

FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #13-114-SYS

## **SNAP POS RELEASE NOTES VERSION 7.3.1**

Date:		Subtopic(s):					
December 20, 2013		PÓS					
This procedure can now be accessed on the FIAweb.	This policy bulletin Nutrition Assistan latest version of th production on Dec be found in SNAP <b>A</b> ), Desk Guide: S ( <b>Attachment B</b> ), Management Con ( <b>Attachment D</b> ) a Phase II ( <b>Attachm</b>	n is to inform Non Cash Assistance Supplemental ce Program (NCA SNAP) Center staff that the ne Paperless Office System (POS) will migrate to cember 23, 2013. Descriptions of the changes can POS Release Notes Version 7.3.1 ( <b>Attachment</b> Self Service Scanning Demonstration Project Desk Guide: ACE Aggregate Report in the POS isole ( <b>Attachment C</b> ), Desk Guide: ACE Recording and Desk Guide: SNAP Front End Review (FER), <b>nent E</b> ).					
	These release notes can also be found on the HRA Intranet at:						
	http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx						
	Effective December 23, 2013						
	Related Items:						
	PB #13-90-SYS PB #12-45-SYS						
	Attachments:						
💻 Please use Print on	Attachment A	SNAP POS Release Notes Version 7.3.1					
Demand to obtain copies of forms.	Attachment B	Desk Guide: Self Service Scanning Demonstration Project					
	Attachment C	Desk Guide: ACE Aggregate Report in the POS Management Console					
	Attachment D Attachment E	Desk Guide: ACE Recording Desk Guide: Desk Guide: SNAP Front End Review (FER), Phase II					

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

## Version 7.3.1 December 23, 2013

These Release Notes contain descriptions of changes in Supplemental Nutrition Assistance Program Release 7.3.1 for the Paperless Office System (POS) 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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## 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 will indicate whether the CIN in the Clearance Report was received from New York City WMS or from the NYS Health Exchange.

#### Updated CIN Re-Use Window

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#### **CIN Selection Criteria Update**

The CIN Selection logic was also updated to add Health Exchange (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
- Sanctioned, closed, or rejected on a SNAP case; or
- Sanctioned, closed, or rejected on an Health Exchange case; or

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• Sanctioned, closed, or rejected on a Medicaid case.

If there are multiple matches with the same CIN score, case type and status, the Eligibility Specialist (ES) must select the appropriate CIN on the window.

## 2. New WMS Clearance Error E2785

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

## 3. 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.

## 4. SNAP Center Number on POS Forms

POS E-Forms were updated to begin the center number for SNAP Centers with the letter **S**. For example, forms that previously listed **F02** for the East End SNAP Center now list the center number as **S02**.

## 5. New N10 Completion Edit

A new completion edit was added to prevent improper use of the Rejection Code **N10** (Failed to Keep Application Interview) in the **SNAP Application Interview**:

• Rejection Code **N10** should only be used when the applicant failed to keep the interview. The rejection must be processed using the **SNAP Failed to Keep Application Interview** activity.

## 6. New Employability Code Completion Edits in SNAP Application and Recertification

New completion edits were added in **SNAP Application Interview** and **SNAP Recertification Interview** to require re-evaluation of the employability code for individuals with updated interview information. These edits run for cases that are activated during the **SNAP Application Interview** or continue active during the **SNAP Recertification Interview**.

The following new edits were added:

- You have indicated a change to Has Daily Activity Limited because of an Illness/Temporary Disability or is Blind, Sick or Disabled window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability code Determination window and click on Run Rule button.
- You have indicated a change to Worker's Compensation window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to NYS Disability Benefits window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on Run Rule button. You have indicated a change to Social Security Disability Benefits

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window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code determination window and click on the Run Rule button.

- You have indicated a change to Private Disability Insurance Health/Accident Insurance Policy Income window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Is or Was Drug or Alcohol Dependent window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Rule button.
- You have indicated a change to Unemployment Insurance Benefits window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Is Unemployed window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Supplemental Security Insurance (SSI) Benefits window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Is Employed window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on Run Rule button.
- You have indicated a change to Is Self-Employed window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Is Pregnant window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Special Assessment window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.
- You have indicated a change to Is Needed in the Home to Care for a Child Under the Age of 6 or an Incapacitated Person window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on Run Rule button.
- You have indicated a change to Client Alien Type window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Rule button.
- You have indicated a change to Education and Training window, the Employability Code Determination window must be reevaluated for this individual, please return to the Employability Code Determination window and click on the Run Rule button.

## 7. Denial Code Y99 Edit in TAD

The **TAD** window was updated to require a case comment when denial code **Y99** (Other) is used for the case or for an individual on the case. When the ES exits the TAD, a new window appears with the following question:

• Do you wish to use this code to Reject/Close this case or individual?

If the ES clicks **Yes**, they must enter a detailed case comment indicating why code **Y99** must be used. The following instructions appear on the window:

 Comments are required if "Yes" is selected. Please enter an explanation for using reason code Y99. (Note: These Comments will be added to the Case Comments section of this case and may be used for Audits).

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If the ES clicks **No**, they must click **Previous** and change the denial code(s) in the TAD from **Y99** to another code. The following appears if the ES clicks **No**:

• You must click Previous to return to the TAD window and change the SNAP Reason Code

#### Reason Code Y99 Window

there is no other code the Previous button to select a	at fits the criteria.	Center: If you still want to us in code on the TAD.	Category
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iose this case or inc	dividual? 🔿	Yes 🔿 No	
ed. Please enter an the Case Commen	n explanation nts section of	for using reaso this case and n	n code Y99 nay be used
	Pre	vious	
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## 8. Reminder: ABAWD (Able Bodied Adult without Dependents) Calendar

The ABAWD Calendar displays the past 36 months of ABAWD compliance information.

### 9. New Question in Employment Information Window

A new question was added on the **Employment Information** window:

"Have you or has anyone living with you changed or quit jobs or reduced any form of income in the last 30 days – including reduced work hours or income?"

This new question will appear in the **SNAP Application Interview**, **SNAP Recertification Interview** and **SNAP Change Case Data** activities, the corresponding error correction activities and the corresponding approval activities.

#### New Response to Question Window

The new **Response** window lists the household members and allows the ES to indicate whether the applicant/participant has changed their job(s), quit their job(s), reduced their work hours or reduced any form of income in the past 30 days.

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Who				-
Changes in past 30 days				
Changed job(s)				
Quit job(s)				
Reduced work hours				
Reduced any form of income				
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#### **New Approval Window**

The Approval window appears when the answer for the new question is Yes.

