of Ineligibility or Disqualifica | <input type="checkbox"/> | |
| RFI Clearance Screen seen | <input type="checkbox"/> | |
| UIB Booklet or Printout | <input type="checkbox"/> | |

OK Cancel

Example of Document Selection Window: Document selected and blank Scan checkbox

In the window below, the document "UIB Monetary Determination Letters" was selected for Unemployment Insurance Benefits, but the **Scan** checkbox was left blank:

- If the "UIB Monetary Determination Letters" document is indexed, POS will select the associated **Scan** checkbox for the document.
- If a different acceptable document is indexed, POS will remove the "UIB Monetary Determination Letters" document; select the newly accepted indexed document in the window and the associated **Scan** checkbox.

| Accepted Document | Scan | NewDoc |
|--|-----------------------------|--------|
| UIB Monetary Determination Letters | <input type="checkbox"/> NR | |
| UIB Notice of Determination of Ineligibility or Disqualifica | <input type="checkbox"/> | |
| RFI Clearance Screen seen | <input type="checkbox"/> | |
| UIB Booklet or Printout | <input type="checkbox"/> | |

OK Cancel

FS POS Release Notes

Version 4.3.1 December 20, 2010

Example of Document Selection Window: Document selected and marked as 'Ready to Scan'

| Accepted Document | Scan | NewDoc |
|--|--|--------|
| UIB Monetary Determination Letters | <input checked="" type="checkbox"/> RS | |
| UIB Notice of Determination of Ineligibility or Disqualifica | <input type="checkbox"/> | |
| RFI Clearance Screen seen | <input type="checkbox"/> | |
| UIB Booklet or Printout | <input type="checkbox"/> | |

OK Cancel

Example of Document Selection Window: Newly accepted Document highlighted and marked as 'Ready to Scan'

If a different acceptable document is indexed, **such as UIB Statement**, POS will remove the "UIB Monetary Determination Letters" document; select the newly accepted indexed document in the window and the associated **Scan** checkbox

| Accepted Document | Scan | NewDoc |
|--|--|--------|
| UIB Monetary Determination Letters | <input type="checkbox"/> | |
| UIB Notice of Determination of Ineligibility or Disqualifica | <input type="checkbox"/> | |
| UIB Check or Copy | <input type="checkbox"/> | |
| UIB Statement | <input checked="" type="checkbox"/> RS | |

OK Cancel

2. Alternate Payee Removal

In order to avoid confusion, POS will remove the Alternate Payee option from the **Relationship** field. Existing individuals with a relationship value of **Alternate Payee** in POS will be converted to a relationship of **Payee**. This will not result in any change in WMS, since both values are equal to Relationship Code **28** (Alternate Payee) in WMS.

The value of "Alternate Payee" will remain in the POS Review Case activity for historical purposes only.

3. Validation rule for the selection of Puerto Rican Birth Certificates

Effective October 30, 2010, all Puerto Rican birth certificates issued before July 1, 2010, by the Puerto Rico Health Department, through its Vital Statistics Record Office, have been invalidated as a result of a new law enacted by the government of Puerto Rico. On July 1, 2010, the Vital Statistics Record Office began issuing new birth certificates with state-of-the-art technology to limit the possibility of document forgery.

FS POS Release Notes

Version 4.3.1 December 20, 2010

If the individual's country of birth is Puerto Rico and they select "Birth/Hospital Certificate" or "Birth Certificate Bureau of Vital Statistics" as the acceptable document for identity, citizenship or relationship, POS will display the following message:

- "The Puerto Rican Birth Certificate issued prior to 07/01/2010 is invalid. If the birth certificate produced is issued on or after 07/01/2010, select the document 'Puerto Rican Birth Certificate issued on or after 7/1/2010'."

In addition, a new document "Birth Certificate from Puerto Rico issued on or after 07/01/2010" has been added in the acceptable document list for the Identity, Citizenship and Relationship document boxes.

Individual Detail window

New document in the acceptable document list for Identity, Citizenship and Relationship

Policy

For additional information, please see Policy Bulletin 10-105-ELI Puerto Rican Birth Certificates.

FS POS Release Notes

Version 4.3.1 December 20, 2010

4. Resetting the Yes/No Radio Buttons in the POS Interview windows

Workers occasionally mistakenly click **Yes** for an interview question and then click the **Cancel** button. If no prior data exists in the **Response** window, this will result in a saved answer of **Yes** for the question in the **Interview** window and missing data in the **Response** window.

