



# FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #13-88-SYS

### SNAP POS RELEASE NOTES VERSION 7.3

<b>Date:</b> October 15, 2013	<b>Subtopic(s):</b> POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of the Paperless Office System (POS) will migrate to production on October 21, 2013. Descriptions of the changes can be found in SNAP POS Release Notes Version 7.3 (<b>Attachment A</b>) and the Desk Guide: WINRO643 Report in POS Management Console (<b>Attachment B</b>).</p> <p>These release notes can also be found on the HRA Intranet at: <a href="http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx">http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</a></p> <p><i>Effective October 21, 2013</i></p> <p><b>Related Items:</b></p> <p><a href="#">CD #05-10</a> <a href="#">Training Manual (05-08) POS Enrollment Manual</a></p> <p><b>Attachments:</b></p> <p><b>Attachment A</b>    SNAP POS Release Notes Version 7.3 <b>Attachment B</b>    Desk Guide: WINRO643 Report in POS Management Console</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

# SNAP POS Release Notes

Version 7.3 October 21, 2013

These Release Notes contain descriptions of changes in Supplemental Nutrition Assistance Program POS Release 7.3 scheduled for Monday, October 21, 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. Paperless Alternate Module (PAM)

MIS has developed the Paperless Alternate Module (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.

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

## 2. PAM Link on POS Portal

The PAM system has been designed to track manually processed cases, the link to the PAM sign-on page was added to the POS Portal.



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**NYC**  
Human Resources  
Administration  
Department of Social Services

## Paperless Alternate Module

### Log In

Already have a User ID and Password, please sign in below

User ID:

Password:

[NYC.gov Home Page](#) | [Privacy Statement](#)

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. Modified on 09/27/2013

### 3. PAM Enrollment

The POS Enrollment window was updated to allow Supplemental Nutrition Assistance Program (SNAP) management to identify workers that can process cases through the new PAM system. The enrollment coordinator will choose the **PAM User** checkbox in the **Special Tasks** window in the **POS Enrollment** window.

Personnel Tasks for UID: [redacted]

- Access Enrollment
- Access SCR Percentages
- Bottom-line Budgeting
- HDU Intake Access
- Mass Caseloading User
- Notice Printing Queue User
- PAM User
- S.A.V.E User
- Single Issue Printing Queue User
- Special TAD Access

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## 4. Refer Back to Worker Button in Household Screen

POS has added a button to allow supervisors to return the case from approval activities to a Worker from the **Household** Screen. Supervisors' will be able to return cases that were mistakenly submitted to the supervisor and must be returned to the same or a different worker.



The **Refer Back to Worker** button has been added to the **Household** screen. When the button is clicked, POS displays the window to allow the Supervisor to return the case to the same worker or a different Worker

 A screenshot of a software dialog box titled "Refer to Worker". The dialog has a blue header bar. Below the header, there are several input fields:
 

- "Select Center" with a dropdown menu showing "040".
- "Selected Case" section containing:
  - "No" with the value "00030006064H".
  - "Case Name" with the value "Xx Xx".
  - "CIN" with the value "PH63004Q".
  - "Suffix" with the value "1".
  - "Caseload" with the value "11111".
  - "Casehead Name" with the value "Xx Xx".
  - "SSN" field which is empty.
- "Refer Case To" section containing a "Search Name:" text input field.
- A table with columns: "Title", "Unit", "Last Name", "First Name", "U/W", and "Phone Number". The table body is currently empty.

 At the bottom of the dialog are "OK" and "Cancel" buttons.

## 5. POS-CNS Notice Automation, Phase 2

POS has developed functionality to automatically create Client Notice System (CNS) notices. In the initial phases, the automatic notice creation is only for limited reason codes. The JOS/Worker initiates the creation of the notice by clicking on the "Create CNS" button on the TAD window. In April 2013, the button was enabled for SNAP-only opening code **Q22** (Expedited - Pended Verification [To be used only for NPA/SNAP cases.]).

The button was updated to allow creation of notices for the SNAP Closing Code **V21** (Failure to Provide Verification [Adequate]). POS will add additional reason codes in the future.



The worker will receive the following error messages when they attempt to create a CNS notice in error:

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- The POS system is not ready for the CNS notice creation for this reason code.
- There is no need to create CNS notice because the use of **M3E** Indicator **A** (CNS notice suppressed, manual notice required [Adequate action]) or **T** (CNS notice suppressed, manual notice required [Timely action]) will suppress the mailing of CNS notice. The document return due date is not passed. You cannot create CNS notice with **V21** (Failure to Provide Verification) at this time.
- In order to generate the CNS notice, the case must have at least one pending document selected that is not available for scanning.
- CNS Notice was already created for this case. If you want to create another notice click **Yes**. otherwise click **No**.

## Successful/Unsuccessful Web service call

When the worker clicks on the **Create CNS** button, POS will contact a web service to create the CNS notice. If the Web service call is successful POS will delete the existing number from the case level and insert the new notice number. The worker will receive a confirmation message, " New CNS notice is created and displayed on the Notice # field. The worker will click **OK** to continue processing the case.

If the web service call was unsuccessful, POS will display the message: "Attempt to create new CNS notice failed. Current CNS notice is restored if applicable."