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Who:						
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Approve Disapprove	•		•			

## 10. SNAP Front End Review (FER), Phase II

The **SNAP-FER** window in the **SNAP-FER** activity was updated to add new web services to retrieve collateral matches:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- TLC Match
- Marriage Match

The updated window includes the following tabs:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- Taxi Limousine Commission (TLC) Match
- Marriage Match
- IREA (Investigation, Revenue and Enforcement Administration)\_Recommendation

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The updates for SNAP FER Phase II will be effective January 13, 2014. For additional details, please refer to **Attachment E: Desk Guide for SNAP Front End Review Phase II.** 

## 11. SNAP FER Window for FIA, Phase II

The **SNAP-FER** window for FIA in the **SNAP Application Interview** activity was updated to include the following tabs:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- TLC Match
- Marriage Match
- IREA Recommendation/FIA Decision

The LexisNexis Instant Verify, LexisNexis Credit Report Match, TLC Match and Marriage Match tabs will include the same information as the IREA version of the window.

The updates for SNAP FER Phase II will be effective January 13, 2014. For additional details, please refer to **Attachment E: Desk Guide for SNAP Front End Review Phase II.** 

## 12. SNAP FER Completion Edit in SNAP Recertification Interview

The following completion edit was added to the **SNAP Recertification Interview** to require an entry in the **FIA Recommendation** section of the **SNAP Front End Review** window within the **SNAP Application Interview** when there is a recommendation from IREA:

 The SNAP FER recommendation was received from the IREA Reviewer, but the SNAP FER screen was not annotated by the FIA worker. The case cannot be completed until the SNAP FER window is annotated in the SNAP Application Interview.

## 13. Recording of ACE (Agile Communication Environment) Calls

POS was updated to record telephone interview calls made through the POS ACE interface effective December 30, 2013.

When the ES initiates a call from ACE and the contact is confirmed, a pre-recorded message is played alerting the applicant/participant that this call may be recorded for quality and training purposes.

The ES hears a few seconds of silence until the message is fully played to the applicant/participant. When the ES picks up the phone, s/he must wait a few seconds to allow this message to play. The ES should not hang up if they do not hear anything immediately.

The recorded calls are available for review by authorized FIA staff in the ACE Recording Log.

For additional details, please review Attachment B: Desk Guide ACE Recording.

## 14. ACE Recording Log

A new log was added on the POS Portal to allow review of ACE calls by authorized FIA staff. The calls are available for 14 days. The authorized FIA staff can:

- Search calls by worker name
- Search calls by applicant name
- Search calls by case number

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## Play call recording

- Pause call recording
- Rewind call recording
- Fast forward call recording
- Archive call specify reason for archiving the call (quality control, training)

### ACE Recording Log Enrollment

The POS Enrollment window was added to the POS Portal. Authorized staff logs into the ACE Recording Log using their WMS ID and Password.

Department of Social Services	Come to 1 OS (raperiess Om	ce System)
Good Afternoon ! Today is Tuesda	γ, November 26, 2013 5:44 PM	<u>HRA Home Pag</u>
NCA SNAP Application Log	POS (Paperless Office System)	POS Management Console
NCA SNAP Recertification Log		POS Release Notes
NCA SNAP Deferral Log	PAM (Paperless Alternate Module)	Child Care System (ACCIS)
NCA SNAP Calendar		Public Transportation Automated
Rental Assistance Database (RAD)		Reimbursement (PTAR)
ACE Recording Log		HRA One Viewer
FIA Reports		Front Door Reception (FRED)
		FIA IVRS Telephone Recert Reporting System (IVRS)
		SNAP Employment

Login Window for ACE Recording Log

Human Resources Administration Department of Social Services	
login	ACE Recording Log
	Jser ID
Pas	isword
	SNAP Sites
L	
All data contained in this system is o regulations. Failure to protect this info subject you to discipline as well as f includi	confidential by City, State and Federal law and mation from unauthorized use or disclosure may financial, civil and criminal penalties, up to and na incarceration.
By logging into this system	m, you agree to these terms of use.
Modifie	ed on 09/27/2013
🦻 <u>POS Portal</u> 🏾 🕯 <u>HRA Home</u> 💡 Help	If you forget your password please contact Help desk: 718-510-0551 or send email to: <u>Helpdesk-</u> <u>POS@hra.nvc.gov</u>

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#### ACE Recording Log Enrollment

The **POS Enrollment** window was updated to allow SNAP management to identify users that can access the **ACE Recording Log**. The enrollment coordinator will choose the **ACE Recording User** checkbox in the **Special Tasks** window in the **POS Enrollment** window.

#### ACE Recording Log

Chttp://localhost:4675/ACECallR	ecording.aspx ·	Microsoft Inte	ernet Explorer	provided by H	uman Resourc	es Admin	istration			<u>_     ×</u>
ACE Recording Center : F43 ACE Call Recording Reports	Log Archieved Ca	ills	-	-	-		Search Related Calls	Review Evaluation	chive Call Review	(2) Help
Search By								Filter By		
O Date         11/18/2013           O Worker Name		C Case Name C Case Numbe	er		C Center	F40	v	O ALL O NOT REVIEWED	O IN PROGRES	S IPLETE
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11/18/2013 02:34 PM 11/18/2013 10:28 AM	00:					332-3686 325-7612	NOT REVIEWED	RECERTIFICATION		
										12345

For additional details, please review Attachment B: Desk Guide ACE Recording.

## 15. 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

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## **16. Case Comments for Online Applications**

A new **Case Comment** button was added for MARU (Mail Application Referral Unit) in the **Appointment Scheduling** window in the **Online Application Intake** activity. This allows MARU to record a case comment if they call the applicant during the intake and scheduling of the appointment for the online application.

