



# FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #12-10-SYS

### CA POS RELEASE NOTES VERSION 16.1

<b>Date:</b> February 13, 2012	<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 February 21, 2012. Descriptions of the changes can be found in POS Release Notes Version 16.1 (<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 February 21, 2012</i></p> <p><b>Attachment:</b></p> <p><b>Attachment A</b>    POS Release Notes Version 16.1</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 16.1 February 21, 2012

These Release Notes contain descriptions of changes in POS Release 16.1 scheduled for Tuesday, February 21, 2012. 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://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

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# POS Release Notes

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## 1. Site Determination Window Updates for Cases with Noncitizens

The **Site Determination** Window in the CA Application Intake activity was updated to add a new question:

- Is everyone in the household a US citizen?

This question helps insure that the intakes are routed to the Specialized JOS Workers who have been specially trained in immigrant eligibility issues and who must process cases that contain a noncitizen who is applying for CA.

If the question is not answered, the following error message appears when the JOS/Worker clicks the **Next** button or the **Refer for Intake** button:

- Please indicate if everyone in the household is a US citizen.

### Updated Site Determination Window

### Change for Refer for Intake button

The **Refer to Intake** button is enabled when the Worker answers the question “Is there a Special Situation?” and clicks on the **Initial Clearance** button.

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## Additional Error Messages

The following additional error messages appear if the questions listed below are not answered from the **Site Determination** window:

- **Is there anyone currently living in the household who was not listed on the case displayed on WMS Inquiry?**
  - “Please indicate if there is anyone else in the household known to WMS.”
- **If Problem is left unanswered:**
  - “Please indicate if there are any problems for this household.”

## 2. Login Queue Updates for Cases with Noncitizens

The Login Queue was updated to add a **Non-Citizen** column. This column has a checkmark when the case has an answer of **No** for the new question “Is everyone in the household a US citizen” on the **Site Determination** window.

The **Assignment** window that appears when an intake is selected is limited to staff who are authorized as **Specially Trained Immigration Worker** in the **POS Enrollment** window. This edit helps ensure that the intake is routed to the Specialized JOS Workers who have been specially trained in immigrant eligibility issues and who must process cases that contain a noncitizen who is applying for CA.

### CA Login Queue

Version 11.2 - Paperless Office System - [Activities Management] 2.1 2:13:07 PM Tuesday, June 26, 2007

File Edit Tools Window Help

Action Supervisor Queue Login Queue

LOGIN QUEUE														
Date Time	Emg	30 Day Reop	Log No	First Name 60	Last Name	Program	Primary Lang	Speak Eng	Paper Case	Non-Citiz	Mail or Fax	Cannot stay	Alert Message	Assigned To
06/20/07 10:12 am	<input type="checkbox"/>	<input type="checkbox"/>	1	Linda	Williams			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Wilson Lynn
06/20/07 03:18 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	Sam	Apple	PA	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Perdichizzi Andr
06/20/07 03:43 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	John	Orange	PA	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Perdichizzi Andr
06/21/07 02:38 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	First	Last	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Perdichizzi Andr
06/22/07 10:41 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Seperate	Determination	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
06/22/07 10:57 am	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	Seperate	Determination	PA/MA/FS	French	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Rangaiah Madh
06/25/07 09:08 am	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Carmen	Perez	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
06/25/07 09:13 am	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	Matia	Sosa	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
06/25/07 02:47 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	Firstname	Lastname	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Perdichizzi Andr
06/25/07 03:05 pm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	Joanna	Gomez	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Brown Larry

Start Assign Left Center Requested Return Regpening Update Dispositiosition WMS View Your Schedule Comment

# POS Release Notes

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## 3. Re-Evaluation of Inactive Noncitizens in Recertification Interview

A re-evaluation of eligibility is required for all new and inactive noncitizens at the recertification interview. In order to ensure that this determination is completed, new business rules were added in the **Individual Detail** window to determine whether the adult and children are in the household and to ensure that new individuals are added to the case. A new window was added to the Recertification Interview

### Individual Detail Window Update in the Recertification Interview Activity

In order to determine if the inactive noncitizen under the age of 21 is still residing in the household and needs to be reevaluated, a new field named **“Does this individual reside in the household?”** was added in the **Individual Detail** window in the **Recertification Interview** activity for these individuals.

