Human Resources Administration
Department of Social Services

FAMILY INDEPENDENCE ADMINISTRATION

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Office of Procedures

POLICY BULLETIN #14-115-SYS

CA POS RELEASE NOTES VERSION 18.3

Date: October 14, 2014	**Subtopic(s):** POS

This procedure can now be accessed on the FIAweb.

This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on October 20, 2014. Descriptions of the changes can be found in POS Release Notes Version 18.3 (**Attachment A**), Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide (**Attachment B**), and RAD Dashboard and Decision Detail Updates (**Attachment C**).

These release notes can also be found on the HRA Intranet at:

http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

Effective October 20, 2014

Related Items

PB #14-104-ELI
CD #14-24

Attachments:

Please use Print on Demand to obtain copies of forms.

Attachment A	POS Release Notes Version 18.3
Attachment B	Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Attachment C	RAD Dashboard and Decision Detail Updates

CA POS Release Notes

Version 18.3 October 20, 2014

These Release Notes contain descriptions of changes in Release 18.3 for the Paperless Office System (POS) scheduled for Monday October 20, 2014. 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

Table of Contents

CA POS Release Notes

Version 18.3 October 20, 2014

1. PRUCOL Window Update

On June 15, 2012, the Secretary of Homeland Security announced that certain people who came to the United States as children and met several guidelines, may request consideration of deferred action for a period of two years, subject to renewal. They are also eligible for work authorization. Deferred action is a use of prosecutorial discretion to defer removal action against an individual for a certain period of time. Non-citizens who have applied for and/or been approved for relief from removal under the Deferred Action for Childhood Arrivals (DACA) program , may be eligible for state funded benefits. These individuals are considered to be Permanently Residing Under the Color of Law (PRUCOL) for benefit purposes.
The Office of Refugee and Immigrant Affairs (ORIA) has requested to have DACA category aliens added to the POS PRUCOL window. POS has been updated to reflect this change with the following information:

Aliens who have been approved for relief from removal under the DACA program:

- Employment Authorization Card Form **I-766** Category **C33**
- SAVE Clearance, Notice of Action (**I-797)**, or other any other authoritative United States Citizenship and Immigration Service (USCIS) or Executive Office for Immigration Review (EOIR) document indicating approval of Application for Employment Authorization USCIS Form **I-765** specifically mentioning category, class or type **C33** SAVE Clearance **I-797**, or other any other authoritative USCIS or EOIR document indicating approval of USCIS Form **I-821D** “Consideration of Deferred Action for Childhood Arrivals”
- SAVE Clearance or any other authoritative USCIS or EOIR document indicating DACA had been approved

After the results from the SAVE clearance are received, you must request a clearance from the ORIA by e-mailing ORIA@hra.nyc.gov.

2. Banknote Building Move and Form Updates for Melrose Job Center

Several FIA Offices moved from the Melrose building in the Bronx to the Banknote building located at 847 Barretto Street, in the Hunt’s Point section of the Bronx. The CA job center **040** is moving effective 10/27/2014. The name of the Job Center **040** will change from **Melrose Job Center (040)** to **Hunt’s Point Job Center (040)**. Refer to **CD #14-24 for** additional information.

Form Updates

Appointment notices printed for center **040** will be updated with the new center name and address if the form was printed before 10/27/14 and the appointment date is 10/27/14 or later. Document request forms printed for center **040** will updated with the new center name and address if the form was printed before 10/27/14 and the due date was 10/27/14 or later.

The following forms will be updated with this change:

- **W-908T**, Notice of Recertification Appointment
- **W-908CC**, Notice of Rescheduled Appointment for Recertification Interview
- **M-3g**, Notice to Report to Center
- **W-186D**, Fair Hearing Compliance Request
- **W-113K**, Documentation Requirements

3. Banknote Building Move and Form Updates for Centers 043 and 048

The Jerome (**048**) and Kingsbridge (**043**) centers will move to the Banknote building located at 888 Garrison Avenue, in the Hunt's Point section of the Bronx. Center **048** is moving effective 10/20/2014 and Center 043 is moving effective 10/27/2014. Refer to **CD #14-24** for additional information.

