

POS Release Notes Final

Version 14.1.1 April 19, 2010

These Release Notes contain descriptions of changes in POS Release 14.1.1 scheduled for April 19, 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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1. Updates to the Single Issue Grant Requests and Issuance Task List

Currently, JOS/Workers use the Single Issue Grant Requests Task List to record the request by an applicant/participant for a Single Issuance (SI) special grant and the decision made on the special grant request. This task list will be renamed **SI Grant Requests and Issuance**.

The following functional areas will be integrated into the task list:

- EAF/E-SNA Eligibility Determination
- EAA Eligibility Determination
- Repayment Agreement Worksheets
- Grant Request Reconciliation and Decision
- Grant Data Entry
- Grant Form Generation
- Grant Decision Notices
- Repayment Agreements
- Grant Transmission
- Single Issuance Grant Form Printing Queue
- Levels of Approval

The Task List appears in the POS application, recertification, change case data and reopening activities and includes the following tasks:

- Task 1 – SI Grant Needs Identified in Interview
- Task 2 – Recording Special Grant Requests
- Task 3 – Request Details
- Task 4 – EAF/E-SNA and EAA Eligibility Determination
- Task 5 – Client Forms and Worksheets
- Task 6 – Outstanding Requests
- Task 7 – Grants Data Entry
- Task 8 – Notices and Repayment Agreements

The following E-Forms will be integrated into the Task List:

- W-137A, Request for Emergency Assistance or Additional Allowance (For Participants Only)
- W-113A, Documentation Request Form (Return Document for Special Grant)
- M-3g, Notice to Report to Center
- W-147F, Shelter Arrears Repayment Agreement Worksheet
- W-147XX, Utility Arrears Repayment Agreement Worksheet
- LDSS-2921A, Emergency Assistance for Adults Applicant Statement (EAA cases)
- W-137B, Action Taken on Your Request for Emergency Assistance or Additional Allowance (For Participants Only)
- W-145HH, Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (for Applicants Only)
- M-15f, Agreement To Repay Cash Assistance (EAA cases)
- W-145TT, Determination of Eligibility for Emergency Assistance to Needy Families (EAF)
- W-147H, Emergency Safety Net Assistance (ESNA) Shelter Arrears Repayment Agreement
- W-147KK, Emergency Assistance to Needy Families (EAF) Agreement to Repay Excess Shelter Arrears
- W-147PP, Information About Repaying the Department of Social Services for Rental Arrears
- W-147X, Utility Arrears Repayment Agreement
- W-147NN, Information About Repaying the Department of Social Services for Utility Arrears

For full details, please see the **Policy Directive for Single Issuance Requests in POS**.

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Revised SI Grant Requests and Issuance Task List

Version SI-10 - Paperless Office System - [SI Grant Requests and Issuance] 12:11:59 AM Wednesday, February 24, 2010

File Edit Tools Window Help

Instructions

The list below shows the tasks that are part of this activity. You should do the tasks in the order presented. Some tasks are required; you must click the GO button and do the task before going on to the next task or completing the activity. Other tasks are not required and will have a button label of NA. All required tasks must be completed before you can complete the activity.

SI Grant Request

1.	Task Name: SI Grant Needs Identified in Interview Action: This Task must be completed before proceeding. Status: This Task is Next	GO
2.	Task Name: Record Special Grant Requests Action: Complete the required tasks above before doing this task Status: Not Done Yet	Wait
3.	Task Name: Requests Details Action: Complete the required tasks above before doing this task Status: Not Done Yet	Wait
4.	Task Name: EAF, E-SNA and EAA Financial Eligibility Determination Action: Complete the required tasks above before doing this task Status: Not Done Yet	Wait
5.	Task Name: Print Forms for Client to Sign Action: Complete the required tasks above before doing this task Status: Not Done Yet	Wait

Next Previous

Version SI-10 - Paperless Office System - [SI Grant Requests and Issuance] 12:25:31 AM Wednesday, February 24, 2010

File Edit Tools Window Help

Instructions

The list below shows the tasks that are part of this activity. You should do the tasks in the order presented. Some tasks are required; you must click the GO button and do the task before going on to the next task or completing the activity. Other tasks are not required and will have a button label of NA. All required tasks must be completed before you can complete the activity.

SI Grant Request

4.	Task Name: EAF, E-SNA and EAA Financial Eligibility Determination Action: This Task must be completed before proceeding. Status: Completed	GO
5.	Task Name: Print Forms for Client to Sign Action: This Task must be completed before proceeding. Status: Completed	GO
6.	Task Name: Outstanding Requests, Documentation/Verification and Referrals Action: This Task must be completed before proceeding. Status: This Task is Next	GO
7.	Task Name: Grants Data Entry Action: This Task must be completed before proceeding. Status: This Task is Next	GO
8.	Task Name: Print Notices and Repayment Agreements Action: Complete the required tasks above before doing this task Status: Not Done Yet	Wait

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Single Issue Grant Printing Queue

Version SI-10 - Paperless Office System - [Print Queues] 1:13:46 AM Wednesday, February 24, 2010

File Edit Tools Window Help

Select the case below to view the list of forms that must be printed. To print the forms, click on the 'Print Selected Forms' button.

Single Issue Grant and Recoupment Form Printing Queue

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Orig Ctr	S
[Empty Table]							

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
[Empty Table]			

Print Selected Forms Refresh Close

For additional details on the **Single Issue Grant Printing Queue**, please see **Appendix A (Single Issue Grant Printing Queue)**.

2. BEV Referral Update

The **BEV Referral** window will be updated as follows:

- POS will systemically determine whether a BEV referral is required;
- Unnecessary fields will be removed from the window;
- Additional connections to BEV MAPPER will be added to determine whether a referral was completed outside of POS and whether a recommendation was entered by BEV;
- Remove improper cancellations of the BEV appointment; and
- Revised messages when there are no in-office appointments available for the center.