The screenshot displays the 'Individual Detail' window in the POS Paperless Office System. The window title is 'Version 15.3 - Paperless Office System - [Individual Detail]' and the system clock shows '10:35:11 AM Tuesday, October 25, 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 Marital Status:** Fields for SSN (Valid), Date SSN Card Applied For (00/00/0000), Marital Status (Single/Never Ma), Country of Birth (Uzbekistan), State, County Of Birth, and Birth Cert No (NYC Only).
- Ethnic/Race Affiliation:** Radio button groups for Yes/No for categories: 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 a table for Immigrant Type, Immigrant No., Date of Status, and Qualified Immigrant Type and Description.
- Education:** Fields for Highest Degree Obtained (High School Grad), Education Level (Twelfth Grade), Student ID, Individual Status (PA, MA, FS), AFIS Referral, WMS AFIS Indicator, Agreed to be Imaged, and Other Names.
- Identity and Residency:** Fields for Birth/Hospital Certificate, Landlord Letter Statement from Non-Relative Landlord, and Citizenship. Includes checkboxes for 'Scan' and 'Scan Verified'.
- Relationship and Household:** Fields for Household Composition and Age. Includes checkboxes for 'Scan' and 'Scan Verified'.
- Social Security No.:** Field for Social Security Card with a 'Scan' checkbox.
- Household Residency:** A prominent question: 'Does this individual reside in the household?' with radio buttons for 'Yes' and 'No'. A yellow circle with the number '1' is next to the 'No' option.

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

### Update to Supervisory Approval Window for Individual Detail

The new question “Does the Individual Reside in the household” was also added in the Supervisory Approval-**Individual Detail** window.

# POS Release Notes

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## New Individuals Requiring Re-Evaluation Window in Recertification Interview

In order to ensure that the eligibility re-evaluation is completed for new case members and for inactive noncitizens, the new **Individuals Requiring Re-Evaluation** window was added in the **CA Recertification Interview** activity. This window appears after the **Individual Detail** window when the father or mother of the child is in the household and does not appear on the case or at least one noncitizen individual is in rejected (**RJ**) or closed (**CL**) status for Cash Assistance (CA), Medical Assistance (MA) or Food Stamps (FS) and the individual is not in active (**AC**), applying (**AP**) or single issue (**SI**) for any program.

If an individual in the household does not appear in the POS case or is on the POS case in “Not Applying” status (**NA**) for CA, MA and FS and does not appear in WMS, POS starts the **Case Member Addition** activity to allow the Worker to add the individual to the case.

If there is an inactive noncitizen on the case, POS sends a transaction to WMS to reset their status to **AP** status for CA, MA and FS.

POS saves a row in the case history with a description of “Individual(s) re-set to applying status” when this transaction is sent to WMS. This Undercare transaction is processed overnight by WMS.

## New window: **Individuals Requiring Re-Evaluation**

## New Completion Edit

When a transaction is submitted to WMS to reset the inactive noncitizen to applying status for CA, MA and FS, a new completion edit was added to prevent the Worker from completing the case until the overnight transaction is processed by WMS. If the Worker attempts to complete the activity, the following error message appears:

- POS submitted a transaction to WMS today to re-set individuals to applying status. You must wait until the action is processed by WMS to complete activity.

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## 4. Single Issue Print Queue Updates

The Single **Issue Grant Printing Queue** was updated to include the new **Backup SI Grant Queue**, which allows the Job Center to transmit backup grants directly from POS to WMS.

The new queue allows Job Centers to transmit backup grants to WMS with Benefit Issuance code **02** and **09** for CA cases when the pick-up code is **1** (Special Roll Check), **2** (Pended Until 45th Day of SNFP/SNCA/SNNC Eligibility) or **9** (EBT Emergency PA Single Issue Special Grant).

In addition, the Backup SI grant queue also allows the following FS backup grants to be transmitted to WMS, Benefit Issuance code **14** (following month FS) and Benefit Issuance code **16** for (FS separate determination cases). This queue is available to Supervisors for transmission of the grant.

This queue retrieves the following **Benefit Issuance** codes when they are marked as backup grants:

- CA SI Code **02** - Recurring Grant with Pick-Up Code **1, 2** or **9**
- CA SI Code **09** - Rent Supplementation with Pick-Up Code **1, 2** or **9**
- FS SI Code **14** - Following Month FS
- FS SI Code **16** - Following Month FS (for FS Separate Determination cases)

### New Backup SI Grant Queue

Version 15.3.1 - Paperless Office System - [Print Queues] 2:41:15 PM Wednesday, February 01, 2012

File Edit Tools Window Help

This tab shows backup SI grants that may need to be transmitted to WMS. Select the case to view the list of grants that can be transmitted. To transmit the grant(s), click on the 'Transmit Grant(s)' button.

Notice Print Queue SI Grant & Recoup Form Print Queue **Backup SI Grant Queue**

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Ca
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

The grants below must be transmitted to WMS if they are required or removed if they are not required. To transmit to WMS, click on the 'Transmit Grant(s)' button. To remove, click on the 'Rem' checkbox.