In order to prevent this mistake, if the Worker clicks **Yes** for a question, clicks the **Cancel** button and no prior data exists in the **Response** window, POS will change the answer for the question to **No**.

This new edit will run in the following interview windows:

- **Employment Information**
- **Current Income**
- **Resources**
- **Medical**
- **Shelter (Housing) Expenses**
- **Other Expenses**
- **Other Information**
- **Special Grants**

5. MARU E-Apps Updates

Household Composition Update for E-Apps

The **FS Online E-Application Submission (“E-App”) Household Composition** window has been updated to allow a shorter flow for cases that do not require changes. The **Household Screen** will be the first window in the “E-App” process.

New Household Screen window

FS POS 4.3 - [Household Screen] 2:58:45 PM Wednesday, October 13, 2010

File Edit Tools Window Help

Suffix/Individual: 00010006767H01 Inquiry Code: WMS Message via OLTP NQAGGI A0267 UNRESOLVED RFI DATA EXISTS FOR THIS CASE

Control Information: District: 66 Center: Richmond Food Stamp Ct Worker: WMCJT Case Number: 00010006767H

Present Address: Street Number: 1290 Direction: INone Name: 5TH AVE Type: Apt #: City: STATEN ISLAND State: NY Zip Code: 10310-0000 Phone: 518-605-9329

Suffix Information: Active (selected) Applying No FS Suffix: 1 FS Status: AP No FS IPV or Sanction Found Working Families: No FS # AC: 0

Suff: 1 Case Name: SMITH PERSON 1

Case Member Information:

| Suff Ln | CIN | Name | Relation | DOB | SSN | Val | Sex | Citizen / National | FS AFIS |
|---------|----------|-------------------|-----------------|------------|-------------|-----|-----|-------------------------------------|---------|
| 1 1 | SZ92127T | Smith Person1 C | Casehead | 01/01/1960 | 127-54-0855 | 1 | F | <input checked="" type="checkbox"/> | AP |
| 1 2 | SZ92117X | Jones Personsev J | Legal Spouse | 02/02/1955 | 125-36-2589 | 1 | M | <input type="checkbox"/> | AP |
| 1 3 | SZ92107B | Jones Personthi M | Non-Legal Union | 12/12/1966 | 125-58-6547 | 1 | M | <input type="checkbox"/> | AP |

Next Previous Update H/H Comp Or Address

The worker will be able to view a summary of the household information submitted by the applicant. If no changes are required, the worker can click on the **Next** button to directly access the **Center Selection** window.

FS POS Release Notes

Version 4.3.1 December 20, 2010

If changes are required, workers will click on the **Update H/H Comp** or **Address** button to access the following:

- Casehead and Adults in Household
- Children in Household
- Food Stamp Household Composition
- Address Information

The **Additional Suffix Level data** window will be removed.

Removal of Application Referral

The application referral activity has been removed from the MARU E-Apps process effective November 2010.

6. Special Authorization Number for N66 Closings

For closings with code **N66** (Duplicate Assistance, Non-AFIS Interstate), POS will send a special authorization number **7777792**. The **N66** Closing code was used for FS suffix-level reason code. Now the **N66** Closing code will also be used as an individual FS reason code and POS will send the same special authorization number **7777792** for the individual.

7. EFS CBIC Update

The **CBIC** window now displays during the Expedited Food Stamp flow when a grant is being issued so that the CBIC Case (cases where the payee in CBIC is not the payee on the CA case) will be properly routed to the supervisor for correct processing. The supervisor will process the CBIC update and complete the EFS process.

The **CBIC Payee Status** window currently appears after the TAD window in the EFS Issuance activity when the case is eligible for Expedited Food Stamps (EFS) and an old case number is reused. This window will now appear for all EFS-eligible cases, including cases where the application registration ("app-reg") will become the permanent case number.

CBIC Payee Status Window

Re-use Case Number: [] Suffix: [] Category: [] FS Status: []

Casehead/Payee name: [] Relationship Code: 01

Casehead/Payee CIN: [] CBIC Payee CIN: []

Is the "Casehead/Payee CIN" listed above the same as the "CBIC Payee Cin"? Yes No

If Open TI is down, go to WMS Screen WIDCCH (Case Number PA/FS Payee Inquiry) using the case number selected in the Case Number Re-Use window to retrieve the CBIC Payee CIN and answer the question above.

MESSAGE

The SDI FS Grant should pass the WMS SDI Payee edit.

