



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #13-113-SYS

CA POS RELEASE NOTES VERSION 17.3.1

Date: December 20, 2013	Subtopic(s): POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on December 23, 2013. Descriptions of the changes can be found in POS Release Notes Version 17.3.1 (Attachment A), Desk Guide: Self-Service Scanning Demonstration Project (Attachment B), and Desk Guide: SI Emergency Grant Check Queues (Attachment C).</p> <p>These release notes can also be found on the HRA Intranet at:</p> <p>http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective December 23, 2013</i></p> <p>Related Item:</p> <p>PB #13-90-SYS</p> <p>Attachments:</p> <p>Attachment A POS Release Notes Version 17.3.1</p> <p>Attachment B Desk Guide: Self-Service Scanning Demonstration Project</p> <p>Attachment C Desk Guide: SI Emergency Grant Check Queues</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

CA POS Release Notes

Version 17.3.1 December 23, 2013

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 17.3.1 scheduled for Monday, December 23, 2013. 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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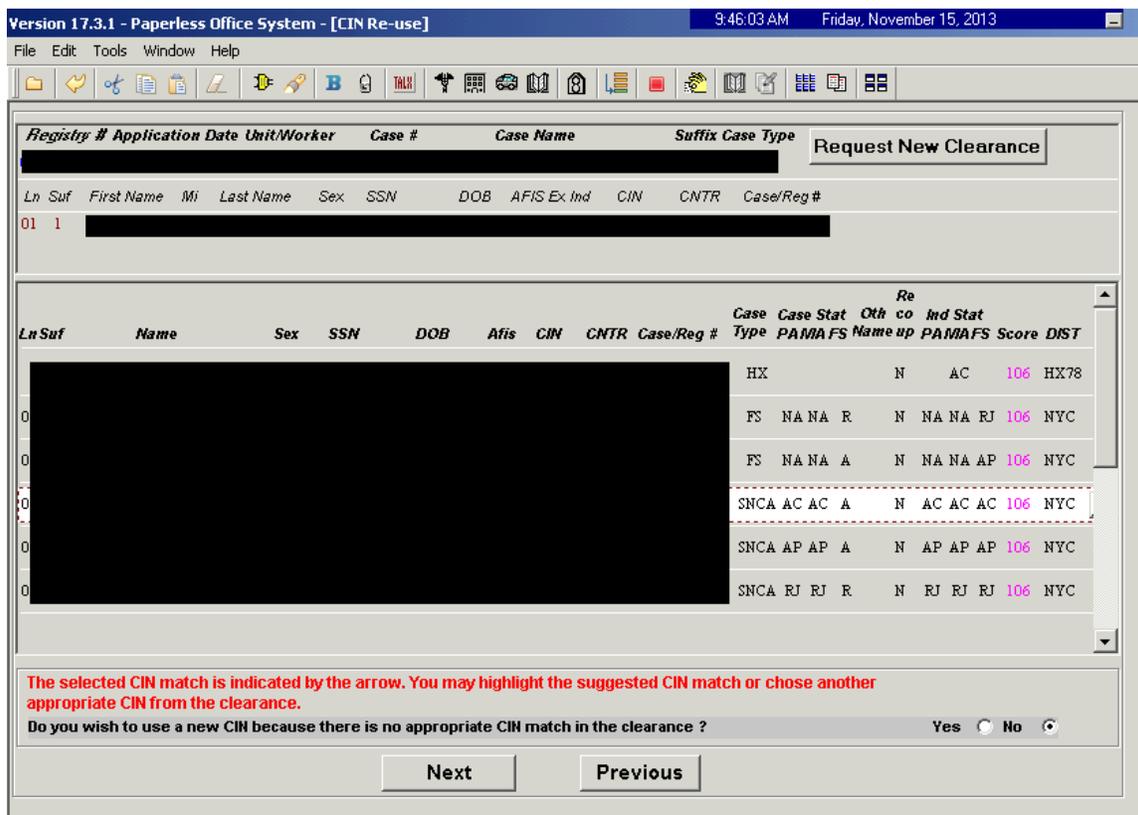
Version 17.3.1 December 23, 2013

1. Updates to POS CIN Re-Use Window for New York Health Exchange (HX)

Effective December 2013, POS was updated to receive Client Identification Numbers (CIN) for individuals who are applying, denied or active through the New York State Health Exchange (NY HX). WMS extended its communication to the HX system when generating the Clearance Report.

The **CIN Re-Use** window was updated to add a new **DIST** (District) field. This field indicates whether the CIN in the Clearance Report was received from New York City WMS or from the NY HX.

Updated CIN Re-Use Window



CIN Selection Criteria Update

The CIN Selection logic was also updated to add HX cases.

POS selects the CIN of an individual who is in receipt of both Medicaid and Supplemental Social Security Income (MSSI) and a score of **102** or higher. When there is no active SSI match and there is one exact (**106**) match, POS selects this match.

When multiple matches are displayed on the Clearance Report, POS selects the appropriate CIN using the following criteria after evaluating the CIN score:

- Active on a Cash Assistance (CA) case; or
- Active on a Supplemental Nutrition Assistance (SNAP) case; or
- Active on a Health Exchange case;
- Active on a Medicaid case; or
- Sanctioned, closed, or rejected on a CA case; or

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- Sanctioned, closed, or rejected on a SNAP case; or
- Sanctioned, closed, or rejected on an Health Exchange case; or
- Sanctioned, closed, or rejected on a Medicaid case.

If there are multiple matches with the same CIN score, case type and status, the JOS/Worker must select the appropriate CIN on the window.

2. New WMS Clearance Error E2785

With the extension of the WMS clearance search to the NYHX, WMS returns the following new error message when the Open TI call for the Clearance Report fails due to a communication problem: **E2785: Communication to HX Failed.**

3. Updates to POS Indexing Window

The following forms were added in the POS Indexing window for PAM:

- PAM **LDSS-4403** Determination of Eligibility for EAF
- PAM **LDSS-3513 NYC** - SNAP Recoupment Data Entry Form
- PAM **LDSS-4707** IPV Ancillary Document

To index manual data entry forms for processing in the **Paperless Alternate Module (PAM)** or to generate the Receipt for Scanning and Indexing Internal Paper Authorization Documents (**FIA-1102**) at centers that do not currently use PAM, the Worker must select **Internal Paper Authorization Document** in the **Document Type** menu and select one of the following forms:

- Paper **LDSS 3517** Turn Around Document
- Paper **LDSS-3573** PA Recoupment Data Entry Form
- Paper **LDSS-3722** Fair Hearing Case Update Data Entry Form
- Paper **LDSS-4962** Infraction Deletion Form
- Paper **LDSS-3652** Transaction Cancellation
- Paper **LDSS-3575** Cash Authorization Document
- Paper **LDSS-3574** Nutrition Assistance Program (SNAP)
- Paper **LDSS-3774** EPFT Benefits Pull
- PAM **LDSS-4403** Determination of Eligibility for EAF
- PAM **LDSS-3513 NYC** - SNAP Recoupment Data Entry Form
- PAM **LDSS-4707** IPV Ancillary Document

Two new options were added for the **Document Type** field: **Citizenship and Immigration Documentation** and **OCSE**.

