FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #12-43-SYS

CA POS RELEASE NOTES VERSION 16.2

Date: June 14, 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 June 18, 2012. Descriptions of the changes can be found in POS Release Notes Version 16.2 (**Attachment A**).
	These release notes can also be found on the HRA Intranet at:
	http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx
	Effective June 18, 2012
	Related Item:
	PD #12-09-ELI
	Attachment:
🖳 Please use Print on Demand to obtain copies of forms.	**Attachment A** POS Release Notes Version 16.2

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*

Distribution: X

POS Release Notes
Version 16.2 June 18, 2012

These Release Notes contain descriptions of changes in POS Release 16.2 scheduled for Monday, June 18 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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1. Transmission of Immediate Needs (Code 44) Grant

The Immediate Needs grant is now transmitted from POS to WMS. This process eliminates the need to print the Public Assistance Single Issuance Authorization (**LDSS-3575**) Form and manually data enter checks within the Distribution and Control (D& C) area. The Immediate Needs Grant is processed as a same day issuance. The transmission of the grant occurs when the Supervisor clicks the **Xmit** button.

When the Immediate Needs Grant is issued for a case in applying (AP) status for Cash Assistance (CA) and a case number will be reused, the grant will be issued on the re-used case number. If a case number is not reused the Immediate Needs Grant is issued under the application registration number. In the event that the Immediate Need Grant is processed with the FS Grant code **52** (Expedited Service, Verified For PA/FS cases) or **54** (Expedited Service -Not verified for PA/FS cases) in the IN/EFS Issuance activity, the system will process the Food stamp grants first, then the Immediate Needs Grant followed by the TAD. If the Food stamp grant cannot be processed due to an error, POS will still attempt to process the Immediate Needs Grant Code **44** (Immediate Needs Grant).

The **CBIC** window will now appear in the beginning of the processing flow when an Immediate Needs Grant Code **44** with a PUC (Pickup Code) **4** (Same day Immediate needs) is being issued. This will allow the worker to make the CBIC payee determination up-front to ensure correct processing of the case.

CBIC window

The following activities will be affected by this new change;

Worker activities

- CA Application Interview
- IN/EFS Issuance

- CA Recertification Interview
- CA Change Case Data
- CA Re-Open a Case
- Non-Food Emergency Interview/Special Grant
- EC CA Application Interview
- EC IN/EFS Issuance
- EC CA Recertification Interview
- EC CA Change Case Data
- EC CA Re-Open a Case
- EC Non-Food Emergency

<u>Supervisor Activities</u>

- Approve CA Eligibility Decision
- Approve IN/EFS Issuance
- Approve CA Recertification
- Approve a CA Case Action
- Approve CA Re-Opening
- Approve Non-Food Emergency
- Approve EC CA Application Interview
- Approve EC IN/EFS Issuance
- Approve EC CA Recertification
- Approve EC CA Change Case Data
- Approve EC CA Re-Open a Case
- Approve EC Non-Food Emergency

2. Preview Button for W-145HH Notice for Supervisors

When an applicant makes a CA grant request, the Worker must prepare the Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance [For Applicants Only] (**W-145HH**) form to inform the applicant about the decision made on their request for assistance to meet an immediate need or special allowance.

The **W-145HH** is printed by the supervisor in POS. The final level supervisor must then print and mail the form to the applicant once s/he has approved the Worker's decision. In centers under the Selective Case Review (SCR) pilot process, POS sends the print job to the **Notice Print Queue** when the final level Supervisor approves the activity.

A new **Preview** button has been introduced for this notice. The notice can be viewed by the supervisor prior to printing.

The **Preview W-145HH Notice** button is available in the **Print Forms** window at a Non-SCR center when the notice is selected or in the **Notice Selection** window when the notice is selected for an SCR center.

At non-SCR centers, the **Preview W-145HH Notice** button is enabled when the **W-145HH** notice is selected. At SCR centers, the **Preview W-145HH Notice** button is enabled when the checkbox for the **W-145HH** notice is selected.