Next Previous

FS POS Release Notes

Version 4.3.1 December 20, 2010

POS retrieves the Casehead/payee CIN of the case number selected in the **Case Number Re-Use** window from the WMS CBIC Screen **WIDCCH** (Case \$ PA/FS Payee Inquiry). POS will compare the Casehead/Payee CIN and CBIC Payee CIN and will answer the question, "Is the "Casehead/Payee CIN" listed above the same as the "CBIC Payee CIN?"

- If they are the same POS will activate the **Yes** radio button, if they are not the same POS will activate the **No** radio button.
- If the answer is **No** the worker is instructed to prepare a CBIC Update form to change the CBIC payee to match the Casehead/Payee.

8. Reminder- Appendix A

- Appendix A, Deferral Log for NCA FS Centers

Deferral Log for NCA FS Centers

User Guide
Paperless Office System
December 2010

Table of Contents

OVERVIEW _____ **3**

BUSINESS DETAILS _____ **3**

NEW OPTION ON POS PORTAL _____ **3**

 ACCESS CONTROL _____ **4**

DEFERRAL LOG _____ **5**

 INSTRUCTIONS _____ **5**

 DATA RETRIEVED _____ **5**

 DEFERRAL LOG WINDOW _____ **6**

 RETRIEVAL _____ **7**

 FILTERS FOR PRINTING AND DISPLAY _____ **7**

 SUMMARY _____ **8**

 LOG DATA _____ **8**

 LOG DATA (CONTINUED) _____ **9**

 PAGE NAVIGATOR _____ **9**

 BUTTONS _____ **9**

 HELP-ABOUT WINDOW _____ **10**

 REFERRAL WINDOW _____ **11**

 ASSIGN PROCEDURE _____ **11**

 CASE CLOSING PROCEDURE _____ **12**

 CLOSING VALIDATIONS _____ **12**

Overview

The web-based **Deferral Log** will allow FS centers to close cases in SI status that were deferred for documentation and failed to return the required documents.

Business Details

The **Deferral Log** meets the following business needs and security requirements:

1. Displays all cases in single issue (“SI”) status for a selected timeframe. Displays all cases closed using closing code **Y29** (Failure to Provide Verification-Expedited FS (No Notice) from the FS SI Deferral Log for a selected timeframe.
2. Allows a Supervisor or CA III to route a case to an Eligibility Specialist and updates all appropriate FS POS queues and tables automatically.
3. Generates a transaction to WMS that includes FS closing code **Y29** when the case will be closed for failure to return with documentation.
4. Allows the user to search by file date, case number or case name.
5. Allows the user to select the columns to display and print.
6. Displays and print filtered output based on the user’s selection.
7. Show all case data for a single case row on the same printed page.
8. Allows Change Center staff to access the Log for multiple centers.
9. The user’s WMS login information is used to confirm access.
10. Applies security settings according to the user’s POS title.
11. The closing activity will appear in the POS case activity history as **Y29**.

New option on POS Portal

There will a link for the **NCA FS Deferral Log** on the POS Portal:

Os\Portal\Default.aspx

NYC
Human Resources
Administration
Department of
Social Services

Welcome to POS (Paperless Office System)

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

NCA FS Application Log
NCA FS Recertification Log
NCA FS Deferral Log
NCA FS Calendar

POS (Paperless Office System)

POS Management Console
POS Release Notes
Child Care System (ACCIS)
Public Transportation Automated Reimbursement (PTAR)

HRA One Viewer
Front Door Reception (FRED)
FIA IVRS Telephone Recert Reporting System (IVRS)
FS Employment System (FSES)

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

Access Control

After clicking on the **Deferral Log** link, staff will enter their WMS ID, password and center and click the **Login** button:

NYC Human Resources Administration
Department of Social Services

login **NCA FS Deferral Log**

Enter your WMS User ID and Password to login

User ID

Password

FS Sites North Brooklyn Food Stamp Center (F26)

LOGIN CLEAR

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

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

The **Deferral Log** is available for users in the following titles:

- Central Office Reviewer (57)
- FS Clerk (61)
- FS Eligibility Specialist (62)
- FS Supervisor (63)
- FS Assistant Site Manager (64)
- FS Site Manager (65)
- Deputy Regional Manager (67)
- Regional Manager (68)
- FS CA III (70)
- FS IT Member (99)

If a user with a disallowed title attempts to access, the following error message will appear:

“Your POS title is not authorized for usage of this tool. Please contact your enrollment coordinator if you should have access to this tool.”