SNAP Inta	ke				Арроі	ntment	Schedu	ling	
Select a Date an	nd Time for th	ne Interview	Appointmen				Esshedula	a Came Day	Internio
Appt.Time	Thursday 09/19/2013	Friday 09/20/2013	Saturday 09/21/2013	Sunday 09/22/2013	Monday 09/23/2013	Tuesday 09/24/2013	Wednesday 09/25/2013	Thursday 09/26/2013	Frida 09/27/2
10:30 AM (10:30 AM - 02:30 PM)	>10	-38	0	x	-11	0	2	2	2
11:30 AM (11:30 AM - 03:30 PM)	>	-26	-4	x	-5	1	2	2	2
12:30 PM (12:30 PM - 04:30 PM)		-25	0	x	-2	-1	2	2	2
01:30 PM (01:30 PM - 05:30 PM)	$\searrow$	-21	0	x	-1	1	2	2	2
02:30 PM (02:30 PM - 06:30 PM)	$\searrow$	-16	0	x	4	0	2	2	2
03:30 PM (03:30 PM - 07:30 PM)	>	-2	0	x	1	2	2	2	2
04:30 PM	×	1	0	×	2	2	2	2	2
<	ed that the best	times to call for	an interview at	re: Not Found		_	SNJ Preferred Langu	AP File Date: M age for Speakir	ay 26, 200 1g: Englis

When the ES clicks on this button, a **Case Comment** window appears. The ES enters their comment and clicks **OK**. The comment is saved when the ES clicks **Next** on the **Appointment Scheduling** window.

SNAP Intake		Appointment	Scheduling
Enter a Comment for the Appo	ointment Case		
Case Number: 120806004885 Suffix: 1 CIN: CIN00001			
This is a sample comment	For the case		X
1963 characters left			
	ок	Cancel	

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## 17. 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 (Paperless Alternate Module), 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.

## 18. Database Move for MARU and S61

On Sunday, November 10, 2013, MIS moved the MARU and the Residential Treatment SNAP Center (**S61**) onto a new database server platform. This new platform offers increased reliability and stability for the POS workers. This is the continuation of the move to one database which will have a number of good consequences.

Both MARU and S61 have updated center selection menus in the POS Sign On page to access MARU, S61 and the Bronx Region SNAP Centers.

## **19. POS SignOn and POS Portal Updates**

The **POS** and **POS Portal SignOn** windows were updated to validate the Windows ID when users log into POS. If the Worker's network ID in POS Enrollment does not match the network ID used to log into the computer, the following error appears:

 The Windows ID for <u>Worker Name</u> with the WMS ID '123XXX' and the Windows ID 'abcd123' does not match the current POS information. Please contact your POS Enrollment Coordinator or the POS Help Desk to update the POS data.

To correct their Windows ID in POS, the Worker must contact their location's POS Enrollment Coordinator or the POS Help Desk.

### 20. Paperless Alternate Module (PAM) Rollout

MIS has developed the PAM system to track manually processed cases. Selected workers and supervisors will 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)

For detailed information on PAM, please refer to the PAM policies and manual.

### 21. Updates to PAM Enrollment

The POS Enrollment window was updated to allow SNAP management to identify Data Entry Supervisors and Data Entry Operators that can process cases through the new PAM system. The enrollment coordinator will

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choose the **PAM Data Entry Supervisor** or the **PAM Data Entry Operator** checkbox in the **Special Tasks** window in the **POS Enrollment** window.

## 22. 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** 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**.

## 23. Documents Removed from POS Indexing Window

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

- VISA Verification (MICSA only)
- Court Document (MICSA 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
- DSS-3574 Food Stamp Single Issuance Authorization Form

## 24. 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.

## Version 7.3.1 December 23, 2013

This new menu includes the Signature Capture, **WINRO643** 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, **Signature Capture**, **WINR0643** or **PC Bank Report** tab.

## 25. Update to ACE Scheduled Calls Report

The **ACE Scheduled Calls Report** will be updated effective December 31, 2013 to include the scheduled interviews that could not be automatically assigned to an interviewer by ACE Auto-Assignment and were placed in the application interview and recertification interview overflow queues.

## 26. Demonstration Project: Self-Service Scanning

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.

For additional details, please refer to Attachment B: Desk Guide for Self-Service Scanning Demonstration Project.

## 27. New ACE Aggregate Report in POS Management Console

A new Management Console report has been developed to allow the Family Independence Administration (FIA) SNAP management to track cases that were scheduled for telephone interviews or received calls through the POS ACE telephony system. This report will be available effective December 31, 2013.

For additional details, please review Attachment C: Desk Guide POS Management Console ACE Aggregate Report.

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 ES 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 ES 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 ES for completion of the indexing.

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 ES.



The Assign button allows Supervisors to assign the new Self-Service Scanning activity to a ES.

X Action F40 SNAP Supervisor Queu	a				
Unit Filter Worker CMU C Uncovered C Uncovered C Activity Status Filter Suspended Remove Not Scheduled Complet Not Started C	TDEV	ty Type Filter	Activity Approve Filter Approve Application Interview Approve ESNAP Issuance Approve Recertification Approve Change Case Data Approve Error Corrections Approve Other Eilter <u>Clear</u>		
Activity	Due Date	Alert	Case Name	Case No	Suf Center
Self Service Scapping					
Self Service Scanning					
Self Service Scanning Total: 1 Case		1 1	1		

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 ES's queue and includes the following windows:

- Household Screen
- Image Indexing

#### **Household Screen**

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

#### Household Screen

Versi	ion 17	.3 - Pa	aperless	Office	Syste	:m - [H	louseh	old Se	reen]	]							4:27:2	2 PM		Tuesda	ay, Deci	ember	03, 201	3	
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Desk Guide: Self-Service Scanning Demonstration Project Date: December 23, 2013

#### Image Indexing Window

The **Image Indexing** winodw allows the ES 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 ES clicks on the back and forward arrows to view each page in the document.

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

#### Image Indexing Window

File Edit Tools Window Help				
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IMAGE	DISPLAYED IN THIS	SPACE		
View Document Description	CIN Ln First I	lame MI Last Name	Sex SSN	DoB
	• 1 M			
Recent Letter from Doctor Clinic etc with Current Addre	✓ 2 S			
Birth/Hospital Certificate	▼ 6 N			
Social Security Card	▼ 6 N			
W-137B Acceptance-Denial of Request for Additional A	• 6 M			
W-137B Acceptance-Denial of Request fo W-137B A	cceptance-Denial of Request	for Additional Allowance		
W-137A Request for Additional Allowance	▼ 6 M			
Hext	Р	revious		

#### Updating the document description

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

Desk Guide: Self-Service Scanning Demonstration Project Date: December 23, 2013

Select the Correct Document Description Window

Select the Correct Docur	nent 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 ES 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 ES clicks in the **CIN** menu in the lower section of the window.

The Individual Selection pop-up window appears. The ES then selects the updated individual.