When the worker clicks on the following button, POS will display the **W-145HH** notice.

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Preview W-145HH Notice button in the Print Forms window
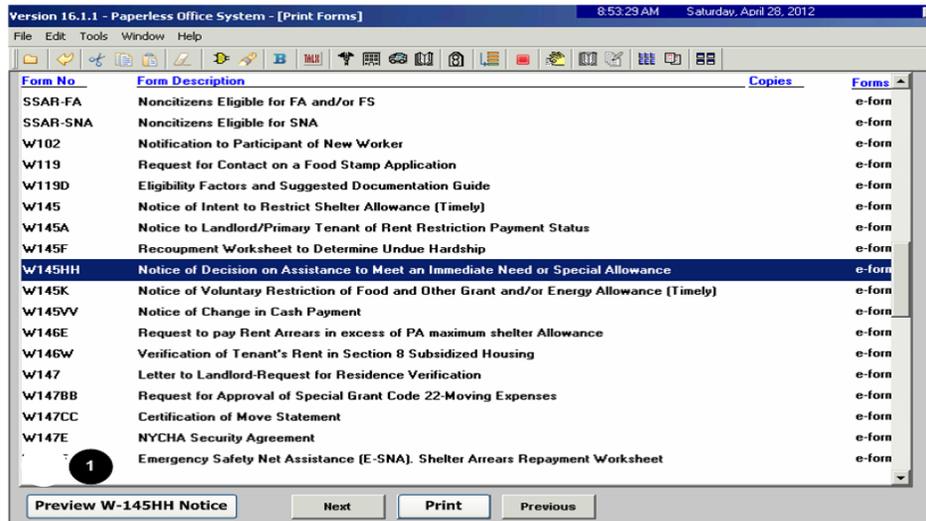
The **Preview W-145HH** button is available in the following approval activities:

Supervisor Activities

Approve CA Eligibility Decision
Approve EC - CA Application Interview
Approve IN/EFS
Approve EC - IN/EFS Issuance
Approve a CA Change Case Action
Approve EC - CA Change Case Data
Approve Non-Food Emergency/Special Grant
Approve EC - Non-Food Emergency/Special Grant
Approve EC Day 2 FS Sep Det

3. Resetting the Yes/No buttons in the POS Grant request questions

Some workers fail to remember to change their grant request questions to **No** for all completed grants. POS has found that these old requests can cause processing problems when the worker is attempting to record a new grant request.

Opening of interview activities

- When the POS interview activity for CA cases opens, POS retrieves all pending grant requests and determines whether the request has been completed, or has no pending grants that are more than **180 days old (6 months).**

- If any completed request or old request without pending grants is found, POS marks the request as complete, and the relevant interview question will be changed from '**Yes' to 'No'.**

- For tracking purposes, POS creates a new **"System Removed – Grant Requests"** activity to record all grant requests that are marked as completed by POS.

- POS processes a look-up in the beginning of the following activities, including the child activities to determine if an old grant request exists on the case:

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- CA Application Interview (NTV)
- CA Change Case Data (CHC)
- CA Recertification
- CA Re-Open a Case
- Non-Food Emergency Interview/Special Grant
- EC – CA Application Interview
- EC – CA Change Case Data
- EC – CA Recertification
- EC – CA Re-Open a Case
- EC – Non-Food Emergency Interview/Special Grant