4. Documents Removed from POS Indexing Window

The POS Indexing window was updated to remove the following forms from the **Document Description** menu:

- VISA Verification (MICA only)
- Court Document (MICA only)
- **LDSS-3517** Turn Around Document TAD
- **DSS-3722** Fair Hearing Update Data Entry Form
- **DSS-3573** New Recoupment
- **DSS-3652** Transaction Cancellation Data Entry Form
- **DSS-3774** EPFT Benefits to be pulled - data entry form
- **DSS-3575** PA Single Issuance Authorization Form Payment

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- DSS-3574 Food Stamp Single Issuance Authorization Form

5. Received From and Date Columns in POS Individual Queue

The POS Individual Queue was updated to indicate the **name of the staff person** from whom the case action was received for all case actions in the **Received From** column and to track the **Date and Time** that a case action was received in the new **Received From Dt (Received From Date)** column:

- The name of the staff person is tracked in the **Received From** column.
 - This column was previously only filled for approval activities.
 - If the case action was reviewed by a Supervisor in an approval activity and returned to the Worker for corrections, the **Received From** column includes the word **Returned** and the name of the Supervisor.
 - For approval activities in a supervisor’s queue, the **Received From** column indicates the name of the Worker who submitted the activity to the supervisor. Previously, this column tracked the latest queue in which the case was last pending.
- The date/time that the action was received is tracked in the new **Received From Dt** column.

Received From	Received From Dt

6. Weekly Work Schedule for Child Care

POS was updated to provide a drill-down window to capture the official work schedule of the employed applicant/participant claiming child care expenses. This new drill down window appears when the JOS/Worker clicks **Yes** for the “Is Employed (Including Babysitting)?” question and answers **Yes** for the question “Do you have child or dependent care expenses due to employment?” The schedule must be officially verified by the employer to justify the required child care hours.

Response Window for Is Employed (Including Babysitting) Question

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New Work Schedule for Child Care Drill Down Window

Drill Down Window

Instructions: To receive child care or continue receiving it (if subsidized child care is already in place), a client must provide her/his weekly work schedule officially verified by the employer. If a work schedule changes often, record the most commonly worked schedule. Also, if a client's travel time varies each day, record the longest travel time and multiply by five (5). For example: Two (2) days a week travel time is two (2) hours, and three (3) days a week travel time is one (1) hour. So, the travel time should be $5 \times 2 = 10$ hours. Round result to the nearest hour.

Who Has Expense: Type of Expenses: Child Care Dependent Care Relationship to Child:

Employer: Street Address:

City: State: Zip: Schedule Type: Standard Variable Scheduled Verified: Yes No Pending

Weekly Schedule

Days	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Start Time	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM
End Time	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM
Number Of Hours Worked	00.00	00.00	00.00	00.00	00.00	00.00	00.00

Total Weekly Travel Time: Total Weekly Hours Worked: 000.00

OK Cancel

The window displays the following instructions;

“To receive child care or continue receiving it (if subsidized child care is already in place), a client must provide her/his weekly work schedule officially verified by the employer. If a work schedule changes often, record the most commonly worked schedule. Also, if a client’s travel time varies each day, record the longest travel time and multiply by five (5). For example: Two (2) days a week travel time is two (2) hours, and three (3) days a week travel time is one (1) hour. So, the travel time should be $5 \times 2 = 10$ hours. Round result to the nearest hour.

The worker selects the applicant/participant who is claiming the expense from the Drop-down menu and the childcare expense type. They also need to choose the relationship between the applicant/participant and the child. The worker enters the employers information, chooses the work schedule type (variable means work hours are different) and indicates whether the work schedule has been verified.

Schedule Verified

If the JOS/Worker selects No, POS displays the following message:

- Give the form FIA-1100a to the applicant/participant. This form will be printed with the FIA-1100 at the PRINT FORMS window.

If the JOS/Worker selects Pending, POS displays the following message:

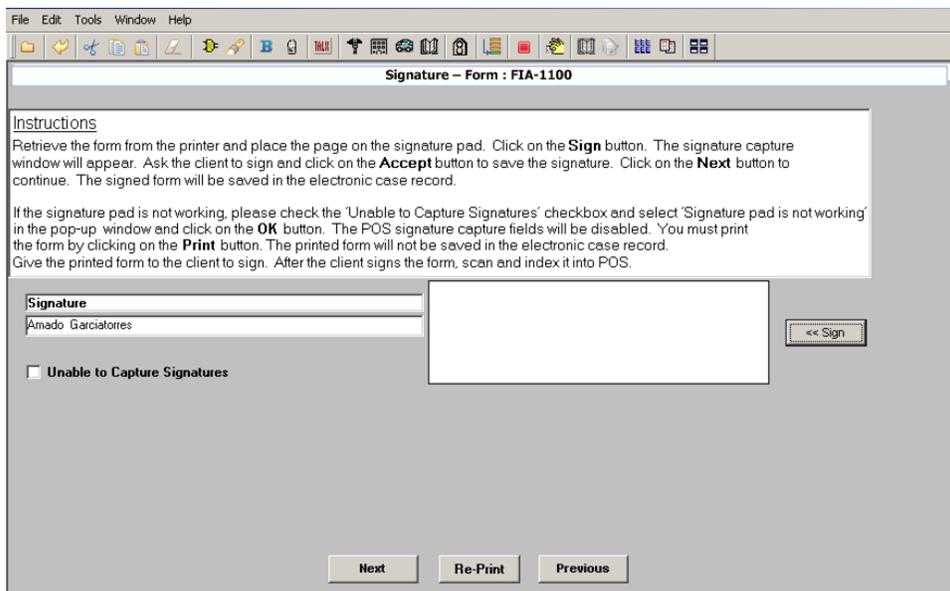
- Give the form FIA-1100a to the applicant/participant. This form will be printed with the FIA-1100 at the PRINT FORMS window.