Removed Fields

The following fields will be removed from the window: Previous BEV Referral, Previous BEV Referral Date, Previous BEV Recommendations, Previous BEV Deny Reason, and Case Change since Last BEV Ref, Worker Name and Interview Date.

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Current window

Revised window

BEV Referral Requirement for Reapplicants

The determination for the BEV referral requirement for Cash Assistance reapplicants will be fully automated. POS will determine whether the case is a reapplication. If the case is a reapplication, the answers entered in the **Reason for Re-Application** window will be used to determine whether there are changes to the case. If there are no changes, POS will also connect to BEV MAPPER via Open TI to retrieve the latest BEV recommendation. For reapplications without changes and with a BEV determination indicating that the applicant is eligible, the BEV referral will not be required.

For additional details on the BEV requirements for reopened or reapplying cases, please see **Policy Bulletin 08-105-ELI** (Reminder Regarding BEV Referrals for Reopened or Reapplying Cash Assistance Cases).

New Fields

A new question will allow the Worker to indicate whether the case action is a re-opening due to Fair Hearing, Aid to Continue (ATC) or agency error. For these cases, the referral will not be required.

A new question will allow the Worker to indicate whether the case will be rejected because the applicant is ineligible for Cash Assistance. For these cases, the referral will not be required.

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Existing Referral or Recommendation

POS will connect directly to BEV MAPPER via Open TI to determine whether an appointment was already scheduled directly in MAPPER.

POS will connect directly to BEV MAPPER via Open TI to determine whether a recommendation was entered for the case by BEV.

New Cancellation Edit

A new edit will only allow cancellation of the appointment for applicants who are withdrawing their Cash Assistance application.

For additional Information please refer to **Appendix B, Bureau of Eligibility Verification Process.**

3. Changes to AFIS Finger Imaging Referral window

The W-519 form will be updated to change the instruction text and remove two checkboxes. As a result, the instructions will be updated in the data entry window. In addition, labels will be updated in the window and one radio button will be removed.

The following updated instructions will appear on the window:

Finger Imaging Notice (Form W519)

State regulations require all case members who are 18 years of age and older and minor heads of households applying for or seeking recertification of Cash Assistance and/or Food Stamps, including applicants for emergency assistance, to be finger imaged.

An individual is exempt from this requirement if they fall into one of the following categories:

- Adult payees on "child only" cases (e.g. a grandparent who is applying for/receiving Cash Assistance on behalf of his/her grandchild) (unless Non Cash Assistance Food Stamp [NCA FS] household member).
- Individuals physically unable to comply with this requirement because of permanent injury or disability.
- Applicants/Participants under 18 years of age unless they are payees for their own cases or suffixes.
- SSI (F15) or Residential Treatment (F61) cases.
- SSI recipients who are applying for a one-shot deal Emergency Assistance to Adults (EAA) grant (only if all members of the household are in receipt of SSI).
- Congregate Care Facility residents.
- Field Visit applicants/participants.
- NCA FS applicants/participants who are sanctioned, disqualified, or ineligible for Food Stamps (such as ineligible aliens, only if the household's ineligibility has been established through a review of documentation).

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Revised Finger Imaging – AFIS window for PA cases

Version SI-10 - Paperless Office System - [Finger Imaging - AFIS] 12:38:28 PM Tuesday, November 13, 2007

File Edit Tools Window Help

Finger Imaging Notice (Form W519)
State regulations require all case members who are 18 years of age and older and minor heads of households applying for or seeking recertification of Cash Assistance and/or Food Stamps, including applicants for emergency assistance, to be finger imaged.

An individual is exempt from this requirement if they fall into one of the following categories:

- Adult payees on "child only" cases (e.g. a grandparent who is applying for/receiving Cash Assistance on behalf of his/her grandchild) (unless Non Cash Assistance Food Stamp [NCA FS] household member).
- Individuals physically unable to comply with this requirement because of permanent injury or disability.
- Applicants/Participants under 18 years of age unless they are payees for their own cases or suffixes.
- SSI (F15) or Residential Treatment (F61) cases.

The applicant is not present at the interview

I agree to be finger imaged.

I am exempt from finger-imaging because I meet one of the above exemption criteria.

I do **not** agree to be finger imaged. I am applying/seeking recertification for Cash Assistance and/or Food Stamps and realize that, by not agreeing to be finger imaged, I will become ineligible and my case will be rejected or closed as appropriate.

I do **not** agree to be finger imaged. I am applying/seeking recertification for Food Stamp Benefits Only and realize that, by not agreeing to be finger imaged, I and my entire Food Stamp Household will become ineligible and my case will be rejected or closed as appropriate.

Sanction Mother

Done Print Previous

The Supervisory Approval & Review activity will also reflect the AFIS changes.

4. Updates to Non-Food Emergency Window

The Non-Food Emergency/Special grant window will now allow the entry of comments.

Current Non-Food Emerg/Special Grant window

Version 12.3.1 - Paperless Office System - [Non-Food Emerg/Special Grant] 2:40:01 PM Tuesday, December 30, 2008

File Edit Tools Window Help

Case No	Suffix	Center	Unit Worker	Case Name
000000106010	T	040	00123	Address Mail

Please Select any additional problems being reported by the applicant

- Has no Job
- Need Child Care
- Need Foster Care
- Need to Establish Paternity
- Need Child Support
- Pregnant
- Drug/Alcohol Problem
- Pending Eviction
- No Food
- Recently Lost Income
- Serious Medical Problem
- Can no Longer Stay with Relative(s)/Friend(s)
- Victim of Domestic Violence
- Fire or Other Disaster
- No Place to Stay/Homeless
- Urgent Personal/Family Problem
- Fuel or Utility Shutoff

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Current Activity: Non-Food Emerg/Special Grant MAIL ADDRESS (000000106010)

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Revised Non-Food Emerg/Special Grant window

The Worker will be able to access additional drop down menus to select a new problem. If additional screen space is required, a scroll bar will allow the Worker to access the additional problem spaces. The Worker will not be able to enter a comment until a problem has been selected.

