



# FAMILY INDEPENDENCE ADMINISTRATION

Matthew Brune, Executive Deputy Commissioner



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

Stephen Fisher, Assistant Deputy Commissioner  
Office of Procedures

## POLICY BULLETIN #11-115-SYS

### CA POS RELEASE NOTES VERSION 15.3.1

<b>Date:</b> December 15, 2011	<b>Subtopic(s):</b> 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 January 3, 2012. Descriptions of the changes can be found in POS Release Notes Version 15.3.1 (<b>Attachment A</b>).</p> <p>These release notes can also be found on the HRA Intranet at:  <a href="http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx">http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</a></p> <p><i>Effective January 3, 2012</i></p> <p><b>Related Item:</b>  <a href="#">PD #08-40-SYS</a></p> <p><b>Attachment:</b>  <b>Attachment A</b>    POS Release Notes Version 15.3.1</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) 639-0298

# POS Release Notes

Version 15.3.1 January 3, 2012

These Release Notes contain descriptions of changes in POS Release 15.3.1 scheduled for January 3, 2012. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Jose Breton**. These and prior Release Notes may also be found on the HRA Intranet at <http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

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# POS Release Notes

Version 15.3.1 January 3, 2012

## 1. Warning Messages for SSN Validation Codes 1, 2, 3, 4, A, B, C, D, E, N and X

New and updated edits will be added for Social Security Number (SSN) Validation Codes **1, 2, 3, 4, A, B, C, D, E, N** and **X** in the **Individual Detail** window for individuals in applying (**AP**), single issue (**SI**), active (**AC**) or sanctioned (**SN**) status for Cash Assistance (**CA**) or Food Stamps (**FS**).

### Updated message for SSN Validation Code 1

When an individual has a value of **1** (SSN present but not yet validated) in the SSN Validation field and the Social Security Number (SSN) is blank, the following error message appears:

- Validation code **1** cannot be entered without entering Social Security Number. Please change validation code to **2, 3** or **4** or add a valid Social Security Number.

The JOS/Worker must correct the SSN or the validation code in order to proceed.

### New edits for SSN Validation Code 2

When an individual has a value of **2** (SSN applied for but not yet available) in the SSN Validation field and the **Date Applied For** is less than 90 days in the past, the following warning message appears:

- Do not enter a **2** unless you have seen and can verify the date the client applied for the SSN. You must use SSN validation code **4** if there is no documentation showing the 'applied for' date.

When an individual has a value of **2** (SSN applied for but not yet available) in the SSN Validation field and the **Date Applied For** is less than 90 days in the past, the following warning message appears:

- The date of application for a SSN is more than 90 days old. A social security number must be provided or the client must reapply for a SSN. Proof must be presented in order to determine eligibility or to continue eligibility.

### New edit for SSN Validation Code 3

When an individual has a value of **3** (SSN applied for and denied) in the SSN Validation field, the following warning message appears:

- An applicant/participant in active status applied for a Social Security Number and was denied (SSN validation code **3**). If the reason for no SSN is the individual's alien status, you must enter an **N** in the social security validation field in the Individual Detail window in order to complete this activity. If the proper SSN validation code is **3**, you must reevaluate the individual's eligibility for Assistance and reject or close this individual.

### New edit for SSN Validation Code 4

When an individual has a value of **4** (SSN not applied for) in the SSN Validation field, the following warning message appears:

- Refer the client to SSA to apply for a SSN. Once verification of an SSN application is submitted, change the validation code from **4** to **2**. If a client is claiming religious exemption for Food Stamps, documentation is required. There is no exemption for Cash Assistance.

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## **New edit for SSN Validation Code A**

When an individual has a value of **A** (Validation failed: SSN not on SSA file) in the SSN Validation field, the following warning message appears:

- Please verify the number entered against the Social Security Card. If the SSN on the card is the same as the SSN on record, make a referral to BFI using referral form **BFI-105** (Do not tell the client about the BFI referral).