Worker Reminder

The Work Schedule for Child Care (**FIA-1100**) requires signature capture from the applicant/participant. The Employer’s Verification (**FIA 1100a**) is required to verify the applicant/ participant’s work schedule and requires them to return this form back to the center.

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7. OCSE Updates

POS was updated to display an error message in the **Print Forms** window when an OCSE appointment is scheduled in the CA Recertification Interview or CA Change Case Data activity and the OCSE Appointment Notice (**M-384**) was not printed by the Worker:

- You must print the M-384 OCSE appointment notice before closing this window.

8. BEV Referral Updates

The **BEV Referral** window was updated for Child Care in Lieu of Cash Assistance (CILOCA) cases and reasonable accommodations.

CILOCA Update

The **BEV Referral** window was updated to add a **CILOCA Case** indicator. The field has a value of **Yes** when the applicant requests Child Care in Lieu of Cash Assistance (CILOCA). CILOCA cases receive priority appointments.



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Reasonable Accommodation Updates

When scheduling an appointment for an individual who has a pending request or who has been granted a reasonable accommodation that requires flexible scheduling or restricted days/hours for HRA appointments, a pop-up message appears in POS that states:

- The client is not available for the days and times noted below. Please schedule all appointments at the client's available dates and times.

The **BEV Referral** window in POS was updated to prevent the JOS/Worker from scheduling an appointment with the Bureau of Eligibility Verification (BEV) during the restricted dates and times. The JOS/Worker must select an appointment date/time that is available on the schedule.

If POS is down, the JOS/Worker must schedule the appointment through the **BEV-MAPPER Scheduling System**. Pop-up windows were added in MAPPER to inform JOS/Workers of a pending and approved Reasonable Accommodation Recommendation (RAR). Once a formal RAR is submitted, MAPPER blocks out any appointment dates and times in which an individual is unavailable.

Policy Reminders

- For additional details regarding the BEV functionality in POS and the CILOCA indicator, please see **PB 13-37-SYS Revision to BEV Functionality in POS**.
- For additional details regarding the Americans with Disabilities Act and reasonable accommodations, please see **PD 12-30-OPE The Americans with Disabilities Act and Reasonable Accommodations**.

9. POS Removal of Medicaid Choice/ Managed Care (M-42V) for HASA Cases

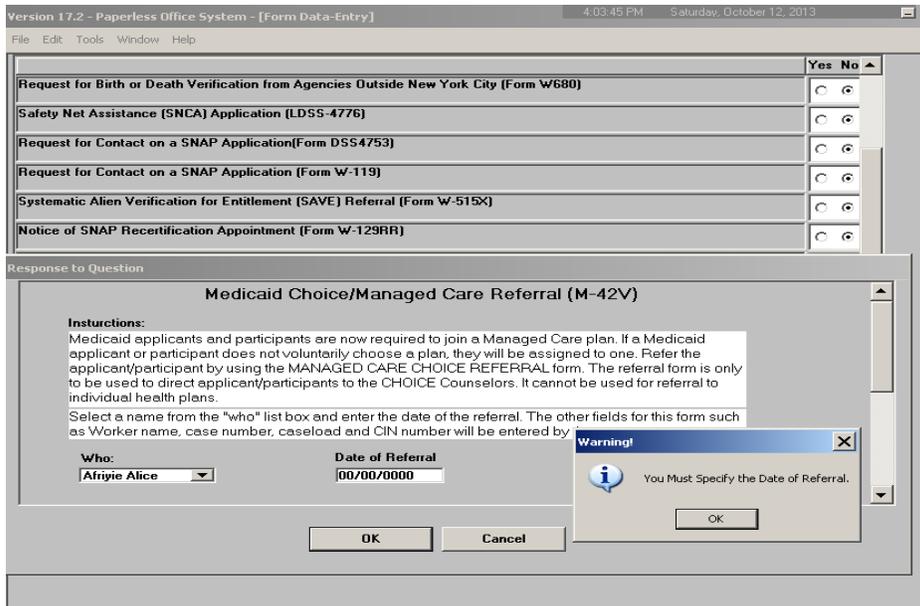
Managed care for HASA has requested that POS stop HASA users from filling these forms with appointment dates since the data entry is not required. POS removed the form from the following:

- **Print Forms** window for HASA cases only.
- **Forms Data Entry** window "Medicaid Choice/ Managed Care Referral (**M-42V**) for HASA cases only.

All associated edits were removed for HASA cases, including filling the form with appointment dates for referral.

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10. Signature Capture Report Update

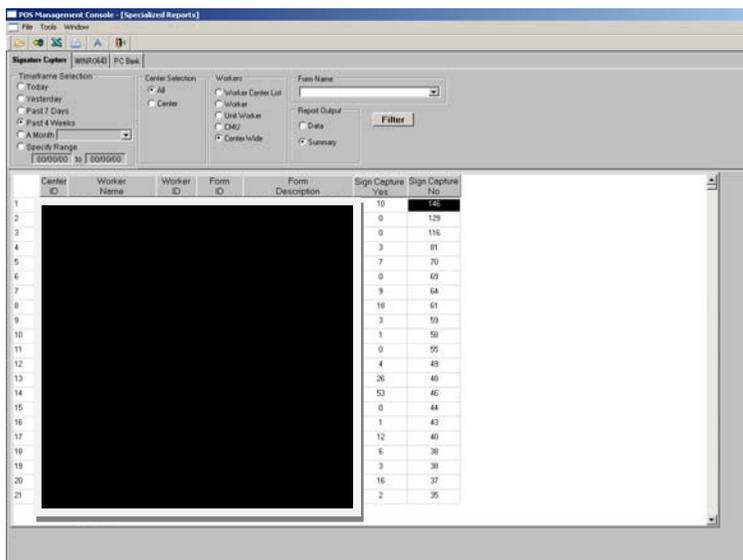
The POS signature capture report has been updated to include the signature or the reason for the non-signature for the **W-147KK**, **W-147X** and **W-147P** forms at Job Centers.

