

FAMILY INDEPENDENCE ADMINISTRATION

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# POLICY BULLETIN #12-31-SYS

# CA POS RELEASE NOTES VERSION 16.1.1

Subtopic(s):
This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on April 16, 2012. Descriptions of the changes can be found in POS Release Notes Version 16.1.1 ( <b>Attachment A</b> ).
These release notes can also be found on the HRA Intranet at:
http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx
Effective April 16, 2012
Related Items:
PB #12-25-ELI PD #09-20-ELI
Attachment:
Attachment A POS Release Notes Version 16.1.1

# Attachment A **POS Release Notes** Version 16.1.1 April 16, 2012

These Release Notes contain descriptions of changes in POS Release 16.1.1 scheduled for Monday, April 16, 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 <a href="http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx">http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</a>

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# 1. Statewide Clearance Window

The Statewide Clearance window was added to POS. The **Statewide Clearance** window is used to identify applicants/participants who are applying, already active or closed within the last 60 days in New York State (NYS) for Cash Assistance, Medicaid and/or Food stamps. The **Statewide Clearance** window is displayed after the **Disposition/Withdrawal** window within the CA application and after the **Education and Training** window in the CA Recertification Interview. The JOS/Worker can also request this clearance from the **POS Tool Menu** displayed below:

#### POS Tool Menu



When a match is found with the social security number or demographics, the window will display the match information from other districts in the new **Statewide Clearance** window. The following detailed instructions are provided at the top of the window:

"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 transaction date represents the date of closing. The authorization 'To Date' shows the last date benefits were/will be received. For more information please review PD-09-20-ELI. Select all check boxes that match the client's demographic record.

Statewide Clearance Window

plicant/P: Name	articipant Information in F	DOB Sex	CIN Policy Dire	dure }	sponsibility
latch Info	rmation from NYS WMS				
Match	District: Case Type: Case Status: Indv Status: Closing or Denial Date:	Albany FA Active Applying 01/02/2012	Name: Sex DOB SSN Application Status Date:		-
	Active Date:	01/02/2012	Match Score:		
Match	District: Case Type: Case Status:	Albany FA Active	Name: Sex DOB		
	Indv Status: Closing or Denial Date:	Applying 01/02/2012 01/02/2012	SSN Application Status Date:		

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All information displayed on the statewide clearance window in Blue font denotes a system entry.

#### **Applicant/Participant Information in POS**

This demographic information will be system entered from POS

#### View Procedure

• Click on Policy Directive- District of Fiscal Responsibility for instructions on processing these cases.

#### **Match Information**

The JOS/Worker places a check in the box when the identified match information is displayed.

District	Local District Name
Case Type	FA, SNCA, SNNC and SNFP
Case Status	Active
Individual Status	Applying or Active
Closing or Denial Date	Date case was closed from identified district
Active Date	Date case was activated
Name	Applicant/Participant
<u>Sex</u>	Male (M) or Female (F)
DOB	Date of Birth
SSN	Social security number
Application Status Date	Date applied for CA. MA or FS assistance

Please refer to Policy Directive 09-20-ELI – District of Fiscal Responsibility for instructions on how to process the received match data.

# 2. Noncustodial Parent Initiative

The Noncustodial Parents' Initiative represents collaboration between HRA's Family Independence Administration (FIA) and Office of Child Support Enforcement (OCSE).

Its purpose is to increase the engagement (financial and otherwise) of noncustodial parents in the lives of their children, to identify noncustodial parents who are Cash Assistance **(CA)** applicants/participants, and assist them in managing their child support obligations.

At every application/recertification interview, noncustodial parents who are applying/recertifying for CA will be identified in the Paperless Office System (POS) based upon POS' data exchange with OCSE's Child Support Management System (CSMS).

POS displays the basic child support case information of an identified noncustodial parent to the interviewing JOS/Worker and will generate a non-mandatory referral to OCSE.

The new **OCSE Child Case information window** was added in POS. At every application/recertification interview, noncustodial parents who are applying or recertifying for CA will be identified in the Paperless Office System (POS) based upon POS' data exchange with OCSE's Child Support Management System (CSMS).

