



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #12-102-SYS

CA POS RELEASE NOTES VERSION 16.3

Date:

October 19, 2012

Subtopic(s):

POS

 This procedure can now be accessed on the FIAweb.

This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on October 22, 2012. Descriptions of the changes can be found in POS Release Notes Version 16.3 (**Attachment A**), Appendix A POS HDU Instructions (**Attachment B**) Appendix B POS RAD RAU Overview (**Attachment C**).

These release notes can also be found on the HRA Intranet at:

<http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

Effective October 22, 2012

Related Items:

[PB #12-40-ELI](#)
[PB #11-94-OPE](#)
[PD #11-18-ELI](#)
[PD #12-30-OPE](#)

Attachments:

 Please use Print on Demand to obtain copies of forms.

Attachment A POS Release Notes Version 16.3
Attachment B Appendix A POS HDU Instructions
Attachment C Appendix B RAD RAU Overview

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 16.3 October 22, 2012

These Release Notes contain descriptions of changes in POS Release 16.3 scheduled for Monday, October 22, 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

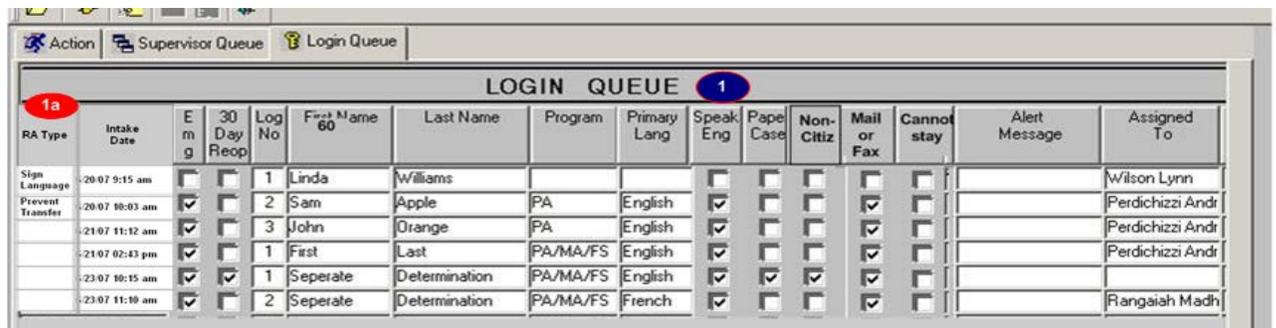
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1. Reasonable Accommodation Request (RAR)

Applicant/participants with physical and/or mental disabilities are protected by the Americans with Disabilities Act (ADA) and other federal, state, and local laws as well as social service regulations. No qualified applicant/participant with a physical or mental disability may be excluded from participation in or denied the benefits, programs, and services of a public entity or be subject to discrimination by any public entity.

Applicants /participants can formally submit a RAR to the Family Independence Administration (FIA). If the request is approved by FIA, POS will display the RA (Reasonable accommodation) type from the IQ system {RAR are processed in the IQ system} on the **POS CA Login** window. The JOS/Worker will also see additional informational messages to the JOS/Worker when there is a scheduling conflict or a travel accommodation. Additional RA types will include reading or completing forms, preventing the transfer of the case etc.

The POS CA Login queue will display the RA Types if the RAR was granted by FIA:



LOGIN QUEUE 1															
RA Type	Intake Date	Emg	30 Day Reop	Log No	First Name 60	Last Name	Program	Primary Lang	Speak Eng	Pape Case	Non-Citiz	Mail or Fax	Cannot stay	Alert Message	Assigned To
Sign Language	-20:07 9:15 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
Prevent Transfer	-20:07 10:03 am	<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
	-21:07 11:12 am	<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
	-21:07 02:43 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
	-23:07 10:15 am	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Seperate	Determination	PA/MA/FS	English	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	-23:07 11:10 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

Priority Queuing In Model Office Centers

RA cases that are identified as Priority queuing will appear in Red in the MONIQ Ticket list. If the JOS/Worker attempts to call a case before a priority queue case the system will display the following message:

“There is a customer in the waiting area that has a reasonable accomodation for priority queuing. You must call and finish that customers ticket(highlighted in red font) before being permitted to call any other tickets.”

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The RA Definition Type Table

IQ RAR Type	RA Type Description	Definition of RA Type
Reading Forms	Assistance with reading applications or forms	This accommodation type requires FIA staff to assist with reading the application/forms for the applicant/participant for any scheduled appointment.
Completing Forms	Assistance with completing applications or forms	This accommodation type requires FIA staff to assist with completing the application/forms for the applicant/participant for any scheduled appointment.
Sign Language	Sign Language Interpreter	This accommodation type requires FIA staff to arrange for a sign language interpreter for any scheduled appointment.
Resched Appts	Not to be scheduled for certain days and times	This accommodation type requires FIA staff to only schedule appointments on the applicant/participant's available dates and times.
Priority Appts	Priority queuing to minimize wait time	This accommodation type requires the applicant/participant's wait time to be minimized by giving priority when waiting.
Travel Comp	Scheduling appointments based on travel companion availability	This accommodation type requires FIA staff to schedule appointments when the applicant/participant's travel companion is available.
Prevent Transfer	Not to have your case transferred	This accommodation type requires FIA staff to allow the applicant/participant to keep his/her case at the preferred location (as long as the preferred site is not closing).
Temp Travel Exemption	Temporary Travel Exemption for 90 days pending Para-transit approval	This accommodation type requires FIA to exempt the applicant/participant from an in-person appointment while waiting for Para-transit. FIA will arrange for a home visit for scheduled appointments during this period.
Blind/Visually Impaired	Individualized assistance for the blind/ visually Impaired	This accommodation type requires FIA staff to assist the applicant/participants necessary due to blindness/visual impairment. For example the applicant/participant may need assistance walking to and from the elevator, or may be accompanied by a service animal.
Other	Other	This accommodation type should be used for a condition where neither home visits nor flexible scheduling is required. This is for something less critical than the other options listed above. For example the applicant/participant may need to eat at a certain hour due to a medical condition.

The JOS/Worker will receive the following RA messages when there is an active RA individual on the case and they attempt to schedule for a application or recertification interview or transfer the case to another center.

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RA Definition Type Messages

RA TYPE	MESSAGE TO WORKER
Assistance with reading applications or forms.	The client has a reasonable accommodation for assistance with reading forms. Please be prepared to read the application/forms for the client for this appointment and any other scheduled appointment.
Assistance with completing applications or forms.	The client has a reasonable accommodation for assistance with completing forms. Please be prepared to assist with the application/forms for this client's appointment and any other scheduled appointment.
Sign language interpreter	The client has a reasonable accommodation for a sign language interpreter. Please arrange for a sign language interpreter for this appointment. The EEO sign language interpreter liaisons are Ms. Joanne Kent (212) 331-5568 and Mr. Luis Caballero (212) 331-5569.
Not to be scheduled for certain days and times.	The client is not available for the days and times noted below. Please schedule all appointment at the client's available dates and times.
Priority queuing to minimize wait time	The client has a reasonable accommodation for priority queuing. Client's wait time must be minimized.
Scheduling appointments based on travel companion availability	The client has a reasonable accommodation for a travel companion and the person is not available for the days and times noted below. Please schedule the client's appointment on their available days and time.
Not to have your case transferred	The client has a reasonable accommodation for a case transfer exemption. You cannot transfer this case to another site.
Temporary Travel Exemption for 90 days pending Para-transit approval	The client has a reasonable accommodation for a travel exemption. Please arrange for a home visit for this appointment and any other scheduled appointment.
Individualized assistance fro the blind/visually Impaired <i>(Show IQ comment text)</i>	The client has a reasonable accommodation for assistance due to blindness/visual impairment. Please examine the information below and give the client assistance or service as needed. <i>(Show IQ comment text)</i>
Other Note: <i>To be used for a condition where neither home visits nor flexible scheduling is required—less critical than other options above</i>	The client has a reasonable accommodation of type "Other". Please examine the information below and give the client assistance or service as needed. <i>(Show IQ comment text)</i>

The activities below will display the RA messages when the activity is initiated by the JOS/Worker:

- CA Application Interview
- CA Recertification
- CA Change Case Data
- CA Non-Food Emergency
- CA IN/ESNAP Issuance
- Finger Imaging Referral
- CA Re-open a Case
- CA Settle in Conference
- In-Center Referral
- Client Intake
- Case Member Addition
- Document Intake

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2. Homeless Diversion Unit (HDU) Integration in POS

HRA's Homelessness Diversion Units (HDUs), part of the Family Independence Administration's (FIA) Office of Housing and Homeless Services / Initiatives, work to keep New Yorkers who are in danger of losing their apartments, or have already lost them, from having to enter the city's homeless shelters. HDUs work with the Department of Homeless Services (DHS), the NYC Housing Authority and many other organizations and City agencies to assist families and individuals in need in obtaining and maintaining stable, affordable housing.

HDU staff members are located at HRA Job Centers throughout the City, the DHS Preventive Assistance and Temporary Housing (PATH) Bronx shelter Intake facility for homeless families with children, the East 30th St. shelter intake facility for single men and adult families (without children), and the women's shelter intake facilities in Brooklyn and the Bronx.

In the first phase of HDU integration, POS has added the workflow of the Homeless Diversion Units (HDUs) at HRA Job Centers with:

- Consolidation and updates to the grant requests window for rent arrears, mortgage arrears and new apartment requests;
- Updates to the **SI Grant Requests and Issuance Task List**;
- The addition of three (3) new activities to allow the processing of requests routed to HDU;
- Electronic referral of grant requests to the Centralized Rental Assistance Unit (RAU); and
- New system for RAU for processing.

The following request types can be referred to HDU:

- Rent Arrears
- Mortgage Arrears
- Property Tax Arrears
- Amortization of mortgage on applicant/recipient-owned property
- Carrying charges on applicant/recipient-owned property
- Rent in Advance to Secure a New Apartment
- Security Deposit or Voucher
- Broker's Fee or Voucher
- Moving Allowance

The JOS/Worker will record the grant request(s) in the **Shelter (Housing) Expenses** window and the **SI Grant Requests and Issuance Task List**.

In-Center referral to HDU

The JOS/Worker will refer the case to HDU when they have received a request for housing assistance which requires HDU. The **Outstanding Request** window will allow the In-Center referral to HDU from the JOS/Worker's activity.

If the HDU JOS/Worker recorded the grant request, POS will start the HDU Intake automatically from the interview activity and a separate assignment will not be required.

Assignment to HDU JOS/Worker

The HDU Supervisor will monitor their queue for **Assign HDU Intake** activities referred to HDU. The Supervisor will access the **Assign HDU Intake**, assign the case and notify the HDU JOS/Worker about the assignment.

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HDU Intake

The HDU JOS/Worker will receive an **HDU Intake** activity in their queue and will access the case to process the intake. The HDU Intake will include the following windows:

- Household Screen
- Address Information
- Referred From
- HDU Information
- SI Grant Requests and Issuance Task List
- Print Forms
- Approval Elements

HDU Approval

The **Approve HDU Intake** activity will be submitted to the HDU Supervisor for approval.

The Approve HDU Intake will include the following windows:

- **Household Screen**
- **Address Information**
- **Referred From**
- **HDU Information**
- **SI Grant Requests and Issuance Task List**
- **Print Forms**
- **Approval Elements**

If the case does not require a referral to the Rental Assistance Unit (RAU), the **HDU AJOS I** will serve as the first level of approval and will send the case for additional levels of approval if needed.

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HDU referral to RAU

If the case requires a RAU referral, the RAU packet must be scanned and indexed prior to referring the case electronically.

The HDU supervisor will ensure the completeness of the RAU packet and refer the case to RAU.

RAU Decision

After RAU processes their decision on the case, an **Assign Non-Food Emergency (Applying Cases)** or an **Assign Change Case data (Active Cases)** activity will be placed in the **RAU recommendation to HDU** queue.

The **Request Action** window will allow HDU to process the case. HDU will process the grants in the **Single Issue Data Entry** window.

Appendix

For more information, please refer to **Appendix A HDU-RAU handout**.

3. Rental Assistance Unit (RAU) Integration with POS

A new system named the **Rental Assistance Database (RAD)** was developed and implemented to allow the Centralized Rental Assistance Unit (RAU) to process reviews and decisions on cases with requests for rent arrears, mortgage arrears and new apartment requests.