W-1	37B Accepta	ance-Denial of Request for Addition	al A 🖵 🛛	6		
Suff Ln	CIN	Name	Relation	DOB	SSN	Ctzn Val Sex / Ntl HB CA MA'SNAP AFIS/ST
1 1						
1 2				,	,	

#### Completing the activity

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

Desk Guide: ACE Aggregate Report in POS Management Console Date: December 31, 2013

#### Overview

A new Management Console report has been developed to allow the Family Independence Administration (FIA) Supplemental Nutrition Assistance Program (SNAP) management to track cases that were scheduled for telephone interviews or received calls through the POS ACE telephony system. The new report will available effective December 31, 2013.

This **ACE Aggregate Report** has been updated with POS data to allow management to track the status of required application actions. The report will contain all SNAP cases scheduled for a telephone interview or that are no longer telephone interview cases, but received at least one contact through ACE.

Regional and center managers are responsible for monitoring the report and ensuring that application actions are processed in a timely manner for cases appearing in the report.

#### Details

The data for the current week's report is updated on a daily basis and will be available in the ACE citywide reporting view in the **POS Management Console**. Access will be limited to authorized users. Access will be limited to off-hours in order to minimize impact on business hours. Retrieval of data will be available for authorized SNAP Centers via a connection to centralized POS tables.

The user is able to save the report output to text or Excel files.

#### Connecting to the report

The user must access the **POS Management Console** through the POS Portal and select **ACE** in the **Select a Center** window. The user must then click on the **ACE Aggregate Report** option in the **Select Report** menu.



Select Report

Desk Guide: ACE Aggregate Report in POS Management Console Date: December 31, 2013

### **Report Filters**

The following filters are available for this report:

- Report Type
- TIPS (Telephone Interview Process and Services)
- Timeframe Selection
- Retrieve By
- Display

#### **Report Type Filter (Radio Button)**

The default option for this filter will be telephone interview. This should be a radio button filter.

(\*) Telephone Interview () ACE Call

#### **TIPS Filter (Drop Down Menu)**

The user will be able to view all cases, cases for home centers covered by **F11**, cases for home centers covered by **F24** and cases for home centers covered by **F43**, respectively. All will be the default option.

(\*) All () TIPS **11** () TIPS **24** () TIPS **43** 

#### **Timeframe Selection Filter**

The reports will be available in daily, weekly and monthly outputs. The user will be able to select specific date ranges.

(\*) Yesterday
() Past 7 Days
() A Month
() Specify Range From \_\_\_\_\_ To \_\_\_\_\_

#### **Retrieve by File Date or First Call Date**

The users will be able to retrieve the data based on the File Date or the First Call Date. If the Worker selects File Date, the Report Date will be retrieved based on the File Date. If the user selects Start Date, only those cases with an ACE Call Date will be retrieved and the data will be retrieved based on the First Call Date.

(\*) File Date( ) First Call Date

#### Display

(\*) Data

() Summary

Desk Guide: ACE Aggregate Report in POS Management Console Date: December 31, 2013

#### **Report Columns:**

#### **Detailed Report Columns**

The detailed report will include the following columns:

- 1. Application Home Center
- 2. Case Number
- 3. Case Name
- 4. File Date
- 5. Phone (Yes/No)
- 6. Decision Status
- 7. Decision Code
- 8. Interviewer
- 9. Interview Date
- 10. Current Center
- 11. Current Status
- 12. Latest File Date
- 13. Source
- 14. Call Count
- 15. First Call Date
- 16. TIPS

#### **Summary View**

The Summary View will group the cases by the TIPS location, number of contacts made, the decision status and the decision code.

#### **Report Responsibilities**

The center managers and deputy managers confirm that the required application actions are completed for the cases listed in this report. Regional staff will conduct a weekly audit of the report to ensure that the required actions were completed.

Desk Guide: ACE Aggregate Report in POS Management Console Date: December 31, 2013

#### Saving report output to an Excel file

Please complete the following steps to save the report data to a text or Excel file:

1. Set the filters and retrieve the report data by clicking on the Retrieve icon.



2. Click on the Save As icon.



- 3. The Save As window will appear.
- 4. Select C\$ on 'Client' (V:) in the Save in menu.
- 5. Double click on the **Documents and Settings** folder.





6. Double click on the folder with your network ID.

Desk Guide: ACE Aggregate Report in POS Management Console Date: December 31, 2013

#### Saving report output to an Excel file (continued)

7. Double click on the **Desktop** folder.



- 8. Type the file name.
- 9. Select Excel with headers in the Save as type menu.
- 10. Click the **Save** button.

Save As					? ×
Save jn: 隘	CBret2781		•	🗢 🔁	-111 *
Cookies Desktop Favorites Start Menu UserData	J	C WINDOWS			
File <u>n</u> ame:					<u>O</u> pen
Save as <u>t</u> ype:	Text with h	eaders		•	Cancel



Desk Guide: ACE Recording Date: December 30, 2013

## **Recording of ACE (Agile Communication Environment) Calls**

POS was updated to record telephone interview calls made through the POS ACE interface effective December 30, 2013.

When the Eligibility Specialist (ES) initiates a call from ACE and the contact is confirmed, a pre-recorded message is played alerting the applicant/participant that this call may be recorded for quality and training purposes.

The recorded calls are available for review by authorized FIA staff in the ACE Recording Log.

## **ACE Recording Log**

A new log was added on the POS Portal to allow review of ACE calls by authorized FIA staff. The calls are available for 14 days.

The authorized FIA staff can:

- Search calls by worker name
- Search calls by applicant name
- Search calls by case number
- Play call recording
- Pause call recording
- Rewind call recording
- Fast forward call recording
- Archive call specify reason for archiving the call (quality control, training)

#### ACE Recording Log Access

Authorized staff logs into the ACE Recording Log using their WMS ID and Password.