The functionality is available to Home Center users for their own center. For example, if the user is enrolled at Melrose (F40) and they attempt to access the Deferral Log for F40, they will be allowed to access. If the user from F40 attempts to access the Deferral Log for Crotona (F46) and they are enrolled at F46, they will receive the following error message:

Attachment B

FS POS Release Notes 4.3.1 – Appendix A - User Guide for Deferral Log for NCA FS Centers

“Your user ID is not enrolled for the selected center. Please contact your enrollment coordinator if you should have access to this center.”

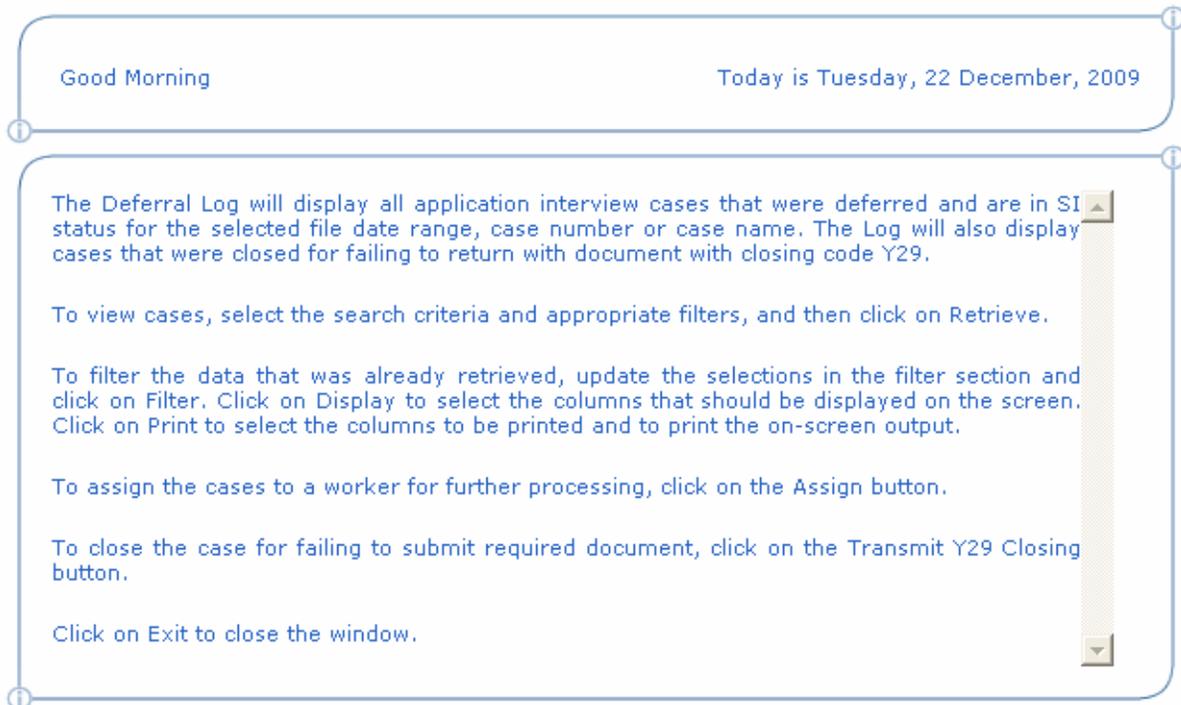
When multiple users have opened the log, the following message will appear:

“The Deferral Log is open by _____ (names).”

Deferral Log

Instructions

The instructions popup window will appear each time the window is opened. The **Deferral Log** window will open. The instructions window will have the following text:



Continue

Data Retrieved

The log will retrieve all cases that are currently in “SI” status and that currently appears in the FS Application Tracking report within the selected timeframe and filters. The log will also retrieve all cases for the time frame that were saved as transmitted for closing.

For all cases displayed in the log, FS POS will also confirm whether documents have been indexed or scanned since the deferral date. The log will allow the FS center to close these cases using a simplified interface and transaction.

