



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #13-44-SYS (This Policy Bulletin Replaces PB #13-35-SYS)

CA POS RELEASE NOTES VERSION 17.1.1

<p>Date: May 3, 2013</p>	<p>Subtopic(s): POS</p>
<p> This procedure can now be accessed on the FIAweb.</p>	<p>Revision to the Original Policy Bulletin</p> <p>This policy bulletin is being revised to inform staff of the following changes to the CA POS Release Notes (Attachment A), and the addition of the Desk Guide: Citywide Signature Capture Report in POS Management Console (Attachment B) which explains the new Signature Capture Report process in detail:</p> <ul style="list-style-type: none"> • There was a correction to the statement in the Employment Window Edit Update section, “when the selected individual has income below 20 times the Federal Minimum Wage which is currently 7.25 an hour,” which should state “when the selected individual has income below 20 <u>hours</u> times the Federal Minimum Wage which is currently 7.25 an hour.” • The Denial reason W10 (Failed to Keep Investigatory Appointment) was removed from Section 13 - TAD Business Rule for BEV Denial Reasons E18 and W10. <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 Immediately</i></p> <p>Related Items</p> <p>PD #13-04-SYS PD #13-05-ELI PD #13-07-ELI</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

🖨 Please use Print on Demand to obtain copies of forms.

Attachment:

Attachment A

POS Release Notes Version 17.1.1

Attachment B

Desk Guide: Citywide Signature Capture Report in POS Management Console

CA POS Release Notes

Version 17.1.1 April 22, 2013

These Release Notes contain descriptions of changes in CA POS Release 17.1.1 scheduled for Monday, April 22, 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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CA POS Release Notes

Version 17.1.1 April 22, 2013

1. CNS Notice Automation Phase I

POS has developed functionality to automatically create Client Notice System (**CNS**) notices. In the first phase, the automatic notice creation is only for limited reason codes. The JOS/Worker initiates the creation of the notice by clicking on the new “**Create CNS**” button on the TAD window. In phase I, the button will be available for SNAP opening codes **Q22** (Expedited - Pended Verification [To be used only for NPA/SNAP cases.]) and **Q23** (Expedited - Pended Verification [To be used only on the SNAP suffix of a PA/SNAP case.]).

Individual Name	Line#	CIN	Prg	Status	Deny ?	Status Reason	Date
Pending Rfi	1	SZ49961W	FS	APPLYING			06/21/2011
Kiddo Rfi	2	SZ49951A	FS	APPLYING			06/21/2011

During the notice creation, POS retrieves from the **Interview** windows the information about the missing documents that the applicant needs to return and post it to the Client Notice System. The created notice number is displayed on the **Notice #** field on the TAD window.

The entries for the notice are based on the Worker's selection in the **Document** boxes in the **CA Application Interview** and ensure that the eligibility factors noted on the CNS notice and the **W-113K** (Documentation Requirements and/or Assessment Follow-Up) match.

In the first phase, the notices are created only when the following conditions are met:

For CA Cases:

- The activity is **IN (Immediate Needs)/ESNAP Issuance (CA Case)** or **EC(Error Correction)-IN/ESNAP Issuance (CA Case)**
- **The CA suffix must remain in AP (Applying) status for the CNS notice to be created.**
- The SNAP suffix status is changed from “AP” to “SI” on the TAD
- The SNAP Suffix Reason Code is **Q23**
- The case is eligible for the Expedited SNAP benefits and the Grant Data entry window is annotated with CA issuance code **54** (Child Support Bonus Payment - Manual Issuance)

For NCA SNAP Cases:

- The activity is **ESNAP Issuance (NCA SNAP Case)** or **EC- ESNAP Issuance (NCA SNAP Case)**
- The SNAP suffix status is changed from “AP” to “SI (Single Issue)” on the TAD
- The SNAP suffix reason code is **Q22**
- The case is eligible for the Expedited SNAP benefits and the **Grant Data Entry** window is annotated with SNAP issuance code **55** (Expedited Service - Not Verified for NPA/SNAP cases)

POS will update this functionality with additional codes in upcoming POS releases.