## 6. NCA SNAP Child Support Window, Phase 2

POS was updated to track Child Support Case Information from the Office of Child Support Enforcement (OCSE) in the POS SNAP **Application** and **Recertification** interviews in February 2013 for household size of 1. **For Phase 2 in October 2013, the question was expanded to households that meet the criteria and have a household size greater than one.** POS will now query the OCSE database for the head of household on these cases.

### **Reminder: Child Support Case Information Response Window**

The information displayed is received directly from OCSE to POS and identifies whether anyone applying for or receiving SNAP benefits has been named as the non-custodial parent on at least one OCSE child support case.

The information displayed on this window identifies the applicant or participant as the Non-Custodial Parent (NCP) on at least one OCSE child support case. At the time of the SNAP Application or Recertification, POS requires the Eligibility Specialist (ES) to click on the question, "Does anyone on the case have a Child Support obligations and/or arrears?"

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POS sends an inquiry to the OCSE database to determine whether the head of household (18 years old or older only) is a Non Custodial Parent (NCP) on an OCSE child support case.

If the match is not found POS displays a “Red Hand” symbol and the child support information response window does not open. The ES can continue processing the case.

If a match is found, the Child support case information window opens for processing by the ES, with the following **exceptions** exist on the SNAP case the window will not appear:

- Domestic violence indicator on OCSE case
- Case has a Court order and Arrears amount of \$0 (Zero amount) and the Monthly Obligation = (equals) \$0 and Paternity has been established.

On the top of the window the ES should follow the instruction listed below:

*“The participant below has been named as the non-custodial parent in at least one child support case. If that participant is present at the interview, hand the OCSE Child Support Program Services Informational Flyer and the OCSE Customer Service Walk-in Center referral to participant. If participant is not present at the interview, mail the OCSE Child Support Program Services Informational Flyer and the OCSE Customer Services walk-in Center referral to that participant. Have participant contact the Office of Child Support at 1-888-208-4485, address 151 West Broadway, NY, NY for any questions he/she might have.”*

If the identified non-custodial parent (participant) named on the child support case is present at the interview, the ES prints out the following forms and hand them directly to the applicant/participant:

- OCSE Child Support Program Informational Flyer – **OCSE-179**
- OCSE Customer Services Walk-in referral – **OCSE-181**

If the applicant/participant is not present, the ES must mail the forms directly to the applicant/participant.

## 7. Updated Employability Code Determination Window

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All SNAP participants between the ages of 16 and 59 who are deemed employable (non-exempt) must comply with the SNAP Program work requirements as a condition of SNAP eligibility. To help ensure compliance with these requirements, a window was added in the SNAP interviews to automate the determination of the employability code for SNAP cases. The window lists the name of the household member, their employability code and the reason for the code.

The **Employability Code Determination** Window was updated to display the exclusion reason (ABAWD Exclusion Rule) for individuals who have an employability code of **WR** (Work Regulations Required), but meet the criteria for exclusion from being called into the vendor/from performing Work Experience Program (WEP). The possible values for this field include:

- Age between 49.5 and 50 years old
- Employed less than 80 hours
- Not the head of household in household that contains more than 1 ABAWD
- Undomiciled

The window was also updated to remove an invalid exemption for individuals residing in temporary shelter.

The screenshot shows a software window titled "Response to Question". Inside, there is an "Instructions" section with the following text: "The system has determined the employability status code's for the household members based on the answers entered on the interview. Please click on the 'Run Rules' button to see the system determined code's. These codes will be entered by the system on the TAD. If you disagree with system determinations, you must go back to the appropriate question and make the necessary updates. Click on the 'Run Rules' button upon return to the window in order for the changes to take effect." Below the instructions is a table with four columns: "Who", "Employability code", "Employability Code Reason", and "ABAWD Exclusion Reason". The table is currently empty. Below the table is a "Message" field, also empty. At the bottom left is a blue button labeled "RUN RULES". At the bottom center are two buttons: "OK" and "Cancel".

The window appears in the **Education and Training** window below the Education Information question. POS retrieves the following information in order to determine the employability code for each household member:

- Household composition;
- Age for all household members;
- Disability status;
- Employment and self-employment;
- Unearned income received;
- Unemployment insurance application;
- Drug and alcohol treatment;
- Eligibility outcome for non-citizens;
- Caretaker of incapacitated person;
- Education; and
- Pregnancy.

## 8. New Employability Code Completion Edit

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A new completion edit was added to require re-evaluation for individuals who were improperly determined as Work-Exempt (**WE**):

- The employability code must be re-evaluated for an individual on the case. Please access the Employability Code Determination question in the Education and Training window.