Form Descriptions

- **W-147KK** - Emergency Assistance to Needy Families (EAF) Agreement to Repay Excess Shelter Arrears
- **W-147X** - Utility Arrears Repayment Agreement
- **W-147P** - Broker's Fee Voucher

A summary view was added to the POS signature capture report, allowing the user to determine the number of forms with signature capture and without signature, by form type and worker.

Summary Window



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11. Paperless Alternate Module (PAM) Rollout

MIS has developed the PAM system to track manually processed cases. Selected workers and supervisors have the ability to document and approve or disapprove cases processed within PAM. PAM rolled out in the following locations in October and November 2013:

- Fordham Job Center (**044**)
- SSI SNAP Center (**S15**)
- East End Job Center (**023**)
- East End SNAP Center (**F02**)
- Rider Job Center (**038**)
- Centralized Fair Hearing (**FSH**)

On December 16, 2013 the PAM system rolled out to the below sites:

- Income Clearance Program (ICP)
- Office of Centralized Processing (OCP)

For detailed information on PAM, please refer to the PAM release notes, policy and manual.

12. Updates to PAM Enrollment

The **POS Enrollment** window was updated to allow Supplemental Nutrition Assistance Program (SNAP) management to identify Data Entry Supervisors and Data Entry Operators that can process cases through the new PAM system. The enrollment coordinator will choose the **PAM Data Entry Supervisor** or the **PAM Data Entry Operator** checkbox in the **Special Tasks** window in the **POS Enrollment** window.

13. New Privacy Agreement Text for POS and POS Portal Sign-On Pages

New privacy agreement text was added in the sign-on pages for POS, RAD (Rental Assistance Database) , PAM, MONIQ (Model Office Numbering Identification Queue) and FRED (Front Door Electronic Reception)::

- All data contained in this system is confidential by City, State and Federal law and regulations. Failure to protect this information from unauthorized use or disclosure may subject you to discipline as well as financial, civil and criminal penalties, up to and including incarceration. By logging into this system, you agree to these terms of use.

14. Specialized Reports Option in POS Management Console

A new option named **Specialized Reports** was added to the **Select Center** screen in the **POS Management Console** effective Monday, November 4, 2013. Access is limited to authorized users. The reports in the Specialized Reports menu are accessible during business hours. Retrieval of data is available for authorized users via a connection to centralized POS tables.

This new menu includes the **Signature Capture**, **WINR0643** and **PC Bank Reports**, which were previously included in the Citywide Reporting menu.

The user must access the **POS Management Console** through the POS Portal and select **Specialized Reports** in the **Select a Center** window. The user must then click on the **WINR0643**, **Signature Capture** or **PC Bank Report** tab.

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15. Streamlined Business Rules

POS was updated to bypass the individual category code business rules for households with more than 10 individuals on the case and more than 2,000 activities in the POS case history. This change prevents freezing on the **TAD** window and allows processing of the case to continue. The following message appears for the Worker:

- Due to the large case composition, the TAD rules will not validate the data for the following field(s) for this case. Please ensure the validity of the value selected in this field. Field(s): Individual Cat Code in TAD Individual Detail window.

16. Demonstration Project: Self-Service Scanning

A new demonstration project in two FIA locations allows CA participants of that site to scan and index their own documents. This new process is restricted to document return for recertifications. For additional details, please refer to **Attachment B: Desk Guide for Self-Service Scanning Demonstration Project**.

17. POS SI Emergency Check Queues

FIA made a request to electronically forward authorization forms for single issuance emergency checks from the approving Supervisor directly to the D&C Unit. POS has added new SI Emergency Grants queues to the existing print queues. The new **SI Emergency Grant D&C Queue** and **SI Emergency Control Queue** will roll out in the following Job Centers that also have the PAM system:

- Fordham (044)
- Rider (038)
- East End (023)

The queues retrieve grants with pick-up code 5 (Emergency Cash Assistance Check) and Pick-Up Code 7 (Emergency Cash Payment). The **LDSS-3575** (Public Assistance Single Issuance Authorization Form) is displayed on the POS screen and no longer prints for centers with these new queues.

For additional details, please refer to **Attachment C: Desk Guide SI Emergency Grant Check Queues**.

ATTACHMENT B

Desk Guide: Self-Service Scanning Demonstration Project

Date: December 23, 2013

Overview

A new demonstration project in two HRA locations allows participants of that site to scan and index their own documents. This new process is restricted to document return for recertifications. This project allows a participant to scan documents a day after the Documentation Requirements and/or Assessment Follow-Up (**W-113K**) has been issued to the participant.

The self-service process is as follows:

- The JOS/Worker conducts a recertification interview and issues a **W-113K** to the participant;
- The participant comes to the self-service area to scan documents at least one (1) day after receipt of **W-113K** and uses the Multi-Function Printer/Scanner (MFP) to scan their documents.
- The JOS/Worker completes a document intake activity to save the documents and route notifications to the appropriate area(s) at the center.

MFP Process

The participant swipes Common Benefit Identification Card (CBIC), enters their Client Identification Number (CIN) or enters their Social Security Number (SSN) on the MFP. The MFP places a web service call to POS to retrieve case information, determine the case type, case status, determine whether a **W-113K** for the recertification interview with a due date in the future and obtain the documents needed. If the case cannot be found or does not meet the **W-113K** recertification criteria, the web service call returns a message to the MFP.

The MFP then informs the participant that their case was not found or that there is no pending **W-113K** for their case.

The MFP displays the case information, including:

- Casehead Information
- List of case members
- Documents were requested for
- Eligibility factors that are requested
- List of documents needed (including any forms needed)

The MFP presents the casehead information and asks the participant that the retrieved case is theirs. The participant selects **Yes** to continue flow; **No** to return to the start of the process. If the participant selects **No**, the MFP returns to the beginning of the flow. If the participant selects **Yes**, the participant selects each case member, scans and identifies the document type for each document. The scanned documents are sent to the Lexmark Document Distributor (LDD). Once all documents are scanned and identified, the participant presses the **Print Receipt** button to complete the self-service scanning. The MFP prints the document receipt for the participant.

If the participant walks away from the MFP without completing the process, the MFP times out after three minutes to end the participant's activity. The case is then loaded to the **Self-Service Scanning Queue** to allow assignment to a JOS/Worker for completion of the indexing.