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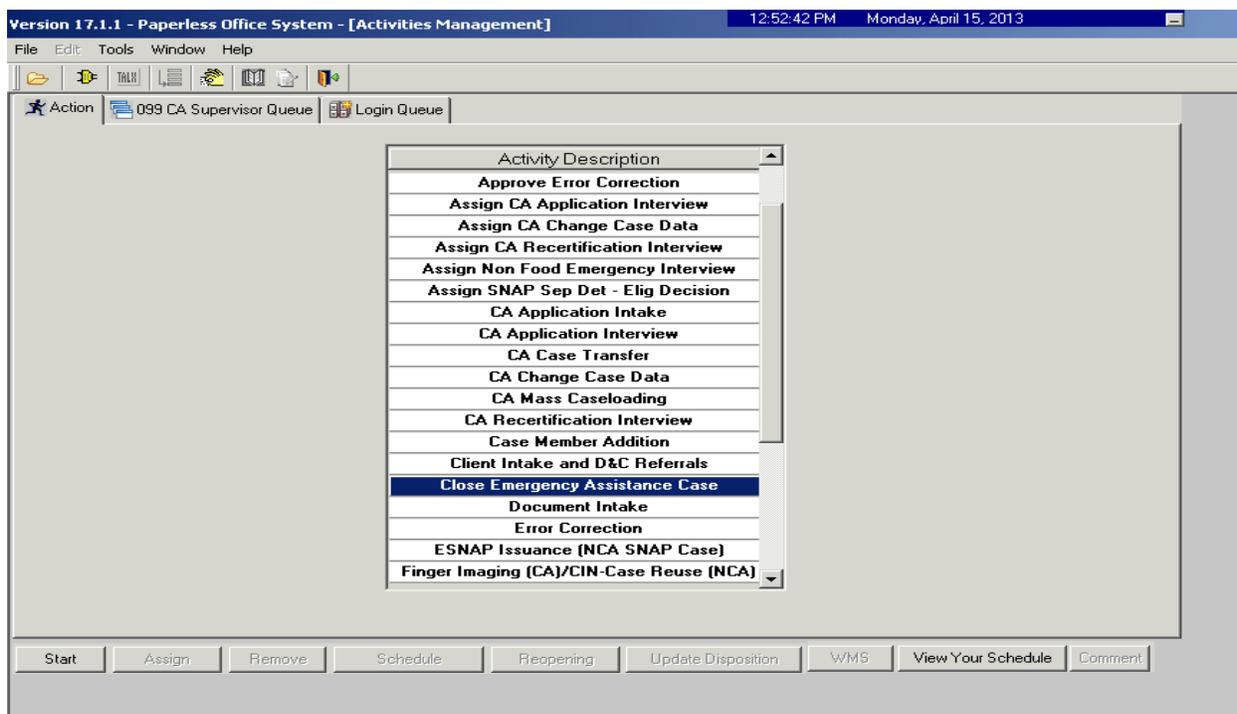
2. New POS Activity: Closing Emergency Assistance Case

POS has added a new activity called **Close Emergency Assistance Case** to shorten the process of closing an Emergency Assistance case after the approved benefits are issued. In order to access the new activity, the case must be in **SI** status and have one of the following emergency assistance categories:

- Emergency Assistance to Families (EAF);
- Emergency Assistance to Adults (EAA); or
- Emergency Assistance to Safety Net (E-SN).

The new POS activities are:

- **Close Emergency Assistance Case**
- **Approve Closing Emergency Assistance Case**
- **EC-Close Emergency Assistance Case**
- **Approve EC- Close Emergency Assistance Case**



Close Emergency Assistance Case / EC – Close Emergency Assistance Case

The new activity includes the following windows:

- **Household** Screen
- **Close One Shot Deal** Window
- **POS TAD**
- **Approval Elements**

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New Close One Shot Deal Window

The window will display the case name, case number and suffix. The JOS/Worker must answer the following questions:

- Have all benefits been issued for this case?
- Are you sure this case should be closed at this time?