4. Single Issue Print Queue Updates

POS now automatically completes the grant activities when the case appears in both the **SI Print Queue** and the **Backup SI Grant Queue** and the grants were recorded in the same worker activity.
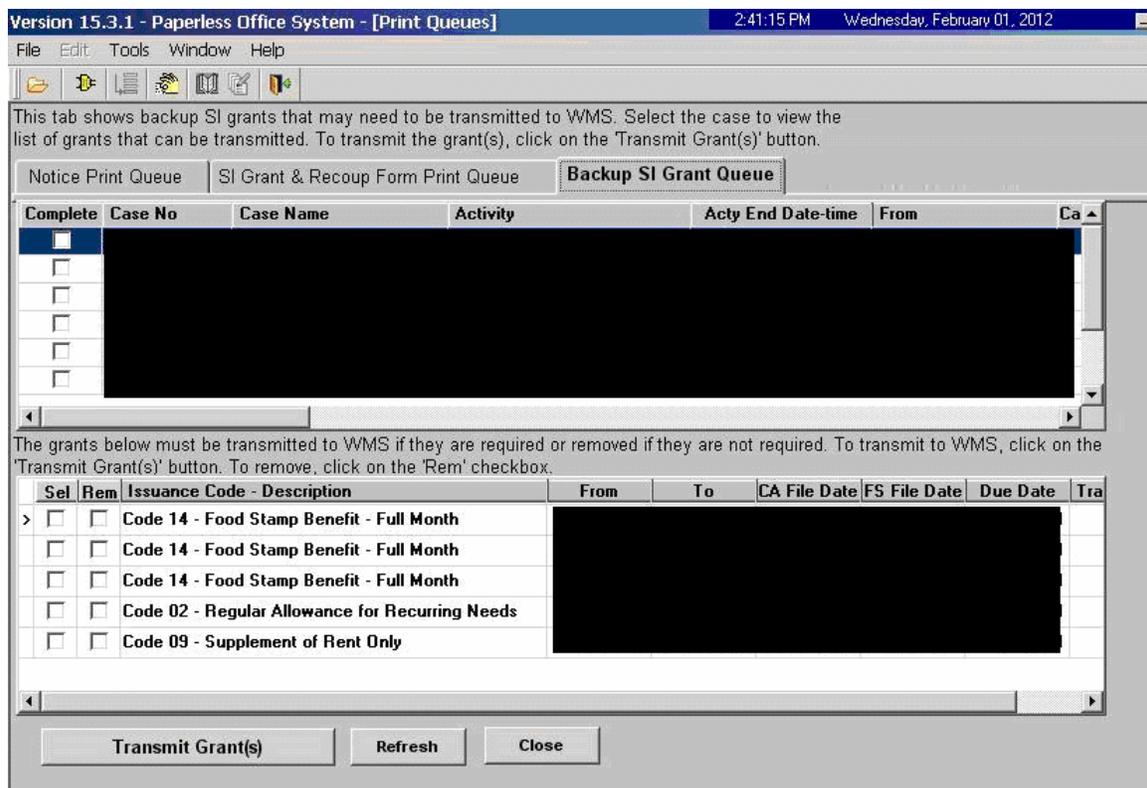
Print queue update for "Complete" checkbox

When the worker clicks the **"Complete"** checkbox in the **SI Grant Print Queue**, POS checks whether any backup grants are pending for the case that would require transmission and are associated with the same printing activity as the printed grants.

If any backup grants that can be transmitted are pending, POS displays the following message for the worker with an **OK** button:

"Warning - There are backup grants pending for this case. POS will now refresh the SI print queue."

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When the worker clicks **OK** on the message, POS refreshes the **SI Grant Print Queue** by removing the grant that appeared in the print queue. The back up grant is still available for processing from the back-up queue.

Backup grant queue update for "Complete" checkbox

When the worker clicks the **"Complete"** checkbox in the **Backup SI Grant Queue**, POS will check whether grants that need to be printed are associated with the same PTG activity as the backup grants. Grants that need to be printed have a pickup code of **4** (Same Day Immediate Needs), **5** (Emergency Public Assistance Check (E-Check)) or **7** (Emergency Cash Payment (E-Cash)).

If any grants that need to be printed are pending, POS displays the following message for the worker with an **OK** button:

"Warning - There are grants that must be printed for this case in the SI Print Queue. POS will now refresh the SI backup grant queue."

When the worker clicks **OK** on the message, POS refreshes the back up queue by removing the grant that appeared in the queue. The single issuance grant is still available for processing from the **SI Grant Print** Queue.