ATTACHMENT B

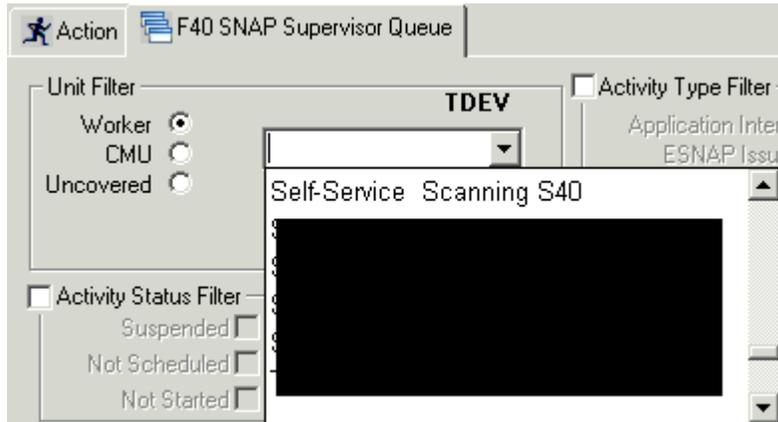
Desk Guide: Self-Service Scanning Demonstration Project

Date: December 23, 2013

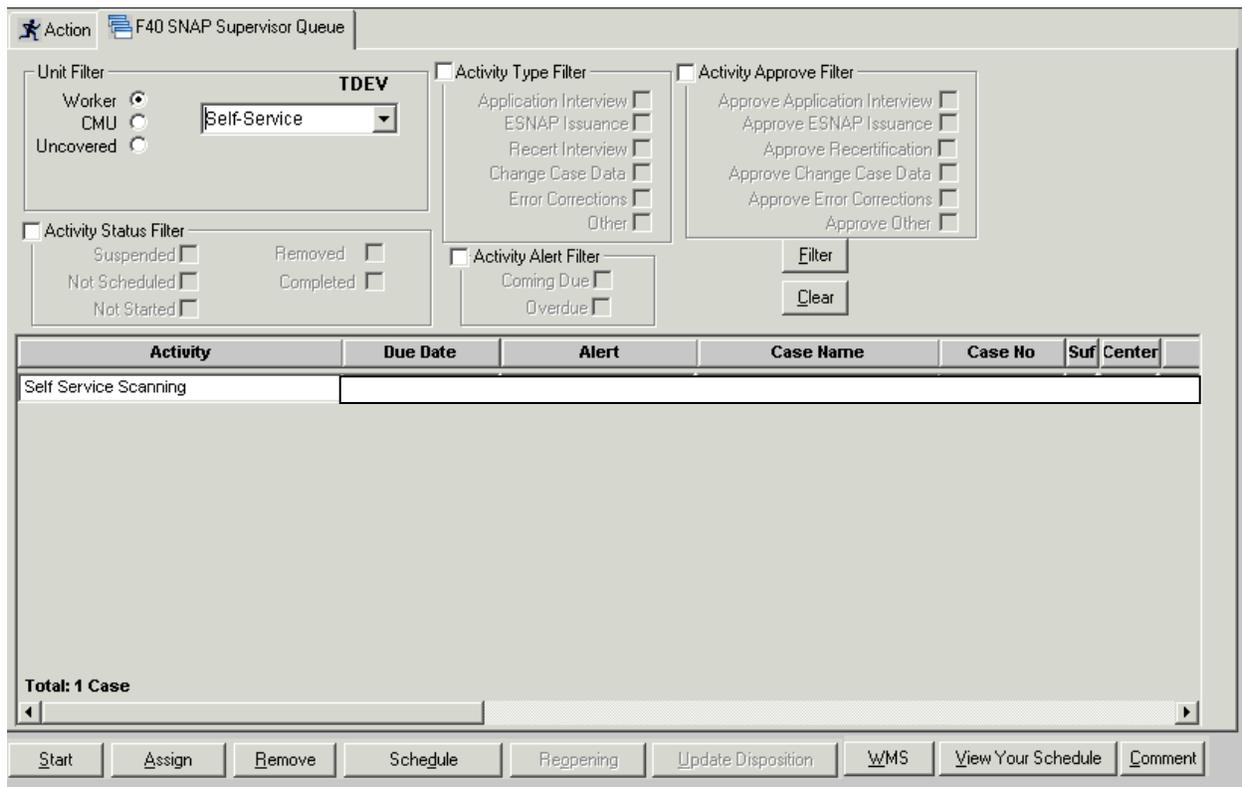
Self-Service Scanning Queue

The **Self-Service Scanning Queue** in POS allows Supervisors to assign cases that require indexing of documents submitted through the MFP.

The queue includes the **Self-Service Scanning** activities that must be assigned to a JOS/Worker.



The **Assign** button allows Supervisors to assign the new **Self-Service Scanning** activity to a JOS/Worker.



ATTACHMENT B

Desk Guide: Self-Service Scanning Demonstration Project

Date: December 23, 2013

Self-Service Scanning Activity

A new activity named **Self-Service Scanning** is assigned via the **Self-Service Scanning** queue.

The activity appears in the JOS/Worker's queue and includes the following windows:

- **Household Screen**
- **Image Indexing**

Household Screen

When the **Household** Screen opens, the JOS/Worker can review the current case information, including the household members. The JOS/Worker clicks **Next** to continue.

Household Screen

The screenshot shows a software window titled "Version 17.3 - Paperless Office System - [Household Screen]" with a timestamp of 4:27:22 PM on Tuesday, December 03, 2013. The window contains several sections of information, all of which are redacted with black boxes:

- Control Information**: A single redacted line.
- Present Address**: A large redacted area.
- Suffix Information**: Includes radio buttons for "Active" (selected), "Applying", and a checked checkbox for "No F5 IPV or Sanction Found". Below this is a large redacted area.
- Case Member Information**: A table with columns: Suf, Ln, CIN, Name, Relation, DOB, SSN, Val, Sex, Nti, HB, CA, MASNAP, and Ctzn. The table content is redacted.

At the bottom of the window are two buttons: "Next" and "Previous".