## **New edits for SSN Validation Codes B, C, D and E**

When an individual has a value of **B** (Validation failed: No match on name), **C** (Validation failed: No match on DOB and sex), **D** (Validation failed: No match on DOB) or **E** (Validation failed: No match on sex) in the SSN Validation field, the following warning message appears:

- Please review the documentation submitted to verified Name, Date of Birth (DOB) and Gender. If needed make appropriate corrections in POS/WMS or else refer client to SSA Office to have their information corrected.

## **New edit for SSN Validation Code N**

When an individual has a value of **N** (Ineligible for SSN due to immigration status) in the SSN Validation field, the following warning message appears:

- If there are changes in the non-citizen's immigration status, refer them to SSA to apply for a SSN using the agency prescribed form. Once verification of an application is submitted, change the validation code from **N** to **2**. If no immigration status changes are reported, take no action.

## **New edit for SSN Validation Code X**

When an individual has a value of **X** (Deceased) in the SSN Validation field, the following warning message appears:

- If this is a single person household you must close the case using closing code E95 or remove the individual if household size is more than one. If client is disputing this information, make a referral to SSA to resolve the issue before continuing eligibility is determined.

## **New edit for blank SSN and Social Security Card**

When a scanned Social Security Card is found for an individual with a blank Social Security Number (SSN), the following warning message appears:

- A Social Security Card for <Name and line number of the individual with blank SSN> was found in the viewer. Please verify the document found, and if the document is appropriate, then update the social security number for this individual.

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## 2. Documentation Request for SSN Validation Codes 2, 4, B, C, D, E and X

POS was updated to allow the Worker to request documentation for SSN validation codes **2, 4, B, C, D, E and X**.

### Documentation request for individuals who must apply for a Social Security Card

When an individual must apply for a Social Security card, has a value of **4** in the SSN Validation field and documentation must be requested, the ES must select one of the following options in the Acceptable Documents list and leave the scan checkbox blank to generate the Documentation Requirements and or Assessment Follow-Up (**W-113K**) notice:

- SS card applied for but no proof submitted-Non-Document

This generates the following eligibility factor on the **W-113K** for the individual:

- Proof you applied for Social Security card.

### Documentation request individuals who must re-apply for a Social Security Card

When an individual must re-apply for a Social Security card, has a value of **2** in the SSN Validation field and documentation must be requested, the ES must select one of the following options in the Acceptable Documents list and leave the scan checkbox blank to generate the **W-113K** notice:

- SSA-2853 Social Security Receipt
- SSA-5028 Receipt for Application for a Social Security Card
- SSA Receipt Original Copy of Updated Info

This generates the following eligibility factor on the **W-113K** for the individual:

- Proof you applied for Social Security card.

### Documentation Request for SSN Validation Codes B, C, D and E

When an individual has a discrepancy in the SSN match, has a value of **B, C, D or E** in the SSN Validation field and documentation must be requested, the JOS/Worker must select the following option in the Acceptable Documents list and leave the scan checkbox blank to generate the **W-113K** notice:

- Report to SSA office to correct info on file-NON DOCUMENT

This will generate the following eligibility factor on the **W-113K** for the individual:

- Report to SSA office with appropriate documentation to have SSA correct the information in its file

### Documentation Request for SSN Validation Code X

When an individual reports that they are not deceased, has a value of **X** in the SSN Validation field and documentation must be requested, the JOS/Worker must select the following option in the Acceptable Documents list and leave the scan checkbox blank to generate the **W-113K** notice:

- SSA letter confirming error was made-Not Deceased

This will generate the following eligibility factor on the **W-113K** for the individual:

- Letter from Social Security Administration confirming that an error was made-NOT Deceased

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## 3. New Warning Message for Blank SSN and Scanned Social Security Card

The **Close** window in CA Application Interview, CA Recertification Interview and CA Change Case Data activities was updated to add a new warning message. When a scanned Social Security Card is found for an individual in **AC** or **SN** status for CA with a blank Social Security Number (SSN), the following message appears with **Yes** and **No** buttons:

A Social Security Card was found in the viewer for the following individual(s) who does not (do not) have a Social Security Number in POS:  
<Client Name, Line Number>,  
<Client Name, Line Number> ...

Please verify the document(s) found and if appropriate, please go to the **Individual Detail** window and add the social security number for the individual(s).