## 9. Updated ABAWD (Able Bodied Adult without Dependents) Tracking Exclusions

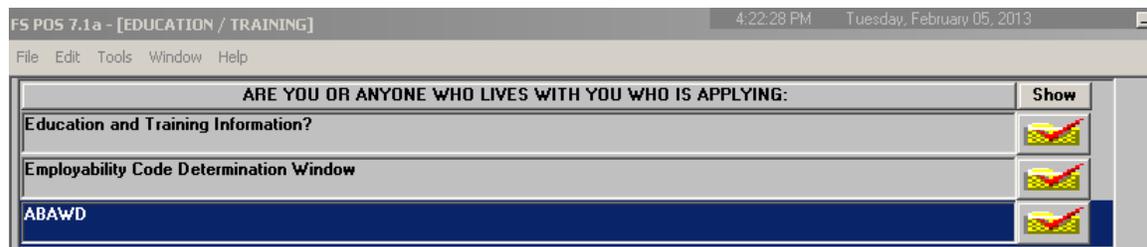
Applicants/participants who meet one or more of the following criteria are excluded from being called into the vendor or from performing WEP:

- The individual has an Employment Status Code of Work Required (**WR**) and is at least 49 ½ years old and less than 50 years old;
- The individual has an Employment Status Code of Work Required (**WR**), is employed and works between 1 and 79 hours per month.
- The individual has an Employment Status Code of Work Required (**WR**), is not the casehead/payee for the case and there is more than one (1) ABAWD individual in the household; or
- The individual has an Employment Status Code of Work Required (**WR**) and is undomiciled.

These individuals are excluded from the ABAWD 3/36 month rule and look back.

## 10. Updated ABAWD Response Window

The ABAWD question is located on the **Education and Training** window. The window was updated to open when there is an individual in the household who was closed or rejected with the Denial code **F94** (Able Bodied Adult without Dependents [ABAWD] – Ineligible able-bodied adult who has not met the ABAWD requirements for three or more months in the past 36 month period.).



When the Worker clicks on the **Show** button, the **ABAWD Compliance Calendar** will open if at least one individual in the household who was previously closed or rejected with Denial code **F94** or if at least one ABAWD individual in the household fits the following criteria:

- The individual is between 18 and 49 years of age;
- The **Employability Code** for individual is **WR**; and
- The individual has at least three months of non-compliance.

If an individual meets the criteria, the ABAWD Compliance calendar will open for review. If no individual in the household fits the criteria, the **ABAWD Compliance Calendar** will not open.

If the ABAWD criteria is not found on the case, the red-hand will display. Once the red hand is displayed, the ES can continue the POS SNAP activity.



### ABAWD Calendar Access

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The Calendar can be retrieved from the **Tools Menu** or from the **ABAWD Response** window. The ES can access the ABAWD Compliance calendar to review and track the ABAWD individual's compliance history. To review the **ABAWD Compliance Calendar** from the **Tools Menu** choose **ABAWD**. In the event that there is no data to display for the Individual with the Employment Code **WR**, POS will display a message "No Calendar Data Exists".

For those non-compliant ABAWD individuals (of 3 or more months), the calendar will automatically open over the top of the **ABAWD Response** window.

## Updated Response window

The question "Have you worked at least 80 hours in a consecutive 30 days period since your case closed/you lost eligibility?" was updated to "Have you worked at least 80 hours (**including in-kind and volunteer work**) in a consecutive 30 days period since your case closed/you lost eligibility?"

**Response to Question**

**Instructions**  
The individual below has been disqualified for failing to meet ABAWD requirements. The individual may re-establish eligibility for SNAP benefits if he/she agrees to provide documentation of future engagement or documentation of past engagement since the case closed/lost ABAWD eligibility. Applicants may also re-establish eligibility by agreeing to do independent job search for the 30 days. If proof of engagement is not submitted then job search should be assigned for applicants. Active individuals who cannot document engagement or ABAWD exemption will be closed and must re-apply for SNAP.

**Existing Information**

Name  
Cumberbatch Matthew

Employability Code  
WR

Reason  
Mandated to participate in work activities

Who: Cumberbatch Matthew

ABAWD Compliance Calendar

Have you worked at least 80 hours (including in-kind and volunteer work) in a consecutive 30 day period since your case closed/you lost eligibility?  Yes  No

Will you be working 80 hours or more in the next 30 days?  Yes  No

Can you perform a job search for the next 30 days (while application is pending)?  Yes  No

Document... Scan

Documentation re-establishing ABAWD eligibility

Comment...

OK Cancel

## Updated setting in SNAP Recertification Interview

The question "Can you perform a job search for the next 30 days (while application is pending)?" only appears in the **SNAP Recertification Interview** for individuals who are in closed or rejected status in WMS with Denial code **F94**.

## 11. IVRS Check Status

In July 2013, the Interactive Voice Response System (IVRS) was updated to allow SNAP applicants and participants to check their case status. IVRS connects to POS to determine the status of the case using the demographic information entered by the applicant/participant.

## 12. SNAP Front End Review (FER) Window Updates

The **SNAP FER** window in the **SNAP FER** activity was updated to add two new fields.

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The window has a new **IREA Recommendation of Accept – Pending W-113K**. This recommendation is selected when IREA recommends acceptance of the application and there is a pending Documentation Request Form (**W-113K**) for the case at the time of the IREA recommendation.