RAD is available as a new icon on the POS Portal. The RAD staff accesses the system by entering the WMS ID and password into the login window.

RAD includes the following windows:

- **Dashboard**
- **Quick Start**
- **Case Information**
- **Grant Decision**
- **Grant Decision Detail**
- **Decision Submission**
- **Staff Information**
- **Worker Availability**

When review of the grant requests is completed, the decision from RAU is electronically transmitted from RAD to POS. RAD staff can initiate referrals directly in RAD and submit them to POS for processing by HDU.

Appendix

For more information, please refer to **Appendix B RAU-RAD Overview**.

4. Updates to Rent Arrears and Mortgage Arrears Window

The question “**Are There Rent Arrears?**” in the **Shelter (Housing) Expenses** interview section was changed to “**Are There Rent or Mortgage/Tax Arrears**” to allow the JOS/Worker to record the following requests in a single window:

- **Rent Arrears**

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- Mortgage Arrears
- Property Tax Arrears
- Amortization of mortgage on applicant/recipient-owned property
- Carrying charges on applicant/recipient-owned property

Are There Rent Or Mortgage/Tax Arrears?

Response to Question

Rent Arrears

Arrears Amount	Period From	Period To	Months of Arrears
\$1,569.00	01/01/2012	07/31/2012	08

Mortgage Arrears

Arrears Amount	Period From	Period To	Months of Arrears
\$.00	00/00/0000	00/00/0000	

Property Tax Arrears Amount	Property Tax Period From	Property Tax Period To	Property Tax Months of Arrears
\$.00	00/00/0000	00/00/0000	

Amortization of mortgage on applicant/recipient-owned property

Amount: \$1,568.00

Carrying charges on applicant/recipient-owned property

Amount: \$1,596.00

Document... Comment...

OK Cancel

- To record rent arrears, the JOS/Worker clicks on the **Rent Arrears** radio button and enters the requested information in the **Arrears Amount**, the **Period From** and **To** and the **Months of Arrears** fields.
- To record mortgage arrears and/or property tax arrears, the JOS/Worker clicks on the **Mortgage Arrears** radio button and enters the requested information in the **Arrears Amount**, the **Period From** and **To** and the **Months of Arrears** fields.
- To record amortization, the JOS/Worker clicks on the **Amortization of mortgage on applicant/recipient-owned property** checkbox and enters an amount in the **Amount** field.
- To record carrying charges, the JOS/Worker clicks on the **Carrying charges on applicant/recipient-owned property** checkbox and enters the amount in the **Amount** field.

Removed questions

Previously, the JOS/Worker accessed three separate windows to record these requests. To accommodate this integration, the **Mortgage Arrears/Property Taxes** question and the request types of “Amortization of mortgage on applicant/recipient-owned property” and “Carrying charges on applicant/recipient-owned property” were removed from the **Issue Generic CA Benefit** question in the **Special Grants** window within the **SI Grant Request and Issuance Task List**.

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5. Updates to Housing-Related Benefits Window

The **Housing-Related Benefits** window in the **Special Grants** section of the **SI Grant Request Task List** was updated to add required fields and improve the interfaces. This window allows the JOS/Worker to record requests for rent in advance to secure an apartment, moving allowance, security deposit, broker's fee or voucher, and furniture allowance.

A new question was added after the **Shelter Code** field: **Is Rent in Advance Required?** When the JOS/Worker clicks **Yes** for this question, the **New Rent** field will be enabled. This new field prevents mistaken entries of new rent when an advance is not required.

The **New Address** and **Landlord Address** sections of the window were moved and now capture the full required information.

This window allows you to record requests for rent in advance to secure an apartment, security deposit, storage fees, broker's fee or voucher and furniture allowance.

Case Head Name	<input type="text"/>	Household Size	<input type="text"/>
Shelter Code	<input type="text"/>	Is Rent in Advance Required?	<input type="radio"/> Yes <input type="radio"/> No
New Rent	<input type="text"/>	Frequency	<input type="text"/>
		Monthly excess rent	<input type="text"/>
		Excess rent...	<input type="text"/>
		Move in Date	<input type="text" value="00/00/0000"/>
		Heat separate from rent?	<input type="radio"/> Yes <input type="radio"/> No
New Address:	Street Number/dir/Name/Type/apt	<input type="text"/>	<input type="text"/>
	City/State/Zip	<input type="text"/>	<input type="text"/>
Landlord Name:	<input type="text"/>		
Landlord Address:	Street Number	<input type="text"/>	<input type="text"/>
	Dir/Name/Type	<input type="text"/>	<input type="text"/>
	City/State/Zip	<input type="text"/>	<input type="text"/>
Moving Allowance	Security Deposit	Broker's Fee/voucher	Furniture
<input type="radio"/> Yes... <input type="radio"/> No	<input type="radio"/> Yes... <input type="radio"/> No	<input type="radio"/> Yes... <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Document...	Scan	Comment...	
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	

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Updates to Moving Allowance window

The **Moving Allowance** window appears when the JOS/Worker clicks **Yes** for **Moving Allowance** in the **Housing-Related Benefits** section. The window was updated to allow the JOS/Worker to record three estimates from movers, and enter the full addresses for the movers.

This window allows you to enter (3) mover estimates and the mover address information.

1st Estimate

Mover name:

Mover Address: Street Number Dir/Name/Type

2nd Estimate

Mover name:

Mover Address: Street Number Dir/Name/Type

3rd Estimate

Mover name:

Mover Address: Street Number Dir/Name/Type

Moving Reason **Moving Detail**

Items Moved

Boxes Beds Chairs Tables Dressers Sofas

Other Items (Specify)

Date items were moved?

Updates to Security Deposit window

The Human Resources Administration (HRA) no longer issues cash security deposits to Cash Assistance (CA) applicants/ participants who request assistance to secure an apartment in a non-NYCHA development. Effective February 1, 2011, HRA began issuing a Security Voucher (**W-147N**) in lieu of a cash security deposit to these CA applicants/participants.

Applicants or participants using a NYCHA Section 8 voucher with a private landlord must use the Security Voucher (**W-147N**).

Form **W-147N** informs the landlord of the HRA policy of providing security vouchers in lieu of cash security deposits and that the Agency will pay the landlord up to the equivalent of one month's rent if it is verified that the participant failed to pay his/her rent and/or damaged the apartment. These payments may not exceed the amount listed on the original voucher. The Landlord's Claim For Security Voucher Payment (on the back of Form **W-147N**) must be submitted within three months after the tenant has vacated the apartment.

CA applicants or participants who seek assistance in obtaining an apartment within a NYCHA public housing development must be issued a NYCHA Rent Security Voucher (**W-147E**) in lieu of a cash security deposit. There is an exception for a limited group of CA applicants or participants, who seek assistance in moving into an apartment in one of the six NYCHA Section 8 Project Based Developments (Multi-Family) that are listed on Attachment A of Policy Bulletin 11-94-OPE (Securing NYCHA Public Housing) who are still eligible to receive a cash security deposit.

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Form **W-147E** is an agreement which guarantees that HRA will pay NYCHA up to one month's rent if the tenant fails to pay his/her rent and/or damages the apartment.

The **Security Deposit** window appears when the JOS/Worker clicks **Yes** for **Security Deposit** in the **Housing-Related Benefits section**. The **Security Deposit** window was updated to accommodate HRA's updated policy and add the following questions:

- Is this a private landlord?
- NYCHA Development (drop-down menu)?
- Is this a NYCHA dwelling requiring cash?
- Accept Voucher?
- Case to be referred to RAU?

Security Deposit Vouchers are given for NYCHA and private landlords. There is an exception where cash is given. See the current policybulletin for the list of locations that can be issued cash. The case must be referred to RAU if the amount requested is greater than the cash assistance shelter allowance for the household size.

Shelter Code		New Address	
<input type="text"/>	Street Number/Dir/	<input type="text"/>	<input type="text"/>
	Name/Type/Apt	<input type="text"/>	<input type="text"/>
	City/State/Zip	<input type="text"/>	<input type="text"/>
Amount Requested	Is this a Private Landlord?	NYCHA Development	
<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	
Is this a NYCHA dwelling requiring cash?	Accept Voucher		
<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Pending		
Case to be referred to RAU?	Document...		Scan
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>

If the security deposit request is higher than the cash assistance shelter allowance for the household or the landlord will not accept a voucher, the case must be referred to RAU.

For additional information, please see **Policy Directive 11-18-ELI** (Security Voucher Issuance Process) and **Policy Bulletin 11-94-OPE** (Securing NYCHA Public Housing).

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Updates to Broker's Fee/Voucher window

The **Broker's Fee/Voucher** window appears when the JOS/Worker clicks **Yes** for **Broker's Fee/Voucher** in the **Housing-Related Benefits** section. The window was updated to add the following questions:

- Is the amount within Agency Limits?
- Will broker accept voucher at agency limits?
- Does broker prefer a check at agency level?
- Case to be referred to RAU for approval?

If the requested amount is higher than the agency limit or the broker will not accept a voucher, the case must be referred to RAU.

Please enter the information that is required for a broker fee voucher request.

Broker Name Broker Fee Reason

Street Number Dir/Name/Type City/State/zip

Reason Detail Amount requested by broker

Is the amount within Agency Limits? Yes No

Will broker accept voucher at agency limits? Yes No Pending

Does broker prefer a check at agency level? Yes No

Document... Scan

Case to be referred to RAU for approval? Yes No

OK Cancel

6. Completion of EAF/E-SNA Eligibility Determination Window for HDU Requests

For requests that will be referred to HDU, the **EAF/E-SNA (Emergency Assistance for Families/ Emergency Safety Net Assistance) Eligibility Determination** window (task 4 in the **SI Grant Requests and Issuance Task List**) will be disabled in the interview activities for the JOS/Worker recording the request and will be completed by HDU in the **HDU Intake**.

Grant requests that will be referred to HDU can be recorded in the **CA Application Interview**, **CA Non-Food Emergency/Special Grant Interview**, **CA Change Case Data** or **CA Recertification Interview** activities. In these activities, the JOS/Worker recording the request will complete the **Request Details** window and check the **HDU Request** checkbox. When this checkbox is selected, the **EAF/E-SNA Eligibility Determination** window is disabled in the **CA Application Interview**, **CA Non-Food Emergency/Special Grant Interview**, **CA Change Case Data** or **CA Recertification Interview** activities.

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For participants, the JOS/Worker will continue to print the Request for Emergency Assistance, Additional Allowances or Adding a Person to the Case (For Participants Only) or Adding a Person to an Active Cash Assistance Case (**W-137A**) form in the **Print Forms for Client to Sign** window (task 5 in the **SI Grant Requests** and **Issuance Task List**).

The case will be referred to HDU when the JOS/Worker clicks **Go** for **Outstanding Requests** (task 6 in the **SI Grant Requests** and **Issuance Task List**).

7. Updates to Outstanding Requests Window

For requests that will be referred to HDU, the **Outstanding Request** window (task 6 in the **SI Grant Requests** and **Issuance Task List**) was updated to open the **In-Center Referral** window and allow the JOS/Worker to route the case to HDU.

8. Updates to Request Action Window

The **Request Action** window (task 6 in the **SI Grant Requests** and **Issuance Task List**) was updated to indicate whether the request requires a referral to RAU, indicate whether the request is ready for referral to RAU and display the decision received from RAU.

The JOS/Worker will not be able to record a decision for the request while the case is pending with RAU.

The following fields are new:

- **RAU Referral Required?** – This read-only field indicates whether the request requires a referral to RAU. This field will not appear for HASA cases.
- **Ready for Referral to RAU?** – This field allows the JOS/Worker to indicate whether the request is ready for referral to RAU. If the RAU packet was not scanned, a message will appear to remind the JOS/Worker to scan and index the packet. This field will not appear for HASA cases.
- **Was Decision Received?** – This field will indicate whether the decision has been received from RAU. This field will not appear for HASA cases.
- **Decision** – This field will indicate the decision by RAU. This field will not appear for HASA cases.
- **Conditions** – This field will indicate any conditions received from RAU for approved requests. This field will not appear for HASA cases.
- **Denied Amount** – This field will indicate the amount for denied requests. This field will not appear for HASA cases.

The **Approved Amount**, **Approved Period From** and **Approved Period To** fields were moved from the **Referrals and Outcomes** tab to the **Grants** tab.

Exception: HASA Cases

HIV/AIDS Services Administration (HASA) cases are not subject to HDU and RAU referrals. The HASA Worker will be able to proceed with the grant decision once approval is received from the HASA housing review process.