Would you like to exit the **Close** window to review the document?

If the JOS/Worker clicks **Yes**, POS exits the **Close** window to allow the JOS/Worker to review the SSN cards. If the JOS/Worker clicks **No**, POS will continue with the completion of the activity.

## 4. Completion Edits for SSN Validation Codes 2, 3, 4, B, C, D, E and X

New completion edits were added to the **Activity Completion** window to prevent improper usage of SSN validation codes **2, 3, 4, B, C, D, E** and **X**.

### New completion edits for SSN Validation Code 2

When an individual in **AC** or **SN** status for CA has a value of **2** in the SSN Validation field and the **Date Applied For** is equal to or more than 90 days in the past, POS will look for the following scanned documents in the case record:

- SSA-2853 Social Security Receipt
- SSA Printout verification only
- Receipt for Application for a Social Security Card
- SSA-5028 Receipt for Application for a Social Security Card
- W-133D Social Security Verification
- SSA Receipt Original Copy of Updated Info

If none of these documents are found, POS will display the following error message:

- An applicant/participant in active status applied for a Social Security Number more than 3 months ago (SSN validation code **2**). You must resolve the Social Security discrepancy or select a proper SSN validation code before you can complete this activity.

### New completion edit for SSN Validation Code 3

When an individual in **AC** or **SN** status for CA has a value of **3** in the SSN Validation field, the following error message appears:

- An applicant/participant in active or sanctioned status has applied for a Social Security Number and was denied (SSN validation code **3**). If the reason for no SSN is the individual's alien status, you must enter **N** in the social security validation field in the **Individual Detail** window in order to complete this activity. You must reevaluate the individual's eligibility for Assistance and reject or close this individual.

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## **New completion edit for SSN Validation Code 4**

When an individual in **AC** or **SN** status for CA has a value of **4** in the SSN Validation field, the following warning message appears:

- An applicant/participant in active or sanctioned status has not applied for a Social Security Number (SSN validation code **4**). You must reevaluate the individual's eligibility for Assistance. You must reject or close this individual in order to complete this activity.

## **New completion edits for SSN Validation Codes B, C, D and E**

When an individual in **AC** or **SN** status for CA has a value of **B, C, D** or **E** in the SSN Validation field, POS will look for a change in the first name, last name or date of birth for the individual since the beginning of the interview activity and will look for the following scanned documents in the case record:

- SSA-2853 Social Security Receipt
- SSA-5028 Receipt for Application for a Social Security Card
- SSA Receipt Original Copy of Updated Info

If no changes in demographics are found and none of the documents are found, POS will display the following error message:

- There is an applicant/participant in active or sanctioned status with a discrepancy with the Social Security Demographics (SSN validation code **B, C, D** or **E**). You must resolve the Social Security discrepancy before you can complete this activity.

## **New edit for SSN Validation Code X**

When an individual in **AC** or **SN** status for CA has a value of **X** in the SSN Validation field, POS will look for the following scanned documents in the case record:

- SSA Receipt Original Copy of Updated Info
- SSA letter confirming error was made-Not Deceased

If none of these documents are found, POS will display the following error message:

- An applicant/participant in active or sanctioned status is listed as Deceased with the Social Security Administration (SSN validation code **X**). If this information is not accurate, you must resolve the issue by obtaining documentation from SSA or reject/close case or line using rejection/closing code E95 before you can complete this activity.

## **5. Updated Document List for Social Security Number**

The following documents were removed from the Acceptable Documents list when a Social Security Number is entered:

- (Form DSS - 2640) Request for Services / DSS / VA Referral
- SS-5 submitted by individual to SSA to correct demographic info

The following document was removed from the Acceptable Documents list for SSN validation code **3**:

- Social Security Receipt (SSA 2853)

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The following documents were added to the Acceptable Documents list for SSN validation code **4**:

- SS card Applied for but no Proof submitted-Non-Document
- Document from religious org stating SSN is in conflict with doctrine

The following documents were added to the Acceptable Documents list for SSN validation code **X**:

- Death Certificate
- Statement from Funeral Director/Funeral Bill
- SSA letter confirming error was made-Not Deceased

## 6. Change to Posting of HVN/HB Action Codes in CA Application Interview

POS has been updated to post the Home Visit Needed/Homebound (HVN/HB) action codes to NYCWAY if the Worker suspends the CA Application Interview prior to the Print Forms window.