The Supervisory Approval window will be updated to display the problems and comments entered in the Site Determination window, IN/EFS Issuance and Non-Food Emergency windows.

5. New Edit for Total Resource window

A new edit will be added to the resource window to prevent the worker from inputting money in the total resource window without specifying the resource.

Error Message Text

If all questions in the **Resources** window have an answer of "No" and there is no value in the Total Resource fields or there is a value greater than zero in the Total Resource fields, display the following error message:

"Warning: If the applicant/participant has countable resources, please answer 'Yes' for the appropriate resource question(s). If the applicant/participant does not have countable resources, please enter a total resource amount of zero (0) in the Total Resource window."

Activities

This new edit applies to the following activity types when the Worker clicks the **Next** button in the **Resources** window or exits the window using the Screen Pick list:

- CA Application Interview, EC – CA Application Interview, CA Recertification Interview, EC – CA Recertification Interview, CA Change Case Data, EC – CA Change Case Data, Re-open a Case, EC – Reopen a Case

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Resources window

Total Resources window

Resource Type	Amount
CASH ON HAND	\$0.00
CHECKING ACCOUNT	\$0.00
CREDIT UNION	\$0.00
SAVING ACCOUNT	\$0.00
MOTOR VEHICLE (Countable FS Resource Amount)	\$0.00
MOTOR VEHICLE (Countable PA Resource Amount)	\$0.00
TOTAL AVAILABLE AND COUNTABLE RESOURCES(PA)	\$0.00
TOTAL AVAILABLE AND COUNTABLE RESOURCES(FS)	0

6. Posting Action Code 94NR in NYCWAY

When a child is found with a non-custodial parent, POS connects and transmits data to the OCSE database. The OCSE database then runs business rules to determine whether a child support referral is necessary. When the OCSE database returns a value of "No referral required", POS saves and displays the result for the Worker in the response window.

For these cases, POS will send action code **94NR** (OCSE No Referral) to NYCWAY when the Worker clicks the **Next** button in the **Print Forms** window in the **CA Application Interview** activity. Formerly, POS sent this code to NYCWAY in a nightly file.

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7. Posting Action Code 101A in NYCWAY

POS will now post action code 101A (**Health and safety kit issued**) to NYCWAY along with the existing posting of code 90LN, when a personal care kit will be issued. As a result, POS will now need to post **action 101A** along with action code 90LN (**Limitation of Immediate Needs Grant Notification**) to NYCWAY if the following occurs:

- **The Worker indicates that a personal care kit will be issued and the activity is completed.**

8. Update to Disapproved Elements Window

The **Disapproved Elements** window appears for the Worker after the **Household Screen** when a case action is returned by the Supervisor. This window provides a summary of the windows that were disapproved by the supervisor and the comments that were entered with the disapproval.

This window will be updated to add 2 new sections named **Disapproved Grants** and **Grant Information Activity Includes SI Grants**.

The **Disapproved Grants** section will include all grants that were disapproved by the Supervisor. The Worker will also be able to click on a new **View Grant History** button to view the WMS benefit issuance history for the case.

The **Grant Information Activity Includes SI Grants** section will include information on whether the activity includes SI grants, the highest PA issuance code total, whether any grants require approval by the Admin JOS and the next level of approval required for the case.

Updated Disapproved Elements window

Version SI-10 - Paperless Office System - [Disapproved Elements] 9:38:07 PM Wednesday, March 17, 2010

File Edit Tools Window Help

Disapproved Element

Has Resources Other Than Those Listed Above? Approval Edit Add Comment

Disapproval Reasons

Review Comment Log

03/17/10 J. Breton, Ca Supervisor: The documentation was not scanned and indexed.

Disapproved Grants Edit

Code	Description	From / To	Special
99	99 - Other Agency Approved Issuance	01/15/2010-02/15/2010	

View Grant History

Next Xmit Previous

Refer Back to Worker

Grant Information Activity Includes SI Grants: Yes
 Highest PA Issuance Code Total: 1200.00
 Grants Needing Center Director (Admin JOS II) Approval: 99
 Next Level: AJOSI

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9. New TAD Business Rules for EAF and EAA

When a Safety Net or Family Assistance case is eligible for benefits under the EAF benefit category, the Worker must enter an “F” (EAF) in the Emergency Indicator field in the POS.

For cases eligible for benefits under EAA, the Worker must enter an “A” (EAA) in the Emergency Indicator field on the TAD.

Two new TAD business rules will help ensure the entry of these codes when a client is eligible for grants under one of these categories.

10. New Queue Alert for E-Checks

When there is an Emergency Cash Assistance Check (E-Check) in a pending approval activity, POS will highlight the activity in red and will display an alert of “E-Check”.

The screenshot shows the 'Activities Management' window in the POS Paperless Office System. The window title is 'Version SI-10 - Paperless Office System - [Activities Management]' and the date is 'Wednesday, March 17, 2010'. The interface includes a menu bar (File, Edit, Tools, Window, Help) and a toolbar with icons for file operations. Below the toolbar, there are tabs for 'Action', '040 CA Supervisor Queue', and 'Login Queue'. The main area contains several filter sections: 'Unit Filter' (Worker, CMU, Uncovered), 'Activity Type Filter' (Application Interview, IN & EFS, Change Case Data, Reop), 'Activity Alert Filter' (Coming Due, Overdue), and 'Activity Approve Filter' (Approve Appl Inter, Approve IN & EFS, Approve Change, Approve Reop, Approve Recert, Approve Error Corr, Approve Other). A 'Filter' button is located below the filters. Below the filters is a table with columns: Activity, Due Date, Alert, Case Name, Case No, Sur, and Receive. The table contains one row: 'Approve CA Eligibility Decision', '3/18/10', 'E-Check', and a redacted Case Name. Below the table, it says 'Total: 1 Case'. At the bottom of the window, there is a row of buttons: Start, Assign, Remove, Schedule, Reggining, Update Disposition, WMS, View Your Schedule, and Comment.