Human Resources Administration Department of Social Services	clome to POS (Paperless Offi	ce System)
Good Afternoon ! Today is Tues	day, November 26, 2013 5:44 PM	HRA Home Pag
NCA SNAP Application Log	POS (Paperless Office System)	POS Management Console
NCA SNAP Recertification Log		POS Release Notes
NCA SNAP Deferral Log	PAM (Paperless Alternate Module)	Child Care System (ACCIS)
NCA SNAP Calendar		Public Transportation Automated
Rental Assistance Database (RAD)		Reimbursement (PTAR)
ACE Recording Log		HRA One Viewer
FIA Reports		Front Door Reception (FRED)
		FIA IVRS Telephone Recert Reporting System (IVRS)
		SNAP Employment System (FSES)

Desk Guide: ACE Recording Date: December 30, 2013

## Login Window for ACE Recording Log

Human Resources Administration Department of Social Services	
login	ACE Recording Log
Pa	User ID
	SNAP Sites
All data contained in this system is regulations. Failure to protect this inf subject you to discipline as well as inclu	confidential by City, State and Federal law and formation from unauthorized use or disclosure may 5 financial, civil and criminal penalties, up to and dina incarceration.
By logging into this syst	em, you agree to these terms of use.
Modi	ified on 09/27/2013
🦻 <u>POS Portal</u> 🏾 🎢 <u>HRA Home</u> 💡 Help	If you forget your password please contact Help desk: 718-510-0551 or send email to: <u>Helpdesk-</u> <u>POS@hra.nvc.gov</u>

## ACE Recording Log Enrollment

The **POS Enrollment** window was updated to allow Supplemental Nutrition Assistance Program (SNAP) management to identify users that can access the ACE Recording Log. The enrollment coordinator will choose the **ACE Recording User** checkbox in the **Special Tasks** window in the **POS Enrollment** window.

## ACE Recording Log

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ACE F	Record F43	ding I	Log						Search Calls	Review Evaluation	chive Call Review	(?) Help
ACE Call Rec	cording F	Reports	Archieved C	Calls								
earch By										Filter By		
Date	11/18/2	2013		O Case Name			O Ce	nter F40	*	O ALL	O IN PROGRES	s
Worker Name	e			O Case Numb	er			1	_	O NOT REVIEWED	C REVIEW CON	MPLETE
Change Center	<u>Date</u>	<u>Time</u>	Duration (In HH:MM:SS)	Worker Name	Case Number	<u>Case M</u>	lame	Dialed Number	<u>Reviewed</u>	Activity	Archived Reason	Archived
	11/18/2013	11:23 AM	00:08:49						NOT REVIEWED	APPLICATION		
	11/18/2013	09:39 AM	00:04:28						NOT REVIEWED	APPLICATION		
	11/18/2013	10:20 AM	00:08:03						NOT REVIEWED	APPLICATION		
	11/18/2013	09:56 AM	00:11:18						NOT REVIEWED	APPLICATION		
	11/18/2013	10:49 AM	00:29:16						NOT REVIEWED	APPLICATION		
	11/18/2013	02:56 PM	l c						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	09:37 AM	00:06:40						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	09:29 AM	l c						NOT REVIEWED			
	11/18/2013	11:34 AM	00:08:34						NOT REVIEWED	APPLICATION		
	11/18/2013	09:52 AM	00:31:33						NOT REVIEWED	APPLICATION		
	11/18/2013	09:41 AM	00:09:28						NOT REVIEWED	APPLICATION		
	11/18/2013	12:08 PM	00:08:51						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	11:43 AM	l o						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	01:01 PM	00:13:04						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	10:44 AM	00:43:11						REVIEW COMPLET	E APPLICATION		
	11/18/2013	09:55 AM	00:15:13						NOT REVIEWED	APPLICATION		
	11/18/2013	11:28 AM	00:05:58						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	11:23 AM	00:10:51						NOT REVIEWED	APPLICATION		
	11/18/2013	02:34 PM	00:01:18						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	10:26 AM	1 00:00:34						NOT REVIEWED	RECERTIFICATION		
												123

Desk Guide: ACE Recording Date: December 30, 2013

## ACE Recording Log Tab

The ACE Recording Log opens with the ACE Recording Log tab, with the following buttons enabled:

Button	Description
Search	Opens a search window
Find Related Calls	Opens Find Related Calls window for a selected case
Review Evaluation	Opens Case Evaluation window (read only)
Archive Call	Archives call
Start Call Review	Once row is selected it retrieves details of that row
Help	Opens the Help about Screen



The ACE Recording Log tab will include the following columns:

Column	Description
Change Center	TIPS Location that completed the call
Date	Sort by Date in descending order
Time	Sorts by Time in descending order
Duration	Displays Duration of call (hour and Minutes)
Worker Name	Worker making the call
Case Number	Applicant/Participant's Case Number
Case name	Applicant/Participant's Case Name
Dialed Number	Phone number for ACE call
Reviewed	History of review activity
Activity	POS case activity
Archived Reason	Sorts by reason
Archived By	The staff person who archived the call

Desk Guide: ACE Recording Date: December 30, 2013

## ACE Call Recording Tab

ACE I	Record F43	ding I	Log		-	-		-	Search Relate Calls	Review Arr	chive Start Call Review	(?) Help
ACE Call Re	cording I	Reports	Archieved	Calls								
earch By	_				_					Filter By	-	
Date Worker Nam	11/18/2 ie	2013		O Case Nam O Case Num	e ber		O Cer	ter F40	*	C ALL C NOT REVIEWED	C IN PROGRES	S IPLETE
hange Cente	r <u>Date</u>	<u>Time</u>	Duration (In HH:MM:SS	Worker Name	Case Number	<u>Case Na</u>	<u>ime</u>	Dialed Number	<u>Reviewed</u>	<u>Activity</u>	Archived Reason	Archived
	11/18/2013	11:23 AM	00:08:49						NOT REVIEWED	APPLICATION		
	11/18/2013	09:39 AM	00:04:28						NOT REVIEWED	APPLICATION		
	11/18/2013	10:20 AM	00:08:03						NOT REVIEWED	APPLICATION		
	11/18/2013	09:56 AM	00:11:18						NOT REVIEWED	APPLICATION		
	11/18/2013	10:49 AM	00:29:16						NOT REVIEWED	APPLICATION		
	11/18/2013	02:56 PM							NOT REVIEWED	RECERTIFICATION		
	11/18/2013	09:37 AM	00:06:40						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	09:29 AM							NOT REVIEWED			
	11/18/2013	11:34 AM	00:08:34						NOT REVIEWED	APPLICATION		
	11/18/2013	09:52 AM	00:31:33						NOT REVIEWED	APPLICATION		
	11/18/2013	09:41 AM	00:09:28						NOT REVIEWED	APPLICATION		
	11/18/2013	12:08 PM	00:06:51						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	11:43 AM							NOT REVIEWED	RECERTIFICATION		
	11/18/2013	01:01 PM	00:13:04						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	10:44 AM	00:43:11						REVIEW COMPLETE	APPLICATION		
	11/18/2013	09:55 AM	00:15:13						NOT REVIEWED	APPLICATION		
	11/18/2013	11:26 AM	00:05:58						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	11:23 AM	00:10:51						NOT REVIEWED	APPLICATION		
	11/18/2013	02:34 PM	00:01:18						NOT REVIEWED	RECERTIFICATION		
	11/18/2013	10:26 AM	00:00:34						NOT REVIEWED	RECERTIFICATION		