Form Updates

Appointment notices printed for center **048** will be updated with the new address if the form was printed before 10/20/14 and the appointment date is 10/20/14 or later. Document request forms printed for center **048** will be updated with the new center name and address if the form was printed before 10/20/14 and the due date was 10/20/14 or later.

Appointment notices printed for center **043** will be updated with the new address if the form was printed before 10/27/14 and the appointment date is 10/27/14 or later. Document request forms printed for center **043** will be updated with the new center name and address if the form was printed before 10/27/14 and the due date was 10/27/14 or later.

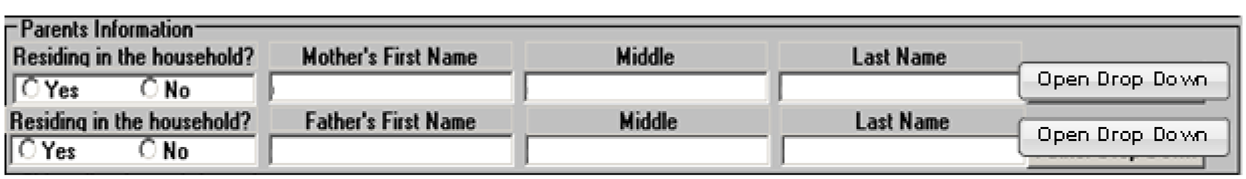
The following forms will be updated with this change:

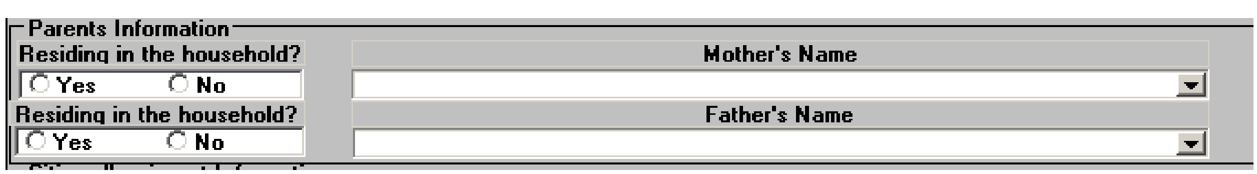
- **W-908T**, Notice of Recertification Appointment
- **W-908CC**, Notice of Rescheduled Appointment for Recertification Interview
- **M-3g**, Notice to Report to Center
- **W-186D**, Fair Hearing Compliance Request
- **W-113K**, Documentation Requirements

4. Update to Parents Information Section in Individual Detail Window

The **Parents Information** section of the **Individual Detail** window was updated to add a new **Open Drop Down** button for the Mother's Name and Father's Name sections. When the JOS/Workers select an answer for the question "**Residing in the household**?" the new button is enabled.

Clicking on this button enabled the new **Mother's Name** and **Father's Name** menus, which display the Client Identification Number (CIN), last name and first name of the household members that can be selected as the parents of the household member.





5. Update to W-515X Data Entry Window

The data entry window for the SAVE Referral (**W-515X**) form was updated to fix the edits for the form and to change the **Yes/No** question into a **Show** button in the **Form Data Entry** window.

When the JOS/Worker clicks on the **Show** button, POS verifies that there is a non-citizen on the case. If the case does not include at least one non-citizen, a red hand is displayed and the **W-515X** data entry does not open.

6. Update to SNAP Monthly Amounts

The maximum monthly amounts for SNAP cases were increased effective 10/1/14:

Household Size	Maximum Monthly Amount
1	$194
2	357
3	511
4	649
5	771
6	925
7	1022
8	1169
9	1315

Each Additional Household Member: +$146 (Refer to **PB #14-104-ELI** for additional information)

7. Update to Standard Utility Allowance (SUA) Amounts

The SNAP Standard Utility Allowance (SUA) amounts increased effective 10/1/14: Refer to **PB #14-104-ELI** for additional information.