Sel	Rem	Issuance Code - Description	From	To	CA File Date	FS File Date	Due Date	Tra
>	<input type="checkbox"/>	Code 14 - Food Stamp Benefit - Full Month						
	<input type="checkbox"/>	Code 14 - Food Stamp Benefit - Full Month						
	<input type="checkbox"/>	Code 14 - Food Stamp Benefit - Full Month						
	<input type="checkbox"/>	Code 02 - Regular Allowance for Recurring Needs						
	<input type="checkbox"/>	Code 09 - Supplement of Rent Only						

Transmit Grant(s) Refresh Close

### Instructions

The new queue includes the following instructions:

- This tab shows backup SI grants that may need to be transmitted to WMS. Select the case to view the list of grants that can be transmitted. To transmit the grant(s), click on the **'Transmit Grant(s)'** button.

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## Case List

The top section of the window includes the list of cases with single issue grant forms that may need to be transmitted. This case list includes the following fields:

Complete	Case No	Case Name	Activity	Acty End Date-time	From	Caseload

- **Complete** – this checkbox allows designated staff to complete the activity once the grants are transmitted.
- **Case No** – this field indicates the case number for which the grants will be transmitted.
- **Case Name** – this field indicates the case name for which the grants will be transmitted.
- **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 current caseload for the case (from CASE\_CONTROL table)
- **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 activity.
- **End Date-time** – this field indicates the start date and time for the activity.

## Grant List

The bottom section of the window includes the following instructions: “The grants below must be transmitted to WMS if they are required or removed if they are not required. To transmit to WMS, click on the **Transmit Selected Grants** button. To remove, click on the **Remove** checkbox.”

Select	Remove	Code	Grant Description	From - To	PA File Date	FS File Date	CA Due Date	Transmitted

- Select (checkbox)
- Remove (checkbox)
- Code (grant code)
- Grant Description
- From – To (grant from and to dates)
- PA File Date
- FS File Date
- CA Due Date
- Transmitted (date of transmission or message)



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## Buttons

The window includes three buttons:

- **Transmit Grant** – this button transmits the selected grant(s) to WMS.
- **Refresh** – this button removes the case from the case list once the grant is marked as completed.
- **Close** – this button closes the Queue.

## Business Rules and Grant Transmission

When the Supervisor clicks on the **Transmit Selected Grants** button, POS runs business rules to determine whether the grant was already issued in WMS. If the grant was already issued, POS will remove the backup grant from the queue.

## 5. Levels of Approval Update for Storage Fees (CA SI Code 21)

Cases with a Storage Fee Grant Code (**21**) that are not in temporary/transitional housing and are not homeless require sign-off by the Deputy Director or Director.

## 6. Levels of Approval Update for FS SI Code 22

When a FS grant with Daily Retroactive Benefits code (**22**) is prepared with a period of more than 30 days, the case action must be approved by an AJOS II or above.

POS was updated to require approval by a AJOSII or above when a grant code **22** is prepared for a period that was covered by a previous grant code **22**. For example, if the AJOS prepares a grant for the period of December 1, 2011 to December 31, 2011, but this period was covered by a previous grant code **22**, approval by a PAAII or above is required.

CA POS was updated to require the entry of an approval in the **Special Grant Approval Screen** (NSGC99) in WMS and approval by an AJOSII or above in POS when a FS grant code **22** is prepared in the **FS Separate Determination** activity for a period that was covered by a previous grant code **22**.

For example, if the AJOS prepares a grant for the period of December 1, 2011 to December 31, 2011, but this period was already covered by a previous grant code **22**, then approval by an AJOSII or above is required.

A FS grant with the code **22** and a period of more than 30 days already requires the entry of an approval in the **Special Grant Code Approval** (NSGC99) screen and approval by an AJOS II or above in POS.

### Instructions for entry in Special Grant Approval Screen (NSGC99):

- To access the data entry **Special Grant Code Approval** screen: (NSGC99):
  - Access the WMS menu (NWMM00) screen
  - Move cursor to “six character transaction code”
  - Enter the six digit transaction code **NPBX05** and **Transmit** (press **Enter**)
- To access the data entry Special Grant Code Approval screen: (NSGC99):
  - The **NSGC99** appears
  - Enter the originating center number
  - Enter the case number
  - Enter the suffix
  - Enter the dollar amount
  - Answer the question, “Are you authorizing a benefit for the same case number and suffix?” with **Y** or **N**
  - **Transmit**