Backup grant queue update for system completed grants

When the **system auto-completes** in the Backup Grant queue, POS checks whether grants that need to be printed are associated with the same printing activity as the backup grants. Grants that need to be printed have a pickup code of **4**, **5** or **7**.

If any grants that need to be printed are pending, POS displays the following message for the worker with an **OK** button:

"Warning - There are grants that must be printed for this case in the SI Print Queue. POS will now refresh the SI backup grant queue."

When the worker clicks **OK** on the message, POS will refresh the queue and remove the grant from the **SI Backup** queue. The grant is still available for processing in the **SI Grant** queue.

Error correction for Backup SI grants

If a case action or approval was transmitted at the same time that the **SI Backup** grants were placed in the **SI** Backup Grant Print queue and the Case Action/TAD is also in error, then the only activity that will be in the **Worker's** queue is the error correction for the originating interview activity.

POS determines the worker's activity associated with the approval and places the error correction in that **Worker's** queue, instead of the **Supervisor** queue.

5. Social Security Validation Update

POS has been updated to reflect the correct Social Security Number (SSN) validation period within the **Individual Detail** window from 90 days to 60 days. If the date of the Social Security application is more than 60 days, the individual must supply an SSN or reapply for an SSN. POS informs the worker with the following message:

> **SSN Validation Code is 2 - The date of application for a SSN is more than 60 days old. A social security number must be provided or the client must reapply for a SSN. Proof must be presented in order to determine eligibility or to continue eligibility.**

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Worker Activity completion edit

When the workers attempts to complete or suspend the case from other activities except Review; POS processes a look-up prior to exiting and disallows the completion of the activity when the SSN validation is over 60 days. The following message will be displayed:

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

If an applicant/participant has not furnished a Social Security Card within 60 days of filing their application for a SSN, staff must send the household a Notice to Report to Center (M-3g) (Job Centers) or a Food Stamps - Request for Contact/Missed Interview (LDSS-4753) (Food Stamp Centers).

For additional details, please refer to Policy Directive 12-09-ELI (Importance of Accurate Social Security Numbers in the Welfare Management Systems [WMS]).

6. CA Application Interview Lockdown

The CA Application Interview activity is used for Cash Assistance (CA) cases in Applying (AP) or Single Issue (SI) status. Workers are accessing this activity incorrectly for closed and rejected cases causing incorrect action codes to be sent to NYCWAY and causing problems with POS case processing.

In these instances, POS displays the **Inappropriate Access for Denied Case** error message with an **OK** button, if the Worker attempts to access the above activity from the **Choose a Case** window or their queue:

> "**Error – This application case has been denied and cannot be processed further through the CA Application Interview activity.**"

The message will appear if the case is in one of the following CA/FS status combinations in WMS:

- **CL/CL**
- **RJ/RJ**
- **CL/RJ**
- **RJ/CL**
- **CL/NA**
- **RJ/NA**

POS displays the **Inappropriate Access for Active Case** error message with an **OK** button, if the Worker attempts to access the above activity from the **Choose a Case** window or their queue:

> "**Error – This case is active and cannot be processed further through the CA Application Interview activity.**"

The message will appear if the case is in one of the following PA/FS status combinations in WMS:

- **AC/AC**
- **AC/RJ**
- **AC/CL**

The following specialized centers will also be included in this application lockdown activity:

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- **HASA Caseloads**
- **Center 080 Special projects**
- **Center 37 Riverview /**
- **Center 18 Housing program**
- **SCR Centers- Fordham #44, Dyckman #35, Richmond #99, and Linden #67.**

7. M3E Indicator Lockdown for Food Stamp Separate Determination Cases

POS will now lockdown the **M3E** indicator to prevent the worker from entering the **A** to suppress the CNS notice in the Food Stamp (FS) TAD for Food Stamp Separate Determination cases. The worker must be given Special rights from the POS enrollment table to allow the **M3E** indicator on the FS TAD. This will affect the Food Stamp Separate Determination cases.