### Search area

The following window appears when the user clicks on the **Search** button:

h				
Search By				
O <sub>Date</sub>	C Case Name	C <sub>Center</sub>	select	T
C Worker Name	C Case Number			

Desk Guide: ACE Recording Date: December 30, 2013

#### **Find Related Calls Window**

The user can also find related calls for a specific case

ACE Recording	g Log						Review Evaluation	Return to Call Log	Archive Call	(?) Help
CE Call Recording Repo	rts Archieved Call	Is								
			Case	e Information:						
ise Number	Case Name		Prog	ram	Case Status		Activity			
	<b>•</b>						RECERTIFICAT			-
mently Selected Call details:										
Change Center Date	Time Uuratio	on Worker Na VI:SS)	ame Case Number	Case Name	Dialed Numbe					
11/18/2013	11:28 Al					OT REVIE	WED RECER	TIFICATION		
er Related Calls found for this	case:									
Change Center Date	Time Un HH	ration HMM:SS	er Name Case Nu	mber Case	Name Dial	ed Number		Activity	Archived	
11/18/2013						N	OT REVIEWED	FRC		
11/18/2013						N	OT REVIEWED	FRC		

## **Archived Calls Tab**

This tab displays calls that were archived. Calls can be archived for up to 90 days. The tab includes the following buttons:



Button	Description
Search	Opens a search window
Find Related Calls	Opens Find Related Calls window
Review Evaluation	Opens case Evaluation window
Start Archive Call Review	Once row is selected it retrieves details of that row
Help	Opens the Help about Screen

Desk Guide: ACE Recording Date: December 30, 2013

The Archived Calls tab include the following columns:

Column	Description
Date	Sort by Date in descending order
Time	Sorts by Time in descending order (after date has been
	sort)
Duration	Displays Duration of call (hour and Minutes)
Worker Name	Worker making the call
Case Number	Applicant/Participant's case Number
Case name	Applicant/Participant's Case Name
Dialed Number	Phone number for ACE call
Reviewed	History of review activity
Activity	POS case activity
Archived Reason	Sorts by reason
Archived by	History of Individuals that archived the call

## Archive Calls Window

ocalhost:4675/	'Archieve	dCalls.a	spx - Micros	oft Internel	Explorer prov	vided by Human R	esources Adn	ninistration			
ACE Center	Recol : F43	rding	g Log	L.				Search	Find Related Calls	teview Start Caluation Review	Call Help
ACE Call Re	cording	Repo	rts Archie	eved Calls							
Search By								Filt	er By		
O Date	11/18/	2013	c	Case Name		O Center	F40	- 0	AI	O In Progress	
O Worker Nam	e		o	Case Numbe	,		1	- 0	Not Reviewed	C Review Com	nlete
										1	
Change Center	<u>Date</u>	<u>Time</u>	<u>Duration</u> (In HH:MM:SS)	Worker Name	Case Number	Case Name	Dialed Number	<u>Reviewed</u>	<u>Activity</u>	Archived Reason	Archived By
	11/18/2013	10:44 AM	00:43:11					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	10:44 AM	00:43:11					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	10:44 AM	00:43:11					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	10:44 AM	00:43:11					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	10:44 AM	00:43:11					NOT REVIEWED	Application	Training	907B01 Supervisor
	11/18/2013	11:48 AM	00:06:04					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	11:48 AM	00:06:04					NOT REVIEWED	Application	Quality Control	907B01 Supervisor
	11/18/2013	11:48 AM	00:08:04					NOT REVIEWED	Application	Training	907B01 Supervisor
	11/18/2013	09:54 AM	00:18:12					NOT REVIEWED	Application	Disciplinary	907B01 Supervisor
	11/18/2013	09:54 AM	00:18:12					NOT REVIEWED	Application	Disciplinary	907B01 Supervisor
	11/18/2013	10:10 AM	00:10:27					REVIEW COMPLETE	Recertification		907B01 Supervisor
	11/18/2013	10:10 AM	00:10:27					REVIEW COMPLETE	Recertification		907B01 Supervisor
	11/18/2013	10:10 AM	00:10:27					REVIEW COMPLETE	Recertification		907B01 Supervisor
	11/18/2013	10:10 AM	00:10:27					REVIEW COMPLETE	Recertification	Quality Control	907B01 Supervisor
	11/18/2013	11:57 AM	00:20:55					NOT REVIEWED	Application	Quality Control	907B01 Supervisor
	11/18/2013	11:57 AM	00:20:55					NOT REVIEWED	Application	Training	907B01 Supervisor
	11/18/2013	09:37 AM	00:06:40					NOT REVIEWED	Recertification	Disciplinary	907B01 Supervisor
	11/18/2013	09:37 AM	00:06:40					NOT REVIEWED	Recertification	Training	907B01 Supervisor
	11/18/2013	10:58 AM	00:21:00					NOT REVIEWED	Application		907B01 Supervisor
	11/18/2013	10:58 AM	00:21:00					NOT REVIEWED	Application	Disciplinary	907B01 Supervisor
											12

#### Desk Guide: ACE Recording Date: December 30, 2013

When there is a request to archive a call, the following pop-up window will appear requesting reason for archive.

CALL ARCHIVE	
Please select the reason for Archiving the c	all:
C Quality Control	
C Training	
C Disciplinary	
Ok	el

#### **Call Review Evaluation**

The review must answer all listed questions. If they answer No for certain questions, a pop-up window appears asking for additional information, as shown below. The reviewer can enter comments with additional details.