Activity	Due Date	Alert	Case Name	Case No	Sur	Receive
Approve CA Eligibility Decision	3/18/10	E-Check	[Redacted]			

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11. Months of Arrears Field in Rent Arrears and Mortgage Arrears Windows

A new field will be added in the Response to Question windows for Rent Arrears and Mortgage Arrears in order to allow the recording of the number of months of arrears. POS will calculate the dates entered in the **Period From** and **Period To** fields to calculate the number of months, but will allow the Worker to correct the value, if necessary.

Response to Question Window for Rent Arrears

Response to Question Window for Mortgage Arrears

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12. New Message for Removed Forms

When a form is revised by FIA Procedures and the new electronic version is not available, the form will be temporarily removed from POS until it can be programmed into the system. The following error message will appear when the Worker attempts to print the form:

"The form [Form Number] was temporarily removed from POS until the next software release. Please obtain the form from HRA forms and scan and index it into the One Viewer."

Sample Error Message



13. E-Form Updates

The following E-Form will be updated:

- W-519, Finger Imaging Notice

The following forms will be converted to E-Forms in POS:

- M-15f, Agreement To Repay Cash Assistance (EAA cases)
- W-113A Document Request Form for Applicants/Participants
- W-137A Grant Request Form for Participants
- W-137B Action Taken on Your Request for Emergency Assistance or Additional Allowance (For Participants Only)

The following forms will be added to POS:

- LDSS-2921A, Emergency Assistance for Adults Applicant Statement
- W-147F, Shelter Arrears Repayment Agreement Worksheet
- W-147H, Emergency Safety Net Assistance (ESNA) Shelter Arrears Repayment Agreement
- W-147KK, Emergency Assistance to Needy Families (EAF) Agreement to Repay Excess Shelter Arrears
- W-147NN, Information About Repaying the Department of Social Services for Utility Arrears
- W-147PP, Information About Repaying the Department of Social Services for Rental Arrears
- W-147X, Utility Arrears Repayment Agreement
- W-147XX, Utility Arrears Repayment Agreement Worksheet

14. Reminder: Appendices

- Appendix A, Single Issue Grant Printing Queue
- Appendix B, Bureau of Eligibility Verification (BEV) Process
- Appendix C, Form Signature Capture

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Single Issue Printing Queue

Overview

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

Implementation

The queue will be implemented with the upgraded version of the **Single Issue Grant Request and Issuance Task List** and will allow designated staff to print grant authorization forms for grants requiring data entry into WMS.

The **DSS-3575** (Public Assistance Single Issuance Authorization Form) forms will be printed from the Print Queue for Same-Day Immediate Needs (**PUC 4**), Emergency Public Assistance Check [E-Check] (**PUC 5**) or Emergency Cash Payment [E-Cash] (**PUC 7**). The forms for these grants will be sent to the **Print Queue** once the final-level supervisor approves the grants. Designated staff will print the form and submit them for data entry.

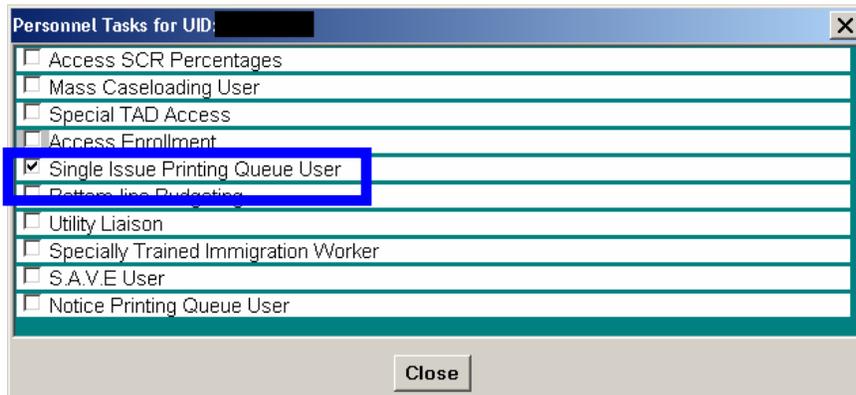
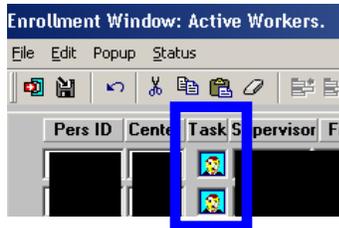
In the initial implementation of the Single Issue functionality, direct transmission from POS to WMS for Special Roll Checks (**PUC 1**), grants pended until the 45th day of SNFP/SNCA/SNNC eligibility (**PUC 2**), EBT Cash Assistance Grants (**PUC 9**) and EBT Next-Day Food Stamp grants (**FS**) will be turned on for the Waverly Job Center.

For all other centers, Special Roll Checks and EBT Cash Assistance grants will be sent to the Print Queues for printing of the DSS-3575 forms. The 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, Special Roll checks and EBT CA grants and EBT Next-Day FS grants will be transmitted directly to WMS.

Enrollment and Access

The Print Queues will be activated for all centers on April 19, 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.