The screenshot shows the SNAP-FER application window. The title bar reads "SNAP-FER". The menu bar includes "File", "Edit", "Tools", "Window", and "Help". The toolbar contains various icons for file operations and navigation. The main interface is divided into several sections:

- Match Information:** Includes fields for "Date Sent" and "Response Received Date", both with "mm/dd/yyyy" placeholders. Below this, there is a "LexisNexis" section with a link to "www.lexisnexis", a name "John Doe", and radio buttons for "Pass" and "Fail". A "LexisNexis Reason" field contains "0212020".
- External Matches Completed:** A list of checkboxes for various systems: ACRIS, ACCIS, LEXIS/ACCURINT, WMS, HRA VIEWER, OTHER, and TALX. All are checked.
- Match Comments:** A large text area for entering comments.
- IREA Recommendation:** Contains radio buttons for "Accept Case", "Deny Case", "Reduce Budget", and "Accept – Pending W-113-K". Below these is a "SNAP-FER Recommendation Reason" dropdown menu with the selected option "UI- Income – Undisclosed Income". A "Comments" text area is also present.
- FIA Decision based on IREA's Recommendation:** Contains radio buttons for "Case Accepted", "Case Denied", "Budget Reduced", and "Disagree with IREA's Findings". A "Comments" text area is also present.

At the bottom of the window, there are "Next" and "Previous" buttons.

The window also has a new **SNAP-FER Recommendation Reason** drop-down menu with the following options:

- Alien – Ineligible Alien Status
- H/H Composition – Undisclosed Earner
- H/H Composition – Individual on Application Not In H/H
- Income – Undisclosed Income
- Income – Undisclosed Income Producing Property
- Identity – SSN
- Identity – Other
- Residency – Applicant Not at The Address on Record
- Residency – Applicant Not a Resident of NYC
- Residency – Address Does Not Exist

The new **SNAP-FER Recommendation Reason** field is enabled when the IREA Worker selects **Deny** or **Reduce Budget** in the **IREA Recommendation** section. The IREA Worker must select a reason when the field is enabled.

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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 Eligibility Specialist and **Approve SNAP Application Interview** for SNAP Supervisor at the SNAP Center.

## 13. SNAP FER Screen Picklist

The **SNAP FER** and **Approve SNAP FER** activities were updated to enable the Screen Picklist when the IREA Worker and IREA Supervisor open the **Approval Elements** window.

## 14. New SNAP FER Completion Edit

A new completion edit was added to require an entry in the **FIA Recommendation** section of the **SNAP Front End Review** window in the **SNAP Application Interview** when there is a recommendation from IREA. If the ES does not complete the **FIA Recommendation** section, the following error message appears when the ES attempts to complete the activity:

- 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.

## 15. SNAP FER Auto-Removal Update

The auto-removal settings for **SNAP Front End Review** activities were updated to consider the WMS status of denied cases (**RJ** [Reject] or **CL** [Close]), instead of the most recently selected denial status in POS.

## 16. Addition of ACCIS Clearances Window to SNAP Change Case Data

The **ACCIS Clearances** window was added to the **SNAP Change Case Data** and **Approve SNAP Change Case** activities. The window appears after the **TALX Information** window when there is a match for a household member in the Automated Child Care Information System (ACCIS).

## 17. Update for Opening Code Y60 and Removal of Opening Code A60

In July 2013, POS was updated to add laws and regulations for Opening Code **Y60** (Reactivation of case closed less than 30 days [Use in Undercare Only]) on the Action Taken on your Supplemental Nutrition Assistance Program (SNAP) Benefits Case (**LDSS-3152**) Form.

POS was also updated to remove Opening Code **A60** (Reactivation of case closed less than 30 days [Eligibility Only]), which is only used in Upstate NY.

## 18. Updated Rule for Puerto Rican Birth Certificate in POS Individual Detail Window

The **POS Individual Detail** Window was updated for individuals whose country of birth is Puerto Rico and for whom the worker selects birth certificate as acceptable documentation. The following message will be displayed:

***"The Puerto Rican birth certificates issued prior to 7/1/2010 are invalid. If the birth certificate produced is issued on or after 7/1/2010 select document "Puerto Rican birth certificate issued on or after 7/1/2010".***

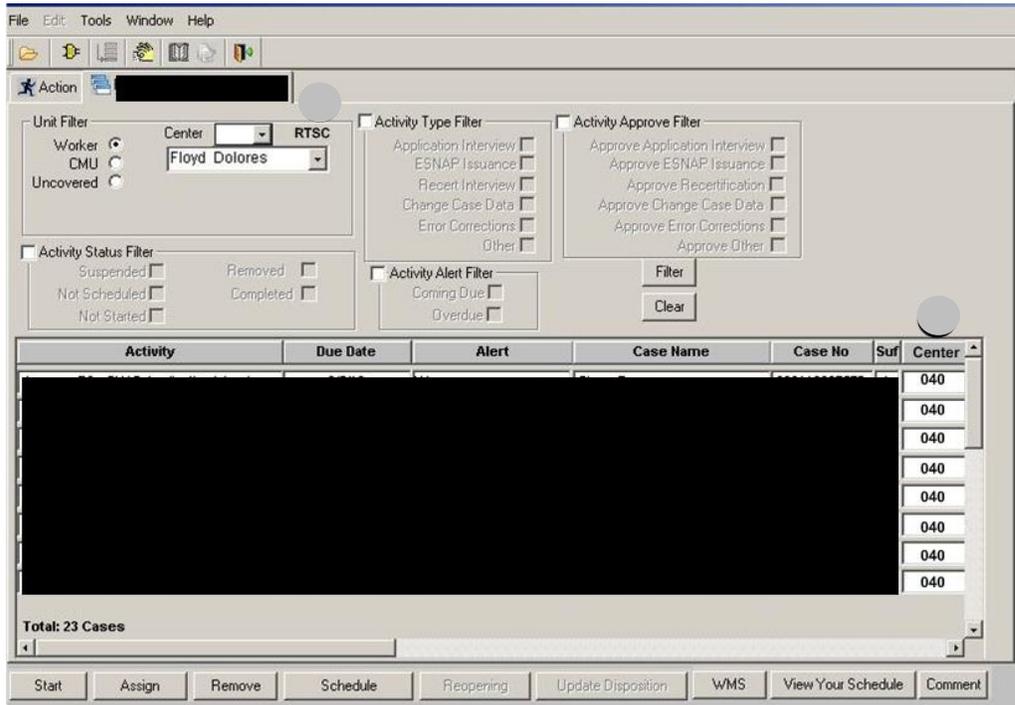
The message was occasionally incorrectly displayed after the Worker made corrections in the document fields.