POS Release Notes

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Request Action Window – Grants tab

The screenshot shows the 'Request Action' window for 'Amortization of mortgage on applicant/recipient-owned property'. The status bar indicates 'Grant Info: Incomplete', 'Referrals and Outcomes: Complete', and 'Documentation and Verification: Complete'. The 'Grants' tab is active, showing 'SI Grant Needed?' as 'Yes', 'Decision Due Date' as '08/13/2012', and 'Overdue?' as 'Yes'. The 'SI Grant Decision' section has 'RAU Referral Required?' as 'Yes', 'Ready for Referral to RAU?' as 'No', and 'Was Decision Received?' as 'No'. The 'Decision' is set to 'Issue Grant'. There are buttons for 'Close', 'Next Request', and 'Previous Request'.

Request Action Window – Referrals and Outcomes tab

The screenshot shows the 'Request Action' window for the same request type, but with the 'Referrals and Outcomes' tab active. The status bar remains the same. The 'Referrals' section contains five rows, each with a 'Yes/No' radio button and a 'Details' text field: 'Referral to HDU', 'Referral to RAU', 'Referral to Housing Court', 'Referral to Center Management', and 'Landlord Contact'. A 'Comments' text field is located at the bottom of the main form area. Buttons for 'Close', 'Next Request', and 'Previous Request' are at the bottom.

POS Release Notes

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9. HDU Referrals to RAU

The HDU Supervisor will submit the case to RAU by clicking on the **Refer to RAU** button in the **Approval Elements** window in the **Approve HDU Intake** activity.

If the RAU packet was not scanned and indexed, an error message will appear and prevent the submission to RAU: "The RAU Referral packet must be scanned and indexed."

10. Non-HDU Referrals to RAU

If the applicant requests fewer than five months of rent arrears, mortgage arrears or property tax arrears and the monthly rent or mortgage expenses is below the household's CA shelter allowance, the case will not require a referral to HDU. If the case category is Emergency Assistance for Adults (EAA), a referral to RAU is not required.

When the referral to RAU is required without an HDU referral, the JOS/Worker will submit the request to their Supervisor for review. The Supervisor will then submit the case to RAU by clicking on the **Refer to RAU** button in the **Approval Elements** window.

If the RAU packet was not scanned and indexed, an error message will appear and prevent the submission to RAU: "The RAU Referral packet must be scanned and indexed."

11. RAU Recommendation Queues

Two new queues will be added for each Job Center:

- RAU Recommendation to HDU – this queue will be monitored by the HDU AJOS I
- RAU Recommendation to CMU – this queue will be monitored by the Job Center's AJOS I

If the CA case status is Applying (**AP**) or Single Issue (**SI**) in the Welfare Management System (WMS) at the time of the RAU decision, RAD will load an Assign Non-Food Emergency activity to the RAU recommendation queue.

For all other cases, RAD will load an Assign Change Case Data activity to the RAU recommendation queues.

12. Processing of Requests Approved or Denied by RAU

The designated HDU or Job Center Supervisor will assign the **Non-Food Emergency/Special Grant** or **CA Change Case Data** activity to the appropriate JOS/Worker.

The JOS/Worker will then access the **SI Grant Requests** and **Issuance Task List** and process the decision in the **Outstanding Requests** section and will prepare the grants for approved requests in the **Grant Data Entry** window.

If the request is approved by RAU, but the total amount for the grants entered in the **Grant Data Entry** window does not match the amount approved by RAU, the following error message will appear:

- "The entered grants do not match the amount approved by RAU."

After the request decision is processed by the JOS/Worker, it will be sent to the appropriate Supervisor for approval.

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13. HDU Reports

A new option of HDU was added in the POS Management Console, with five reports:

- Monthly Emergency Rental Assistance Approval Rates
- Monthly Report of Cases Reviewed by RAU who subsequently entered DHS Shelter
- HDU MMR Monthly Report
- HDU Outcome Report
- Diversion Referral Report

The reports are available to authorized HDU managers.

14. RAU Reports

A new option of RAU was added in the **POS Management Console**, with nine reports:

- Total Cases /Approved/Denied Case Summary
- Summary for Total Cases
- Approved Case Summary
- Denied Case Summary
- Case Detail
- Moving Expenses Summary
- Moving Expenses Detail
- Reasons for Approval
- Reasons for Denial

The reports are available to authorized RAU managers.

15. Update to EAF/E-SNA Eligibility Determination Window for SSI Recipients

The **EAF/E-SNA (Emergency Assistance for Families/Emergency Safety Net Assistance) Eligibility Determination** window (task 4 in the **SI Grant Requests** and **Issuance Task List**) has been updated to display a warning message to the JOS/Worker if the head of household or another adult on the case is in receipt of SSI when they initially record the request in Single Issue Task 4.

Messages

If the casehead or payee is in receipt of Supplemental Security Income (SSI) benefits and the WMS CA case status is **AP**, POS displays the following warning message:

- The head of household is in receipt of SSI. Please evaluate the case for EAA eligibility. If the case is eligible for EAA, please update the case category in the **Application Modification** activity.

If another adult is in receipt of SSI benefits and the WMS CA case status is **AP**, POS displays the following warning message:

- There are individuals on the case eligible for SSI. Please evaluate the case for EAA eligibility. If the case is eligible for EAA, please update the case category in the **Application Modification** activity.

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16. POS Marriage Equality Update

The POS CA TAD business rule has been updated to reflect the same sex marriage equality law.

17. OCSE Updates

The OCSE appointment form (**M384**)has been updated to add new fields for the child's first name, line number and CIN. In addition, new checkboxes were added to indicate whether the OCSE referral is done at the time of application, recertification, reopening, or other case changes.

18. POS Response Window Updates

POS has added additional edits and validations to the following response windows when the JOS/Worker answers **Yes** to one of the following questions;

1. Has Daily Activity limited because of an Illness/temporary disability or is Blind, Sick or Disabled?
2. Is or was Drug or Alcohol dependent?
3. Does anyone in the Household receive the following?
 - Workmen Compensation
 - Unemployment Benefit
 - Supplemental Security Income Benefits
 - New York State Disability
 - Private Disability Insurance

The JOS/Worker will not be able to exit the **Response** window without answering the necessary information.

19. CA Settled in Conference (SIC) Update

POS will perform a full TAD synchronization when the JOS/Worker initiates the CA Settled-in-Conference (SIC) activity. The POS TAD will encompass the latest updates to ensure correct processing of the SIC activity.

20. Medicare Buy- In Update

The Medicare Buy-In transaction process has been updated in POS to include Cash Assistance cases. A new **Medical Drill down** window will be updated to reflect the new elements required for the Buy-in process. POS will calculate the household income and determine if the applying or active individual is eligible for the Medicare Buy-in. If they are eligible POS will transmit these elements to process the Medicare Buy-in request after the TAD has been processed. If the applicant/participant does not qualify for the Medicare-Buy-in POS will display " Not eligible for Medicare Buy-In Program.

POS Release Notes

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Drill Down Window

Indicator **Zaza**

Health Insurance Claim Number
Example: 123-45-6789D

Date Enrolled in Medicare Part-A

Are you enrolled in Medicare Part B? Yes No

Date enrolled in Medicare Part B?

Medicare (MCR) Indicator

Medicare Savings Program (MSP) Indicator

Total Household Income

Outcome of Medicare Buy In

Instructions:
System will send data to EMEDNY when TAD is processed

21. Activity Completion Edit

POS has identified JOS/Workers reopening cases closed more than 30 days with the **Y42** (Case Closed in Error) opening code. To prevent this error, POS has added additional edits to prevent the use of **Y42** opening code being used for cases closed more than 30 days ago.

22. POS Portal Update

A new reporting interface will be made available for FIA reports. There currently exists a web portal named the **POS Portal** for applications used by HRA staff, which provides links to web applications maintained by the POS team (among others). After the user clicks one of these links, he/she is navigated to a login page which performs certain checks on his or her credentials.

Authorized users will be able to access these previously emailed reports thru the POS portal. This new option called FIA reports will be on the main page of the POS portal. Once the user clicks on the FIA Report link, the new FIA Reports log-in page should open.

NYC Human Resources Administration
Department of Social Services

login FIA Reports

Enter your WMS User ID and Password to login

User ID

Password

Sites

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

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

Users must be validated to have access to these reports and will enter the following:

- **User ID**- the user will enter their WMS ID in this field.

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- **Password-** the user will enter their WMS password
- **Sites-** the user will select their site in this menu.

The following messages will occur if the user's validation fails:

- Your **Computer**, [PC name], is not known to **FIA Reports**. Please inform the POS Help Desk that you received this alert message.
- Your **ID**, [WMS ID], is **not known** to the system. If you believe you should have access to **FIA Reports**, please inform POS Help Desk that you received this alert message.
- Your **ID**, [WMS ID], is **inactive**. Please contact your enrollment coordinator if you need to reactivate your ID.

23. Bureau of Eligibility Verification (BEV) Updates

POS will transmit the CILOCA (Childcare in lieu of Cash Assistance) information to the BEV appointment scheduling system. BEV staff will be able to determine if the referred individual has elected to receive CILOCA only.

24. WMS Updates

Effective October 2012 POS will reflect the following WMS changes:

Basic allowance increase:

H/H Size	Amount
1	\$ 158
2	\$ 252
3	\$ 336
4	\$ 433
5	\$ 534
6	\$ 617

Each additional person \$85

The Supplemental Nutrition Assistance Program Standard Utility Allowance (SUA) will decrease effective October 2012:

- 1 SUA Level 1 will decrease from \$736 to \$725
- 2 SUA Level 2 will decrease from \$291 to \$287
- 3 The SUA level 3 will remain unchanged at \$33.

The **NYSNIP** Shelter types(**94-95**) update is effective October 2012:

- 94-**Household eligible for Full SUA High shelter cost, SNAP shelter amount \$235.01 or greater.
- 95-** Household eligible for Full SUA Low shelter cost, SNAP shelter amount \$235.00 or less.

Additional Needs type 47 will reflect the budgeting of the entire household regardless if an individual is sanctioned on the case. The budget will now include the total household size which is equal to the number of individuals on the case in AP, SI, AC or SN status.

POS Release Notes

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25. Alien Disability Details

PB #12-40-ELI, Clarification on the SNAP Determination of Disability, has updated the following disability questions in Alien Disability window:

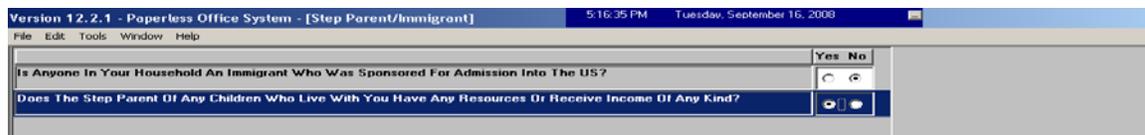
- Is in receipt of Veteran's 100% service connected disability benefits.
- Is in receipt of Veteran's 100% non-service connected disability benefits.
- A veteran or surviving spouse and considered by VA administration to be permanently homebound or in need of regular aid and attendance.
- Is a surviving child of veteran considered to be permanently incapable of self support.
- Is in receipt of MA based on Disability, Blindness or SSI related.

The following updates required an addition of a checkbox with the following updated text:

1. Is a surviving spouse/child of a veteran and entitled to compensation for a service-connected death or pension benefits for a non-service connected death based on a VA determination and has a disability considered permanent under the SSA.
2. Is in receipt of Federal or State supplemental benefits based on disability or blindness.
3. Is in receipt of Federal or State administered supplemental benefits.

26. Stepparent Income Update

POS has been updated to correctly process the step parent income utilizing the Step-Parent/Grandparent Budget Worksheet - Cash Assistance (**W648B**) process. The JOS/Worker must select the correct responses to the stepparent question "Does the Step Parent of any children who live with you have any resources or receive any income of any kind?" to start the budget process.



When the JOS/Worker receives the new **Response** window they will proceed to input the stepparent's information.

New **Response** window for Stepparent budgeting.

The screenshot shows a dialog box titled "Response to Question". The text inside reads: "Stepparent can refuse to apply for the CA filing Unit if they are in the Household. If so, Income and Shelter allowance must be calculated using W-648b. If stepparent is not in the Household and is contributing to the children needs then, any income should be considered as child support income".