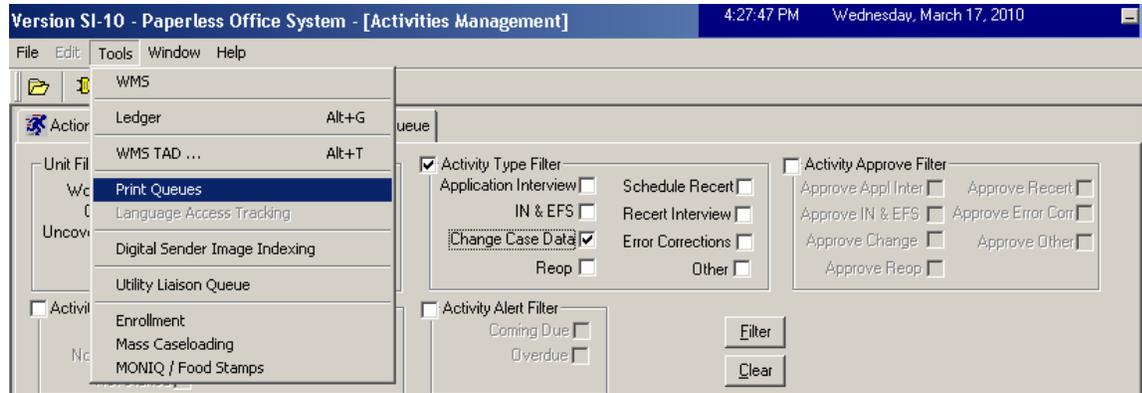


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Tools Menu

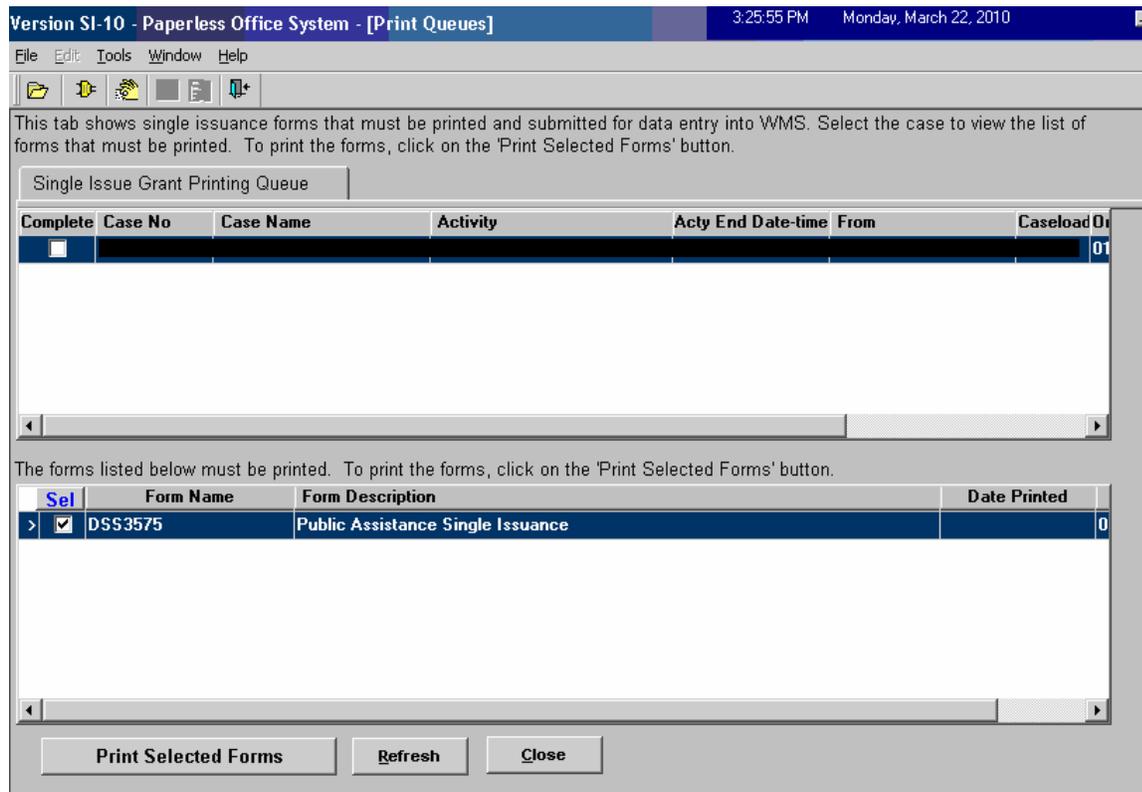
The designated staff will access the Print Queues by clicking on the **Tools** menu and selecting **Print Queues**.



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.”



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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"/>	DSS3575	Public Assistance 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



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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"/>	DSS3575	Public Assistance Single Issuance	

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.



Handling E-Checks

The emergency CA checks (E-Checks) should be sorted separately so they can be forwarded to the proper area for immediate data entry.

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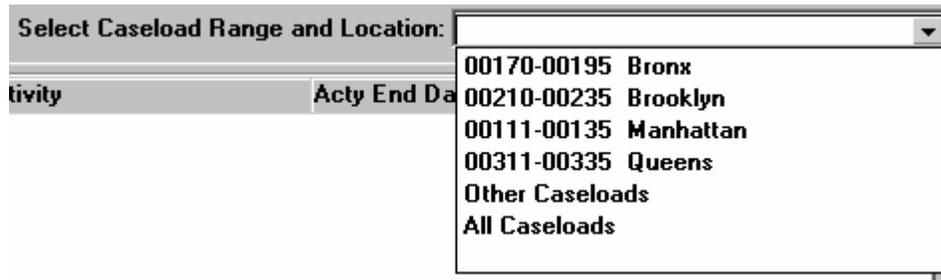
Special Instructions for Family Services Call Center (Center 17)

The Family Service Call Center has satellite locations throughout New York City. In order to allow each location to view their own grant forms, the following menu will appear for Center 17 staff only:

- Select Caseload Range and Location

The designated staff responsible for the Print Queue should select the caseload range for their location. The grant forms for the selected location will then appear in the Case List and the staff can proceed to print the forms.

Select Caseload Range and Location menu



The following options will appear in the menu:

- **00170-00195 Bronx** – this option will load the case list for the Bronx Satellite location.
- **00210-00235 Brooklyn** – this option will load the case list for the Brooklyn Satellite location.
- **00111-00135 Manhattan** – this option will load the case list for the Manhattan Satellite location.
- **00311-00335 Queens** – this option will load the case list for the Queens Satellite location.
- **Other Caseloads** – this option will load the case list for the Center 17 cases that are in caseload that is not covered by the Bronx, Brooklyn, Manhattan, or Queens Satellite locations.
- **All Caseloads** – this option will load the full case list.