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## 19. POS Individual Queue Updates

POS was updated to the database name and the center number for cases in the individual queue to allow improved identification of cases. This update allows workers and the POS help desk to determine if the case is correctly located.



## 20. WMS Updates

As per a new procedure from FIA and required by the US Department of Agriculture (USDA) and Office of Temporary Disability Assistance (OTDA), the SNAP standard utility allowance (SUA) amounts increased effective October 1, 2013.

1. SUA level 1 increase from \$725 to \$753.
2. SUA level 2 will increase from \$287 to \$298.
3. SUA level 3 will remain the unchanged at \$33.

SNAP Amount Decrease effective November 1, 2013

The maximum SNAP allotment for a household will be decreased effective 11/1/2013. POS will be updated accordingly.

## 21. M3E Indicator Updates

The **M3E** Indicator was updated so the field will be enabled at all times. If the worker does not have special rights to access the indicator, POS will display an error message:

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"You do not have rights to enter a value in the M3E indicator. See your supervisor if you have any questions."

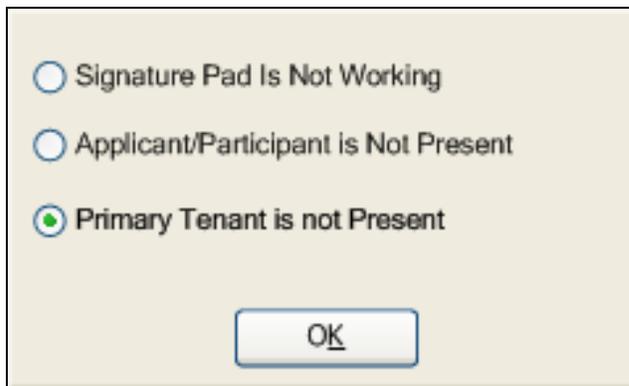
The **M3E** indicator will be cleared when the Worker starts a **new POS interview activity**. The authorized worker is allowed to enter a new value if needed in this new activity.

## 22. POS Completion Edits for Attestation of Employment as a Child Care Provider (W-274U)

POS has been updated to search for new data on or after the start date of the current interview activity. This will implement the correct completion edit for this childcare form.

## 23. POS Update to W-147Q signature window

The POS signature window for the Primary Tenant's Statement Regarding Occupancy of Secondary Tenant (**W-147Q**) was updated to add a new option when the Worker selects the **Unable to Capture Signature** checkbox: "Primary tenant is not present"



The image shows a screenshot of a software dialog box. It has a light beige background and a thin black border. At the top, there are three radio button options, each with a blue circle to its left. The first option is "Signature Pad Is Not Working", the second is "Applicant/Participant is Not Present", and the third is "Primary Tenant is not Present". The third option is selected, indicated by a green dot inside its radio button. At the bottom center of the dialog box is a rectangular button with a blue border and the text "OK" in the center.

## 24. 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, Rental Assistance Database (RAD) , PAM, MONIQ (Model Office Numbering Identification Queue) and FRED (Front Door Electronic Reception)::

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

## 25. Updates for Interview Window Labels

POS was updated with additional changes for updated labels in interview windows:

- The **Adults in Household**, **Children in Household**, and **Case Login** windows were updated to change the **FS** (Food Stamps) fields to **SNAP**.
- The **Household Screen** was updated to change the **FS File Date** field to **SNAP File Date**.
- The **Additional Suffix Information** window was updated to change the **FS** fields to **SNAP**.
- The **EFS Eligibility Determination** window was renamed **ESNAP Eligibility Determination**.

## 26. Updates for ESNAP Decision Form

The **EFS Decision Form** window was renamed **ESNAP Decision Form**. The instructions text on the window was also updated:

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- Instructions: This window will display the determination made for expedited processing of SNAP benefits in the ESNAP activity.

## 27. Tracking of Self-Service Model in Application Reports

The SNAP Tracking and Timeliness reports will be updated to track cases submitted through the banks of computer terminals at HRA locations through the new Self Service model.

A new **Self Service** filter will be added and a new **Self Service** column will be added in each report to indicate the cases that were submitted through the new Self Service model.