## 7. Change to Posting of Action Code 94HB in CA Application Interview

POS has been updated to post the action code **94HB** (OCSE Homebound Referral) for HVN/HB cases that require an OCSE referral if the Worker suspends the CA Application Interview prior to the Print Forms window.

## 8. OCSE Referral Rule Update

When a non-custodial parent is found in the CA Application Interview, CA Recertification Interview and CA Change Case Data activities in the OCSE Referral window, POS connects to NYCWAY to retrieve prior sanction information. POS was updated to continue with the OCSE referral determination when the call for prior sanction information to NYCWAY fails.

## 9. Update for Posting of Action Code 14NR

In the CA Recertification Interview and CA Change Case Data activities, when the recommendation of "Do Not Make a Referral" occurs for every non-custodial parent, POS posts the action code **14NR** (OCSE referral not required) to NYCWAY. POS was updated to suppress the posting of this action code when the case is an emergency assistance ("One Shot Deal") application.

## 10. Expansion of Retrieval of CNS Notice Number in POS TAD

The **POS TAD** window was updated in CA POS release 15.3 to automatically retrieve the latest pending notice number created by the Worker in the **Client Notice System (CNS)** in the **Welfare Management System (WMS)** for certain case openings, closings and rejections and pre-fill the **Notice #** field.

This retrieval was expanded to closing, rejection and sanction of individual lines on active cases. The Worker must ensure that the retrieved notice number is the correct notice number for their action.

### Retrieval of Notice Number for CA Individual Line Closings, Rejections and Sanctions

POS will pre-fill the **Notice #** field for individual CA line closings, rejections and sanctions when:

- The current CA case status in WMS is not **CL** or **RJ**, and
- The CA case status in POS is not changed to **CL** or **RJ**, and
- The CA individual status in POS is changed to **CL**, **RJ** or **SN**, and
- The CA individual status reason does not begin with **E**, **F**, **G** or **Y**, and
- The **M3E Indicator** field is empty.

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## Retrieval of Notice Number for FS Individual Line Closings, Rejections and Sanctions

POS will pre-fill the **Notice #** field for individual FS line closings, rejections and sanctions when:

- The current FS case status in WMS is not **CL** or **RJ**, and
- The FS case status in POS is not changed to **CL** or **RJ**, and
- The FS individual status in POS is changed to **CL**, **RJ** or **SN**, and
- The FS individual status reason does not begin with **E**, **F**, **G** or **Y**, and
- The **M3E Indicator** field is empty.

## 11. Changes to Filtering of Documentation for Alien Type S

The **Alien Document List** window was updated to list documents for the alien status, 40 quarters and proof of US residence prior to 8/22/1996 when the individual's alien code is **S** (Lawfully Admitted for Permanent Residence (LPR) with 40 Qualifying Quarters) and the date that they physically entered the country is prior to 8/22/1996.

The **Alien Document List** window was updated to list documents for the alien status and 40 quarters when the individual's alien code is **S** (Lawfully Admitted for Permanent Residence (LPR) with 40 Qualifying Quarters) and the date that they physically entered the country is after 8/22/1996.

## 12. Updates to Individual Detail window

The **Individual Detail** window was updated to list inactive individuals in the Mother's Name and Father's Name fields and to add a new edit for the **Residing in the household** questions in the Parents' Information section.