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Scheduling Bureau of Eligibility Verification Appointments

This desk guide will introduce the updated BEV response window. The BEV referral process is now fully automated for applicants and reapplicants within POS.

The determination of the need for a new referral to BEV for reapplicants will be handled by POS based on the answers entered in the “reason for reapplication window”. Workers will be able to see on the response window if the “**BEV referral is required**” is set to **Yes** (referral is required) or **No** (no referral is required).

Updates to the BEV Referral Window

The **BEV Referral** window will be updated as follows:

- Unnecessary fields will be removed from the window;
- POS will systemically determine whether a BEV referral is required;
- Additional real-time connections to BEV MAPPER will be added to determine whether a recommendation was entered by BEV;
- Additional real-time connections to BEV MAPPER will be added to determine whether a referral was completed outside of POS;
- A new edit will prevent improper cancellations of the BEV appointment; and
- Revised messages when there are no in-office appointments available for the center.

Updated response window

New Fields

A new question will allow the Worker to indicate whether the case action is a re-opening due to Fair Hearing, Aid to Continue (ATC) or agency error. For the cases, the referral will not be required.

A new question will allow the Worker to indicate whether the case will be rejected because the applicant is ineligible for Cash Assistance. For the cases, the referral will not be required.

Existing Referral or Recommendation

POS will connect directly to BEV MAPPER via Open TI to determine whether an appointment was already scheduled directly in MAPPER.

POS will also connect directly to BEV MAPPER via Open TI to determine whether a recommendation was entered for the case by BEV.

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BEV Referral Requirement for Reapplicants

The determination for the BEV referral requirement for Cash Assistance Reapplicants will be fully automated. POS will determine whether the case is a reapplication. If the case is a reapplication, the answers entered in the **Reason for Re-Application** window will be used to determine whether there are changes to the case. If there are no changes, POS will also connect to BEV MAPPER via Open TI to retrieve the latest BEV recommendation.

For reapplications without changes and with a BEV recommendation indicating that the applicant is eligible, the BEV referral will not be required.

New Cancellation Edit

A new edit will only allow cancellation of the appointment for applicants who are withdrawing their Cash Assistance application.

Making the In-Office BEV Appointment

When the Worker accesses the updated response window and the “**BEV referral is required**” field displays “Yes”, the Worker selects appointment to “In-Office” and selects the Case Type (New case, Reopen, SI Rent, SI Utility), the **View/Schedule BEV Appointment** button will be enabled. When the Worker clicks on this button, the **View/Schedule BEV Appointment** window will appear.

Making the Field Visit BEV Appointment

When the Worker accesses the updated response window and the “**BEV referral is required**” field displays “Yes”, the worker selects appointment to “Field Visit” and selects the Case Type (New case, Reopen, SI Rent, SI Utility), the **View/Schedule BEV Appointment** button will be enabled. When the Worker clicks on this button, the **View/Schedule BEV Appointment** window will appear.

Removed Fields

The following fields will be removed from the window:

- Previous BEV Referral
- Previous BEV Referral Date
- Previous BEV Recommendations
- Previous BEV Deny Reason
- Case Change since Last BEV Ref
- Worker Name
- Interview Date

Removed Fields

The screenshot displays a software interface with the following elements:

- Previous BEV Referral**: A section with two radio buttons, "Yes" and "No". The "No" button is selected.
- Previous BEV Referral Date**: A text input field.
- Previous BEV Recommendations**: A dropdown menu.
- Previous BEV Deny Reason**: A dropdown menu.
- Case Change Since Last BEV Ref**: A dropdown menu.
- Worker Name**: A text input field.
- Interview Date**: A text input field containing the value "00/00/0000".

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View/Schedule BEV Appointment window with no prior appointment

If there is no prior appointment, the **Make a New Appointment** button is enabled and the **Reschedule the Appointment** and **Cancel the Appointment** buttons are disabled.

View/ Scheduled BEV Appointment

The screenshot shows a window titled "View/Schedule BEV Appointment". It contains an "Instructions" box with the text: "Click on the Make a New Appointment button to schedule the appointment." Below this are three input fields: "Scheduled Date" (empty), "Scheduled Time" (empty), and "Appt. Type" (containing "FA"). Underneath is a "Referral Reasons" section with a table:

Code	BEV Referral Description

At the bottom, there are four buttons: "Make a New Appointment" (enabled), "Reschedule the Appointment" (disabled), "Cancel the Appointment" (disabled), and "Done" (disabled).

View/Schedule BEV Appointment window with a prior appointment

If there is a prior appointment, the scheduled appointment date, time, type and referral reasons are displayed and the **Reschedule the Appointment** and **Cancel the Appointment** buttons are enabled. The **Cancel** button can only be clicked if the applicant is withdrawing their Cash Assistance (CA) application and the **Disposition/Withdrawal** window was updated accordingly.

The screenshot shows the same window as above, but with the following changes:

- The "Scheduled Date" field now contains "2008/03/28".
- The "Scheduled Time" field now contains "09:00".
- The "Appt. Type" field still contains "FA".
- The "Referral Reasons" table now contains data:

Code	BEV Referral Description
20	PO Box used as a mailing address
42	Children/adults in household w/o birth certificate
18	Concealed Income

At the bottom, the buttons are: "Make a New Appointment" (disabled), "Reschedule the Appointment" (enabled), "Cancel the Appointment" (enabled), and "Done" (disabled).

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Referral Reasons

If the Worker clicks on the **Make a New Appointment** button or the **Reschedule the Appointment** button, POS displays the **BEV Referral Reasons** window. The Worker must select a BEV referral reason and click on the OK button. The Worker may select up to 3 three reason codes. If none of the reasons apply, the Worker must check the **“None of the above”** checkbox.

Instructions: Please select up to 3 BEV codes for each individual scheduled for an appointment. If none of the reasons apply please select "None of the above".