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```

NWMM00 (P)                WELFARE MANAGEMENT SYSTEM                03/27/08
                          HOST SYSTEM MENU

Selections:
01.....Inquiry
02.....PA/FS Budgeting
03.....Applications
04.....MABEL
05.....Worker Batch Functions
06.....Child Support Management System
07.....Worker Case Update Functions
08.....Medical Assistance Menu
09.....COMMON BENEFIT ID CARD SUBSYSTEM
10.....Archive Retrieval Menu
11.....TIME LIMIT TRACKING MENU
12.....Client Notice System
13.....MAPPER APPLICATIONS
14.....SSA 40 QUARTER MATCHING
      Enter Selection # █
      Or 6-Character Transaction Code NPBX05

COMPUTER SYSTEM - PRODUCTION
OPERATING MODE  - PRODUCTION
  
```

## Special Grant Approval Screen

```

NSGC99 (Z)                SPECIAL GRANT CODE APPROVAL SCREEN        03/27/08

ORIG ID:                   ISSUANCE CODE:
CASE #:                     SUFFIX:           AMOUNT:

ARE YOU AUTHORIZING A BENEFIT FOR THE SAME CASE NUMBER AND SUFFIX? Y OR N
  
```

## WMS Approval Prior to Transmission

In order to properly issue the benefits, the Worker must send the grants to the supervisor. The supervisor (AJOSII or above) must then **first enter the approval** in WMS screen **NSGC99**, **before transmitting the grant from POS to WMS.**

Once the **approval is entered in WMS**, the grant can then be transmitted into WMS. If the supervisor transmits the grant before entering the approval in **WMS screen NSGC99**, the grant transaction fails in WMS.

# POS Release Notes

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## 7. New Business Rules for FS Grant Code 22

When a FS grant with code **22** (Daily Retroactive Benefits) is prepared with a period of more than 30 days, the following warning message appears in the **FS Single Issue Data Entry** window:

- FS SI code **22** is for more than 30 days. AJOS II approval is required. **Special Grant Approval** Screen (NSGC99) is required before transmission to WMS.

When a grant code **22** is prepared for a period that was covered by a previous grant code **22**, the following warning message appears:

- Date overlap with prior FS SI code **22**. AJOS II approval is required. Special Grant Approval Screen (NSGC99) is required before transmission to WMS.

## 8. Completion Edit for Employment Plan

POS has new completion edits to ensure that an Employment Plan was started for a casehead 16 years of age or older and for all adults between the ages of 18 and 59.5 years in the household.

When the application case is activated or continues active at recertification, POS runs an Open TI query to NYCWAY for Action Code **119A** (EP Initiated) for the casehead and adult individuals:

- CA Application Interview
- EC – CA Application Interview
- CA Recertification Interview
- EC – CA Recertification Interview

If Action Code **119A** is not found for the casehead or the adults, the following error message appears:

- There is an adult in the household that requires an Employment Plan in NYCWAY.

To clear this error, the JOS/Worker must process an employment plan for the individual and update the case.

This edit will not affect the following case types and individuals:

- HASA cases
- Payees
- Emergency-Only applications (EAA, EAF, E-SN)
- Individuals marked as Home Visit Needed/Homebound (HVN/HB)

## 9. AFIS Window Update

POS will pre-fill the **Exempt** radio button for rejected and closed FS-only adults who are sanctioned or disqualified for Food Stamps.

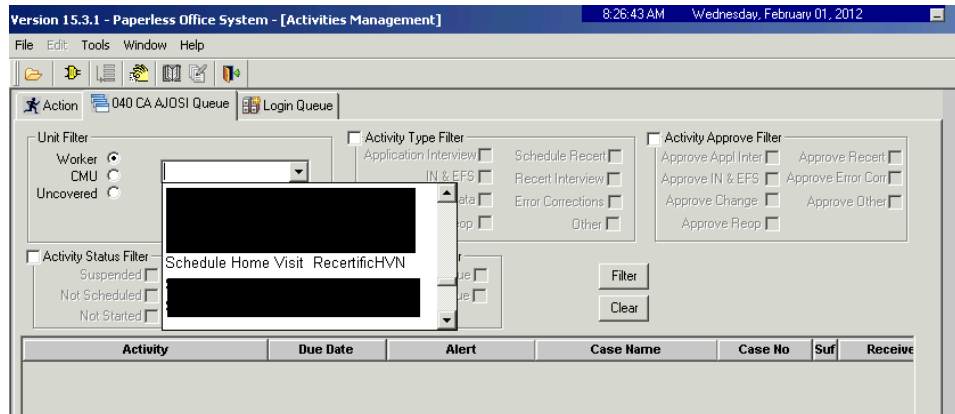
# POS Release Notes

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## 10. New Schedule Home Visit Recertification Queues

Beginning with the February 2012 WIN32X for March Cash Assistance (CA) Recertifications, POS was updated to place the **Schedule CA Recertification Appointment** activities based on the WIN32X into new **Schedule Home Visit Recertification** queues for each Job Center. These specific cases have a casehead or payee with Home Visit Needed or homebound (HVN/HB) status marked as homebound in WMS.

The Manager or Designee at each Job Center must access the Schedule Home Visit Recertification queue and assign the scheduling activities to the Designated JOS/Workers who will schedule and complete the home visit for CA recertification.