## 28. Update for Center Number Application Reports

A small number of cases had an incorrect center number when a TAD was reviewed on the re-use case number prior to the application intake activity. This problem was resolved and affected cases were fixed as they were reported to the POS help desk.

## 29. Bronx Database Move

On Sunday, August 4th, 2013, MIS moved the Melrose SNAP Center (**S40**) and the Melrose Job Center (**040**) onto a new database server platform. On Sunday, September 15th, 2013 MIS moved the remaining Bronx SNAP Centers (**S45** and **S46**) and Bronx CA Centers (**038**, **044**, and **046**) onto the same new database server platform. This new platform offers increased reliability and stability for the POS and Model Office system workers. This is the beginning of the move to one database which will have a number of good consequences.

This change was transparent to most staff but Back Offices and Change Centers, TIPS **43**, **S25**, **S61**, Centralized Fair Hearings, **S66**, Regional Office staff, and other program areas that access Bronx SNAP Centers (**S40**, **S45** and **S46**) and Job Centers (**038**, **040**, **044** and **046**) have an updated center selection menu in the POS Sign On page to access all Bronx Region SNAP Program Centers and Bronx Region Job Centers.

## 30. New POS Management Console Report: WINRO643

A new Management Console report was developed to allow Supplemental Nutrition Assistance Program (SNAP) management to track cases appearing on the **WINRO643** (NCA SNAP Overdue Recertification Report) report. This report is updated with POS data to allow management to track the status of required recertification actions. For additional details, please refer to the attached **Desk Guide for the POS Management Console Report WINRO643**.

## 31. POS Management Console Security Enhancements

The security for the POS Management Console was upgraded for all POS locations. Effective September 16, 2013, all requests for access to the POS Management Console must be submitted to the POS Enrollment Coordinator(s) for the location and changes in access will require an approved POS Access Request form (**M-327J**).

The Enrollment Coordinator must assist users with POS Management Console access requests by completing a form **M-327J** for the user.

The Enrollment Coordinator must indicate in the "justification" section that the request is for access to the POS Management Console; include all required information and provide a concise justification of why access to the POS Management Console is required.

# SNAP POS Release Notes

Version 7.3 October 21, 2013

The **M-327J** must be submitted to the Center Director or Deputy Director for approval.

The Enrollment Coordinator must inform users once requests are approved and initial processing is completed by Management Information Systems (MIS).

The Center Director(s) or Deputy Director(s) must review and approve POS Management Console access request and submit approved forms to the POS Help Desk via email.

## Processing of Request

The POS Help Desk will review the request for access for completeness. If the request is incomplete, it will be returned to the requestor. Completed requests will be submitted to MIS for review and approval. Enrollment and access problems must be reported to the POS Help Desk at (718) 510-0551.

## POS Enrollment Policy Documents

For details regarding maintenance of the Enrollment tables, please refer to **Center Directive 05-10** (Management of Paperless Office System (POS) and Enrollment Tables) and **Training Manual 05-08** (POS Enrollment Manual).

## **32. Reminder: POS SignOn Page**

Staff must log into POS using the POS Portal. The portal will take the user to the POS SignOn site at <http://possignon/>

The old login pages (POS Primary and POS Secondary) at <http://pos> are no longer supported and can lead to slowness during the sign-on process and while using the system.

## ATTACHMENT B

### Desk Guide: WINRO643 Report in POS Management Console

Date: October 2013

#### Overview

A new Management Console report was developed to allow the Family Independence Administration (FIA) Supplemental Nutrition Assistance Program (SNAP) management to track cases appearing on the **WINRO643** (NCA SNAP Overdue Recertification Report) report. This report is updated with POS data to allow management to track the status of required recertification actions.

The WINRO643 report contains all SNAP cases with a certification period expiring in that month. Many cases listed on this report do not appear in standard SNAP recertification report such as the WINR0076 (SNAP Recert Report) because they were created by the SNAP separate determination process or through Fair Hearing decisions.

Regional and center managers are responsible for monitoring the report and ensuring that recertification 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 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.

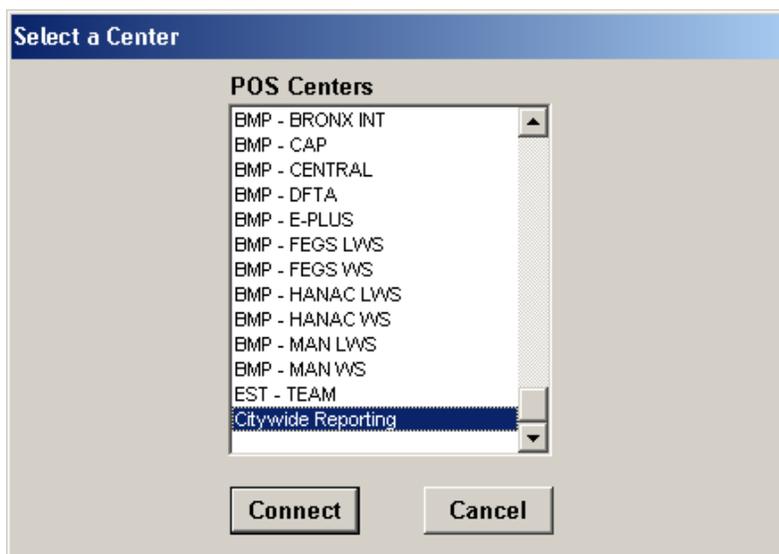
Access will be limited to authorized users. Access will be limited to off-hours in order to minimize impact on business hours. Retrieval of data will be available for authorized SNAP Centers via a connection to centralized POS tables.