- SUA Level 1 increased from $753 to $785.
- SUA Level 2 increased from $298 to $311.
- SUA Level 3 remained unchanged at $33

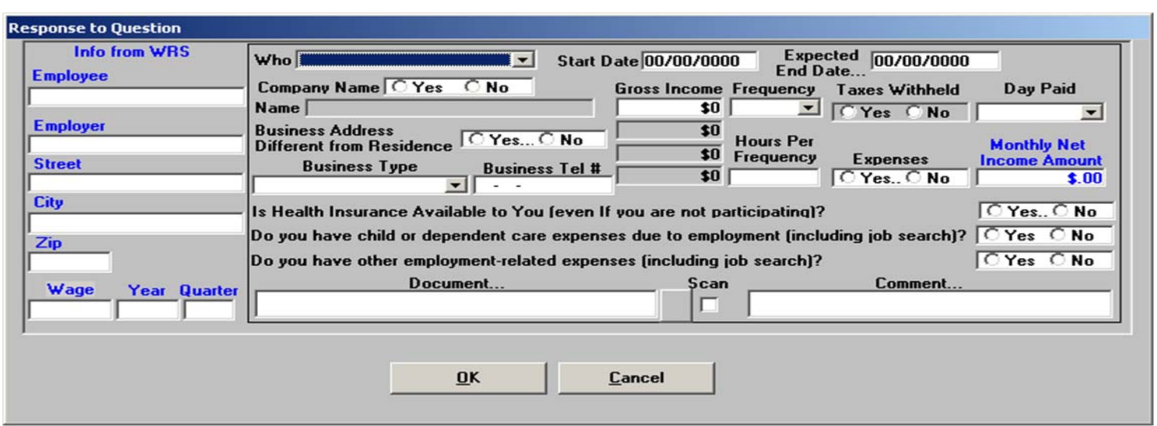
8. Update to Expedited Processing Determination for Homeless Applicants

The **Expedited SNAP Eligibility Determination** window was updated to include the $143 deduction for homeless applicants (Shelter Type **23 [Undomiciled]**).

9. Updates to Self-Employment Window

The **Self-Employment** window was updated to allow the JOS/Worker to select the method used to calculate the self-employment income for the individual who is self-employed.

Current Window:



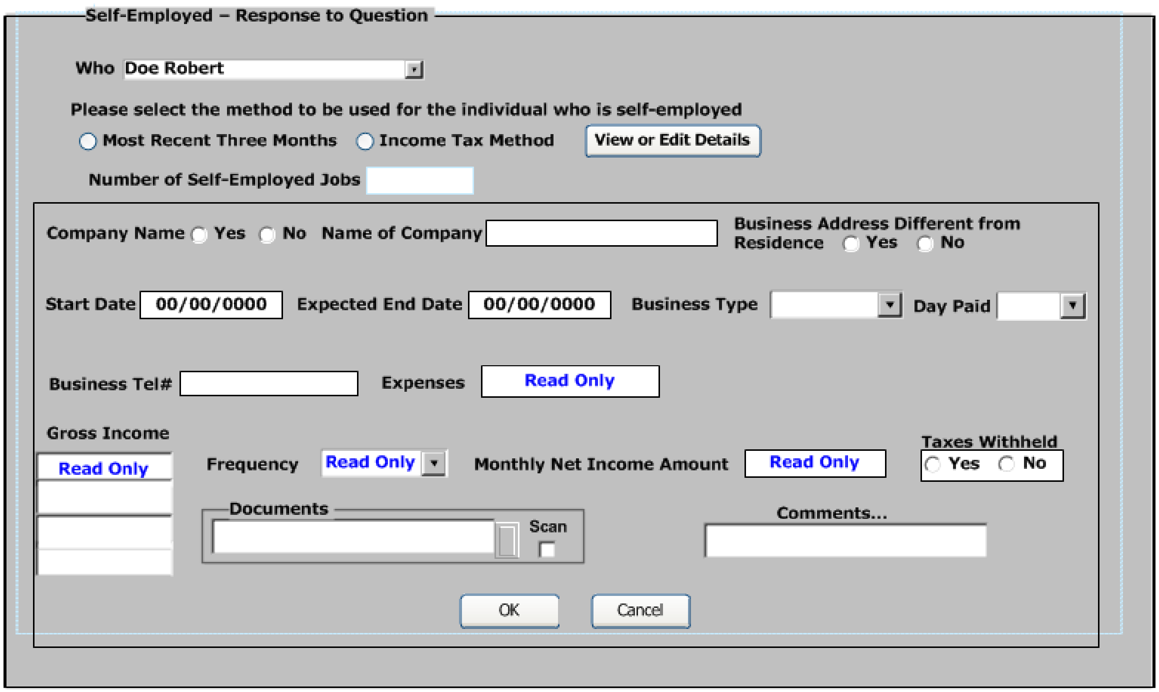
CA POS Release Notes

Version 18.3 October 20, 2014

Summary of changes

- A new question named **Please select the method to be used for the individual who is self-employed**" was added. The new question has two options:
  - Most Recent Three Months
  - Income Tax Method.
- When **Most Recent Three Months** is selected, a new drill-down window named **Most Recent Three Months** appears.
- When **Income Tax Method** is selected, a new drill-down window named **Income Tax Method** appears.
- The **Gross Income**, **Frequency**, **Monthly Net Amount** and **Expenses** fields are now read-only fields.
- The **Info from WRS** section (**Employee**, **Employer**, **Street**, **City**, **Zip**, **Wage**, **Year**, **Quarter**) and the **Hours per Frequency** field were removed.

Updated Response Window for Is Self-Employed?