There are two radio button questions:

- "Is the Stepparent in the Household?" with "Yes" and "No" options.
- "Is the Stepparent Applying/Active on the CA (PA) filing unit?" with "Yes" and "No" options.

Below these are two input fields:

- "Who:" with a dropdown menu.
- "Enter 'Total Deemed Income' from Section VI of the W-648b" with a text input field.
- "Enter 'Maximum CA Shelter Allowance' from Section VII of the W-648b" with a text input field.

At the bottom, there is a "Document" section with a "Scan" checkbox (checked) and a "Comment..." text input field. "OK" and "Cancel" buttons are at the bottom.

The JOS/Worker will follow the instructional text messages below when appropriate and input the correct information on the new response window.

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Stepparent Message #1

"Stepparent can refuse to apply for the CA filing Unit if they are in the Household. If so, Income and Shelter allowance must be calculated using W-648b. If stepparent is not in the Household and is contributing to the children needs then, any income should be considered as child support income".

Stepparent Message #2

"If the Stepparent is not in the House hold then, you must click on the 'Cancel' button and consider the stepparent's income as child support or Alimony".

Stepparent Message # 3

"If the Stepparent is Part of the CA house hold unit, then, you must click on the 'Cancel' button and use the appropriate income source on the stepparent's line".

The Shelter amount will be multiplied by two to correctly process the income from a stepparent outside of the household unit and the codes will be prefilled in the budgeting window to correctly process the deemed income from the stepparent.

27. EAF Determination Update

POS has updated the Determination of Eligibility for Emergency Assistance to Needy families (EAF) (W-145TT) Form to add the following new question under **Section II EAF Eligibility Determination Checklist on the data entry window**.

1. Does the caretaker relative or non-parent caretaker receive SSI? If "Yes," determine eligibility for Emergency Assistance of Adults (EAA) first, if "No" or not EAA eligible, proceed to question 2.

28. Statewide Clearance

Effective October 22, 2012, the Statewide Clearance will be available to process CA/SNAP applicants/participants. During the application and recertification interview POS will automatically run the Statewide Clearance. If there is a match, the Statewide Clearance match window will open displaying the match results. If there is no match, the window will not open and the JOS/Worker can continue with the interview.

Window in the CA flow

The screenshot shows a software window titled "Version 16.3 - Paperless Office System - [Statewide Clearance Match]". The window contains the following information:

Instructions:
Below you will find data from other districts in NYS based on a social security number and demographics. Make sure the SSN entered is the applicant/participant's correct SSN. If the status of the case is active, it means that benefits are being received. If the status of the case is closed, the "Denial or Closing Date" represents the date of closing. The "Active Date" represents the last date benefits were/will be received. For more information, please review the procedure for "Processing the Statewide Clearance Match in POS". Select all checkboxes that match the client's demographic record.

Applicant/Participant Information in POS:

Name	SSN	DoB	Sex	CIN
JERRY GARCIA	277983764	1/1/1940	M	RJ10709W

Match Information from NYS WMS:

Match <input type="checkbox"/>	District: Albany County DSS	Name: JERRY GARCIA
	Case Type: FS	Sex: M
	Case Status: AC	DoB: 1/1/1940
	Indv Disp Status: AC	SSN: 277-98-3764
	Closing or Denial Date:	Application Status Date:
	Active Date: 6/30/2012	Match Score: 106

Buttons: Next, Previous

POS Release Notes

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In addition to the automated display of the Statewide Clearance, the JOS/Worker can request the Clearance at any time by accessing the **Tool Menu** and choosing Clearance and then Statewide clearance.

Window when selected from **Tools Menu**

Instructions
Below you will find data from other districts in NYS based on a social security number and demographics. Make sure the SSN entered is the applicant/participant's correct SSN. If the status of the case is active, it means that benefits are being received. If the status of the case is closed, the "Denial or Closing Date" represents the date of closing. The "Active Date" represents the last date benefits were/will be received. For more information, please review the procedure for "Processing the Statewide Clearance Match in POS". Select all checkboxes that match the client's demographic record.

Applicant/Participant Information in POS

Name	SSN	DoB	Sex	CIN
JERRY GARCIA	277983764	1/1/1940	M	RJ10709W

Match Information from NYS WMS

Match	District: Albany County DSS	Name: JERRY GARCIA
<input type="checkbox"/>	Case Type: FS	Sex: M
	Case Status: AC	DoB: 1/1/1940
	Indv Disp Status: AC	SSN: 277-98-3764
	Closing or Denial Date:	Application Status Date:
	Active Date: 6/30/2012	Match Score: 106

Buttons: Next, Close, Previous

If there is a match the information will be displayed after the **Disposition and Withdrawal** window for CA applications and the **Education and Training** window for CA recertifications.

29. Activity Inquiry in NYCWAY Window Update

The Activity Inquiry in NYCWAY window in the CA Application Interview and CA Recertification Interview activity was updated with a new question for each engageable adult household member between the ages of 18 and 59 years old. This question will help ensure that the Employment Plan was completed for each individual:

- Was an Engagement interview conducted for <Applicant/Participant Name>?

NYCWAY Employment Plans

Line	Name	SSN	EP Date	EP	EP Status	NYCWAY Status
01			/ /			AWT16 Await. Sched.

Client Employment Summary

Was an Engagement interview conducted for:

Line No	Client Name	Age	Presented On Interview	Comments
1	Nunez, Loyda	59	<input checked="" type="radio"/> Yes <input type="radio"/> No	

Buttons: Close

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If an engagement interview was not conducted, the JOS/Worker will be required to enter a detail case comment.

The **Approve CA Eligibility Decision** and **Approve CA Recertification** were updated to require approval of each review window when they are completed.

30. E-Forms

The following forms were updated:

- **M-384** Office of Child Support Enforcement (OCSE) Appointment Notice
- **W-147** Letter to Landlord - Request Residence Verification
- **W-147BB** Request for Approval of Special Grant Code 22- Moving Expenses
- **W-147CC** Certification of Move Statement
- **W-147E** NYCHA Security Agreement
- **W-147F** Shelter Arrears Repayment Agreement Worksheet
- **W-147H** Emergency Safety Net Assistance (ESNA) Shelter Arrears Repayment Agreement
- **W-147JJ** Broker's Statement for Fee Payment by Check
- **W-147KK** Emergency Assistance to Needy Families (EAF) Agreement to Repay Excess Shelter Arrears
- **W-147M** Landlord/Managing Agent's Statement
- **W-147P** Broker's Fee Voucher
- **W-147Q** Primary Tenant's Statement Regarding Occupancy of Secondary Tenant
- **W-147XX** Utility Arrears Repayment Agreement Worksheet
- **W-897P-EPU** Notification of Rent Payment Responsibility for Residents of CSRO Hotels and Family Emergency Apartments

The following forms were updated with the **SNAP** required language:

- **EBT-23** Notice of Special Cash Assistance and/or Supplemental Nutrition Assistance Program (SNAP)
- **M-3mm** Notification of Application Withdrawal (Cash Assistance, Supplemental Nutrition Assistance Program (SNAP) and Medical Assistance)
- **W-113K** Documentation Requirements and/or Assessment Follow Up
- **W-119** Request for Contact on a Supplemental Nutrition Assistance Program (SNAP) Application
- **W-145HH** Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (For Applicants Only)
- **W-519** Finger Imaging Notice

The following form has been removed from POS:

- **W 515N** Referral to Citizenship NYC.

Appendix A: POS HDU INSTRUCTIONS

HDU Intake Activity

After completing the Household Screen, Address Information, and Individual Detail sections in the **HDU Intake Activity**, the HDU worker must continue to complete the following sections:

- **Referred to HDU From** (see below)
- **HDU Information** (see pages 4-16)
- **SI Grant Requests** (see page 16)
- **Print Forms** (see page 17)
- **Approval Elements** (see page 18)

Referred to HDU From Window

Version 16.2 - Paperless Office System - [Referred to HDU from] 4:28:38 PM Wednesday, August 22, 2012

File Edit Tools Window Help

Case Information
Case Number: 00000022006B Case Name: LALA POLA

Referred to HDU From:
Homeless Referral Type: Domestic Violence At-Risk Population: Section 8 Defaults
Other Details:

Risk Factors
Risk Factors: Disability in Household
Risk Factors Details:

Requesting RAU Reconsideration/Addition Reason for Reconsideration/Addition
 Yes No

Other Details:
Narrative

Next Previous

In the **Referred to HDU From** Window, the HDU worker must complete:

- the **Referred to HDU From** section.
- the **Risk Factors** section.
- a detailed narrative in the **Narrative** section.

Requests and Reasons for RAU Reconsideration/Addition will also be shown.

HDU Information Window

Version 16.2 - Paperless Office System - [HDU Information] 11:49:45 AM Friday, August 24, 2012

File Edit Tools Window Help

Instructions: Use the window below to record grant requests. To record a request, click "Yes" for the appropriate row in the window. A Response to Question window will appear to allow you to record the details of the request. Once all requests are recorded, click the Next button to continue.

	Yes	No
Is Employed?	<input checked="" type="radio"/>	<input type="radio"/>
Is Self-Employed?	<input type="radio"/>	<input type="radio"/>
Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses?	<input type="radio"/>	<input type="radio"/>
Are There Rent Or Mortgage/Tax Arrears?	<input type="radio"/>	<input type="radio"/>
Mortgage/Property Tax Arrears?	<input type="radio"/>	<input type="radio"/>
HDU Shelter Arrears Detail	<input type="radio"/>	<input type="radio"/>
Household Resources, Expenses and Other Potential Savings	<input type="radio"/>	<input type="radio"/>
HDU Decision/Plan of Action	<input type="radio"/>	<input type="radio"/>
Document Deferral	<input type="radio"/>	<input type="radio"/>

Spanish Next Previous

The HDU worker must complete the **HDU Information** section which contains the following screens (shown in pages 3 through 15):

- **Is Employed?** (read only window, see page 4)
- **Is Self-Employed?** (read only window, see page 4)
- **Do you (or anyone who lives with) have a rent, mortgage or other shelter expenses?** (see page 5)
- **Are there rent or mortgage arrears?** (see page 5)
- **Mortgage/Property Tax arrears?** (see page 6)
- **HDU Shelter Arrears Details** (see pages 7-9)
- **Household Resources, Expenses and Other Potential Savings** (see page 10)
- **HDU Decision/Plan of Action** (see pages 11-14)
- **Document Deferral** (see page 15)

Is Employed? Response to Question Window (Read Only)

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:		Yes	No
Is Employed?		<input checked="" type="radio"/>	<input type="radio"/>
Response to Question			
Info from WRS			
Employee	Who Perkins Sam	Start Date 00/00/0000	Expected End Date... 00/00/0000
	Type of Work... Beauty Culture	Gross income \$0.00	Taxes Withheld \$0.00
Employer	Employer 111 Main	Frequency Hours/Freq... BW	Day Paid <input type="radio"/> Yes <input type="radio"/> No
Street	Street 111 Main St	Is Health Insurance Available through Your Employer (even If you are not participating)? <input type="radio"/> Yes.. <input type="radio"/> No	
City	City Queens	Do you have child or dependent care expenses due to employment (including job search)? <input type="radio"/> Yes <input type="radio"/> No	
State	State NY Zip -	Do you have other employment-related expenses (including job search)? <input type="radio"/> Yes <input type="radio"/> No	
City	Contact	Document... Scan Comment	
Zip	Title		
Wage	Phone - -		
Year			
Quarter			
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Is Self-Employed? Response to Question Window (Read Only)

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:		Yes	No
Is Employed?		<input type="radio"/>	<input checked="" type="radio"/>
Is Self-Employed?		<input checked="" type="radio"/>	<input type="radio"/>
Response to Question			
Info from WRS			
Employee	Who	Start Date 00/00/0000	Expected End Date... 00/00/0000
	Company Name <input type="radio"/> Yes <input type="radio"/> No	Gross Income \$0	Frequency <input type="radio"/> Yes <input type="radio"/> No
Employer	Name	\$0	Day Paid <input type="radio"/> Yes <input type="radio"/> No
Street	Business Address Different from Residence <input type="radio"/> Yes... <input type="radio"/> No	\$0	Hours Per Frequency
City	Business Type Business Tel #	\$0	Expenses <input type="radio"/> Yes.. <input type="radio"/> No
Zip			Monthly Net Income Amount \$0.00
Wage			Is Health Insurance Available to You (even If you are not participating)? <input type="radio"/> Yes.. <input type="radio"/> No
Year			Do you have child or dependent care expenses due to employment (including job search)? <input type="radio"/> Yes <input type="radio"/> No
Quarter			Do you have other employment-related expenses (including job search)? <input type="radio"/> Yes <input type="radio"/> No
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses? Response to Question Window