ATTACHMENT B

Desk Guide: Self-Service Scanning Demonstration Project

Date: December 23, 2013

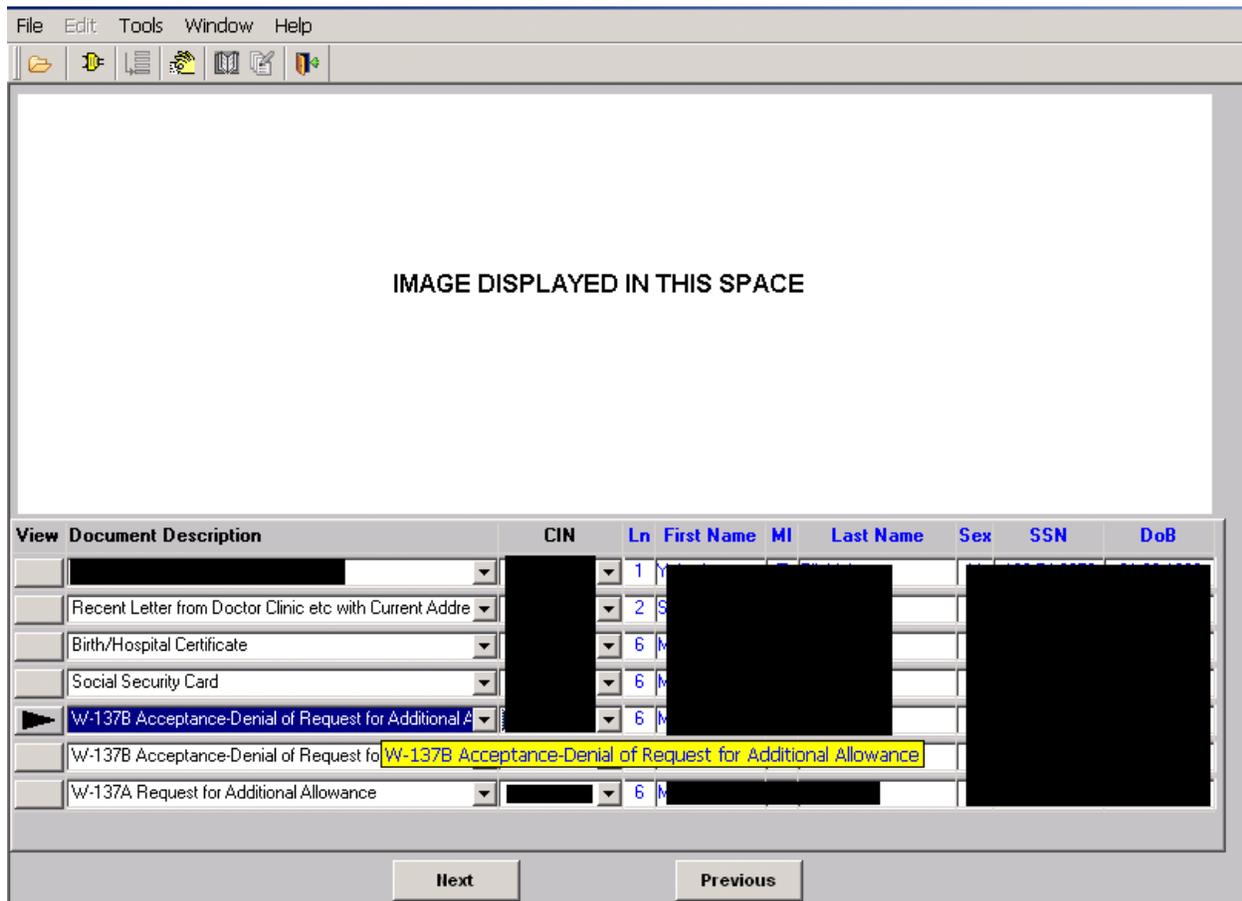
Image Indexing Window

The **Image Indexing** window allows the JOS/Worker to review and index the documents. The document description and selected by the participant for each document at the MFP are displayed in the window.

The upper half of the window displays the document. The JOS/Worker clicks on the back and forward arrows to view each page in the document.

The lower half of the window allows the JOS/Worker to review and update the **Document Description** and **CIN** selected by the participant at the MFP for each document.

Image Indexing Window



Updating the document description

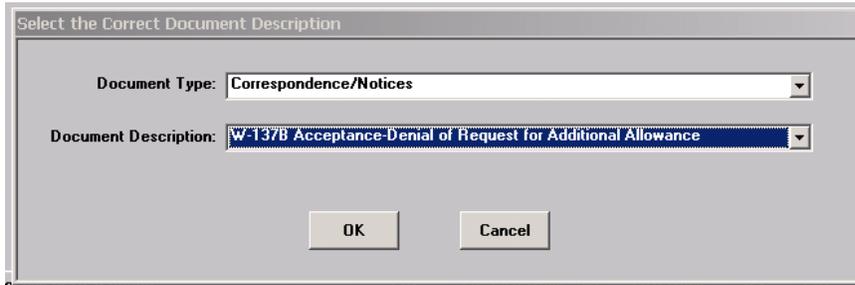
To update the document description, the JOS/Worker selects the document in the lower section of the window. The **Select the Correct Document Description** pop-up window appears. The JOS/Worker selects the updated **Document Type** and the updated **Document Description**.

ATTACHMENT B

Desk Guide: Self-Service Scanning Demonstration Project

Date: December 23, 2013

Select the Correct Document Description Window



Select the Correct Document Description

Document Type: Correspondence/Notices

Document Description: W-137B Acceptance-Denial of Request for Additional Allowance

OK Cancel

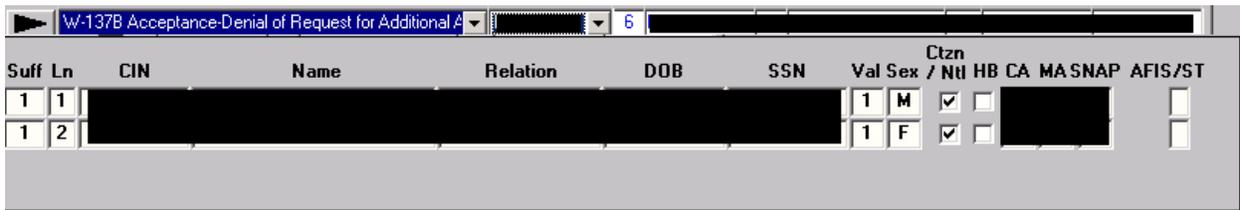
Document received cannot be used

When the JOS/Worker finds a document that cannot be used, they must select **Miscellaneous** in the **Document Type** menu and **Unusable Self Service Scanned Document** in the Document Description field.

Updating the individual to whom the document belongs

To update the individual to whom the document belongs, the JOS/Worker clicks in the **CIN** menu in the lower section of the window.

The **Individual Selection** pop-up window appears. The JOS/Worker then selects the updated individual.