Income/Resources		
<input type="checkbox"/> HRA Employee	<input type="checkbox"/> Resource file integration RFI hit	<input type="checkbox"/> Client recently left work force
<input type="checkbox"/> New Hires Match	<input type="checkbox"/> Evidence of ownership of personal assets	<input type="checkbox"/> Supported by loans from family/friends
<input type="checkbox"/> Concealed Income	<input type="checkbox"/> Evidence of real property ownership	<input type="checkbox"/> Expenses exceed income/grant w/o explanation
<input type="checkbox"/> Self employed without business records	<input type="checkbox"/> Working off the books	

Address/Household Composition		
<input type="checkbox"/> Questionable Landlord signature/document	<input type="checkbox"/> Household composition	<input type="checkbox"/> Rent paid to a relative
<input type="checkbox"/> Moved into the country within the last 6 months	<input type="checkbox"/> PO Box used as a mailing address	<input type="checkbox"/> Frequent address changes
<input type="checkbox"/> Client unsure of own address	<input type="checkbox"/> Not primary tenant	<input type="checkbox"/> Out of state applicant
<input type="checkbox"/> Questionable address or suspect mail drop	<input type="checkbox"/> Primary tenant with no utilities	<input type="checkbox"/> Landlord does not verify household composition

Other		
<input type="checkbox"/> Social Security validation match	<input type="checkbox"/> Client's past maintenance is questionable	<input type="checkbox"/> Previously active with a spouse or parent
<input type="checkbox"/> An individual has no identification to verify identity	<input type="checkbox"/> Client states they managed by living on streets	<input type="checkbox"/> Children in household under 6 w/o birth certificate
<input type="checkbox"/> Sanctioned individual in household	<input type="checkbox"/> Questionable documents/shelter forms	<input type="checkbox"/> Other applications requiring investigation
<input type="checkbox"/> Children/adults in household w/o birth certificate	<input type="checkbox"/> Duplicate assistance another active case	<input type="checkbox"/> Lives alone but accompanied by an adult
<input type="checkbox"/> Prior history of case closing	<input type="checkbox"/> Applicant is inconsistent	<input type="checkbox"/> Missing absent parent information

None of the above

OK
Cancel

Available Appointments

Once the Worker clicks the **OK** button in the **BEV Referral Reasons** window, POS connects to the BEV MAPPER database to retrieve the available appointments and opens the **Available Appointments** window. The Worker must select the appointment from the list and click on the **Schedule/Reschedule the Appointment** button.

Instructions:
Please select the acceptable appointment and click 'Schedule/Reschedule the Appointment' button. To exit the window without scheduling or rescheduling an appointment, click 'Cancel'.

Available Appointments

Center	Floor	Date (YYYYMMDD)	Time (HHMM)	Slots
040	5th	20080327	0900	0009
040	5th	20080327	1130	0010
040	5th	20080328	0900	0010
040	5th	20080328	1130	0010
040	5th	20080331	0900	0010
040	5th	20080331	1130	0010
040	5th	20080401	0900	0010
040	5th	20080401	1130	0010

Schedule/Reschedule the Appointment
Cancel

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Reminder: BEV Referral Appointment Notice for In-Office Appointment (Form W-532R)

If the applicant is scheduled for an in-office appointment, after scheduling the BEV appointment, the Worker must access the **Print Forms** window, select the BEV Referral (W-532R) form and click on the **Print** button. The appointment notice will print and a signature capture window will appear.

To capture the signature, the Worker must:

- Retrieve the form from the printer and place it on the signature pad;
- Click on the **Sign** button to open the **Signature Pop-Up** window;
- Ask the applicant to sign using the electronic pen;
- Click on the **Accept** button to save the signature;
- Click the **Next** button to save the form and return to the **Print Forms** window.

Reminder – Case Types that do not require a BEV Referral

The POS BEV Referral window is not available for the following case types:

- HASA
- Cases with a category of EAA (Emergency Assistance for Adults)
- Cases in Active Status

Reminder – Inappropriate BEV Referrals

Applicants found to be ineligible for CA during their initial application interview are not to be referred to BEV. The CA case is to be denied and the appropriate notices must be issued in accordance with current procedures. For additional information, please see **Policy Bulletin # 08-26-OPE** (Inappropriate Referrals to the Bureau of Eligibility Verification).

Reminder Regarding BEV Referrals for Reopened or Reapplying Cash Assistance Cases

For additional details on the BEV requirements for reopened or reapplying cases, please see **Policy Bulletin 08-105-ELI** (Reminder Regarding BEV Referrals for Reopened or Reapplying Cash Assistance Cases).

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Form Signature Capture

Printed POS forms are saved in the POS Printed Forms area, which is available in POS interview and approval activities and in the Review Case activity.

Printed E-Forms are saved in the FileNET image repository. The forms are available for viewing and re-printing through the HRA One Viewer. E-Forms are also available through the **Tools > Printed Forms** menu.

This document contains reminders on the steps to capture a signature for an E-Form and a POS form.

Reminder: Signature Capture for E-Forms through the Print Forms window

To capture signatures in POS for an E-Form, the Worker must follow these steps:

1. Select the form on the Print Forms window.
2. Click on the Print button.
3. Pick up the form from the printer.
4. Place the page with the signature space on the Topaz signature pad.

Window: eForm Signature Capture

The screenshot shows a software window titled "Version 11.2 - Paperless Office System - [eForm Signature Window]". The window has a menu bar with "File", "Edit", "Tools", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main content area is titled "Signature - Form Number:" and contains the following text:

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

If the signature pad is not working, please check the 'Unable to Capture Signatures' checkbox and select 'Signature pad is not working' in the pop-up window and click on the **OK** button. The POS signature capture fields will be disabled. You must print the form by clicking on the **Print** button. The printed form will not be saved in the electronic case record. Give the printed form to the client to sign. After the client signs the form, scan and index it into POS.