Are There Rent Or Mortgage/Tax Arrears? Response to Question Window

	Arrears Amount	Period From	Period To	Months of Arrears
<input checked="" type="radio"/> Rent Arrears	\$1,569.00	01/01/2012	07/31/2012	08
<input type="radio"/> Mortgage Arrears	\$.00	00/00/0000	00/00/0000	
	Property Tax Arrears Amount	Property Tax Period From	Property Tax Period To	Property Tax Months of Arrears
	\$.00	00/00/0000	00/00/0000	

Amortization of mortgage on applicant/recipient-owned property Amount \$1,568.00
 Carrying charges on applicant/recipient-owned property Amount \$1,596.00

Mortgage/Property Tax Arrears? Response to Question Window

Mortgage/Property Tax Arrears?						
Response to Question						
This window allows you to record the property details for homeowners requesting assistance with Mortgage/Tax Arrears or information for those requesting assistance with a Co-op purchase. For Co-op purchase, the purchase price must be entered and all details about the purchase must be entered in the "How was Home Afforded/Details of Co-op Purchase?" question.						
Type of Request <input type="radio"/> Purchase Co-op Apt <input type="radio"/> Help with Mortgage/Tax Arrears <input type="radio"/> Property Tax Arrears Only		Property Purchase Date <input type="text" value="00/00/0000"/>	Purchase Price (Incl tax, fees & closing costs) <input type="text" value="\$00"/>	Name of Mortgage Holder <input type="text"/>	Terms of Mortgage Years <input type="text"/> Interest <input type="text"/>	
Did you or will you make a Down Payment? <input type="radio"/> Yes <input type="radio"/> No	Down Payment Amount <input type="text" value="\$00"/>	Is Property Producing Income? <input type="radio"/> Yes <input type="radio"/> No	Monthly Amount Received <input type="text" value="\$00"/>	Number of Mortgages <input type="text"/>	Date Last Mortgage was taken <input type="text" value="00/00/0000"/>	Last Mortgage Amount <input type="text" value="\$00"/>
Equity in Home? <input type="radio"/> Yes <input type="radio"/> No	Equity Amount <input type="text" value="\$00"/>	Foreclosure Action? <input type="radio"/> Yes <input type="radio"/> No	Foreclosure Details <input type="text"/>		How Afforded Home/Details of Co-op Purchase? <input type="text"/>	
Document... <input type="text"/>		Scan <input type="checkbox"/>	Comment... <input type="text"/>			
<input type="button" value="OK"/>		<input type="button" value="Cancel"/>				

Note: The **Mortgage/Property Tax Arrears? Response to Question Window** is used to record *property specific information* for homeowners requesting Mortgage/Tax Arrears or Co-op purchase assistance.

HDU Shelter Arrears Detail

The **Instructions**, **Excess Rent**, and **Income** options may be selected toward the bottom of the above **HDU Shelter Arrears Detail** screen.

The **Instructions** option on the next page gives directions on how to complete the **Excess Rent**, **Third Party Details** (within the **Excess Rent** window) and **Income** windows.

Instructions Window from HDU Shelter Arrears Detail

Instructions

The Shelter and Landlord/Lender Information from the main shelter window “Shelter (Housing) Expenses” appears below in blue.

Please verify the information with the client and make updates as necessary by returning to the “Shelter (Housing) Expenses”. Please enter the shelter arrears details in this window.

Click the “Income” button to view a summary of all income recorded on the case. If the income information is incorrect or incomplete, the client should be referred to CMU/CSIC for correction and possibly re-budgeting.

Click the “Excess Rent Payment” button to record excess rent information if a client rent is more than cash assistance benefits.

Click the “Third Party Details” button in the “Excess Rent Payment” window to view and update third party information.

For multiple selections in the Reason for Non-Payment field: hold Ctrl key down and left click with your mouse.

OK

Excess Rent Payment Screen

Excess Rent Payment

If the client's rent is more than the Cash Assistance benefits, has the client been paying the full rent or has a third party been assisting EACH month?

Client pays the full rent Amount the client pays monthly:

Third party has been paying the balance rent EACH month Amount the Third Party agreed to pay monthly:

The balance remains unpaid

Have there been problems with the Third Party continuing to assist with the client's rent? Yes No
If yes, explain:

Does the client receive any subsidy for rent each month? Yes No
Type of subsidy: Amount of the client's share (Monthly)

Third Party Details Used to record Third Party donor information. See page 10.

OK Cancel

The above screen is accessed by clicking on Excess Rent on the HDU Shelter Arrears Detail screen

- Click on Third Party Details to access the Third Party Drill Down window.

Third Party Drill Down Window

This screen is an option from **Excess Rent Payment** Window

Income window

Name	Income Type	Monthly Amount (Gross)	Monthly Amount (Net)
		Total <input type="text"/>	Total <input type="text"/>

- This window is accessed by clicking on **Income** from the **HDU Shelter Arrears Detail** window.

The **Income** window is used to view a summary of the income recorded on the case. If the income information is incorrect or incomplete the applicant/participant must be referred to CMU/CSIC for correction and possibly re-budgeting.

HDU Decision/Plan of Action

HDU DECISION/PLAN OF ACTION

To be eligible for a rent arrears grant, a plan is needed for future rent/mortgage payments when the cash assistance allowance does not cover the entire shelter amount for participants/applicants. The applicant's/participant's available resources must not exceed the Resource Limits. All resources (if any) must be evaluated to determine whether they are countable towards the resource limit or exempt. Also cases applying for a one-time-cash grant must use all available resources and to apply for, as well as pursue, potentially available resources. A resource must be easily converted to available cash, even if it results in a penalty for liquidating the resource, such as in the case of stocks, bonds, etc. Click the 'Landlord Contact' button to record details of discussion with landlord and to indicate that no contact was made.

Case Information
 Case Number: Case Name:

<p>Future Rent Payment Plan</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Payment Plan w/Landlord:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Pension Loan:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Bank/Credit Union Loan:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Salary Advance:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Retirement/IRA/401K Loan:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Cashing Savings Bond:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Borrow From Family/Friend:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Cash Value of Life Insurance:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Other Potential Resource:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> <tr> <td>Charity/Church/Synagogue:</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> <td>Status: <input type="text"/></td> </tr> </table>	Payment Plan w/Landlord:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Pension Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Bank/Credit Union Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Salary Advance:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Retirement/IRA/401K Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Cashing Savings Bond:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Borrow From Family/Friend:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Cash Value of Life Insurance:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Other Potential Resource:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	Charity/Church/Synagogue:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>	<p>Unforeseen Circumstances that Caused Arrears</p> <p>Are there unforeseen circumstances that caused the arrears? (select all that apply) <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="checkbox"/> Robbery or Loss of Property <input type="checkbox"/> Medical <input type="checkbox"/> Unexpected Death in a Family <input type="checkbox"/> Loss of Income <input type="checkbox"/> Natural Disaster/Fire <input type="checkbox"/> Loss of affordable childcare</p> <p>Participant provide documentation to verify circumstances? <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Deferred</p>
Payment Plan w/Landlord:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Pension Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Bank/Credit Union Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Salary Advance:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Retirement/IRA/401K Loan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Cashing Savings Bond:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Borrow From Family/Friend:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Cash Value of Life Insurance:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Other Potential Resource:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													
Charity/Church/Synagogue:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Status: <input type="text"/>																													

HDU Plan of Action

Outcome: Outcome Date:

Other Details:

Did the Participant Provide all necessary Documentation? Yes No Deferred RAU Packet Complete: Yes No

Reason for extension beyond 30 days

Initial Plan of Action
 example on pages 13 and 14.

Landlord Contact
 example on page 15.

- Click on **Initial Plan of Action** or **Landlord Contact** to access the **Initial Plan of Action** or **Landlord Contact** windows.

Initial Plan of Action Window

The screenshot shows a software window titled "HDU DECISION/PLAN OF ACTION". At the top, there is a text box with the following text: "To be eligible for a rent arrears grant, a plan is needed for future rent/mortgage payments when the cash assistance allowance does not cover the entire shelter amount for participants/applicants. The applicant's/participant's available resources must not exceed the". Below this is a section titled "HDU Decision/Plan of Action" containing a list of options with checkboxes:

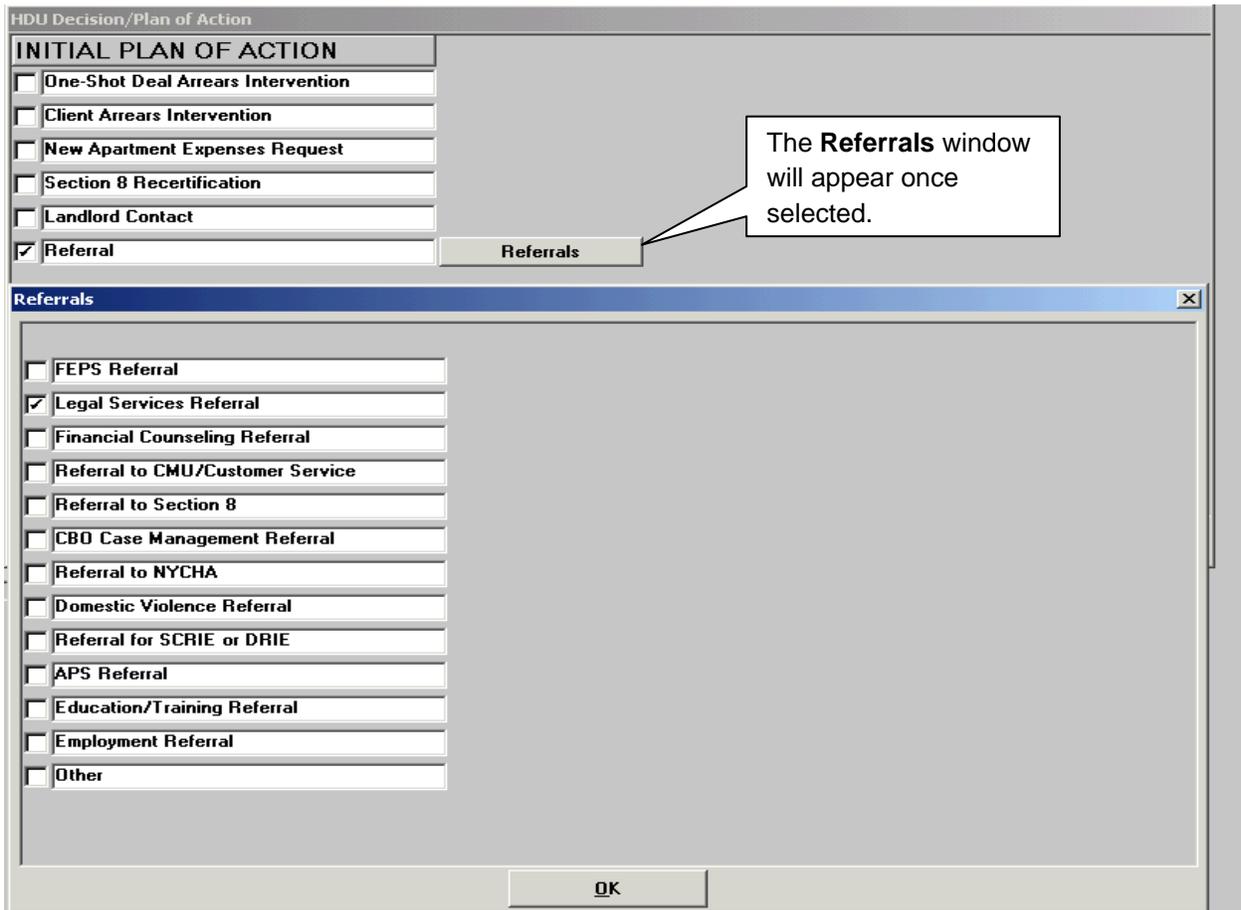
- One-Shot Deal Arrears Intervention
- Client Arrears Intervention
- New Apartment Expenses Request
- Section 8 Recertification
- Landlord Contact
- Referral

To the right of the "Referral" option is a button labeled "Referrals". A callout box points to this button with the text: "Once Referral is checked, select the adjacent Referrals button to enter a specific referral type." At the bottom of the window, there are two sets of "OK" and "Cancel" buttons.