8. HASA M3E Indicator

When a HASA worker is processing a case from AC to SI the reason code Y67 will be added to the existing list of codes.

When a HASA worker is processing a case from SI to CL and the worker selects Y95 reason code POS will place an "A" in the M3E indicator.

9. Language Access Tracking Updates

The **Tracking Language Access indicators** screen below has been updated with specific questions related to providing free interpretation services. Workers must answer and provide a reason when applicable.

This window will continue to appear when the applicant/participant's preferred language for speaking or preferred language for written notices has not been indicated or is not English.

The following questions were removed:

- Is the applicant/participant present for the interview?
- Is the applicant/participant on the phone for the interview?

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These questions were replaced with a new field named "Applicant/Participant is". The JOS/Worker must select one of the following options in this field:

- In the office
- On the phone
- At home (homebound cases only)
- None of the above

The JOS/Worker must indicate whether the applicant/participant wants to use HRA's free interpretative services. If the applicant/participant does not want to use HRA's free interpretative services, the ES must select one of the following reasons:

- Applicant/participant used their own interpreter
- Applicant/participant indicated they did not need interpretation services

10. Child/Teen Program Script Update

The Child/Teen script located in POS has been updated with the following **new text**:

Now I'm going to tell you about a **program** that can protect the health of your children. It's called **the** Child/Teen Health Program, or CTHP. CTHP is free for Children under 21 who have Medicaid.

Your Children need regular checkups, even if **they're** healthy. Checkups can **help** identify problems like asthma and lead poisoning, and can show if a child needs any other medical or dental treatment. Medicaid doctors, clinics and health plans will do the checkups free. If health problems are found, your child will get any additional health care that is needed.

The CTHP Fact Sheet, in English and Spanish, and the List of Participating Clinics and Hospitals are in your packet. The Fact Sheet explains the Child/Teen Health Program and gives a toll-free CTHP telephone number. The List of Participating Clinics and Hospitals lists some places you can take your children for medical, dental or vision exams.

If you call the CTHP number you can get help finding CHTP doctors or clinics near where you live. The doctors or clinics can help you to arrange transportation to and from your appointment, and they can tell you how to get a travel reimbursement.

11. Posting Action Code 94NA to NYCWAY

POS sends Action Code **94NA (OCSE Not Applicable)** to NYCWAY for CA applications without non-custodial parents. This action code allows CA to easily identify cases without a non-custodial parent, which do not require an OCSE determination or appointment.

POS was updated to post the Action Code **94NA** via Open TI when the Worker suspends the **CA Application Interview** activity or clicks the **Next** button in the **Print Forms** window in the **CA Application Interview** activity. Once the code has been posted it does not need to be posted again.

12. Prevent In-Office scheduling of HVN/HB HASA Cases

POS has added an edit to prevent the in-office scheduling of identified HVN (Home Visit Needed)/ HB (Homebound) cases in HASA. When the worker selects HASA In-Office to schedule an in-office appointment for these types of cases the following error message will display:

"This case is marked as homebound in WMS and cannot be scheduled for an in-office appointment."

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13. Prevent Transfer of HVN/HB Cases

POS will process a look-up to NYCWAY to determine if an open Action Code **192P** (Pending Homebound) exist on an individual on the case. If POS finds the **192P** code the following error message will display when an attempt is made to transfer the case:

> **"There is a pending homebound code 192P for an individual on the case. The case cannot be transferred"**

When the worker clicks **OK** the **POS transfer** activity will be cancelled.