If the answer to either question is “No”, POS displays the following message:

- You cannot complete this activity at this time. Click the **Cancel** button if you wish to return to change your answer. Click **OK** and POS will suspend the **Close Emergency Assistance Case** activity.

If the JOS/Worker answers “Yes” to both questions and clicks the **Next** button, POS opens the **TAD** window. The Cash Assistance (**CA**) status will be pre-filled with a status of Closed (**CL**) and CA reason code **Y95** (Case Closed After Acceptance for Emergency Assistance [SNAP Separate Determination Required]). Once the worker completes the TAD, the **Approval Elements** window opens to allow the Worker to send the activity to the supervisor.

Approve Close Emergency Assistance Case / Approve EC – Close Emergency Assistance Case

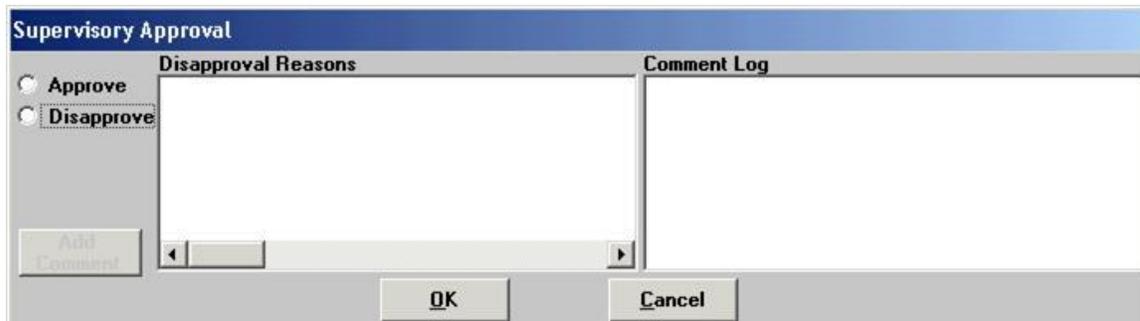
The new activity includes the following windows:

- **Household** Screen
- **Close One Shot Deal** Window
- **POS TAD**
- **Approval Elements**

Supervisors must approve the **Close One Shot Deal** and **POS TAD** windows using the **Supervisory Approval** menu:

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Once the windows are approved, the Supervisor transmits the closing to WMS from the **Approval Elements** window.

3. Employment Window Edit Update

The **POS Employment** and **Self-Employment Response** windows were updated to display a warning message when the selected individual has hourly income below 20 hours times the Federal Minimum Wage, which is currently \$7.25 per hour.

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:		Yes	No
Is Employed? (Including Babysitting)		<input type="radio"/>	<input type="radio"/>
Is Self-Employed?		<input checked="" type="radio"/>	<input type="radio"/>
Is Unemployed? (Currently not Working)		<input type="radio"/>	<input type="radio"/>
Participating In A Strike?		<input type="radio"/>	<input type="radio"/>
Is Anyone in the Household a Migrant or Seasonal Farm Worker?		<input type="radio"/>	<input type="radio"/>
Is Needed in the Home to Care for a Child Under the Age of 6 or an Incapacitated Person?		<input type="radio"/>	<input type="radio"/>

When the worker answers “Yes” to the “Is Employed (including Babysitting)” or “Is Self-Employed” question, POS opens the **Response** window requesting the employment information (hours and income). Once the information is entered and the JOS/Worker clicks **OK**, POS determines whether the hourly earned income is below 20 hours times the Federal Minimum Wage (\$145/week). If the earned income is below \$145/week, POS displays the following warning message: “The earnings listed for the individual are below the minimum wage. Would you like to proceed?”

If the JOS/Worker clicks **Yes**, POS records the response and continues the interview. If the JOS/Worker clicks **No**, the JOS/Worker re-enters the corrected employment information in the **Response** window.