Attachment B

FS POS Release Notes 4.3.1 – Appendix A - User Guide for Deferral Log for NCA FS Centers

Deferral Log Window

File Retrieve Print Filter Display Summary Help About

Search By

File Date

Select Date

Filed:

Specify Range

From:

To:

Case Number

Case Name

Interview Type Filter

In Center

Telephone

Case Status

SI

CL

| <u>Case No</u> | <u>Case Name</u> | <u>File Date</u> | <u>Deferral Due Date</u> | <u>Valid to</u> | <u>WMS Case Status</u> | <u>Indexed Document</u> | <u>Scanned Document</u> |
|----------------|------------------|------------------|--------------------------|-----------------|------------------------|-------------------------|-------------------------|
| | | | | 12/01/2009 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |

Page 1 of 2

Transmit Closing Assign Exit

Retrieval

The **Deferral Log** is retrieved according to the file date, case number or case name of the case. The user can specify a specific date or select a date range. The report output can be filtered by interview type and case status through the **Filter** menu option.

The screenshot shows a software window with a menu bar containing: File, Retrieve, Print, Filter, Display, Summary, and Help About. The main area is divided into sections:

- Search By:**
 - File Date
 - Select Date: Filed:
 - Specify Range: From: To:
 - Case Number:
 - Case Name:
- Interview Type Filter:**
 - In Center
 - Telephone
- Case Status:**
 - SI
 - CL

Filters for Printing and Display

The on-screen and printed output for the log can be customized using the **Print** and **Display** menu options:

Print Menu

The Print Menu dialog box has a title bar "SELECT COLUMNS" and a list of items with checked checkboxes:

- Deferral Due Date
- Valid To
- WMS Status
- Indexed Document
- Scanned Document
- Telephone
- Assigned
- Assigned To Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

Below the list is a section titled "TO PRINT" with two radio buttons: Entire Report and Current Page. At the bottom are "OK" and "Cancel" buttons.

Display Menu

The Display Menu dialog box has a title bar "SELECT COLUMNS" and a list of items with checked checkboxes:

- Deferral Due Date
- Valid To
- WMS Status
- Indexed Document
- Scanned Document
- Telephone
- Assigned
- Assigned To Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

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

Summary

A summary view allows the user to view the number of cases in SI or CL status.

The screenshot shows a web page dialog titled "Deferral Log - Summary -- Web Page Dialog". It contains a "Totals:" section with three rows of data:

| Totals: | |
|---|----|
| Total deferred cases in SI Status | 17 |
| Total deferred cases in CL Status | 0 |
| Total deferred cases in SI or CL status | 17 |

At the bottom of the dialog is an "OK" button.

Log Data

The following data is available in the log:

- Case Number
- Case Name
- File Date
- Deferral Due Date
- Valid To
- WMS Case Status
- Indexed Document

| <u>Case No</u> | <u>Case Name</u> | <u>File Date</u> | <u>Deferral Due Date</u> | <u>Valid to</u> | <u>WMS Case Status</u> | <u>Indexed Document</u> | <u>Scanned Document</u> |
|----------------|------------------|------------------|--------------------------|-----------------|------------------------|-------------------------|-------------------------|
| | | | | 12/01/2009 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |
| | | | | 01/01/2010 | SI | No | No |

Log Data (continued)

- Scanned Document
- Telephone
- Assigned
- Assigned To – Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

| <u>WMS Case Status</u> | <u>Indexed Document</u> | <u>Scanned Document</u> | <u>Telephone</u> | <u>Assigned</u> | <u>Assigned To Activity</u> | <u>Pending Saturday TAD</u> | <u>Y29 Closing Transmitted</u> | <u>Pending Transactions</u> |
|------------------------|-------------------------|-------------------------|------------------|-----------------|-----------------------------|-----------------------------|--------------------------------|-----------------------------|
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | No | |
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | No | No |
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | No | No |
| SI | No | No | In-Center | No | | No | Yes | No |
| SI | No | No | In-Center | No | | No | Yes | No |

Page Navigator

The log will display ten (10) cases per page. To view additional pages, the user must use the page navigator:

- The first left arrow with a line allows the user to view the first page of data.
- The second left arrow allows the user to view the previous page.
- The first right arrow with a line allows the user to view the last page.
- The second right arrow allows the user to view the next page of data.