The screenshot displays the 'Individual Detail' window in the POS system. The window title is 'Version 15.3.1 - Paperless Office System - [Individual Detail]' and the system clock shows '11:17:53 AM Wednesday, November 30, 2011'. The interface includes a menu bar (File, Edit, Tools, Window, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Demographics:** Fields for Case Number, Suf, Ln, CIN, First Name, Middle, Last Name, Sex, and DOB. A dropdown menu for Relationship is visible.
- SSN and Birth Information:** Fields for SSN (with a 'Valid' indicator), Date SSN Card Applied For, Marital Status, Country of Birth, State, County Of Birth, and Birth Cert No (NYC Only).
- Ethnic/Race Affiliation:** Radio button groups for Hispanic/Latino, Asian, Native Hawaiian/Pacific Islander, Native American/Alaska Native, Black or African American, and White.
- Parents Information:** Fields for Mother's First Name, Middle, Maiden Name, and Residing in the household? (Yes/No). Similar fields for Father's First Name, Middle, Last Name, and Residing in the household? (Yes/No).
- Citizen/Immigrant Information:** Radio button for US Citizen / National (Yes/No), and fields for Immigrant Type, Immigrant No., Date of Status, and Qualified Immigrant Type and Description.
- Education:** Fields for Highest Degree Obtained, Education Level, and Student ID. Includes Individual Status (PA, MA, FS, AP) and AFIS Referral (WMS AFIS Indicator, Food Meals).
- Identity and Residency:** Scan buttons for Birth/Hospital Certificate, Landlord Letter Statement from Non-Relative Landlord, and Citizenship.
- Relationship and Age:** Scan buttons for Birth/Hospital Certificate, Household Composition, and Age.
- Social Security:** Scan button for Social Security No. / Social Security Card.

At the bottom of the window, there are 'Next' and 'Previous' navigation buttons.

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## Update to Mother's Name and Father's Name fields

The **Parents' Information** section was updated to include the inactive individuals in the drop-down list for the fields **Mother's First Name, Middle and Maiden Name** and **Father's First Name, Middle and Last Name**.

These fields were also updated to pre-fill the **Middle and Maiden Name** fields when a selection is made in the **Mother's First Name** field and to pre-fill the **Middle and Last Name** fields when a selection is made in the **Father's First Name** field.

## New edit for "Reside in the household" questions in Parents' Information section

POS was updated to display an error message when the Worker indicates that the parent resides in the household for one child, but indicates that the parent does not reside in the household for another child on the case. The following error message appears for the JOS/Worker:

- You have selected the same parent name in more than one line, but the answers selected in the "Residing in the Household" field are different.

## 13. Update to ACCIS Clearances window

The POS ACCIS Clearances window was updated to change two labels and move printing of the form to the Print Forms window.

### Updated fields

The label of the **ACCIS Address** field was changed to **ACCIS Residential Address**.

The label of the **Net pay for the last five months** field was changed to **Gross pay for the last five months**. This field now retrieves the gross pay amounts from ACCIS, instead of the net pay amounts.

ACCIS Clearances

**Instructions**

The Clearance below represent a Social Security Match in the ACCIS system for the applicant/Participant. You must choose a resolution in order to complete an Activity before case is forward for supervisory Approval

Applicant/Participant Demographics in POS			Address information in POS		
NAME	SSN	DOB			

Information from Childcare system (ACCIS)					
Child Care Provider SS#	Child Care Provider #	Last Name	First Name	ACCIS Status	ACCIS Residential Address

Gross Pay for the last five months (after deductions if any)	Enrollment information	
	Date provider activated in ACCIS	
	Number of Children Enrolled with Provider	
<a href="#">View Details</a>		

Is the Applicant/Participant disputing this match?  Yes  No

Does the Applicant/Participant claim they stop providing childcare?  Yes  No

Resolution Applicants	Participants
Was the FIA-3A initiated and completed? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Pending	Was this childcare Income previously budgeted with the correct amount? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Pending Was a recoupment initiated due to this childcare income match? <input type="radio"/> Yes <input type="radio"/> No

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## 14. Move of Attestation of Employment as an Informal Childcare Provider Form

The Attestation of Employment as an Informal Child Care Provider Form (**W-274U**) was moved from the **POS ACCIS Clearances** window to the **Print Forms** window. The JOS/Worker must print the form and capture the applicant/participant's signature when they indicate that they are no longer providing childcare.

## 15. Completion Edit for Form W-274U

When there is a match in the **POS ACCIS Clearances** window and the applicant/participant claims that he/she no longer provides childcare, the signed **W-274U** form is required at application and recertification.