POS will run this new employment edit within the following CA activities;

- **CA Application Interview**
- **EC- CA Application Interview**
- **CA Recertification Interview**
- **EC- CA Recertification Interview**
- **CA Change Case Data**
- **EC- CA Change case Data**

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Supervisor Approval Edits

Supervisors are required to review and approve the **Employment** window when the recorded income in the “**Is Employed (including Babysitting)?**” window is between \$1 and below \$145/week (20 hours times the Federal Minimum Wage) for any individual on the case. If the Supervisor fails to approve the window, the following message appears in the **Activity Completion** window and the Supervisor is unable to complete the activity:

- The **employment income** is below 20 hours at minimum wage. The supervisor must review and approve the approval window for employment. If the information must be corrected, please return the case to the worker.

Supervisors are required to review and approve the **Employment** window when the recorded income in the “**Is Self-Employed?**” window is between \$1 and below \$145/week (20 hours times the Federal Minimum Wage) for any individual on the case. If the Supervisor fails to approve the window, the following message appears in the **Activity Completion** window and the Supervisor is unable to complete the activity:

- The **self-employment** income is below 20 hours at minimum wage. The supervisor must review and approve the **Approval** window for employment. If the information must be corrected, please return the case to the worker.

POS will run this new employment edit within the following CA Approval activities:

- **Approve CA Application Interview**
- **Approve EC- CA Application Interview**
- **Approve CA Recertification Interview**
- **Approve EC- CA Recertification Interview**
- **Approve CA Change Case Data**
- **Approve EC- CA Change Case Data**

4. Updated PRUCOL Documentation Window

The **POS PRUCOL Documentation** window has been updated to reflect the latest documentation criteria for aliens by the Executive Office of Immigration review and match the PRUCOL Eligibility Desk Aid.

5. Human Trafficking Update

POS will post Action Code **991T** (NYS Certified HTV) for every confirmed Human Trafficking Victim with the exception of Certified Human Trafficking Victims who are coded with an Alien Citizenship Code (ACI) code of **D** (Victims of Human Trafficking and Violence Protection Act of 2000). Please refer to the Human Trafficking Policy Directive # 13-07-ELI for additional details.

6. Standard Utility Allowance (SUA) Updates for Shelter Type 11 (Room Only)

POS has been updated with the new SUA rules for Shelter Type **11** (Room Only) in the following activities:

- **CA Application Interview**
- **IN/ESNAP Issuance**
- **CA Recertification Interview**
- **CA Change Case Data**

Participants in Shelter Type **11** are now only eligible for full SUA when they pay for fuel or air conditioning separately from their rent expense, and are eligible for level 2 if they pay for gas/electric separately from their rent expense, regardless of the rent amount. Please refer to the WMS Software Release Policy Directive # 13-04-ELI for additional details.

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When Shelter Type **11** is entered and there is no entry in FSUA, Fuel Type or FSUT (Food Stamp Utility) when transmitting from the **Household/Suffix Financial Data (NSBLO2)** screen the warning message below appears in WMS: "A0324 – FSUA ENTRY REQD FOR SHELTY TY 11 TO GET FULL SUA".

The **POS Budget** windows were updated accordingly in the CA POS 17.1 release in February 2013.

7. Manual Budget Entry during POS Outages

POS was updated to accept the entry of a budget processed in WMS during POS-WMS communication outages. The POS Help Desk will notify MIS to enable this functionality when there is an official budget outage.

When the functionality is available, the Worker opens the **Existing Budgets** window and checks the **Manual Budget Required** check box.

If the Worker does not check off the manual budget required checkbox, POS will not open the **Budget Number Required** window after the Worker clicks **Next**.