The following questions appear for the call reviewer:

- 1. Did the staff person ask the applicant/participant if they have an Access NYC account?
- 2. Did the staff person explain the benefits of having an Access NYC account?
- 3. Did the interviewer identify him/herself and purpose of the call?
- 4. Was appropriate language used?
- 5. Did the staff person let the client know approximately how long the interview would take?
- 6. Did the staff person speak clearly and in a pleasant tone of voice?
- 7. Was the appropriate hold technique/handled dead air used appropriately?
- 8. Was the staff person knowledgeable and able to answer all the applicant/client's questions?
- 9. Was the information communicated to the applicant/participant by the staff person correct and accurate?
- 10. Was the referral/deferral completed correctly? Was it necessary?
- 11. Did the staff person summarize the next step(s) for the client?
- 12. Did the staff person offer assistance?
- 13. Did the staff person information the applicant/client that in addition to dropping off the document, mail or fax options are available?
- 14. Was the fax number offered to the applicant/client?
- 15. Was the fax number correct?
- 16. Enter any additional comments here:

#### Desk Guide: ACE Recording Date: December 30, 2013

### **Call Review Window**

Call Review Evaluation: Please answer all of the questions below:	
Did the staff person ask the applicant/participant if they have an Access NYC account?	🖲 Yes 🌑 No
Did the staff person explain the benefits of having an Access NYC account?	€ <sub>Yes</sub> € <sub>No</sub>
Did the interviewer identify him/her self and purpose of the call?	€ <sub>Yes</sub> € <sub>No</sub>
Was appropriate language used?	€ <sub>Yes</sub> € <sub>No</sub>
Did the staff person let the client know approximately how long the interview would take?	€ <sub>Yes</sub> € <sub>No</sub>
Did the staff person speak clearly and in a pleasant tone of voice?	🖲 Yes 🌑 No
Was the appropriate hold technique/handled dead air used appropriately?	€ <sub>Yes</sub> € <sub>No</sub>
Was the staff person knowledgeable and able to answer all the applicant's/client's questions?	€ <sub>Yes</sub> € <sub>No</sub>
Was the information communicated to the applicant/participant by the staff person correct and accurate?	€ <sub>Yes</sub> € <sub>No</sub>
Was the referral/deferral completed correctly? Was it necessary?	€ <sub>Yes</sub> € <sub>No</sub>
Did the staff person summarize the next step(s) for the client?	🖲 Yes 🌑 No
Did the staff person offer assistance?	€ <sub>Yes</sub> € <sub>No</sub>
Did the staff person inform the applicant/client that in addition to dropping off the documents, mail or fax options are available?	€ <sub>Yes</sub> € <sub>No</sub>
Was the fax number offered to the applicant/dient?	€ <sub>Yes</sub> € <sub>No</sub>
Was the fax number correct?	🖲 Yes 🖨 No
Enter any additional Comments here:	
SPIZMAN MARIA Case Review	

## Call Review Evaluation Pop-Up Response Windows



handled dead air w	/as not used
appropriately, plea	se select one of
these options: Obisengaged converses	sation abruptly
O Extensive wait time	e without explanation
<ul> <li>Talking to others he</li> </ul>	ard in the background
	Close

Desk Guide: ACE Recording Date: December 30, 2013

## Call Review Evaluation Pop-Up Response Windows (continued)

Close

If staff person di and in a pleasar	id not speak clearly nt tone of voice,
please select or	ne of these options:
O Judgmental	
<ul> <li>Intimidating</li> </ul>	
Abrasive	
<ul> <li>Inappropriate la</li> </ul>	nguage used
Comments	
	Close
If staff person di	d not communicate urate information, pleas
select one of the	se options:
Cited incorrect p	ase options: policy s applicant/participant inqui

If staff person did not	summarize
next step(s), enter co	mment here:
	Close

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## SNAP Front End Review (FER), Phase II

The Investigation, Revenue and Enforcement Administration (IREA) in conjunction with the Family Independence Administration (FIA) Supplemental Nutrition Assistance Program (SNAP) created a new SNAP POS activity in June 2013.

The Supplemental Nutrition Assistance Program -Front End Review (SNAP-FER) system gives the IREA worker the ability to review the SNAP application and make a recommendation to SNAP based on their own findings or results.

Phase II of the SNAP-FER functionality will be implemented on January 13, 2014.

#### **SNAP FER Window for IREA**

The **SNAP-FER** window for IREA in the **SNAP-FER** activity was updated to add new web services to retrieve collateral matches:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- TLC Match
- Marriage Match

The updated window includes the following tabs:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- Taxi Limousine Commission (TLC) Match
- Marriage Match
- IREA (Investigation, Revenue and Enforcement Administration)\_Recommendation

#### **SNAP FER Window for FIA**

The **SNAP-FER** window for FIA in the **SNAP Application Interview** activity was updated to include the following tabs:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- TLC Match
- Marriage Match
- IREA Recommendation/FIA Decision

#### **SNAP FER Completion Edit in SNAP Recertification Interview**

The following completion edit was added to the **SNAP Recertification Interview** to require an entry in the **FIA Recommendation** section of the **SNAP Front End Review** window within the **SNAP Application Interview** when there is a recommendation from IREA:

The SNAP FER recommendation was received from the IREA Reviewer, but the SNAP FER screen
was not annotated by the FIA worker. The case cannot be completed until the SNAP FER window is
annotated in the SNAP Application Interview.

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## Updated SNAP-FER Window (LexisNexis Instant Verify Tab Displayed)

This tab displays the LexisNexis Instant Verify collateral results. If there are multiple matches, the IREA Worker clicks the **Forward** and **Back** arrows to navigate between results.

i <mark>se Informa</mark> ase Number	tion Case Name	SNAP Case	Status	Address	Apt	City	State	Zip Code
exisNexis tant Verify	LN Credit Report	TLC Match	Marriage Match	IREA Recommend	ation			
dividual Sta CIN	atus Ln Last Na	ime	First Name	Middle	Sex	DOB	SSN	Ind. St
							and model	
							n i	Page 1 of 27
<u>xisNexis</u>								
LexisNexis \	Verification			Status			LexisNexis	ID
Verification	Checks			3.				-
SSN matche	s First and Last nar	me.		Fail				
SSN is valid	per SSA format			Fail				
SSN is Not li	sted as deceased.			Fail				
Number of id threshold val	lentities associated lue.	with SSN is belo	w the	Pass				
Address is N	lot a Mail Drop.			Fail				
Address is N	lot High Risk.			Fail				
Address is N	lot Business.			Fail				
Ownership o	f the Property is ve	rified (historical).		Fail				
0	of the Address is us	wified (bistorias)		Feil				
Current resid	dency of the address	s is verified.		Fail				
Comments								
Jonnients								
omments								^

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## Updated SNAP-FER Window (LexisNexis Credit Report Tab Displayed)

This tab will display the LexisNexis Credit Report collateral results. The IREA Worker clicks on the **Request Credit Report** link to request the information. The IREA Worker clicks on the **Display Credit Report** link to display the match results. If there are multiple individuals, the IREA Worker clicks the **Forward** and **Back** arrows in each section to navigate between results.