At the time of the Application or recertification, POS requires the JOS/Worker to click on the question, "Does anyone on the case have Child Support obligations and/or arrears?"

Version 16.1.1 - Paperless Office System - [OTHER EXPENSES]	3:31:03 PM	Wednesday, March 28, 2012	2
File Edit Tools Window Help			
INDICATE IF YOU OR ANYONE WHO LIVES WITH Y	YOU WHO IS APPLYING:	Ye	es No
Has Child Or Dependent Care Expenses?		C	0
Are You Able to Prepare Meals At Home ?		<u></u>	0
Has Additional Expenses?, Specify.		C	0
Pays Tuition and/or Fees?		0	0
Pays Child Support?		0	0
Pays Alimony?		(	0
Owes At Least Four Months' Court-Ordered Support For A Child Under 18?		(	0
Buys Or Plans To Buy Meals From A Home Delivery Or Communal Dining Ser	vice?	(	0
Does anyone on the case have Child Support obligations and/or arrears?			≤

POS will send an inquiry to the Office of Child Support Enforcement database to determine if anyone on the case 18 years old or older is a Non-Custodial Parent (NCP) on an OCSE child support case.

If the match is not found POS will display the "Red Hand" symbol and the child support information response window will not open. The JOS can continue processing the case in POS.

If a match is found the Child support case information window will open for processing by the JOS. The information displayed in this window will identify the applying applicant or active participant as the Non-Custodial parent on at least one OCSE child support case

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- Exceptions- the Child Support Information <u>window will not open</u> if one of the following exist on case:
  - o Domestic violence indicator on OCSE case
  - Case has a Court order and the Arrears and the Monthly Obligation is Zero and Paternity has been established.

#### Child Support Case Information Response Window

		Instruc	tions			
e participant belo lect "Yes" in the " formational Flyer lease any informa i1 Broadway, NY,	ow has been named Is participant named will be printed. If per ation if named partici NY for any question	as the non-custodial pa in this window present rson is not present, sele pant is not present. Ha he/she might have.'	rent in at least one c at the interview' que ect 'No' and this wind ve participant contac	hild support case. If that stion and the OCSE Custo low will close. Do not hav at the Office of Child Supp	person is pre omer Service e a discussio ort at 1-888-	esent at the interview, Referral letter and on and do not 208-4485, address
Is Participant	named in this window	w present at the Intevie	w? •Yes	No		
ion-Lustodial Pai	Present Information	No. Contaction	Deveel CCN	New Courte Fel Deve		
Non-Lustodiai	Parent Name	Non-Lustodia	Parent SSN	Non-Lustodial Pare	AT DUB	
hild Support Cas	es and Obligations -					
CSMS Number	Court Ordered Support	Custodial Parent Nam	ne Arrears Amour	nt Monthly Obligation	Amount	Last Payment Date
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On the top of the window the JOS worker will follow the detailed instructions:

"The participant below has been named as the non-custodial parent in at least one child support case. If that person is present at the interview, select "YES" in the "Is participant named in this window present at the interview" question and the OCSE Customer Service Referral letter and Informational Flyer will be printed.

If person is not present, select "NO" and this window will close. Do not have a discussion and do not release any information if the named participant is not present. Have the participant contact the Office of Child Support at 1-888-208-4485, address 151 West Broadway, NY, NY for any questions he/she might have."

A **Job Opportunity Specialist (JOS)/Worker OCSE Script** has been developed to provide the JOS/Worker with general language to introduce the child support referral to the identified noncustodial parent. The JOS/Worker should print the script from the procedure for use as a desk reference until it is available in POS.

If the identified non-custodial parent named on the child support case is present at the interview the JOS/ Worker should answer the question "Is participant named in this window present at interview." A **Yes** answer will print out the following OCSE forms:

- OCSE Child Support Program Informational Flyer Form (OCSE-179)
- OCSE Customer Services Walk-in referral Form (OCSE-181)

### Form OCSE-181

Services for Noncustodial Parents in Establishing and Paying Child Support Orders (OCSE-181 [E]) provides the noncustodial parent's first name and last initial, the current date and information from OCSE about his/her child support case. It also recommends that the noncustodial parent visit the OCSE Customer Service Walk-in Center, located at 151 West Broadway, 4th floor between the hours of 8:00 am and 7:00 pm on Monday through Friday for more assistance.