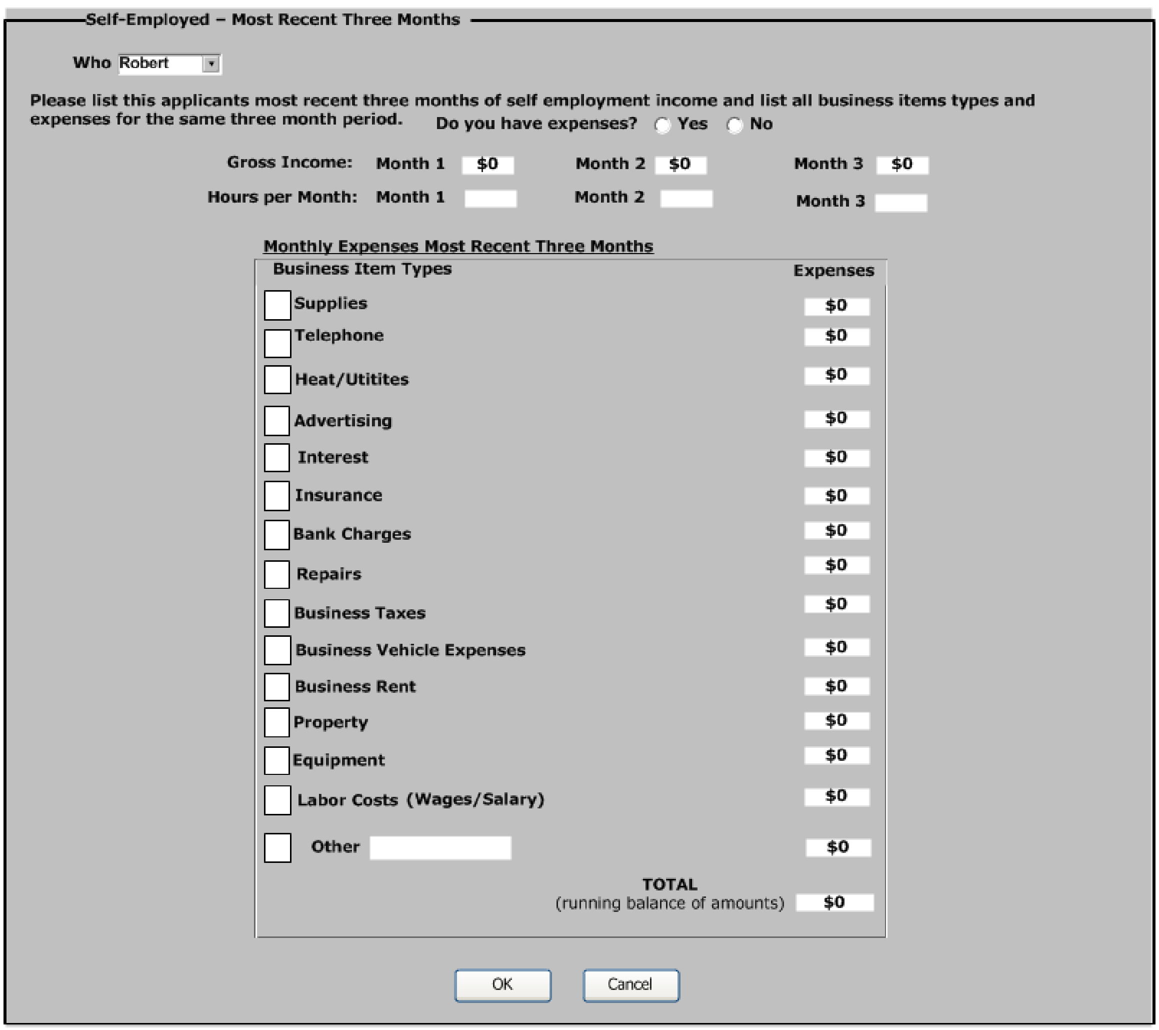


Most Recent Three Months

The **Most Recent Three Months** window appears when the JOS/Worker selects **Most Recent Three Months** for **Please select the method to be used for the individual who is self-employed** in the main **Response** window.

This window allows the JOS/Worker to capture the applicant/participant's most recent three months of gross income, the hours worked in each month and the business item types and expenses for the period.

- To enter an expense, the JOS/Worker must check the **Business Type** and enter the**Expense**. POS keeps a running total of the expenses and uses the gross income and expenses to calculate the **Monthly Net Income Amount**.