If the application will be accepted or the case will continue active at recertification, the form was not signed in POS and was not scanned and indexed by the JOS/Worker, the following error message appears when the Worker attempts to complete the activity:

- You stated that the applicant or participant is no longer providing childcare; therefore you must print the W-274U and capture the applicant/participant signature or scan and index the signed W-274U form.

## 16. Printing Case Comments

POS was updated to allow authorized users to print the case comments. A new button labeled **Print Case Comments** was added to the Case Comments window.

When the Worker clicks on this button, the **Print Case Comments** window opens.

*Updated Case Comments window*

The screenshot shows a software window titled "Case Comments" with a close button (X) in the top right corner. The window is divided into several sections:

- Selected Case:** A group of input fields for "No.", "Case Name", "CIN", "Suffix", "Casehead Name", and "SSN".
- Staff Member:** A vertical list of four dropdown menus, each currently displaying "Breton Jose".
- Comment:** A large, empty rectangular text area for entering comments.
- Date Entered:** A vertical list of four input fields for recording the date.
- Buttons:** At the bottom of the window, there are three buttons: "Print Case Comments", "OK", and "Cancel".

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## *Print Case Comments window*

Print Case Comments

Selected Case

No  Case Name  CIN

Suffix  Casehead Name  SSN

Date Range: From  To   Number of comments

Date	Activity	Staff Member	Comment

The Worker must enter the date range for the comments that will be printed and click on the **Retrieve** button. The following information is retrieved:

- Date
- Activity
- Staff Member
- Comments

The Worker then clicks the **Print Case Comments** button to print the comments on their local printer. To close the window, the Worker clicks on the Exit button.

## 17. W-102 Mailer

POS was updated to generate a batch Notification of New Worker (**W-102**) form for cases where the caseload was updated via the **Mass Caseloading Tool** and where the caseload is designated to an active JOS/Worker at the Job Center. The form will be mailed by MIS mail distribution on the following business day.

# POS Release Notes

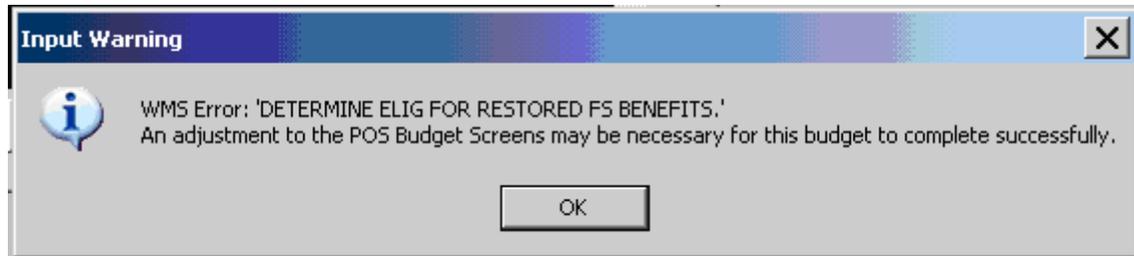
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## 18. Update to Budget to Handle Warning Message A0301

WMS has a warning message **A0301** (DETERMINE ELIG FOR RESTORED FS BENEFITS) to remind the workers to determine the eligibility for restored FS benefits whenever income code **31** (SSI Benefit) is entered on the Budget Individual window.

This warning caused the POS budget transmission to stop in WMS. POS was updated to continue the budget transmission after the Worker closes the warning message.

*Warning Message A0301*



## 19. Rent Window Update for Congregate Care

The **Rent Expense** window was updated for applicants/participants residing in Congregate Care facilities. The Congregate Care facility can request restriction of the shelter payment to the facility. As a result, the window was updated to allow a restriction to be entered in the shelter window when shelter type is **15** (Congregate Care Level 1 (NYC / Nassau / Suffolk / Westchester / Rockland), **16** (Congregate Care Level 2 – State Certified (NYC / Nassau / Suffolk / Westchester / Rockland), **42** (Congregate Care Level 3 - Adult Homes and DOH Enriched Housing) or **43** (Congregate Care Level 2 - OMH/OPWDD Supervised/Supportive Apartments).