#### Form OCSE-179

Noncustodial Parent (NCP) Tips and Benefits in Establishing and Paying Child Support Orders through the **OCSE-179[E]** - provides general information on Child Support Services and advises noncustodial parents of the services available to help them. It also gives Child Support Services contact addresses, websites and telephone numbers for information.

The JOS/Worker refers the noncustodial parent to OCSE's Customer Services to pursue the details of his/her child support case(s) and to receive counsel about OCSE programs that may be available to assist them (noncustodial parent) in meeting his or her child support obligation.

#### Posting of NYCWAY Action Code

After the OCSE forms have printed POS will transmit the **action code 14NP** - Completed printing of OCSE child referral to **NYCWAY**.

#### Non-custodial Parent not Present

If "No" is selected to the question "Is participant named in this window present at interview?" as the NCP is not present; POS *will not* permit the JOS/Worker to continue the OCSE process until the identified Non-custodial parent is present.

#### Non-custodial parent information

- NCP Name
- NCP Social security number
- NCP date of birth

#### **Child Support Cases and Obligations**

- CSMS Number- OCSE assigns a court number to the child support case
- Court ordered support- will denote whether the support has been mandated through the court
- Custodial Parent name- name of parent that child resides with
- Arrears amount
- Monthly Obligation
- Last Payment

#### Children on Child Support Case

- CSMS Number- OCSE assigns a court number to the child support case
- Child Name
- Paternity Established (Y)=YES, (N)=NO
- Custodial Parent name- name of parent that child resides with

Once the referral has been provided to the noncustodial parent, the JOS/Worker must check **Yes** to the question, "Did you provide the participant with information about OCSE?"

# 3. Error Correction Lockdown

The POS error correction activities were updated to confirm that there is a pending error in WMS or a pending grant error for the case.

The following activities will be affected:

- EC- CA Application Interview
- EC- CA Change Case Data
- EC- IN/EFS Issuance
- EC- CA Recertification Interview
- EC- Reopen a Case
- EC- FS Separate Determination-Eligibility Decision

If the JOS worker attempts to access the error correction activity from the **Choose a Case** window or their queue and POS has confirmed that there is no pending error on the case then the following message will be displayed:

# *"Error – The error correction activity cannot be accessed because there is no error transaction pending in WMS for the case."*

When this message is displayed, POS will not start the activity and will return the JOS/Worker back to their queue.

## 4. New Warning Message for Finger Imaging Results

POS was updated to display a warning message for individuals who have an AFIS indicator of 1. <u>Finger</u> <u>Imaged [System Generated]</u>, 2. <u>Exempted Left and Right Index Fingers Permanently Unavailable or Unusable</u> [System Generated], 3. <u>Temporarily Unavailable or Unusable, One Finger [System Generated]</u>, or 4. <u>Temporarily Unavailable or Unusable, Two Fingers [System Generated]</u> in WMS, but for whom AFIS results were not received in POS. This helps ensure that the individual is not improperly denied for missing AFIS results.

Warning message example:

Warning!

The following individuals on the case have a valid AFIS indicator in WMS, but no AFIS result was received in POS:

John Doe, Line Number 1 Mary Doe, Line Number 2

Please review the POS TAD to determine compliance with finger imaging and report the case to the POS help desk for follow-up.

The Worker must report the missing results to the POS help desk when they receive this message. The POS help desk will follow-up on these cases.