14. Prevent Access from Incorrect Database

POS will now prevent workers from accessing cases within the wrong database. The following error message will be displayed:

"**Error – The case cannot be accessed from this database. Please log off and select the correct center in the POS Sign-On page."**

15. Section 8 Rent Window Updates

POS has updated the labels for the following Section 8 shelter types:

- **Shelter Type 38**-Subsidized Housing- Deep Subsidy- Voucher Program/Project Based Section 8 (**Non-NYCHA** Section 8 e.g. HPD, DHCR)
- **Shelter Type 39-**Subsidized Housing – Shallow Subsidy – Section 236/Section 202 (Non Section 8)
- **Shelter Type 40-**Section 8 Voucher – 30% Limit (**NYCHA Section 8**)

16. New Edit for Section 8 Cases

POS will now restrict the worker from removing the Shelter Type Code **40** on cases in SI or AC status. If POS does not find a Shelter approval activity coinciding with the case after the worker attempts to remove the Shelter Type Code **40** the worker will receive the message below:

> **"Approval by an AJOS II or above is required to change the shelter type 40. The AJOS II must enter a detailed case comment approving the shelter type change in POS and must then submit the case to the POS help desk to have MIS update the record with the approval."**

When a new budget has been processed POS determines if the Shelter Type Code **40** is being removed from the case correctly, if not POS will check for a **Shelter Approval** activity and if it does not find any activity the following message will be displayed:

> **"Approval by an AJOS II or above is required to change the shelter type 40. The AJOS II must enter a detailed case comment approving the shelter type change in POS and must then submit the case to the POS help desk to have MIS update the record with the approval."**

17. July Basic Allowance Increase

The basic allowance will increase by 5% effective July 2012. The new pre-added allowance effective July 1, 2012 will be as follows:

CA Family Size	Semimonthy Pre-Added Allowance Amount
1	75.00
2	119.50
3	158.50
4	204.50
5	252.50
6	291.50
7	331.50
Each Additional Person	**40.00 for each additional person**

18. Budget Utility Allowance

POS has been updated to reflect the WMS changes for the correct processing of the utility budget. This POS change is to record the fuel type field for NYCHA Shelter Types **02** (NYCHA Apartment Utilities Included (For PA SI Codes 40 and 41 this code is defined as "M3E Indicator is signed")), **24** (NYCHA Utilities Not Included (Rent Public)), **38** (Subsidized Housing - Deep Subsidy -Voucher Program/Project Based Section 8/Section 236), **40** (Section 8 Voucher - 30% Limit)when appropriate.

19. WMS Updates

The following WMS updates in POS were made to match changes in the New York State Welfare Management System (WMS) version 2012.2

WMS will allow the use of the Additional Needs Type **47** (Family Eviction Prevention Supplement) on a sanctioned individual or with the following Income Source Codes for sanctions or noncompliance **44** (PA/Budget Reduction - PA Budget Deficit is reduced due to Non Compliance with IV-D Requirements for Recipient or Re-Applying Household), **45** (PA Budget Reduction-PA Budget Deficit is Reduced Due To Non-Compliance with IV-D Requirements for Applicant Households.), **46** (PA Prorata Sanction-Recipient or Re-Applying Households Sanctioned Due to Non-Compliance with Employment or Drug/Alcohol Requirements, or **47** (PA Prorata Sanction-Applicant Households Sanctioned Due to Non-Compliance with Employment or Drug/Alcohol Requirements).

- JOS/Workers must use the **M3E** indicator of **A** (Manual notice – Adequate Action) or **T** (Manual notice – Timely Action) for PA closings on the Turn-Around Document (TAD) or the POS TAD with Income Source Code **67** (Safety Net Self Support) and issue a Manual notice.
- HRA will implement the automation of FS Recoupments using the Food Stamps Claiming and Recoupment system. The Food Stamps Claiming and Recoupment system enables HRA-FIA staff to electronically review potential claim cases and calculate the accurate amount of Food Stamps overpayment.
- Effective for FEPS cases, when the recoupment amount is greater than the PA grant, once the FEPS payment is removed (FEPS supplement not counted for FS purposes), WMS will reduce the S/M recoupment amount to equal the PA grant for purposes of FS calculations only.

For additional details, please see the Policy Directive for WMS version 2012.2 under separate cover.