Version 17.1 - Paperless Office System - [Existing Budgets] 11:54:01 AM Wednesday, January 30, 2013

File Edit Tools Window Help

Click on the 'New Budget' button to calculate a new budget. Manual Budget Required

Case No: 00030002097B

POS Suf Bdt No.	Author-izable	Authorized Budget?	WMS Bdt No.	Type	Save Date	Effective Dates	Description
1	N	N	PA & FS	PA & FS	1/30/2013 11:53:50	11A02	POS Interview Budget

New Budget View Selected Budget View Budget Result

Next Previous

After the check box is checked the Worker will click **Next** thus prompting POS to open the **Budget Number Required** window. POS will display:

"You have indicated that a manual budget is required for the case. Please access WMS and calculate a new budget. After the budget is calculated, please enter the WMS budget number in the budget number required window."

The JOS/Worker then:

- Opens WMS, calculates a manual budget and saves the budget number, exits WMS and returns to POS.
- Enters the saved budget number in the **New Value** field and clicks **Next**.

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POS opens the TAD pre-filled with the WMS budget number entered in the **Budget Required** window. The JOS/Worker then proceeds with case processing.

8. OCSE Updates

New NYCWAY OCSE Sanction Outcome Code

POS was updated to post a Read Back code **94PP** (OCSE Sanction Outcome) to allow NYCWAY to track successfully sanctioned OCSE applicants who failed to keep or comply with OCSE appointments. This sanctioning process is initiated in the POS **Application Interview** for applicants who have the following non-compliance codes in NYCWAY: **940E** (FTR To OCSE Appointment - Sanction Required Applicant), **940F** (FTR To OCSE Appointment - Sanc Req For Active Clients), **940C** (Failure To Provide Information- Sanction Req Applicant) or **940H** (Failure To Provide Information- Sanc Req For Ac Client).

Validation edits for signature capture OCSE M-384 (OCSE Appointment Notice)

POS requires the Worker to capture the OCSE signature on the OCSE Appointment Notice (**M-384**). The Worker must capture the signature of the individual or select a reason for not capturing the signature. The JOS/Worker cannot exit the **Signature Capture** window if they do not capture or choose a legitimate reason for not capturing signatures.

9. New Signature Capture Report

POS has developed a new citywide report that tracks signature capture and the reason(s) that the signature was not captured. The new report includes the following detailed information:

- Case Center
- Form Name
- Form Description
- Print Date/Time
- Case Number
- Case Name
- Individual Name
- Signature Captured (Yes/No)
- Reason Unable to Capture Signature
- Activity Description
- Worker's Center
- Worker Name
- Worker ID
- Unit Worker
- Section
- Caseload

The user selects a form type (currently **M-384** but will be expanded to include other signature capture forms). The report will include the standard timeframe filters and a summary view which will display signature capture by the Worker and center plus a summary of reasons why the signature was not captured.

Please see **Attachment B** (Desk Guide for the POS Management Console Citywide Signature Capture Report) for additional details.

10. BEV Referral Window Update

The Front-End Detection (FEDS) Codes for the Bureau of Eligibility Verification (BEV) referral were updated. As a result, the **BEV Referral Reasons** window was updated.

CA POS Release Notes

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Instructions: Please select up to 3 BEV codes for each individual scheduled for an appointment. If none of the reasons apply please select "None of the above".

Income/Resources

- NYC City employee
- Resource file integrations (RFI) hit
- Client left workforce within the past ninety (90) days
- New Hires Match

Household Composition

Information provided is questionable or inconsistent with application, such as different name used for signature, forms completed by a relative to a relative to country within last six (6) months is used as a mailing address without a reasonable explanation, e.g., high crime area of not residing at given address or four (4) or more address changes within the past twelve (12) months own address

Other

- Social Security Validation Match is not eight (8).
- Client's statement of past maintenance is questionable
- Previously active with a spouse or parent, spouse or significant other recently left household
- No documentation to verify identity or documentation of identity is questionable
- Client states has currently or previously managed by living off the streets or through criminal/illegal activities

OK Cancel None of the above

11. Grant Data Entry Window Update

The **Delete Grant** button in the **Grant Data Entry** window was updated to allow the JOS/Worker to complete old grants for **old grant requests** when the Action Taken on Your Request for Emergency Assistance or Additional Allowance (For Participants Only) (**W-137B**) Form or the Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance For Applicants Only (**W-145HH**) Form has been printed, but POS did not properly update the grant status. The Worker must enter a **Case Comment** detailing why the grant will be completed. The grant status is updated to "Printed" to complete the grant.