## 5. W-113K Documentation Requirements Updates

JOS/Workers will not be able to print the Documentation Request (**W-113K**) Form, if they have not filled out the data entry window form. The printing of the **W-113K** is now limited to the following interview and change activities:

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- CA Application Interview
- EC-CA Application Interview
- IN/EFS Issuance
- EC-IN/EFS Issuance
- CA Change Case Data
- EC-CA Change Case Data
- CA Recertification Interview
- EC-CA Recertification Interview

### 6. TALX Edit

When the JOS/Worker clicks the **Next** button on the **TALX** window, POS will determine whether the JOS/Worker has clicked on the TALX link to open the TALX website during the CA Application Interview. The **TALX** window displays the following message when the case has not been assessed by TALX during the interview:

#### "You must click on the TALX link to the website to see if the household members are employed".

Instructions For Applicants: Click on the TALX link, located at the top of the TALX Information Window. If a Match exist, print, scan and index the document, then close the TALX link for Participants: Click on the TALX icon located on the toolbar. If the participant is known, TALX will display information from the latest TALX return file. If no informatio is displayed, proceed to answer questions on the TALX link For Participants: Click on the TALX icon located on the toolbar. If the participant is known, TALX will display information from the latest TALX return file. If no informatio is displayed, proceed to answer questions on the TALX link For Participants: Click on the TALX icon located on the toolbar. If the participant is known, TALX will display information from the latest TALX return file. If no information is displayed, proceed to answer questions on the TALX link For Participants: Click on the TALX icon located on the toolbar. If the participant is known, TALX will display information from the latest TALX return file. If no information is displayed, proceed to answer questions on the TALX link For Participants: Click on the TALX icon located on the toolbar. If the participant is known, TALX will display information the TALX information window.  Existing Information WHO TALX Link For Participants: Click on the TALX icon located on the toolbar.  Existing Information WHO TALX Link For Participants: Click on the TALX icon located on the toolbar.  Existing Information File TALX Outcome TALX Results For Participant is All X cluckers For Par	LX INFORMATION V	ANDOW
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Next Previous		Next

The worker needs to click **OK** and process the TALX file to continue the case activity.

## 7. CA-TAD Business Rule Update

POS has been updated to prevent the JOS/Worker from incorrectly rejecting or closing a case using the reason code **M88** (Failure to comply with Finger imaging requirements) when the finger imaging result is in WMS.

When workers attempt to reject or close the case with the **M88** code POS will determine whether the casehead and adults on the case have valid AFIS indicators. If the rejection or closing is incorrect, POS will display the following message:

#### "The case cannot be denied with reason code M88. All adults have valid AFIS indicators."

POS has also been updated to prevent the JOS/Worker from incorrectly rejecting or closing an individual using the CA individual closing code **F88** (Failure to comply with Finger imaging requirements)

When the worker attempts to close or reject the individual line with the **F88** code, POS will determine if the individual has a valid AFIS indicator. If the rejection or closing is incorrect, POS will display the message:

"The individual cannot be denied with reason code F88. They have a valid AFIS indicator."

# 8. New HVN/HB Denial Code in NYCWAY

POS receives a nightly update from NYCWAY when the CA Home Visit Needed case is rejected or closed. POS posts a denial code in NYCWAY and the homebound recertification activity is processed in POS for the casehead.

The **192X** (Case has been inactive for 10 plus days) denial code has been added to the NYCWAY Home visit needed/homebound outcome codes.

After a denial of a home visit request is entered in NYCWAY by FIA Central Office staff, NYCWAY sends the decision to POS via a nightly automated data exchange and POS updates the interview data as follows:

- POS changes the answer for the question "Is any Adult in the household homebound or requesting a home visit?" to No if all home visit requests were denied for the household.
- POS removes the individual from the <u>Response</u> window for the question "Is any Adult in the household homebound or requesting a home visit?" if any other individual in the household still has a pending or approved home visit request.

## 9. Poverty Level Update

The Federal Poverty levels have been updated in POS to reflect the new increase effective 4/1/2012. Please refer to PB 12-25-ELI: 2012 Federal Poverty Level Guidelines for EAF and ESNA Categories of Assistance (**EXP-76D**).

# 10. E-Form Updates

The following forms were updated:

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

#### 11. Reminder:

#### NYCWAY Error Message

Any JOS/Worker processing a case after 9pm will receive the following error message when they attempt to post an action code or process a referral to NYCWAY, OCSE, BEV or attempt to access NYCWAY from POS:

#### "Nightly Batch Processing is in Progress, Online Access is Denied"

The JOS/Worker must return to the case the next day to process any of the above transactions. Also remember WMS also closes down at 9pm.