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## 20. Levels of Approval for AFIS Indicator A

POS was updated to require approval by an AJOS II or higher when an application case is accepted for ongoing CA or FS and a selection of **A** (County Specific Approved Exemption) is made in the AFIS Exemption Indicator field for an individual who is accepted.

POS was updated to require approval by an AJOS II or higher when a recertification case continues active for CA or FS and a selection of **A** is made in the AFIS Exemption Indicator field for an individual who will continue active.

POS was updated to require approval by an AJOS II or higher when a Food Stamp separate determination case is accepted for ongoing FS and a selection of **A** is made in the AFIS Exemption Indicator field for an individual who is accepted.

## 21. Updated to LDSS-4013 Data Entry Window

The **LDSS-4013 Data Entry** window will no longer open in the CA Change Case Data activity.

## 22. EFS Completion Edit

A new completion edit was added to ensure that the IN/EFS Issuance activity is not improperly completed. When the CA status or FS status was updated on the TAD and the JOS/Worker attempts to complete the activity, the following error message appears:

- The TAD was updated. The case must be transmitted to WMS.

## 23. Case Number Re-Use Business Rule

POS was updated to ensure removal of the reuse case number from the POS TAD for an Undercare case where the eligibility transaction is made using a paper TAD for a case that was started in POS.

## 24. TAD Window Update for Notice Budget Number Field

The **Notice Budget Number** field in the POS TAD was updated from a text box to a drop-down menu. This menu includes all budgets with an ineligible budget result for CA or FS.

## 25. New WMS TAD Field for Alien Type P

A new field labeled **Alien Type P** appears in the WMS Data section of the POS TAD to display the new Alien/Citizenship Indicator of **P** (FFP Pregnant Special PRUCOL or Child below 21) that was added for Medicaid cases in WMS Version 2011.3.

## 26. TAD Synchronization Update for AFIS Indicator

The POS TAD synchronization that occurs at the beginning of the interview activities was updated to pre-fill the AFIS Indicator from the WMS TAD when appropriate. This will ensure that the system-generated values are received in the POS Data section of the TAD.

## 27. TAD Rule for AFIS Indicator Retrieval on Re-Use CIN

The POS TAD was updated to retrieve the AFIS Indicator from the re-use CIN and pre-fill the AFIS Indicator when appropriate. This will ensure that the system-generated values that are associated with the re-use CIN are received in the POS Data section of the TAD.

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## 28. TAD Business Rule Updates for Alien Eligibility

Three new business rules were added to prevent improper activations of ineligible non-citizens.

### New CA TAD Business Rule

When the Alien Checklist has an outcome of ineligible for CA for an individual and the Worker attempts to change the CA individual status for **SI** or **AC**, the following error message appears:

- "Individual cannot be activated for CA due to ineligible alien status."

### New FS TAD Business Rule

When the Alien Checklist has an outcome of ineligible for FS for an individual and the Worker attempts to change the FS individual status for **SI** or **AC**, the following error message appears:

- "Individual cannot be activated for FS due to ineligible alien status."

### New MA TAD Business Rule

When the Alien Checklist has an outcome of ineligible for MA for an individual and the Worker attempts to change the MA individual status for **SI** or **AC**, the following error message appears:

- "Individual cannot be activated for MA due to ineligible alien status."

## 29. TAD Business Rule for Individual Category Code FS

The POS TAD business rule indicating that the individual category should be FS (NCA Individual on a CA Case) was updated to ensure that the MA individual status is not **AP**, **SI**, **AC** or **SN**.

## 30. TAD Business Rule for Reductions in FS Coupon Amount

When the FS benefit amount is reduced for a participant at recertification, the budget clocks-down.

The TAD business rule for reductions in the FS benefit amount at recertification was updated to ensure that the message only appears when the FS benefit amount is reduced in the new budget. The following error message appears:

- When processing a new budget that results in a reduction in the food stamp coupon amount, you must use the next available "A" cycle following the end of the budget clock-down. Please return to the budget window and reauthorize the budget with a new effective cycle.

## 31. TAD Transmission Rule Update

POS was updated to transmit changes in first name, last name and date of birth for individuals in applying (**AP**) status for CA and single issue (**SI**) or active (**AC**) status for FS or MA on an Undercare case.