Suff	Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Ctn	HB	CA	MA	SNAP	AFIS/ST
1	1						1	M	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
1	2						1	F	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Completing the activity

Once indexing is completed, the JOS/Worker clicks **Next** to complete the **Self-Service Scanning** activity.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

Date: December 23, 2013

Overview

FIA made a request to electronically forward authorization forms for single issuance emergency checks from the approving Supervisor directly to the D&C Unit. POS has added new SI Emergency Grants queues to the existing print queues. The new **SI Emergency Grant D&C Queue** and **SI Emergency Control Queue** will roll out in the following Job Centers that also have the Paperless Alternate Module (PAM) system:

- Fordham (044)
- Rider (038)
- East End (023)

The queues retrieve grants with pick-up code 5 (Emergency Cash Assistance Check) and pick-up code 7 (Emergency Cash Payment). The **LDSS-3575** (Public Assistance Single Issuance Authorization Form) is displayed on the POS screen and no longer prints for centers with these new queues.

SI Emergency Grants D&C Queue

Version 17.3.1 - Paperless Office System - [Print Queues] 3:42:42 PM Tuesday, November 26, 2013

File Edit Tools Window Help

This tab shows cases that need emergency checks. D&C Supervisors must select Auto E-check or Manual E-Check before assigning the case to an operator/typist. To view pending emergency grants, you must select the Open checkbox and click Open Selected Forms button.

Notices Recoup Form Print Queue **SI Emg Grant D&C Queue** SI Emg Grant Control Queue Backup Grant Queue

Complete	Toe	Case No	Case Name	Activity	Acty End Date-time	From
<input type="checkbox"/>	2					
<input type="checkbox"/>	3					
<input checked="" type="checkbox"/>	8					
<input type="checkbox"/>	4					
<input type="checkbox"/>	2					

Version 17.3.1 - Paperless Office System - [Print Queues] 3:45:03 PM Tuesday, November 26, 2013

File Edit Tools Window Help

This tab shows cases that need emergency checks. D&C Supervisors must select Auto E-check or Manual E-Check before assigning the case to an operator/typist. To view pending emergency grants, you must select the Open checkbox and click Open Selected Forms button.

Notices Recoup Form Print Queue **SI Emg Grant D&C Queue** SI Emg Grant Control Queue Backup Grant Queue

Case Name	Activity	Acty End Date-time	From	Caseload	Assn Operator
					J. Aarons
					S. Abraham
					J. Patton
					J. Patton

Instructions:

This tab shows cases that need emergency checks, D& C supervisors must select Auto E-check or Manual E-Check before assigning the case to the operator typist. To view pending emergency grants, you must select the Open checkbox and Click Open selected forms button.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

Date: December 23, 2013

SI Emergency Grant D& C Queue

Complete – this checkbox allows designated supervisors to complete and remove case from the queue once all pending grants are done.

Case No – this field indicates the case number for which the forms will be open.

Case Name – this field indicates the case name for which the forms will be open.

Activity – this field indicates the activity in which the JOS/Worker prepared the grants.

Acty End Date-Time – this field indicates the end date and time of the activity in which the JOS/ Worker prepared the grants.

From – this field indicates the name of the JOS/Worker who prepared the grants.

Caseload – this field will indicate the current caseload for the case

Assn Operator – this field is a drop down list box displaying operators/typist awaiting assignment of emergency grants.

Emergency Checks Details section

Open – this checkbox allows designated staff to select grant to be opened

Grant Issuance Code-Description – this field displays pending grant issuance code and code description

Done – this checkbox allows designated operator\typist to select grants that were done

Date Completed – this field displays date when designated operator checked “Done” checkbox

Command Buttons

Open Selected Form – on the click of this button generate the e-form and open it in the window for user to view.

Refresh – this button removes the case were marked as complete (“Complete” checkbox is selected) from the queue

Close – this button closes the Emergency Checks Queue.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

Date: December 23, 2013

Open Selected Form Window

The following window opens when the supervisor or operator/typist clicks on Open selected form button in the SI Emergency D & C queue. POS will enter the authorization number on the window when an e-form is generated.

DSS-3575

WARNING: FRAUDULENT OR UNAUTHORIZED USE OF THIS FORM IS A CRIME. VIOLATORS ARE SUBJECT TO CRIMINAL AND/OR ADMINISTRATIVE CHARGES. WRITE OUTS AND ERASURES WILL INVALIDATE THIS FORM.

DSS-3575 (NYC) (7/95)
NEW YORK STATE
DEPARTMENT OF SOCIAL SERVICES

PUBLIC ASSISTANCE SINGLE ISSUANCE AUTHORIZATION FORM

CASE NAME LAST FIRST M.I.
ISSUANCE CODES AMOUNT Dollars FROM Mo. Day Yr. TO Mo. Day Yr. ROUTING LOCATION REPLACES CHECK NUMBER EPA CHECK NUMBER RESTRICTED INDICATOR

PICK-UP CODES
SPECIAL ROLL - 1 EFFT HR 45 DAY ELIG 2 E-CHECK 6 E-CASH 7 EFFT LINKED 8 EFFT NEXT DAY 9 IS CENTER

CASE NUMBER SUFFIX DATE FORM PREPARED AUTHORIZATION NUMBER

TOTAL Amount PAIR HEARING NUMBER
PRINT TOTAL DOLLAR AMOUNT IN WORDS DOLLARS CENTS

OPTIONAL FIELDS
PAYEE NAME
STREET ADDRESS
CITY STATE ZIP CODE
SHELTER TYPE REQUIREMENT INDICATOR CATEGORY
CONTROL UNIT ONLY
For already issued checks: D & C Date

ELIGIBILITY SPECIALIST DATE GROUP SUPERVISOR DATE DEPUTY DIRECTOR OF ELIGIBILITY DETERMINATION DATE
UNIT WORKER ID/CLIENT CASELOAD DIRECTOR OF ELIGIBILITY DETERMINATION DATE DIRECTOR EDIT/OVERRIDE CODE DATE
CASELOAD OF WORKER COMPLETING FORM CONTROL CLERK DATE CRT OPERATOR DATE

Was this grant previously issued? Yes No
 Auto E-Check Manual E-Check
D&C Check #
Grant 1 of 3

← CLOSE →

Was this grant previously issued – Allows the operator to answer if grant on the form was previously issued.