This window is accessed from the **HDU Decision/Plan of Action** window.

- Click on **Referrals** to access the **Referrals** window.

Referrals window



The Referrals window is accessed from the Initial Plan of Action window

Landlord Contact Window

HDU DECISION/PLAN OF ACTION

To be eligible for a rent arrears grant, a plan is needed for future rent/mortgage payments when the cash assistance allowance does not cover the entire shelter amount for participants/applicants. The applicant's/participant's available resources must not exceed the

Landlord Contact

Case Information
Case Number: 00007421939F Case Name: PERKINS SAM

Landlord Contact Made? Yes No Discussion Date: 00/00/0000

Results of Discussion With Landlord
 Move to New Apartment Rent Reduction Arrears Reduction Awaiting FEPS Pending Outcome Negative Outcome

Lease Duration: New Monthly Rent: \$00 New Arrears:

Comment...

OK Cancel

OK Cancel

The Landlord Contact window is accessed from the HDU Decision/Plan of Action window.

HDU Document Deferral Window

HDU DOCUMENT DEFERRAL WINDOW

Instructions: This HDU Documentation Deferral window lists the names of **all active adult household members over 18 years of age**. If there is someone residing in your household over 18 that does not appear on this list, select "Other Person Not Listed", then enter the name in the "Other Name" field. Once you have selected from the "who" list box, you should select **all of the documents needed for the name you selected only**. For instances when you have more than one selection for a request type, you can make multiple selections per each request type group, Hold the 'Ctrl' button down on your keyboard and left click with your mouse). If you need to make additional request for the next household member, use the 'scroll bar' to view the next available row so that you can fill their request information separately.

Deferral Due Date: 05/24/2012

Return Documents To: Homeless Diversion Unit (HDU) Must See Your Worker

Who: Other Person Not Listed Other Name: John Ramos Jr.

Request Type	Select Documentation List	Supporting Information
<input type="checkbox"/> Brokers Fees/Voucher		
<input checked="" type="checkbox"/> Mortgage Payments/ Arrears	Income tax return for year	2011
<input type="checkbox"/> Moving expenses		
<input type="checkbox"/> Property Tax Payments/ Arrears		
<input checked="" type="checkbox"/> Rent Arrears	Income tax return for year	2003
<input type="checkbox"/> Security Deposit/ Voucher		
<input type="checkbox"/> Other HDU Request:	Specify	

Comments

OK Cancel

This window is accessed from the HDU Information window.

- Select the person(s) selected for the deferral in the **Who** drop-down box. If there is another individual, over 18 years of age, that is not listed in the drop-down box, select "**Other Person Not Listed**", then enter the name in the **Other Name** field.
- Select the **Request Type** and complete the **Select Documentation List** fields.

SI Grant Requests Window

Version 16.2.1 - Paperless Office System - [SI Grant Requests and Issuance] 5:35:09 PM Wednesday, Aug

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: No Action Required	NA
2.	Task Name: Record Special Grant Requests Action: This Task must be completed before proceeding. Status: Completed	GO
3.	Task Name: Requests Details Action: This Task must be completed before proceeding. Status: No Action Required	NA
4.	Task Name: EAF, E-SNA and EAA Financial Eligibility Determination Action: This Task must be completed before proceeding. Status: No Action Required	NA
5.	Task Name: Print Forms for Client to Sign Action: This Task must be completed before proceeding. Status: No Action Required	NA

Next Previous

Print Forms

Version 16.2.1 - Paperless Office System - [Print Forms] 5:36:02 PM Wednesday, August 22, 2012

File Edit Tools Window Help

Form No	Form Description	Copies	Forms
DSS2474	SSI Referral and Certification of Contact		e-form
DSS3151	Food Stamp Change Report Form		e-form
DSS3573	PA-Recoupment		e-form
DSS3938	Food Stamp Application Expedited Processing Summary Sheet		e-form
DSS4198	Third Party Data Sheet		e-form
DSS4279	Notice of Responsibilities and Rights for Support		e-form
DSS4529	Agreement to Repay Any Safety Net Assistance Overpayments Still Owed After Case Is Closed		e-form
DSS4530	Assignment of Wages, Salary, Commissions or other Compensation for Services		e-form
DSS4571	Alcohol/Substance Abuse Screening Instrument		e-form
DSS4733	DFR Legal Residence Statement		e-form
DSS4753	Food Stamps - Request for Contact/Missed Interview		e-form
DSS4776	Safety Net Assistance (SNCA) Application (LDSS-4776)		e-form
EXP_76R	Documentation Receipt		e-form
EXP83H	Declaration of Application for a Social Security Number		e-form
M15	Inquiry Regarding Veterans' Benefits and Servicemen's Allotments		e-form
M15F	Agreement to Repay Public Assistance		e-form
M186RR	Mandatory Dispute Resolution Action Taken Form		e-form
M186TT	Mandatory Dispute Resolution No Action Taken Form		e-form

Preview W-145HH Notice Next Print Previous

Approval Elements

Version 16.2.1 - Paperless Office System - [Approval Elements] 5:36:32 PM Wednesday, August 22, 2012

File Edit Tools Window Help

Disapproved Element
Address Information Approval Edit
Add Comment

Disapproval Reasons Review Comment Log

Disapproved Element
Suffix Information Approval Edit
Add Comment

Disapproval Reasons Review Comment Log

Disapproved Element
Identity,Citizenship,Relationship,Residence,SSN,Age&Household Composition Approval Edit
Add Comment

Disapproval Reasons Review Comment Log

Next Xmit Previous
Xmit via COM Refer Back to Worker

Activity Includes Ready SI Grants: No
Highest PA Issuance Code Total: 0
Grants Needing Center Director (Admin JOS II) Approval:
Next Level: AJOSII

Approve HDU Intake Activity

The HDU Supervisor will use the **Approve HDU Intake** Activity to approve information completed by the HDU worker via the **HDU Intake** activity. The **Approve HDU Intake** activity will contain the following sections *with Supervisory Review* areas attached toward the bottom of those sections.

- Household Screen
- Address Information
- Individual Detail
- HDU Referred From
- HDU Information
- SI Grant Requests
- Print Forms
- Notice Selection (SCR Centers)
- Approval Elements

Supervisory Approval – HDU Information Example

Version 16.2.1 - Paperless Office System - [Supervisory Approval-Shelter] 5:38:21 PM Wednesday, August 22, 2012

File Edit Tools Window Help

Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses?

Shelter Type	Actual Amount Charged For Rent/Mortgage	Frequency	Rent Charged to Secondary Tenant	Frequency	Verified
23	\$0	M		00	Yes

Housing Advantage Indicator (HAI)

No One Pays Rent, Mortgage or Other Shelter Expense Shelter Type Number of bedrooms
Monthly PA Shelter Amount

Landlord Information:
Landlord Type
Name
Address
Phone
SSN Tax Number

Rent Restriction Info
Restriction Type
PA Shelter Amount:
Name
Address
Routing

Supervisory Review

Documents: Documents Reviewed:

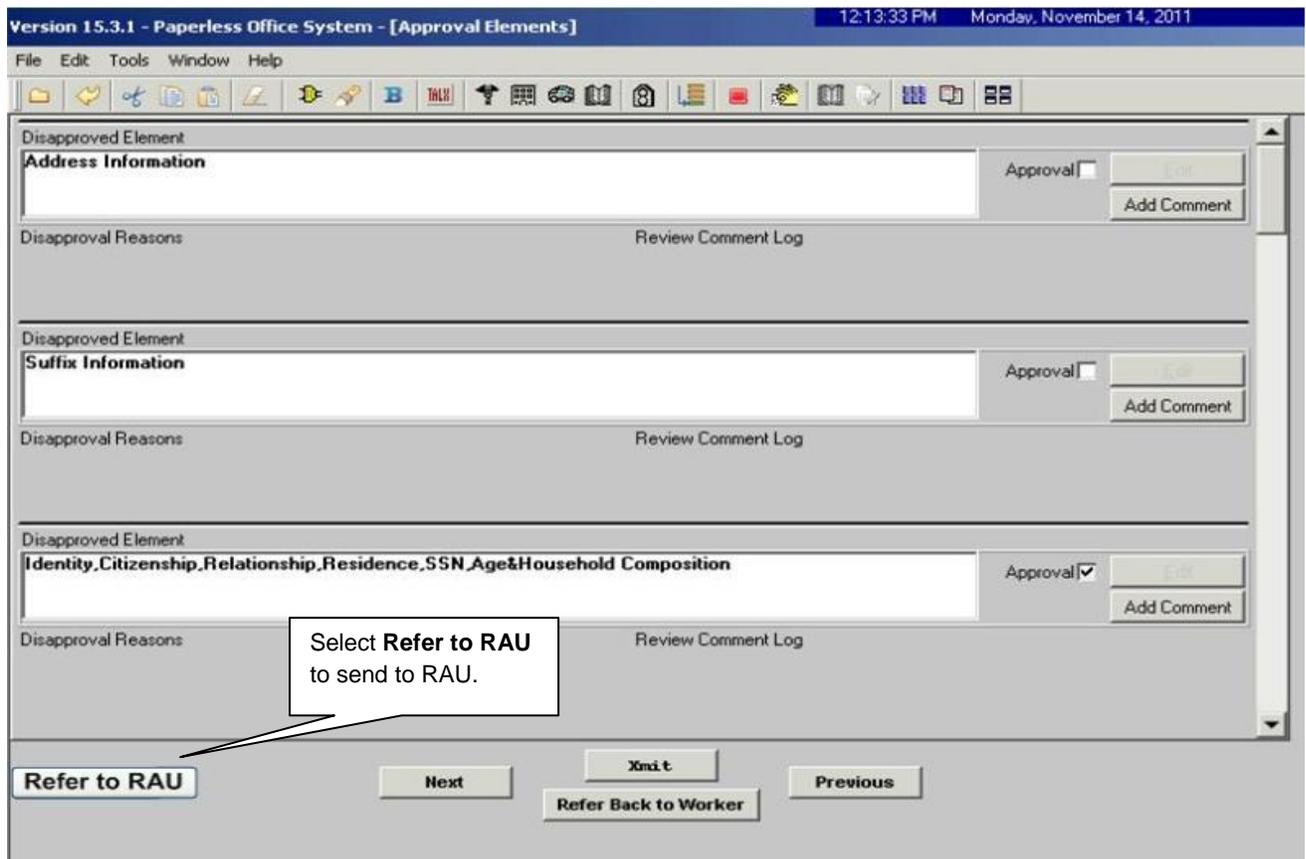
Approve
 Disapprove

Disapproval Reasons

Preview Comment Log

Supervisory Review Area

Approval Elements Screen



The HDU Supervisor sends the case to RAU by selecting the **Refer to RAU** button toward the bottom of the **Approval Elements** screen.

Decisions Received From RAU

When RAU processes a decision on the case, an **Assign Change Case Data** (for active cases) or **Assign Non-Food Emergency** (for applying cases) will be placed in the **RAU Recommendation to HDU** queue.

The **Request Action** window is updated with the RAU decision allowing HDU to process the decision. The **SI Grant Details** and the **SI Grant Decision** sections of the **Grants** tab will be systematically pre-filled with the decision details.

Request Action Window

Version 16.2 - Paperless Office System - [Request Action] 10:36:43 AM Wednesday, August 22, 2012

File Edit Tools Window Help

Request Type: Financially Eligible for: EAF? E-SNA? EAA?

Grant Info: **Incomplete** Referrals and Outcomes: **Complete** Documentation and Verification: **Complete**

Grants Referrals and Outcomes Documentation and Verification

SI Grant Details

SI Grant Needed? Yes No

Decision Due Date: Overdue? Yes

Comments: [View Benefit Issuance History](#)

SI Grant Decision

RAU Referral Required? Yes No Ready for Referral to RAU? Yes No Was Decision Received? Yes No

Decision: Issue Grant Issue Grant Conditionally Deny Grant

Conditions:

Not ready for decision Other:

Accept Approved Amount: Approved Period From: To:

Deny Denied Amount:

Single Issue Grant Summary Window

Version 16.2.1 - Paperless Office System - [Single Issue Grant Summary] 5:49:46 PM Wednesday, August 22, 2012

File Edit Tools Window Help

Case Number: 00007421939F Case Name: PERKINS SAM Suffix: 1

Re-Use Case Number: 00008428474E Center: Melrose Job Center Category: SNCA

Filters

Show PA Grants Show FS Grants View Grant Issuance History

Code	Description	From / To	Created	Amount	Next Month Amount	Special	Status
30	30 - Rent Payments in Excess of Maximum	08/01/2012-08/31/2012	08/22/2012	\$800.00		E-Check	Awaiting Action

Grant Details

Next Previous

Select **Grant Details** to access the **Single Issue Data Entry** window.