The Manager, Designee and Supervisors at each Job Center must ensure that staff schedules and conducts the home visits within the required recertification timeframe.

### Important Reminder:

If the participant fails keep the homebound/home visit needed interview and does not reschedule the appointment, do not use closing code **G10** (Cash assistance has been discontinued because the participant failed to appear for face-to-face recertification interview). CA closing code **G20** (Failure to Recertify – Home Visit) must be used in these instances.

## 11. Schedule CA Recertification Appointment Activity Updates

POS was updated to add new edits for Home Visit Needed/Homebound cases in the **Schedule CA Recertification Appointment** activity and to prevent the Worker from improperly completing the scheduling activity.

### Edit for Cases Marked as Homebound in WMS

A new edit in the **Schedule CA Recertification Appointment** activity when the case is marked homebound in WMS but the Casehead/Payee is not selected in the "Is any adult requesting a home visit or homebound" in POS. The following error message will appear for the JOS/Worker:

"This case cannot be scheduled until the conflict in the homebound status is resolved. The case is marked as homebound in the TAD Homebound Indicator, but the casehead is not marked as Home Visit Needed/Homebound in the interview.

The recertification appointment has not been scheduled. Please click the 'Cancel' button in the Close window and click the 'Next' button in the Household Screen before attempting to complete this activity.

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Please update the TAD Homebound Indicator in the CA Change Case Data activity if the casehead or payee is not requesting home visit status and is not homebound.”

## Completion Edit

POS will prevent the JOS/Worker from completing the scheduling activity from the **Household** Screen. If the JOS/Worker attempts to complete the activity without accessing the **Calendar** window, the following message will appear:

- The recertification appointment has not been scheduled. Please cancel the Close window and click 'Next' before attempting to complete this activity

## Home Visit Edit

If the case requires a home visit for recertification and the activity was not started from the Schedule Home Visit Recertification queue, the following message will appear for the JOS/Worker in the Calendar window:

“This case requires a home visit. Will you be making the home visit?

If you will be making the home visit, please click 'Yes' to continue.

If you will not be making the home visit, please click 'No' to suspend the activity and move the case to the Home Visit Needed queue for your center. You must notify the Home Visit Needed/Homebound Liaison that a home visit recertification is required.”

If the JOS/Worker clicks **No**, the activity will be moved to the Schedule Home Visit Recertification queue for the center.

## 12. CA Recertification Lockdown

The worker will receive the following error message when they attempt to access the CA Recertification Interview for a case in applying (**AP**) status:

- Error – This application case cannot be processed through the CA Recertification Interview activity

## 13. Update to POS FFRs Report in POS Management Console

The POS FFRs report for CA recertifications was updated to add a new column and a new filter for the Recertification Type.

The new column named "Recert Type" will be listed before the Interview Start Date and will include the type of recertification selected in the Schedule CA Recertification Appointment.

The Recert Type filter will appear in the Timeframe Selection of the report and will include the following options: (1) In-Office; (2) Video; (3) Home Visit with Contact; (4) Home Visit without Contact; (5) RTSC Mail; and (6) HASA Mail.

## 14. Update to Completion Edit to Prevent the Improper Completion of EFS

A completion edit ensures that Supervisors do not improperly complete the Approve IN/EFS activity when the case status for CA and/or FS was updated. This edit was used to run only when the case is eligible for EFS or Immediate Needs in the Approve IN/EFS activity.