Buttons

Three buttons will appear at the bottom of the log:

- Transmit Closing
- Assign
- Exit

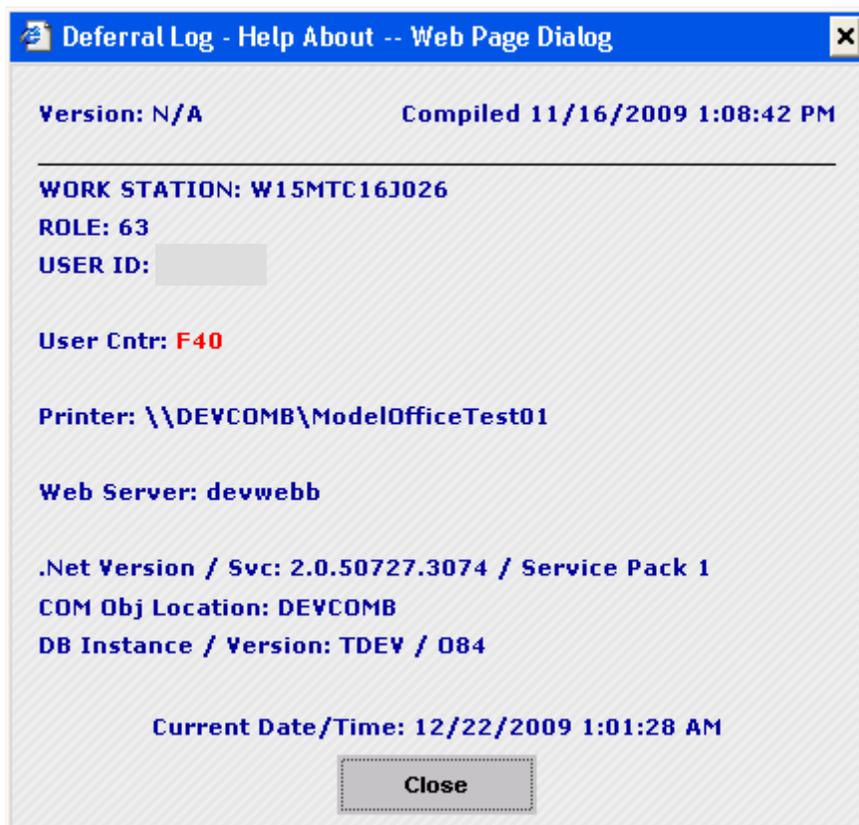


Attachment B

FS POS Release Notes 4.3.1 – Appendix A - User Guide for Deferral Log for NCA FS Centers

Help-About Window

This window allows the user to provide information to MIS about their PC and setup and will allow faster and better troubleshooting. It should be included in error reports submitted to the **POS Help Desk**.



Attachment B

FS POS Release Notes 4.3.1 – Appendix A - User Guide for Deferral Log for NCA FS Centers

Referral window

When the user clicks on the **Assign** button, the **Referral** window will appear. The list of workers from the user's site will appear by default.

Deferral Log: Referral Action -- Web Page Dialog

Selected Case

Case Number [REDACTED] Case Name [REDACTED]
Casehead CIN [REDACTED] Casehead Name [REDACTED]

Center [F40]

FS Supervisor
FS Site Manager
FS Site Manager
FS Supervisor
FS Site Manager
FS Supervisor
FS Supervisor
FS Supervisor
FS CA
FS Eligibility Specialist
FS Assistant Site Manager
FS Site Manager
FS Supervisor
FS Supervisor
FS Supervisor
FS Supervisor

Enter Comments, If Any

Close

Individuals with the following titles will appear in the **Referral** window:

- FS Eligibility Specialist (62)
- FS Supervisor (63)
- FS Assistant Site Manager (64)
- FS Site Manager (65)
- FS CA III (70)

Assign Procedure

The FS POS queues will be updated when the **Refer** window is closed:

- If a pending FS Application Interview activity is found, the activity will be routed to the queue of the selected individual.
- If no pending FS Application Interview is found, a FS Change Case Data activity will be routed to the queue of the selected individual.

Attachment B

FS POS Release Notes 4.3.1 – Appendix A - User Guide for Deferral Log for NCA FS Centers

Case Closing Procedure

When the user clicks on the **Transmit Closing** button, the log will confirm whether the case can be closed, whether there is a pending transaction in WMS, and whether documents were indexed since the interview.

If the case is closed, an activity named **Y29** will appear in the case activity history for the case.

Closing Validations

If the case is no longer in SI status in WMS, the log will display the following error message:

“The case is no longer in SI status in WMS. The case closing cannot be completed.”

If the case is in SI status and there is a pending transaction in WMS, the log will display the following error message:

“There is a TAD pending in WMS for this case. The closing cannot be transmitted until the TAD is processed. Please return to the case once the TAD has processed.”

If the case is in SI status and the Indexed Documents column has a value of “Yes”, the log will display the following warning:

“Warning! Documents have been indexed for the case since the interview. Please confirm whether the required documentation was submitted before closing the case. Would you like to proceed with the case closing?”