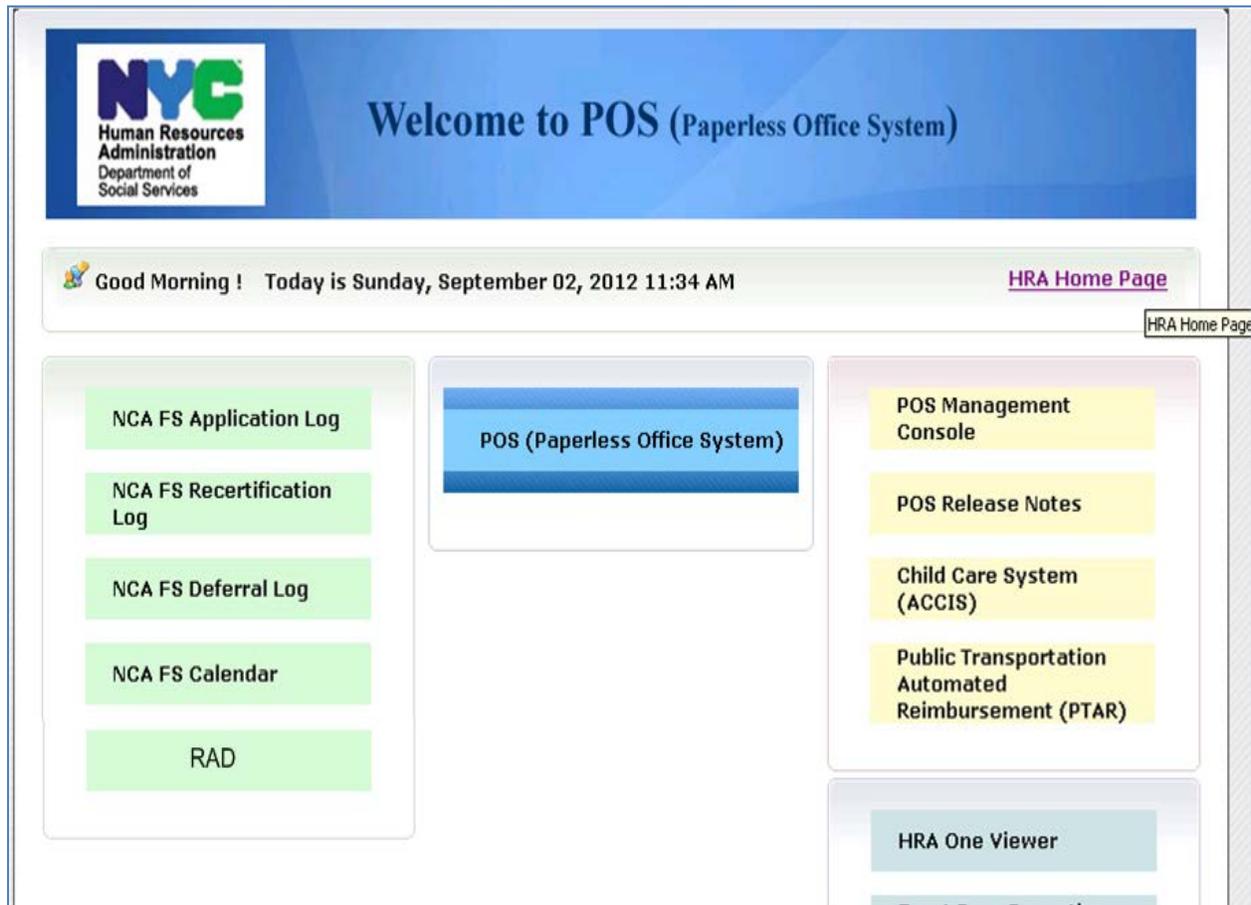
The **Single Issue Grant Summary** window will be updated with the approved grant. HDU or designated staff must process the grant in the **Single Issue Data Entry** window (accessed by selecting **Grant Details**). See **PD #10-22-SYS Single Issuance Grant Requests in POS** for more information.

Appendix B: RAU-RAD Overview

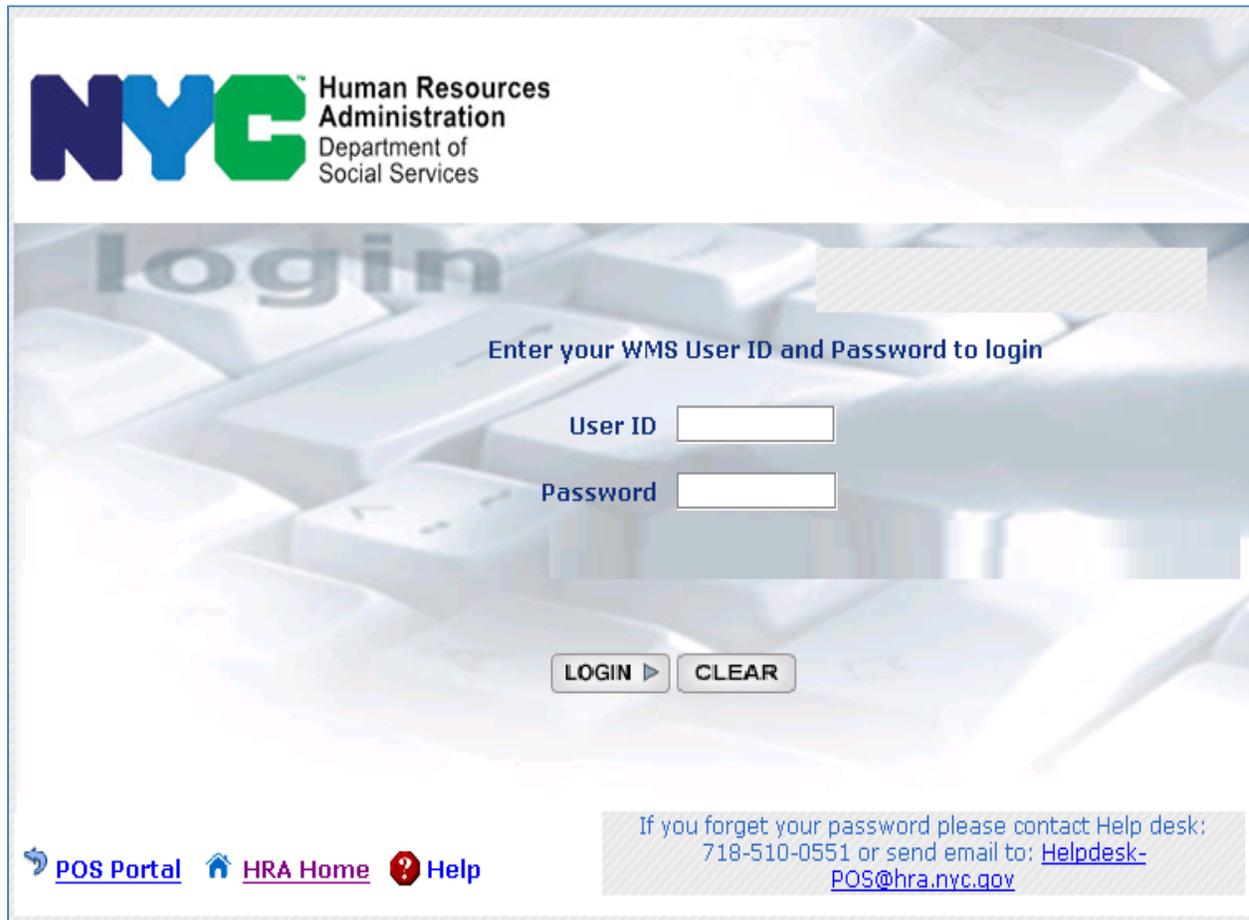
The Cash Assistance Paperless Office System (POS) has been upgraded to integrate the work of the Homeless Diversion Units (HDU) and the Rental Assistance Unit (RAU).

The new Rental Assistance Database (RAD) will replace the Rental Assistance Decision Management System (RADMS). The single issuance grant requests will be submitted electronically from POS to the RAD.

RAD LOGIN



- POS Portal
 - A new icon has been added for **RAD** on the POS Portal.
 - When the RAU consultant or supervisor clicks on this icon, the Login page will appear.



- RAD Login Page
 - The consultant or supervisor must enter their **WMS ID and password** and click the LOGIN button to access RAD.
- RAD consists of six (6) main windows:
 - Dashboard
 - Quick Start
 - Case Information
 - Grant Decision
 - Decision Details
 - Decision Submission
- RAD will automatically assign cases to available consultants according to their priority.
- Supervisors and administrators will be able to re-assign cases.

RAD Dashboard Window

8/(S(uhfcka45ljqn445xo2fat55))/RADDashboard.aspx - Microsoft Internet Explorer provided by Human Resources

Rental Assistance Database

Dashboard - Referral List

Search for Case No

List of Referrals Open

List of RAU Referrals Awaiting a Decision

Priority	Orig Referral Date	Origin	Recons	Case Name	Case number	Status	Assignee	Supervisor
Eviction Scheduled	06/24/2012	EAF	0	Cukier, Jadzia	00010030970H	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013180978C	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	110313169657	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013230345E	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00001045624C	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012658495C	Awaiting Sup	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013163664J	In Sup Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00005187674G	Changes Required	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012664244G	In Review	Szewczyk, Wojxxx	Perna, Anthony
New Apartment	07/25/2012	EAF	0	Cukier, Jadwiga	00012628190G	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony

Update Staff Info

Export List

Review Selected Referral >>

Re-Assign Selected Referral(s)

The **Dashboard** will be the first window displayed for Supervisors in RAD.

- **Dashboard window**
 - The **Dashboard** will display the list of RAU referrals awaiting a decision.
 - The list will be sorted by priority and case number.
 - The **Dashboard** will include the following data:
 - Priority
 - Original Referral Date
 - Origin
 - Recons

ATTACHMENT C
POS Release Notes 16.3 RAU Desk Guide

- The **Dashboard** will include the following data:
 - Case Name
 - Case Number
 - Status
 - Assignee
 - Supervisor
- This window will allow:
 - re-assignment of cases
 - case search
 - start of referrals
- The **Dashboard** will be also be available for consultants. It will display all cases assigned to the individual consultant.

RAD Quick Start Window

Rental Assistance Database  **Quick Start**

Your Pending Referrals

Count	Description
7	referrals requiring changes
3	priority referrals from 08/09/2012
5	priority referrals from 07/30/2012
5	priority referrals from 07/29/2012
5	priority referrals from 07/28/2012
5	priority referrals from 07/27/2012
5	priority referrals from 07/26/2012
5	priority referrals from 07/25/2012
4	priority referrals from 07/24/2012
1	priority referrals from 06/24/2012

Your Next Referral

Orig Referral Date	06/24/2012
Case Name	Cukier, Jadzia
Case Number	00010030970H
Priority	Eviction Scheduled
Referrer	907B09
New?	TBD
Grant(s) Requested	Advance Rent Moving Expenses Security

To start review on a different referral, click [here](#)
Otherwise click Start Review

Start Review >>

- **Quick Start window**

- The **Quick Start** page will be the first page displayed for RAU consultants.
- It will display the first assigned referral for the consultant.
- The left side of the page will display a summary list of pending referrals for the consultant.
- The right side of the page will display the details of the next referral.
- To begin the review, the consultant will click the **Start Review** button.
- To access the **Dashboard** and start review on a different referral, the consultant will click the link on the page:
- To start review on a different referral, click [here](#).

RAD Case Information Window

Instructions

Review the information below for case number 00010039070H (Cukier, Jadzia - Eviction Scheduled).