The report first generated on the second Saturday of each month, then each Saturday until the end of the month. The default view will be the current month. For the purpose of this report, the "current month" runs from the second Saturday of the month to the second Friday of the following month. For example, the "current month" for the October report runs from Saturday, October 12 to Friday, November 8.

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 **Citywide Reporting** in the **Select a Center** window. The user must then click on the **WINRO643** report tab.



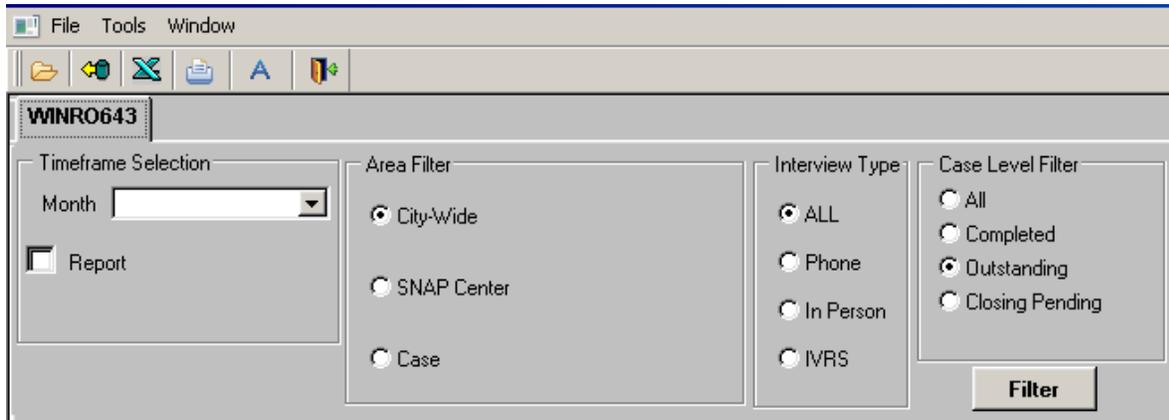
## ATTACHMENT B

### Desk Guide: WINRO643 Report in POS Management Console

Date: October 2013

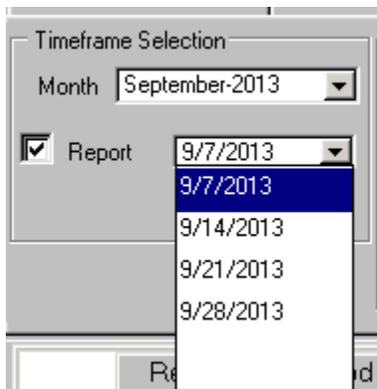
#### Report Filters

The following filters are available for this report:



#### Timeframe Selection

This filter allows the user to select the month of the report. The user must check the Report checkbox to select a specific week.



#### Area Filter

This filter allows the user to select the SNAP Center or case, The default option is “City-Wide”.

#### Interview Type

This filter allows the user to select the Interview Type. The default view is “ALL” and the options are: ALL, Phone, In Person, and IVRS.

#### Case Level Filter

This filter allows the user to select the status for the cases in the report. The default option is “Outstanding,” which indicates that the recertification has not been completed and the case does not have a pending closing. Outstanding cases must be processed prior to the end of the certification period. The options in this filter are: All, Completed, Outstanding and Closing Pending.

**ATTACHMENT B**

**Desk Guide: WINRO643 Report in POS Management Console**

**Date: October 2013**

**Report Screenshots:**

*Data*

The screenshot shows a web application window titled "WINRO643". The interface includes a menu bar with "File", "Tools", and "Window". Below the menu bar is a toolbar with icons for home, back, forward, print, search, and refresh. The main panel is divided into several sections:

- Timeframe Selection:** A dropdown menu for "Month" and a "Report" button.
- Area Filter:** Radio buttons for "City-Wide", "SNAP Center", and "Case".
- Interview Type:** Radio buttons for "ALL", "Phone", "In Person", and "IVRS".
- Case Level Filter:** Radio buttons for "All", "Completed", "Outstanding", and "Closing Pending".
- Filter:** A button to apply the selected filters.

Below the filter sections is a data table with the following columns: Report Date, Period Covered Dt, Center ID, Local Office, Change Center, Case No, Suf, Case Name, Last Recert, Next Recert (From Rpt), and Click In. The table is currently empty, and the status "Total Rows: 0" is displayed at the bottom left of the table area.