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## 32. Removal of Inquiry Screen NQIN19

Effective with this release, Option #9 (Employment Services Client Info) previously shown on the Individual Inquiry Screen (**NQIN00**) has been removed. The Office of Employment Services Client Info screen (**NQIN19**) was disabled with WMS Software Release 2008.3 effective October 20, 2008.

The applicant's/participant's employability status information formerly displayed on screen **NQIN19** is now available in NYCWAY on the following screens:

- Activity Inquiry screen (displays current employability status in the Program and Status fields);
- Activity Record screen (displays employability status at the time the action code was posted in the Prim-Status and Secd-Status fields)

Refer to PD # 08-40-SYS WMS Software Release 2008.3 for more information.

## 33. E-Form Updates

The following forms were converted to E-Forms:

- **LDSS-3573 NYC**, PA Recoupment Data Entry Form – WMS;
- **LDSS-3574 NYC**, Food Stamp Issuance Authorization Form;
- **LDSS-3575 NYC**, Public Assistance Issuance Authorization Form.

The **LDSS-3573**, **LDSS-3574** and **LDSS-3575** are not saved in the HRA One Viewer. To re-print these forms, the JOS/Worker must access the **Review Case** activity in POS and access the **Printed Forms** menu.

The following forms were updated:

- **LDSS-2474**, SSI Referral and Certification of Contact;
- **LDSS-4279**, Notice of Responsibilities and Rights for Support;
- **M-15**, Inquiry Regarding Veteran's Benefits and Servicemen's Allotments;
- **M-384**, OCSE Appointment Notice;
- **M-528n**, Request for Child Care Assistance or Request to Close My Cash Assistance (CA) Case;
- **M-858v**, Notification to Utility Company;
- **W-137B**, Action Taken on Your Request for Emergency Assistance or Additional Allowance (For Participants Only);
- **W-145VV**, Notice of Change in Cash Payment;
- **W-147BB**, Request for Approval of Special Grant Code 22- Moving Expenses;
- **W-153P**, Rental Assistance Unit (RAU) Case Documentation Transmittal; and
- **W-700D**, FIA School/Training Enrollment Letter.

New edits were added in the following forms to prevent improper future dates:

- **M-3g**, Notice to Report to Center;
- **W-113A**, Documentation Request Form (Return Document for Special Grant); and
- **W-113K**, Documentation Requirements and/or Assessment Follow-Up.

New eligibility factors were added for the following form for SSN validation:

- **W-113K**, Documentation Requirements and/or Assessment Follow-Up.

# POS Release Notes

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## E-Form M-42v

The following form was added back into POS as an E-Form in the CA Application Interview, CA Recertification Interview and CA Change Case Data activities:

- **M-42v**, Medicaid Choice/Managed Care Referral.

## New data entry for form M-42v

A new data entry window was added to the **Form Data Entry** window for the **M-42v** form. The JOS/Worker must select the name of the individual for whom the form will be printed and the date of referral.

The screenshot shows a software window titled "Medicaid Choice/Managed Care Referral (Form M-42v)". The window has a blue header bar with the text "Response to Question". Below the header, the main content area is titled "Medicaid Choice/Managed Care Referral (M-42V)".

**Instructions:**  
Medicaid applicants and participants are now required to join a Managed Care plan. If a Medicaid applicant or participant does not voluntarily choose a plan, they will be assigned to one. Refer the applicant/participant by using the MANAGED CARE CHOICE REFERRAL form. The referral form is only to be used to direct applicant/participants to the CHOICE Counselors. It cannot be used for referral to individual health plans.  
Select a name from the "who" list box and enter the date of the referral. The other fields for this form such as Worker name, case number, caseload and CIN number will be entered by the system.

Below the instructions, there are two input fields:  
- A dropdown menu labeled "Who:" with a small downward arrow.  
- A text box labeled "Date of Referral" containing the value "00/00/0000".

At the bottom of the window, there are two buttons: "OK" and "Cancel".

## Print edit for form M-42v

The form will be required for active individuals with MA coverage code **01** (Full Coverage). In order to print the form, the JOS/Worker will be required to complete the data entry window.