Referral Information

(Current + Past) Referrals/Recons: 06/24/2012

Request Types

Advance Rent - Amount Requested: \$800

Moving Expenses - Estimate 1: \$240 Man with Van Estimate 2: \$265 Other Man with Van Estimate 3: \$260 Movers Inc

Security - Amount Requested: \$800

Household Composition

Case Client Line	Case Client Cn	Case Client First Name	Case Client Last Name	Case Client Sex	Case Client Date Of Birth	Social Security Number	Relationship
1	TB54379A	Sam	Perkins	M	01/02/1980	055-88-3107	Casehead
2	TB54369E	Judith	Perkins	F	01/01/1963	046-55-9173	Natural Sister
3	TB30309V	Kid	Perkins	M	02/02/2000	054-68-5468	Step Son

Message

Back Suspend / Next

- **Case Information** window
 - The **Case Information** window will allow the RAU consultant to view the information entered for the case in POS.
 - It will also review of past referrals sent from POS to RAD.
- The **Case Information** window will display the requested grants, referrer info, household composition, address information and other interview data entered in POS, including:
 - Risk Factors
 - Landlord/Lender Info
 - Arrears Info
 - Pending Court Actions
 - Third-Party Donor Information
 - Mortgage Information
 - New Apartment Information
 - Moving Information
 - Income
 - Household Resources
 - Household Monthly Expenses
 - Potential Savings
 - Future Payment Plan
 - Unforeseen Circumstances Plan of Action

RAD Grant Decision Window

Rental Assistance Database

Grant Decision

Record/amend RAU's decision for case number 00010039070H (Cukier, Jadzia – Eviction Scheduled). [HRA One Viewer](#)

Advance Rent Moving Expenses Security

Request for Advance Rent

Approved Denied Not Requested

RAU Case Type
Excess Rent

Amount Requested \$ 800.00

Amount Approved \$

Reviewer's Comments

<< Back Suspend Next >>

- **Grant Decision** window
 - The Grant Decision window will allow the RAU consultant to record the decision for the grant requests in the referral.
 - There will be one tab for each grant request.
 - The consultant must enter the decision and RAU Case Type for each request in the window.
 - The tab for back rent, mortgage arrears and property tax arrears will include approval dates (from and to).

RAD Decision Details Window

Rental Assistance Database  **Decision Details**

Check all boxes below that apply to the grant request(s) for case number 00010030970H (DB2 - Eviction Scheduled)

Advance Rent | Security | Moving Expenses

Request for Back Rent

Decision Justification	Approval Conditions	Instructions to Referrer
<input checked="" type="checkbox"/> Sufficient Income to Pay Future Rent	<input type="checkbox"/> Must Comply with Eligibility Requirements	<input type="checkbox"/> Issue Applicable Code 8/9 Not Covered
<input checked="" type="checkbox"/> Homeless	<input type="checkbox"/> Responsible for Current Month's Rent	<input type="checkbox"/> Add/Restrict Rent Direct Vendor to Landlord
<input type="checkbox"/> Post-Eviction	<input type="checkbox"/> Responsible for Arrears Balance	<input type="checkbox"/> Restrict Full Rent Direct Vendor to Landlord
<input type="checkbox"/> FEPS Eligible/OTDA Approved	<input type="checkbox"/> Should Establish Bank Bill Payment Account for Rent Direct to Landlord	<input type="checkbox"/> Re-Budget Due to Income/Rent Change
<input type="checkbox"/> NYCHA	<input type="checkbox"/> Should Attend Budget Counseling	<input type="checkbox"/> Provide Budget Letter to NYCHA/SECT8
<input type="checkbox"/> SECT8	<input type="checkbox"/> Other	<input type="checkbox"/> Evaluate Category Change from EAA to EAF
<input type="checkbox"/> SECT8-FTR		<input type="checkbox"/> Evaluate Category Change from EAF to EAA
<input type="checkbox"/> HUD		<input type="checkbox"/> Monitor APC Referral/APC to Implement

Apply to All Other Approvals Apply to All Other Approvals Apply to All Other Approvals

<< Back Suspend Next >>

- **Decision Details** window
 - The Decision Details window will allow the RAU consultant to record the justifications, conditions and instructions to referrer for the grant requests in the referral.
 - There will be one tab for each grant request.

RAD Decision Submission Window

RAD **Decision Submission Window** [Help About](#)

Instructions :
Select case type and income codes, then review the decision for case number Case Number and (Name - Eviction Scheduled).

Referral Source
HRA Center

Priority (change only if incorrect)
Eviction Scheduled

RAU Income Codes

- Salary, Wages
- On-the-Job Training
- Work Experience (Non-WIN)
- Annuity/Mortgage/...
- Income from Lodger
- Adoption Subsidy
- Court Ordered Alimony, Child Support, Other Spousal Support
- Dividends/Interest/Receipts
- Railroad Retirement Benefits - Dependant
- Pensions Retirement Benefits
- Severance Pay
- Sick Pay (Individual Provided Insurance)

Decision Summary

#	Type	Cat	Amt Req.	Amt Appr.	Period Req.	Period Appr.	Appr. Mover
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To submit RAU's decision to the appropriate center, click Submit. To have the Consultant make changes, click Return. To see the previous page, click Back.

[Back](#) [Suspend](#) [Return to Consultant](#) [Submit Decision](#)

- **Decision Submission window**

- The **Grant Decision** window will allow the RAU consultant to record the referral source and income types for the grant requests in the referral.
- For approvals, the consultant will click **Submit Decision** to send the referral to the supervisor.
 - The case will have a status of **In Sup Review**.
- APS cases will be submitted to the RAU supervisors for approvals and denials.
- For denials, the consultant will submit the case directly to the Job Center, if the case is not an APS case.
 - A referral is denied when all grants requested are denied.
- APS cases will be submitted to the RAU supervisors for approvals and denials.

RAU SUPERVISORY REVIEW

- The Supervisor will review the approved referrals and all decisions on APS cases.

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Rental Assistance Database

Dashboard - Referral List

Search for Case No

List of Referrals Open

List of RAU Referrals Awaiting a Decision

Priority	Orig Referral Date	Origin	Recons	Case Name	Case number	Status	Assignee	Supervisor
Eviction Scheduled	06/24/2012	EAF	0	Cukier, Jadzia	00010030970H	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013180978C	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	110313169657	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013230345E	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00001045624C	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012658495C	Awaiting Sup	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013163664J	In Sup Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00005187674G	Changes Required	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012664244G	In Review	Szewczyk, Wojxxx	Perna, Anthony
New Apartment	07/25/2012	EAF	0	Cukier, Jadwiga	00012628190G	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony

RAD

Case Information Window

Instructions

Review the information below for case number 00010039070H (Cukier, Jadzia - **Eviction Scheduled**).

Referral Information

(Current + Past) Referrals/Recons:

Advance Rent - Amount Requested: \$800
 Moving Expenses - Estimate 1: \$240 Man with Van Estimate 2: \$265 Other Man with Van Estimate 3: \$280 Movers Inc
 Security - Amount Requested: \$800

Case Client Line	Case Client Cin	Case Client First Name	Case Client Last Name	Case Client Sex	Case Client Date Of Birth	Social Security Number	Relationship
1	TB54379A	Sam	Perkins	M	01/02/1980	055-88-3107	Casehead
2	TB54369E	Judith	Perkins	F	01/01/1963	046-55-9173	Natural Sister
3	TB30309V	Kid	Perkins	M	02/02/2000	054-68-5468	Step Son

Message

Rental Assistance Database



Grant Decision

Record/amend RAU's decision for case number **00010039070H (Cukier, Jadzia – Eviction Scheduled)**. [HRA One Viewer](#)

Advance Rent
Moving Expenses
Security

Request for Advance Rent

Approved Denied Not Requested

RAU Case Type: Excess Rent

Amount Requested: \$ 800.00

Amount Approved: \$.

Reviewer's Comments

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Rental Assistance Database



Decision Details

Check all boxes below that apply to the grant request(s) for case number **00010039070H (DB2 - Eviction Scheduled)**

Advance Rent
Security
Moving Expenses

Request for Back Rent

Decision Justification	Approval Conditions	Instructions to Referrer
Description	Description	Description
<input checked="" type="checkbox"/> Sufficient Income to Pay Future Rent	<input type="checkbox"/> Must Comply with Eligibility Requirements	<input type="checkbox"/> Issue Applicable Code 8/9 Not Covered
<input checked="" type="checkbox"/> Homeless	<input type="checkbox"/> Responsible for Current Month's Rent	<input type="checkbox"/> Add/Restrict Rent Direct Vendor to Landl
<input type="checkbox"/> Post-Eviction	<input type="checkbox"/> Responsible for Arrears Balance	<input type="checkbox"/> Restrict Full Rent Direct Vendor to Landl
<input type="checkbox"/> FEPS Eligible/OTDA Approved	<input type="checkbox"/> Should Establish Bank Bill Payment Account for Rent Direct to Landlord	<input type="checkbox"/> Re-Budget Due to Income/Rent Change
<input type="checkbox"/> NYCHA	<input type="checkbox"/> Should Attend Budget Counseling	<input type="checkbox"/> Provide Budget Letter to NYCHA/SECT8
<input type="checkbox"/> SECT8	<input type="checkbox"/> Other	<input type="checkbox"/> Evaluate Category Change from EAA to
<input type="checkbox"/> SECT8-FTR		<input type="checkbox"/> Monitor ACS Referral/ACS to Implement
<input type="checkbox"/> HUD		

Apply to All Other Approvals
Apply to All Other Approvals
Apply to All Other Approvals

<< Back
Suspend
Next >>

RAD **Decision Submission Window** [Help About](#)

Instructions :
Select case type and income codes, then review the decision for case number Case Number and (Name - Eviction Scheduled).

Referral Source
HRA Center

Priority (change only if incorrect)
Eviction Scheduled

RAU Income Codes

<input checked="" type="checkbox"/> Salary, Wages	<input type="checkbox"/> Income from Lodger	<input type="checkbox"/> Railroad Retirement Benefits - Dependant
<input type="checkbox"/> On-the-Job Training	<input type="checkbox"/> Adoption Subsidy	<input type="checkbox"/> Pensions Retirement Benefits
<input type="checkbox"/> Work Experience (Non-WIN)	<input type="checkbox"/> Court Ordered Alimony, Child Support, Other Spousal Support	<input type="checkbox"/> Severance Pay
<input type="checkbox"/> Annuity/Mortgage Int. Exp.	<input type="checkbox"/> Dividends/Interest/Receipts	<input type="checkbox"/> Sick Pay (Individual Provided Insurance)

Decision Summary

#	Type	Cat	Amt Req.	Amt Appr.	Period Req.	Period Appr.	Appr. Mover
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To submit RAU's decision to the appropriate center, click Submit. To have the Consultant make changes, click Return. To see the previous page, click Back.

- The Supervisor will process the request thru RAD by choosing the following:
 - He/she will click the **Submit Decision** button to send the referral to the appropriate Job Center.
 - He/she will click **Return to Consultant** to send a referral back for review.
 - The returned case will have a status of **Changes Required**

ATTACHMENT C
 POS Release Notes 16.3 RAU Desk Guide

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Rental Assistance Database  **Dashboard - Referral List**

Search for Case No

List of Referrals Open

List of RAU Referrals Awaiting a Decision

Priority	Orig Referral Date	Origin	Recons	Case Name	Case number	Status	Assignee	Supervisor
Eviction Scheduled	06/24/2012	EAF	0	Cukier, Jadzia	00010030970H	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013180978C	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	110313169657	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
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APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00001045624C	In Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012658495C	Awaiting Sup	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00013163664J	In Sup Review Suspended	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00005187674G	Changes Required	Szewczyk, Wojxxx	Perna, Anthony
APS Referral	07/24/2012	EAF	0	Cukier, Jadwiga	00012664244G	In Review	Szewczyk, Wojxxx	Perna, Anthony
New Apartment	07/25/2012	EAF	0	Cukier, Jadwiga	00012628190G	In Sup Review	Szewczyk, Wojxxx	Perna, Anthony

1. RAU initiated referrals can be started by RAU clerical staff, but only RAU consultants or above can process the decision on the case.
2. To find the referral, the user must enter all four leading zeros and the correct alpha of the case number in the **Search for Case No** field in the **Dashboard** window in the Rental Assistance Database (RAD).
3. The RAD will look for open referrals, then closed referrals within RAD. If the RAD finds an open referral, a new referral cannot be initiated by RAU until the open referral must be completed.
4. If no open or closed referral is found, the RAD will process a look-up to WMS to display case members and household address.
5. To start an RAU initiated referral, click on the **New Referral** button. RAD will retrieve the latest information from POS and will open the **Case Information** window.
6. If the referral is initiated by RAU clerical staff, they must click **Back** to return to the **Dashboard** window once the referral is initiated. If the referral is initiated by an RAU consultant, supervisor, deputy or director, he/she must review the **Case Information** window and then proceed with the entry of the request and decision information by clicking **Next** in the **Case Information** window.