## ATTACHMENT B

### Desk Guide: WINRO643 Report in POS Management Console

Date: October 2013

### Report Columns

The user must monitor the report to ensure that all required recertifications are completed prior to expiration of the certification period. The new report includes the following detailed information:

- **Report Date** – This date is retrieved from the **WINRO643** report.
- **Period Covered Dt (Date)** – This date is retrieved from the **WINRO643** report.
- **Center ID** – This is the center number for the case on the **WINRO643** report.
- **Local Office** – This is the center number for the case in WMS.
- **Change Center** – A value of “Y” indicates that the case was scheduled for a telephone interview and the SNAP Application/Recertification Form (**LDSS-4826**) () was received for the case.
- **Case No** – Case Number
- **Suf** – Case Suffix
- **Case Name** – Case Name
- **Last Recert** – This date is retrieved from the original **WINRO643** report and indicates the last recertification completed for the case. This report column is not updated after transmission from POS.
- **Next Recert (From Rpt)** – This date is retrieved from the original **WINRO643** report and indicates the next recertification date for the case. This report column is not updated after transmission from POS.
- **Clkdn Ind** – This indicator is retrieved from the original **WINRO643** report. It indicates whether there was a pending **Y10** (Failed to Keep Recertification) transaction clocking down in WMS at the time that the original **WINRO643** report was generated. This report column is not updated after transmission from POS.
- **Wkr ID** – When there is a pending **SNAP Recertification Interview** or **Approve SNAP Recertification** activity in POS, this column indicates the ID of the queue in which the case is pending. The queue may be an Mail Processing Unit (MPU) queue if the case was deferred.
- **Wkr Name** – When there is a pending SNAP Recertification Interview or Approve SNAP Recertification activity in POS, this column indicates the ID of the queue in which the case is pending. The queue may be an MPU queue if the case was deferred.
- **Current Case Status** – This column indicates the current SNAP status for the case in WMS.
- **Appt Status** (Appointment Status) – This column indicates the current appointment status on the SNAP Recertification Log for the case in POS.
- **Recert Compl Dt (Recertification Completion Date)** – This is the date that the Continuing Eligibility Date (CED) was posted from POS to WMS.
- **SIC Flag** – This column indicates whether a Settle in Conference activity was completed after the recertification completion date.
- **SIC Date** – This column indicates the date that a Settle in Conference activity was completed after the recertification completion date, if any.
- **Closing Pending Flag** – This column indicates whether there is a pending closing clocking down in WMS for the case.
- **Closing Code**
- **Phone\_Pers\_IVRS** (Interactive Voice Response System) – This column indicates the interview type (Phone, In-Person or IVRS).

### Report Responsibilities

The center managers and deputy managers confirm that the required recertification actions are completed for the cases listed in this report.

Regional staff conducts a weekly audit of the report to ensure that the required actions were completed.

## ATTACHMENT B

### Desk Guide: WINRO643 Report in POS Management Console

Date: October 2013

#### Saving report output to an Excel file

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

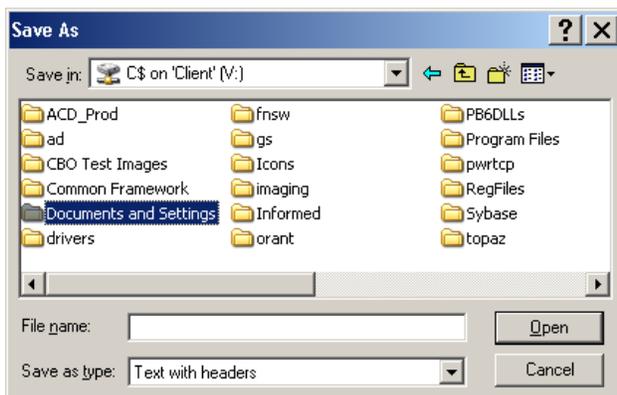
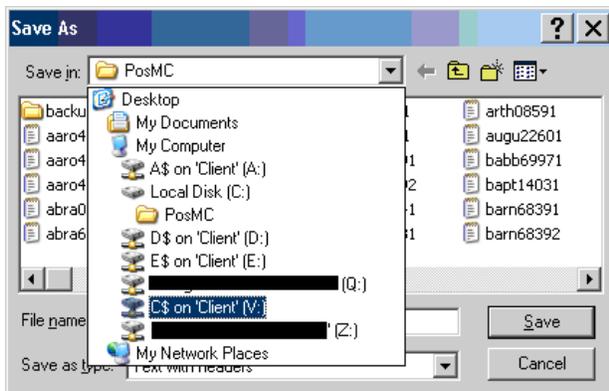
1. Set the filters and retrieve the report data by clicking on the **Retrieve** icon.



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.

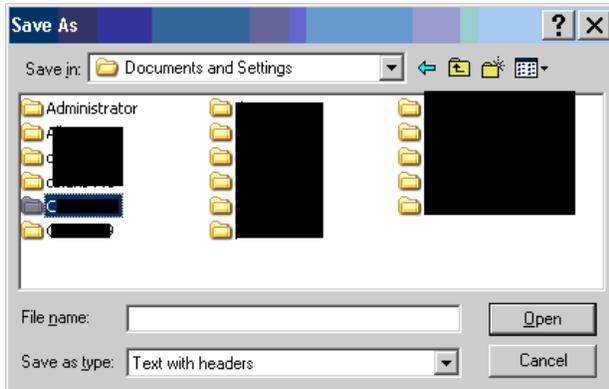
## ATTACHMENT B

### Desk Guide: WINRO643 Report in POS Management Console

Date: October 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.