Auto E-Check – radio button that is selected by operator to indicate that grant is an auto e-check

Manual E-Check – radio button that is selected by operator to indicate that grant will be manually typed.

D & C Check # - this field is enabled and required only if the **Manual E-Check** radio button is selected.

Grant 1 of MM – this field depicts the count of emergency grants on the case.

Close button – this button will be enabled only on the last SI emergency grant. Clicking on close will close the window.

Back Arrow – click of this arrow opens the previous SI emergency grant for the case.

Forward Arrow – click of this arrow opens the next SI emergency grant for the case.

D&C Operator Completion

The assigned operator selects the Auto E or manual E Check description. If it is a manual E check they must enter the D&C check number. If the **Manual E-Check** radio button is selected and **D & C Check #** field is left empty, the operator will see the following:

“You must enter check number for all Manual E-Checks”

After the D& C operator processes all the pending E-checks they were assigned, they will go back to the SI Emergency Grant D & C queue and select done. The date will be displayed in the Date Completed field.

Removal of E-Check cases from D & C Emergency Queue

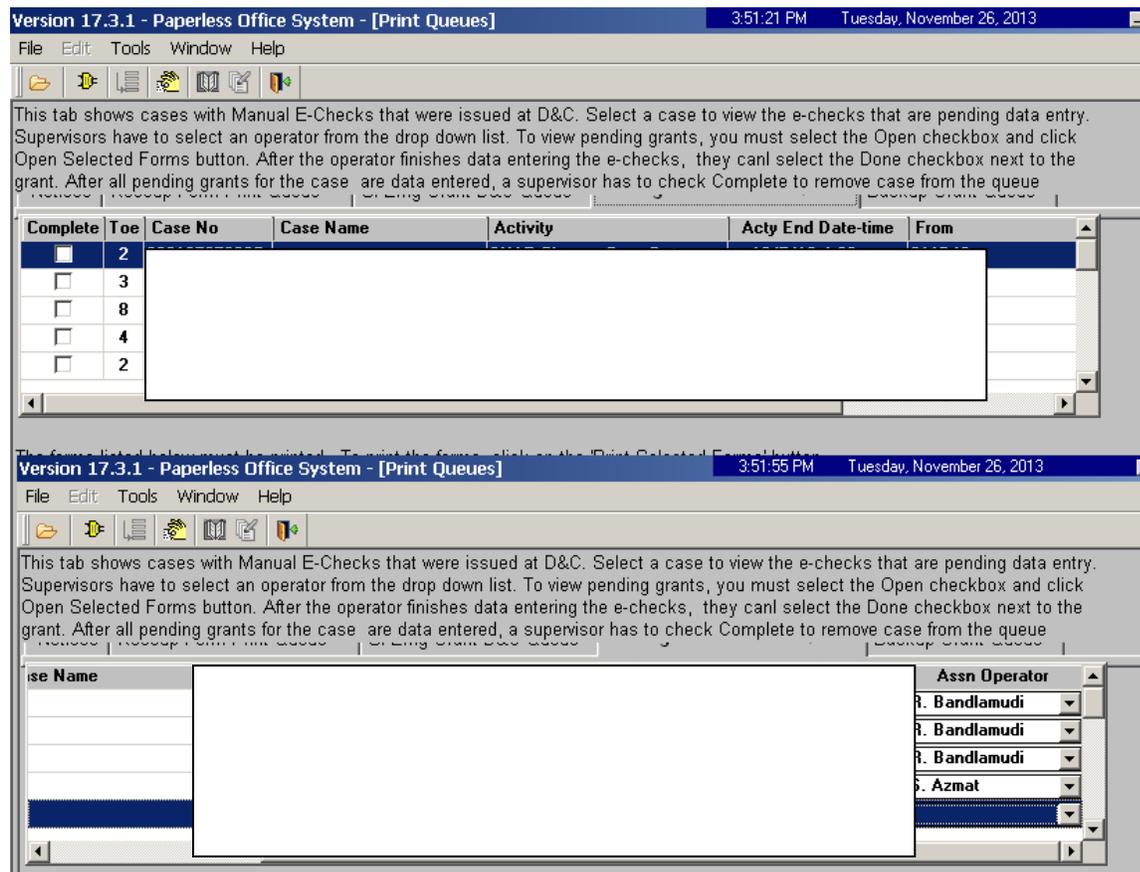
Once the data entry operator or typist completes their processing of the E checks from the queue, the supervisor is responsible for completing and removing the case from the queue by selecting the complete checkbox and refresh.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

Date: December 23, 2013

SI Emergency Grants Control Queue



Instructions:

This queue shows cases with Manual E-Checks issued at D & C. Supervisors must select the operator in Assn Operation. To view grants, select Open and click Open Selected Forms. After data entry is complete, the operator selects the "Done" checkbox. After all pending grants for the case are data entered, the Supervisor selects the Complete checkbox and clicks Refresh to remove the case from the queue.

SI Emergency Grants Control Queue

Complete – this checkbox allows designated supervisors to complete and remove case from the queue once all pending grants are done.

Case No – this field indicates the case number for which the forms will be open.

Case Name – this field indicates the case name for which the forms will be open.

Activity – this field indicates the activity in which the JOS/Worker prepared the grants.

Acty End Date-Time – this field indicates the end date and time of the activity in which the JOS/ Worker prepared the grants.

From – this field indicates the name of the JOS/Worker who prepared the grants.

Caseload – this field will indicate the current caseload for the case

Assn Operator – this field is a drop down list box displaying operators/typist awaiting assignment of emergency grants.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

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Emergency Checks Details section

Open – this checkbox allows designated staff to select grant to be opened

Grant Issuance Code-Description – this field displays pending grant issuance code and code description

Done – this checkbox allows designated operator\typist to select grants that were done

Date Completed – this field displays date when designated operator checked “Done” checkbox

Command Buttons

Open Selected Form – on the click of this button generate the e-form and open it in the window for user to view.

Refresh – this button removes the case were marked as complete (“Complete” checkbox is selected) from the queue

Close – this button closes the Emergency Checks Queue.

Completion of E Check cases from Control Queue

Once the data entry operator or typist completes their processing of the E checks from the queue, the supervisor is responsible for completing and removing the case from the queue by selecting the complete checkbox and refresh.

ATTACHMENT C

Desk Guide: SI Emergency Grant Queues

Date: December 23, 2013

SI EMERGENCY GRANT QUEUE WORKFLOW