# POS Release Notes

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## 15. New Unscannable Documents Filter

POS will not allow workers to index documents that fit the Unscannable document category.

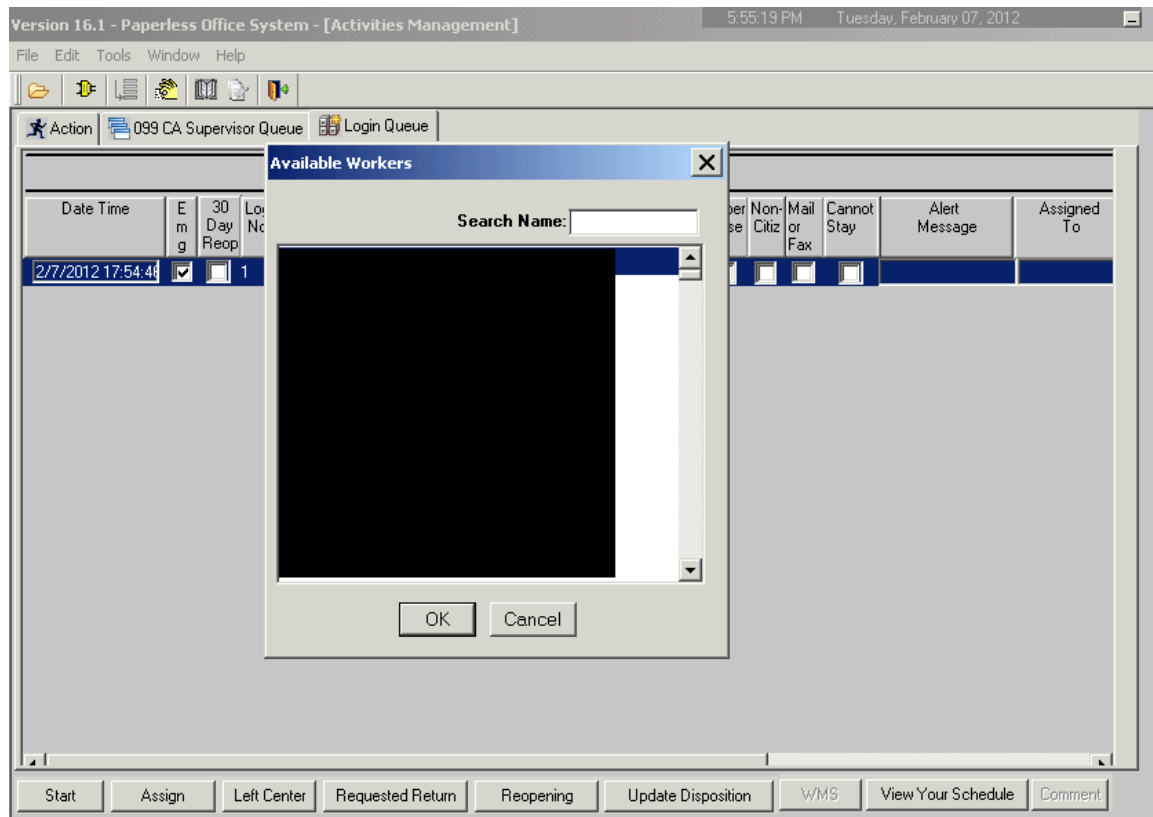
## 16. POS Incremental Search Update

POS has added the incremental search function to the **Available Worker Selection Box** which will make staff selection easier and faster. The Incremental search feature has been added to the following POS windows:

- POS Log-in Queue
- POS Worker/ Supervisory Queue
- POS Approval Assignment
- POS In-Center Referral
- POS Document Intake
- POS Case Assignment Screen for the following activities:
  - CA Application Interview, CA Recertification Interview, Non-Food Emergency Interview, FS Sep-Det Eligibility Decision, and CA Change Case Data.

Incremental Search will allow the staff to search for the available worker or supervisor by the last name. When the worker enters a "P" the following list comes up enabling the worker to choose from the selected names.

### *Example: Login Queue*



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## Example: Approval Assignment

The screenshot shows the 'Approval Assignment' window. At the top, there's a 'Selected Case' section with fields for 'No', 'Case Name', 'CIN', 'Suf', 'Caseload', 'Casehead', and 'SSN'. Below that is the 'Refer Case To' section, which includes a 'Search Name' field and a table with columns: 'Title', 'Unit', 'Last Name', 'First Name', 'U/W', and 'Phone Number'. The table content is currently blank. Underneath is a text area labeled 'Enter Comments If Any'. At the bottom, there are several status fields: 'Activity Includes Ready SI Grants: Yes', 'Highest PA Issuance Code Total: 225.00', 'Grants Needing Center Director (Admin JOS II) Approval:', and 'Next Level: AJOSII'. 'Cancel' and 'OK' buttons are located at the bottom right.

The search will run using the last name.

## 17. Regional Office and Special Project Center Access to CA Application Intake

CA Regional offices and the Special Project Center have access to multiple Job Centers for special projects. The CA Application Intake activity was updated to allow these sites to process application intakes for the Job Centers that they can access.

### Site Determination

POS displays the list of available centers to the worker from their current database. The JOS/Worker selects the application center from the menu. The selected center is used in the **Site Determination**, **Address Information** windows and **Case Login** windows as the center for the case.

If no centers are available, POS will display the following error message if the JOS/Worker attempts to start the CA Application Intake: "No Job Centers are available in the current database for intake"

### Login Queue

The JOS/Worker at the CA Regional Offices and Special Project Center has access to the Login Queue for the centers that they can access via a drop-down menu for their current database, in case they must resume an intake.

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## Site Determination Window with New Center Menu

Version 15.3.1 - Paperless Office System - [Site Determination] 3:27:26 PM Wednesday, December 21, 2011

File Edit Tools Window Help

Residential Address Undomiciled?  Center: **Melrose Job Center**

House No: 99 Street Dir/Name/Type: [None] Undomiciled [None] Alt: [None]

City: New York State: NY Zip Code: 100110000 Phone: [None]

Mail or Fax Application  Cannot stay for same day Interview Get Ticket

Is there a Special Situation / Hardship? **No Shelter/Homeless**

Casehead  
Last Name First Name Middle Name Sex D.O.B. SSN  
Trying This [None] M 01/01/1981 021-53-1684 Verify Address

Initial Clearance Is there anyone currently living in the household who was not listed on the case(s) displayed on WMS inquiry screen?  Yes...  No

Programs Applying For:  
 PA  MA  FS  Child Care in Lieu of PA  One Shot Deal One-Time Emergency Payment Only  
 CA case closed less than 30 days?  Yes  No You may be eligible for Food Stamps. Would you also like to apply for Food Stamps?  Yes  No