SN	IAP-FER					LexisNexis C	redit Report	
FER Indicator			_					
Case Information	n							
Case Number	Case Name	SNAP Case St	atus	Address	Apt	City	State	Zip Code
LexisNexis Instant Verify	LN Credit Report	TLC Match	Marriage Match	Recommer	<u>dation</u>			
Individual Status CIN Ln	Last Name	9 F	irst Name	Middle	Sex	DOB	SSN	Ind. St
							H I Pa	ge 1 of 27
Request Credit Report	t (PDF)					Dis	play Credit Report	
				and the second sec				
Comments								
10								~
J								
		Previ	ous		Save			

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## Updated SNAP-FER Window (TLC Match Tab Displayed)

This tab will display the TLC Match collateral results. It displays two sections:

- TLC Business Owner Match If there are multiple matches, the IREA Worker clicks the **Forward** and **Back** arrows in each section to navigate between results.
- TLC Driver Match If there are multiple matches, the IREA Worker clicks the **Forward** and **Back** arrows in each section to navigate between results.

						-F
SNAP-FER				TLC M	latch	
FER Indicator						
Case Information						
Case Number Case Name S	NAP Case Status	Address	Apt	City	State	Zip Code
LexisNexis         LN Credit         TLC           Instant Verify         Report         TLC	C Match Marriag	ie IRE Recomme	<u>A</u> ndation			12
Individual Status						
CIN Ln Last Name	First Name	Middle	Sex	DOB	SSN	Ind. St
					ज ज	Page 1 of 27
TLC Business Owner Match						
Business Owner Information		Base	License Info	rmation		
Principal Owner SSN		Base	Vame			
Principal Owner Name		Base	_icense			
Principal Owner DOB		Period	Expires			
Principal Owner Title		Licens	е Туре			
Base Address						
Building Street	Apt#	City		State	Zi	p Code
				14	▲ Page 1 of	27 ) )1
TLC Driver Match						
Drivers Information	Lice	nse Informatio	n			120
Driver SSN	Driver	License		License Type	Driver	DOB
Driver Name						
Driver Address	Period	d Expires		License Status		
Bldg No Street		APT C	City	State	Zip Co	de 📮
Income Information Fair Amount	Tip Amount	Period	(MM/YYYY)			
				14 4	Page 1 of 27	ा मा 🗹
Comments						
						^
						~
	Previous		Save			

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## Updated SNAP-FER Window (Marriage Match Tab Displayed)

This tab displays the Marriage Match collateral results. If there are multiple matches, the IREA Worker clicks the **Forward** and **Back** arrows to navigate between results.

SNAP-FER		Marriage Ma	itch	
FER Indicator				
Case Information				
Case Number Case Name SNAP Case Status	Address Apt	City	State Zip Code	
LexisNexis Instant Verify         LN Credit Report         TLC Match         Marriage Match	IREA Recommendation			
Individual Status				
CIN Ln Last Name First Name	Middle Sex D	JOB SSN	Ind. St	
8			14 4 Page 1 of 27 1 1	
Marriage License & Ceremony Data				
License Number	Ceremony Address			
Match Type	Ceremony City			
Ceremony Date	Ceremony State/Zip			
Ceremony Place	Ceremony Country			
Bride Information	contracting country			
Einet Nome			OP	
	Address			
Last Name	APT	B	sirth City	
Middle Name	City	Birth State		
Surname (new)	State	Birth Country		
Bride AKA	Zip	Occupation		
SSN	Country			
Father's First/Last Name	Mother's First/Last Name			
Father's Birth Country	Mother's Birth Country			
Groom Information				
First Name	Address		DOB	
Last Name	APT		Bidb Ciby	
Middle Name	City		on in ony	
Susama	City		Birth State	
Sundifie	State		Birth country	
Groom AKA	Zip		Occupation	
SSN	Country			
Father's First/Last Name	Mother's First/Last Name			
Father's Birth Country	Mother's Birth Country			
Comments			~	
1			×	
Previous	Save			

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## Updated SNAP-FER Window (IREA Recommendation Displayed)

This tab displays the existing IREA Recommendation section.

								- FX
	SNAP-FER				IR	EA Recomme	endation	
FER Indicator								
			10					
Case Informa	tion							
Case Number	Case Name	SNAP Case	Status	Address	Apt	City	State	Zip Code
LexisNexis Instant Verify	LN Credit Report	TLC Match	<u>Marriage</u> <u>Match</u>	Recomm	EA endation			
INLA RECOM	nendation							
Ber	v 230 C	Date Sent 00	0/00/0000		Response Rec	eived Date 00/0	0/0000	
Comment	t Case 🔿 R Recommenda ts	Deny Case ( tion Reason: (U	○ Reduce Bi Jse only whe	udget 🔾 R en recommene	ecommendation Pe dation is Deny or F	nding OAccept Reduce) EI-Excess	-Pending W-1	13K
1		Pre	vious	[	Next			200

The new fields were also added as read-only fields in the **SNAP Front End Review** window in the **Approve SNAP FER** for the IREA Supervisor, and in the **SNAP Application Interview** for the ES and **Approve SNAP Application Interview** for SNAP Supervisor at the SNAP Center.

Desk Guide: SNAP Front End Review (FER), Phase II Date: January 13, 2014

## **SNAP FER Window for FIA**

The **SNAP-FER** window for FIA in the **SNAP Application Interview** activity was updated to include the following tabs:

- LexisNexis Instant Verify
- LexisNexis Credit Report Match
- TLC Match
- Marriage Match
- IREA Recommendation/FIA Decision

The LexisNexis Instant Verify, LexisNexis Credit Report Match, TLC Match and Marriage Match tabs will include the same information as the IREA version of the window.

#### Updated SNAP-FER Window (IREA Recommendation/FIA Decision Tab Displayed)

This tab displays the existing IREA Recommendation/FIA Decision section.

	SNAP-FER	é			FIA Decisi	on	
Case Informa	tion						
Case Number	Case Name	SNAP Case Status	Address	Apt	City	State	Zip Code
<u>LexisNexis</u> Instant Verify	LN Credit Report	TLC Match Marr	iage ich Recomme FIA De	<u>=A</u> endation/ cision			
Recommenda	tion from IRE	A					
O Accept Cas	e O Den Recommendatio nmendation Co	y Case  () Reduce B In Reason: (Use only whe mments	udget OReco	mmendation Pending n is Deny or Reduce)	C Accept-Pend	ding W-113K me	×
FIA Decision	based on IRE/	A's Recommendatio	n				
Case Acco	epted 🔿 Ca	se Denied 🛛 🔿 Budget I	Reduced V	bisagree with IREA's F	indings		
					14		~
		Previous	[	Next			