12. SCR Print Queue Update

POS will run an update for the SCR (Selected Case Review) centers to ensure that the Public Assistance Single Issuance Authorization Form (**LDSS 3575**) Benefit is sent to the print queue for processing.

13. TAD Business Rule for BEV Closing Code E18

POS was updated with a new TAD business rule to help prevent an inappropriate BEV closing code:

- Closing Code **E18** (Failed to Keep a BEV Appointment) can only be used when BEV has entered a recommendation of **Failed to Keep Appointment with BEV (900)**.

If the JOS/Worker selects one of these denial reasons, but the recommendation is not appropriate, the following error message will appear on the POS TAD:

- Reason Code **E18** is incompatible with the BEV disposition.

14. POS Transmission Rule Update

POS will allow the posting of alien numbers or Date of Status (**DOS**) or Date Entered Country (**DEC**) separately when appropriate.

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Version 17.1.1 April 22, 2013

15. ABAWD Updates

The **Able Bodied Adults Without Dependents (ABAWD) Re-Establishment** window has been added to the SNAP separate determination activity. Please refer to the ABAWD Policy Directive # 13-05-ELI for additional details.

16. E-Forms

The following form has been updated:

- **M-858m**, Utility Arrears/Emergency Heating

ATTACHMENT B

Desk Guide: Citywide Signature Capture Report in POS Management Console

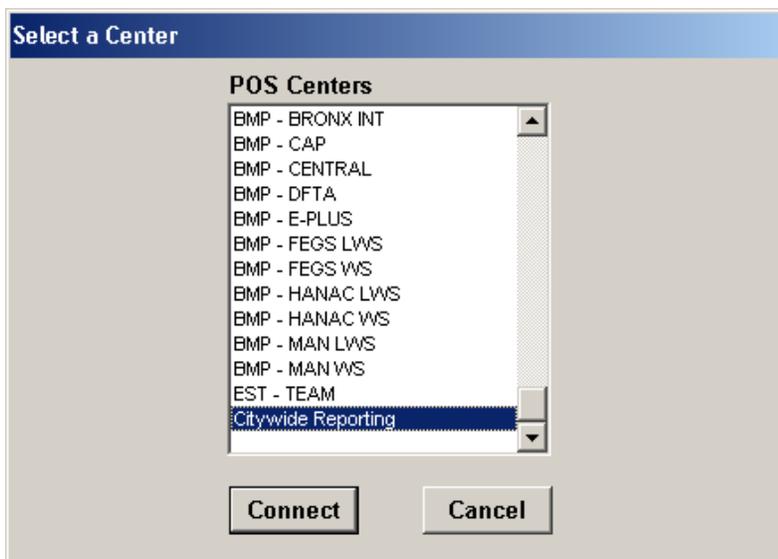
Date: April 2013

Overview

A new Management Console report will allow the Family Independence Administration (FIA) to track signature capture for Cash Assistance (CA) cases.

Details

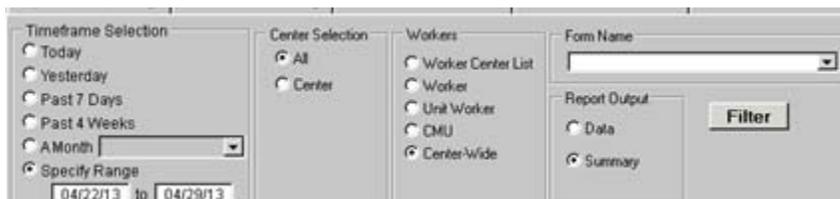
1. The report will be available in a new citywide reporting view in the POS Management Console, between 7 AM and 9 AM on weekdays, between 6 PM and 8 PM on weekdays and between 9 AM and 4 PM on weekends. Access will be limited to authorized users. Access will be limited to off-hours in order to minimize impact on business hours.
2. Retrieval of data will be available for all Job Centers via a connection to centralized POS tables.
3. The user will be able to select data for the entire city or for a specific center while connected to citywide view via the Center Selection filter.
4. The user will be able to save the report output to text or Excel files.