Language Spoken: English Can you speak English?  Yes  No Do you need an interpreter?  Yes  No  
 Language Read: English Can you read English?  Yes  No Can you write English?  Yes  No

Problem  
Has no Job

Next Refer for Intake Referral

When the CA JOS/Worker transmits (clicks the Xmit button) to register the case in WMS, POS will send the center selected in the Site Determination as the application center.

## Login Queue with New Center Menu

Version 15.3.1 - Paperless Office System - [Activities Management] 3:39:06 PM Wednesday, December 21, 2011

File Edit Tools Window Help

Action CA4 CA Supervisor Queue Login Queue

**LOGIN QUEUE** Center: **Melrose Job Center**

Date Time	Emg	30 Day Reop	Log No	First Name	Last Name	Program	Primary Lang	Speak Eng	Par Case	Mail or Fax	Cannot stay	Alert Message	Assigned To	St
12/21/2011 15:17	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	This	Trying	PA/MA/FS	E	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Breton Jose	Br

Start Assign Left Center Requested Return Regpending Update Disposition WMS View Your Schedule Comment

Noncitizen cases will continue to be restricted to be the "Specially Trained Immigration Worker" in the Assign window.



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## 18. Address Information Window Update for E-mail Address

POS has updated the Address Information Window to display the E-Mail Address field under the Mailing Address.

## 19. Removal of Applicant/Participant Task List Questions

All questions referring to the obsolete applicant (Form **W-680F**) and participant (Form **W-680W**) task lists have been removed from pre-referral section of all POS interviews including the review of those activities.

## 20. Model Office Updates

The following updates are scheduled for release during the week of January 30<sup>th</sup>, 2012:

- BEV appointments now appear in FRED. They are considered "offsite" appointments at every Model center except Center 037/F53, which has a co-located BEV office.
- NCA periodic mailer "appointments" (code 151) no longer appear in FRED.
- The previous release of FRED extended the date range over which NCA Recertification appointments are displayed in FRED. However the range for rescheduled appointments was calculated based on the rescheduled date, not the original appointment date. This bug is fixed in this latest release.
- The I-Speak form is now printed with tickets issued at Front Door Reception to clients whose preferred language is not English, and who have not already received the form in the past three months. The instructions that appear on the Front Door Reception (FRED) Confirmation page after a ticket is issued were updated to reflect this new feature. If the form prints, the user must indicate on the Confirmation page that the form was given to the client before the user can proceed.

### Front Door Reception (FRED) Confirmation window

You have issued the ticket shown below to [redacted]

Make sure this is the ticket you take from the printer and hand to the customer, then issue applicable passes if any, and click OK. If the ticket did not print properly, or if the customer received the wrong ticket, click Cancel and issue another ticket.

[redacted ticket image]

FLOOR: [redacted]

CA APPLICATION/ADDITION [redacted] LANGUAGE SPOKEN: [redacted]

The I-Speak Form printed with this ticket.  
Check here to confirm that you gave the I-Speak form to the customer:

Print Visitor/Case Member Passes

OK Cancel

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## 21. WMS Updates

The updates listed below were made to match changes in the New York State Welfare Management System (WMS) version 2012.1:

- A Recert Source field was added to Inquiry Screens **NQCS01**, **NQCS02**, **NQCS3A**, **NQCS3B**, **NQCP01**, and **NQCS28**.
- A CNS Abbreviated Notices field was added to Inquiry Screens **NQCS02** and **NQCP02**.

For additional details, please see the Policy Directive for WMS version 2012.1 under separate cover.

## 22. Activity Completion Window Updates

The **Activity Completion Edits** window has been updated to display the case and user information. The following fields were added to this window:

- Current Case, Suffix, DB Name, Case Center