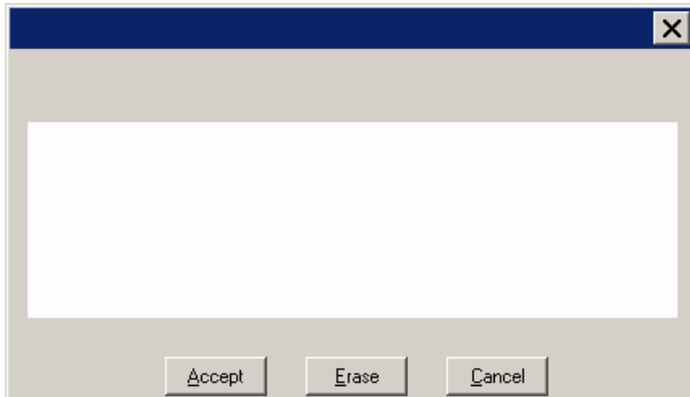
Below the instructions, there is a "Signature" field with the name "Mitch Child" entered. To the right of this field is a large empty rectangular box for the signature. Below the signature field is a checkbox labeled "Unable to Capture Signatures" which is currently unchecked. To the right of the signature box is a button labeled "<< Sign". At the bottom of the window are three buttons: "Next", "Re-Print", and "Previous".

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5. Click on the **Sign** button.
6. Ask the applicant/participant to sign using the electronic pen.
7. View the signature in the pop-up window.
8. Click Accept to save the signature
9. Click the **Next** button.

Window: Signature Capture Pop Up Box



The signatures are not visible on the E-Form signature window once the Worker clicks the Next button. To view the signed form, go to the HRA One Viewer or open the POS Printed Forms menu.

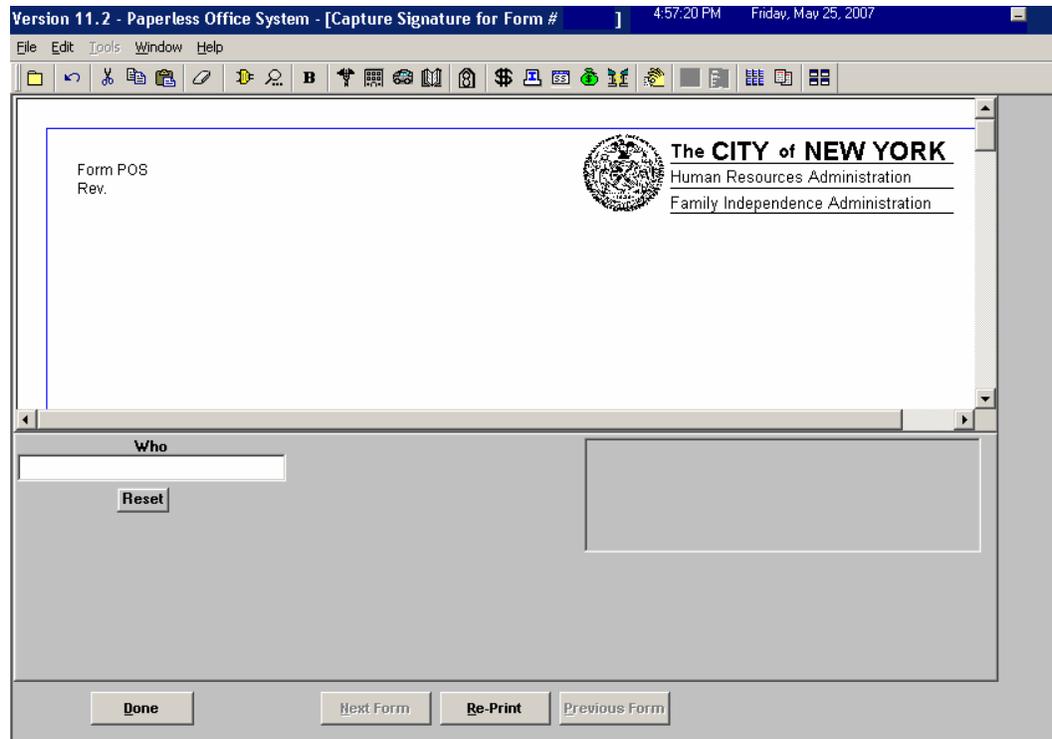
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Reminder: Signature Capture for POS Forms through the Print Forms window

To capture signatures in POS, the Worker must follow these steps:

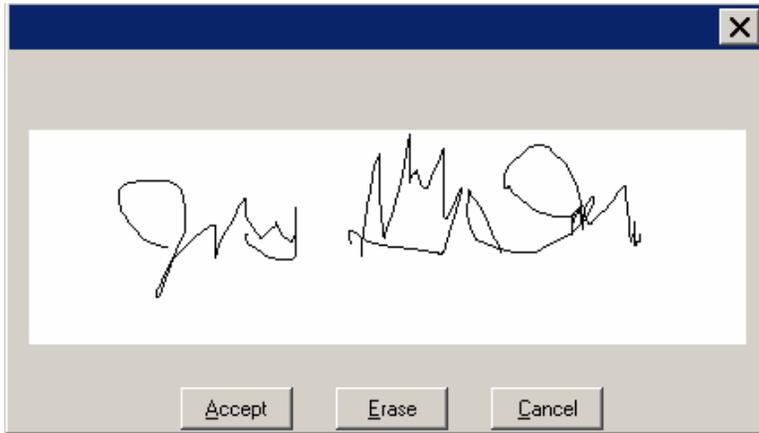
1. Select the form on the Print Forms window.
2. Click on the Print button.
3. Pick up the form from the printer.
4. Place the page with the signature space on the Topaz signature pad.
5. Click on the signature box on the POS signature capture window to open the signature capture pop up box.



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6. Ask the applicant/participant to sign using the electronic pen.
7. View the signature in the pop-up window.
8. Click Accept to save the signature



9. Close the Topaz window by clicking on the "X" in the upper right hand corner.
10. Click the **Next Form** button (if enabled) to capture the next signature or the **Done** button to close the signature capture window.