Filters

The following filters are available for this report:

- Timeframe Selection: This filter allows the user to select the month or date range of review.
 - Options: Month, Specify Range (a date range of up to 2 months can be entered, but the from date cannot be more than 3 months before the current month).
- Center Selection: This filter allows the user to select the job center for which to retrieve the report. The default option is "All".
- Area Filter: This filter allows the user to select the worker center, worker, unit worker or CMU, The default option is "Center-Wide".
 - Options: Worker Center List, Worker, Unit Worker, CMU, Center-Wide.
- Report Output: The report output is available in the Data and Summary view.



ATTACHMENT B

Desk Guide: Citywide Signature Capture Report in POS Management Console

Date: April 2013

Report Screenshots:

Data

POS Management Console - [Citywide Reporting]

File Tools Window

Citywide PA Tracking | Citywide FS Tracking | Citywide PA Timeliness | Citywide FS Timeliness | Citywide FS Paper Usage | Fraud Indicator | **Signature Capture**

Timeframe Selection
 Today
 Yesterday
 Past 7 Days
 Past 4 Weeks
 A Month [v]
 Specify Range
 04/22/13 to 04/29/13

Center Selection
 All
 Center

Workers
 Worker Center List
 Worker
 Unit Worker
 CMU
 Center-Wide

Form Name [v]
 Report Output
 Data
 Summary
 Filter

	Center ID	Form ID	Form Description	Form Printed Date	Case No	Case Name	Individual Name	Sign Captur
1	044	m384	OCSE Appointment Notice	4/22/2013				Y
2	038	m384	OCSE Appointment Notice	4/22/2013				Y
3	046	m384	OCSE Appointment Notice	4/22/2013				Y
4	046	m384	OCSE Appointment Notice	4/22/2013				Y
5	046	m384	OCSE Appointment Notice	4/22/2013				Y
6	046	m384	OCSE Appointment Notice	4/22/2013				Y
7	038	m384	OCSE Appointment Notice	4/22/2013				Y
8	044	m384	OCSE Appointment Notice	4/22/2013				Y
9	046	m384	OCSE Appointment Notice	4/22/2013				Y
10	038	m384	OCSE Appointment Notice	4/22/2013				Y
11	038	m384	OCSE Appointment Notice	4/22/2013				Y
Total : 2055								

Summary

POS Management Console - [Citywide Reporting]

File Tools Window

Citywide PA Tracking | Citywide FS Tracking | Citywide PA Timeliness | Citywide FS Timeliness | Citywide FS Paper Usage | Fraud Indicator | **Signature Capture**

Timeframe Selection
 Today
 Yesterday
 Past 7 Days
 Past 4 Weeks
 A Month [v]
 Specify Range
 04/22/13 to 04/29/13

Center Selection
 All
 Center

Workers
 Worker Center List
 Worker
 Unit Worker
 CMU
 Center-Wide

Form Name [v]
 Report Output
 Data
 Summary
 Filter

	Center ID	Worker Name	Worker ID	Form ID	Form Description	Sign Capture Yes	Sign Capture No
91	038			m384	OCSE Appointment Notice	8	1
92	038			m384	OCSE Appointment Notice	12	1
93	037			m384	OCSE Appointment Notice	0	1
94	046			m384	OCSE Appointment Notice	0	1
95	013			m384	OCSE Appointment Notice	0	1
96	037			m384	OCSE Appointment Notice	0	1
97	067			m384	OCSE Appointment Notice	1	1
98	066			m384	OCSE Appointment Notice	0	1
99	071			m384	OCSE Appointment Notice	0	1
100	079			m384	OCSE Appointment Notice	3	1
Total :- 536							

ATTACHMENT B

Desk Guide: Citywide Signature Capture Report in POS Management Console

Date: April 2013

Report Columns

The user selects a form type (currently M-384 but will be expanded to include other signature capture forms). The report will include the standard timeframe filters and a summary view which will display signature capture by the Worker and center plus a summary of reasons why the signature was not captured.