- Current Activity, Parent, PC Name, PC Center
- User ID/POS Title, Caseload, User Center

The screenshot shows a web application window titled "Activity Completion Edits". It contains several input fields arranged in a grid-like structure. The fields are: Current Case, Suffix, DB Name, Case Center, Current Activity, Parent, PC Name, PC Center, User ID/POS Title, Caseload, and User Center. Below the input fields, there is a message: "The errors listed below must be resolved before completing the Error Correction activity." and a link labeled "Edit Instruction".

## 23. Updates to POS TAD

The following updates will be made to the POS TAD:

- The AFIS Indicator is set to **5 - Exempt good cause** for FS-only rejected and closed adults who are sanctioned or disqualified for Food Stamps.
- A new Birth Verification Indicator (BVI) code of **6** (Verified Medicare Clients) was added. This value will be set by POS when the MA status changes to active (AC) and the applicant/participants has a value of "Y" in the MCR (Medicare) field.
- A new field named **ABBR-CNS** (Abbreviated CNS Notices) appears on the WMS data section of the POS TAD. This field will be reserved for future use.

## 24. Update to Child/Teen Health Program Script Window

The Child/Teen Health Program Script will only appear in the **CA Application Interview** activity when there is a child in the household.

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## 25. Review Case Activity Updates

The Review Case was updated for actions that are not interviews, change actions or approvals. The review of these actions will be limited to the relevant windows for those actions.

For the following activities, POS will only display the Household Screen, TAD and Grant Summary windows:

- FS Grants Transmitted
- PA Grants Transmitted
- Print Grants/Recoupments
- WINR0352 Received

For the BEV Recommendation activity, POS will display the **Household** Screen and the **Referrals** Screen.

For the following activities, POS will only display the **Household** Screen:

- Access FS Application Log
- Access FS Deferral Log
- Access FS Recertification Log
- Access NCA FS Calendar
- ACME Young Report Received
- Activity Reassigned in Queue
- AFIS Freedom Results Received
- Application Withdrawal
- Approval Activity
- Assign CA Application Interview
- Assign CA Change Case Data
- Assign CA Recertification Interview
- Assign JOS Worker
- Assign FS Application Interview
- Assign FS Recertification Interview
- Assign FS Sep Det - Elig Decision
- Assign FTK FS Application Interview
- Assign Non Food Emergency Interview
- Assignment from Deferral Log
- Begin Recert Prep - Request IC
- CA Mass Caseloading
- Case Member Addition
- CBIC Referral to D&C
- CED Received
- Client Intake and D&C Referrals
- Clothing Voucher Referral to D&C
- Document Intake
- Error Correction
- FIA-1021 ABAWD Form Mailed
- Forwarded Document
- FS Application Interview Rescheduled
- FS Reception Intake
- FS Recert Rescheduled
- FTK FS Recert Interview
- Home Visit/Homebound Status Removed
- In-Center Referral
- Indexing
- IVRS Recertification Completed

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- IVRS Recertification Unsuccessful
- LDSS-4753 Form Mailed
- LDSS-4826 App/Recert Form Received
- MA Resubmission
- MA Sep Det - Case Submitted to EDITS
- MA Sep Determination Not Required
- Make a FS Budget
- Make a PA Budget
- Make a PA/FS Budget
- Make Case Comment
- NCA FS Case Registered
- Phone Contact Attempt
- Print a Form
- Referred to Print Queue
- Remove Activity (Resolve)
- Review Case
- Schedule Appointments
- System Removed
- TAD Received
- TAD Sent
- Transfer Recoupments
- Utility Liaison Review
- W-102 Form Mailed
- Waiting to See You
- WINR0632 Received
- WINR0656 Received
- WINR0706 Received
- WINR0750 Received
- WMS Internal Clearance Received

## 26. E-Form Updates

The following forms were updated:

- **M-3mm**, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance);
- **M-858ff**, Notice of Intent to Restrict Home Energy Allowance (Timely);
- **M-858x**, Notice of Intent to Recoup Utility Grant (Timely); and
- **W-145K**, Notice of Voluntary Restriction of Food and Other Grant and/or Energy Allowance (Timely).