The Data view of the new report includes the following detailed information:

- Center ID
- Form ID
- Form Description
- Form Printed Date
- Case Number
- Case Name
- Individual Name
- Signature Captured (Yes/No)
- Reason Unable to Capture Signature
- Activity Description
- Worker's Center
- Worker Name
- Worker ID
- Unit Worker
- Section
- Caseload

The Summary view of the new report includes the following detailed information:

- Center ID
- Worker Name
- Worker ID
- Form ID
- Form Description
- Signature Capture Yes
- Signature Capture No

The center directors need to confirm that wet signatures are captured on the paper appointment notices and that the forms are scanned and indexed when workers are unable to capture the electronic signature.

Regional staff will conduct a weekly audit of the report to ensure the forms captured on the report have a wet signature and are scanned and indexed.

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.



ATTACHMENT B

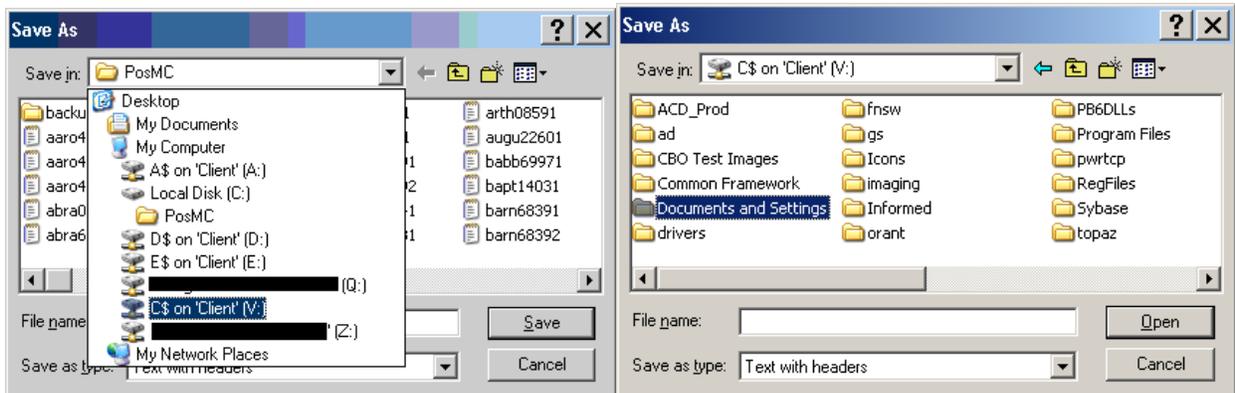
Desk Guide: Citywide Signature Capture Report in POS Management Console

Date: April 2013

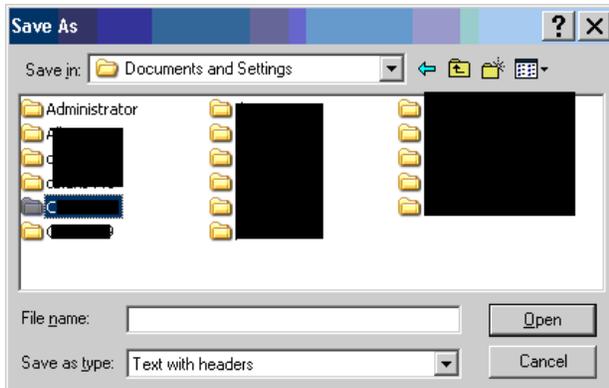
2. Click on the **Save As** icon.



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.
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.

ATTACHMENT B

Desk Guide: Citywide Signature Capture Report in POS Management Console

Date: April 2013

Saving report output to an Excel file (continued)