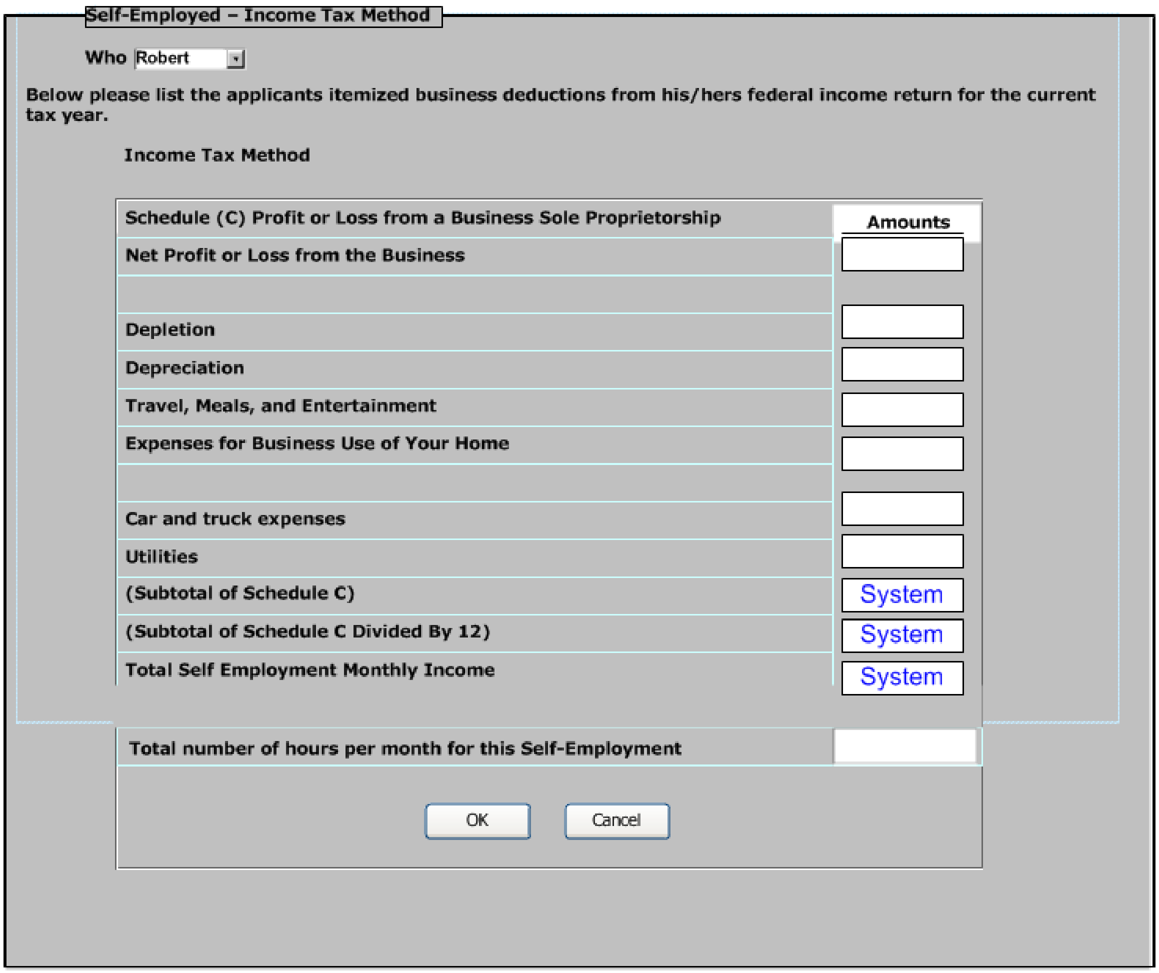


Income Tax Method

The **Income Tax Method** window appears when the JOS/Worker selects **Income Tax Method** for **Please select the method to be used for the individual who is self-employed** in the main **Response** window.

This window allows the JOS/Worker to capture the applicant/participant's net profit or loss from the business, itemized business deductions and hours worked based on the applicant/participant's federal income tax return.

POS uses the information entered in this window to calculate the **Monthly Net Income Amount**.

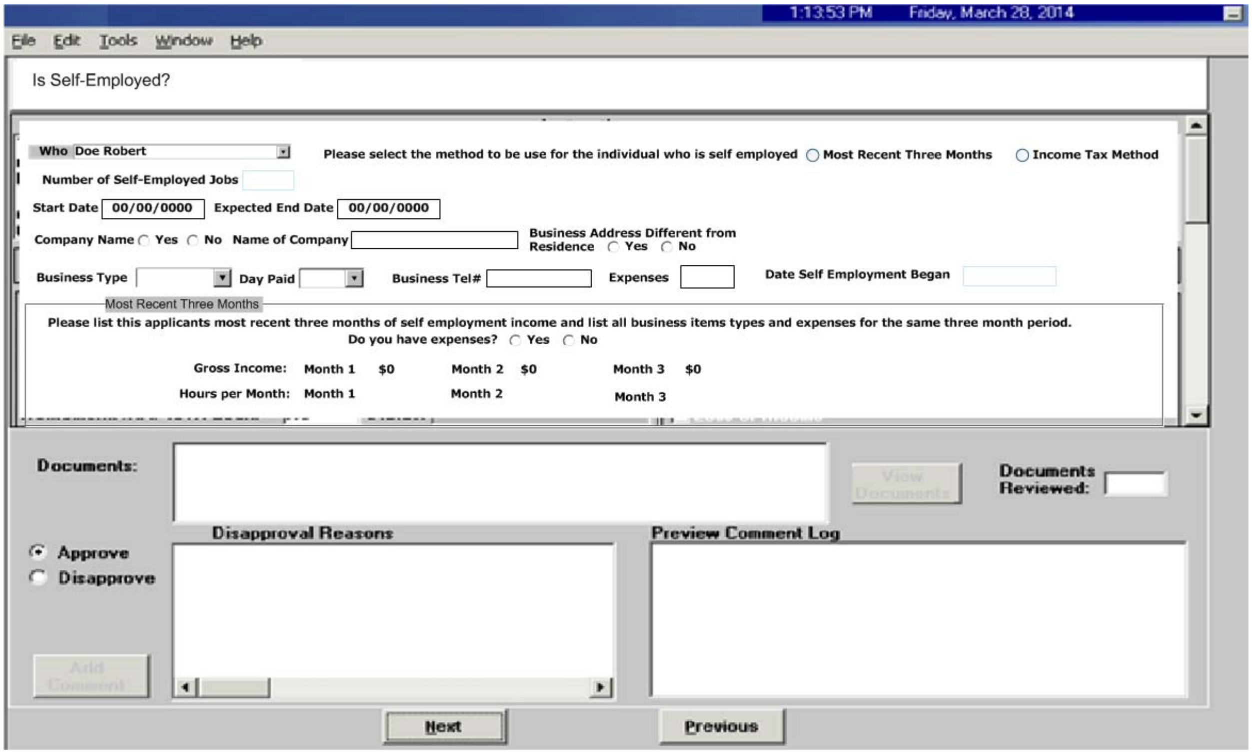


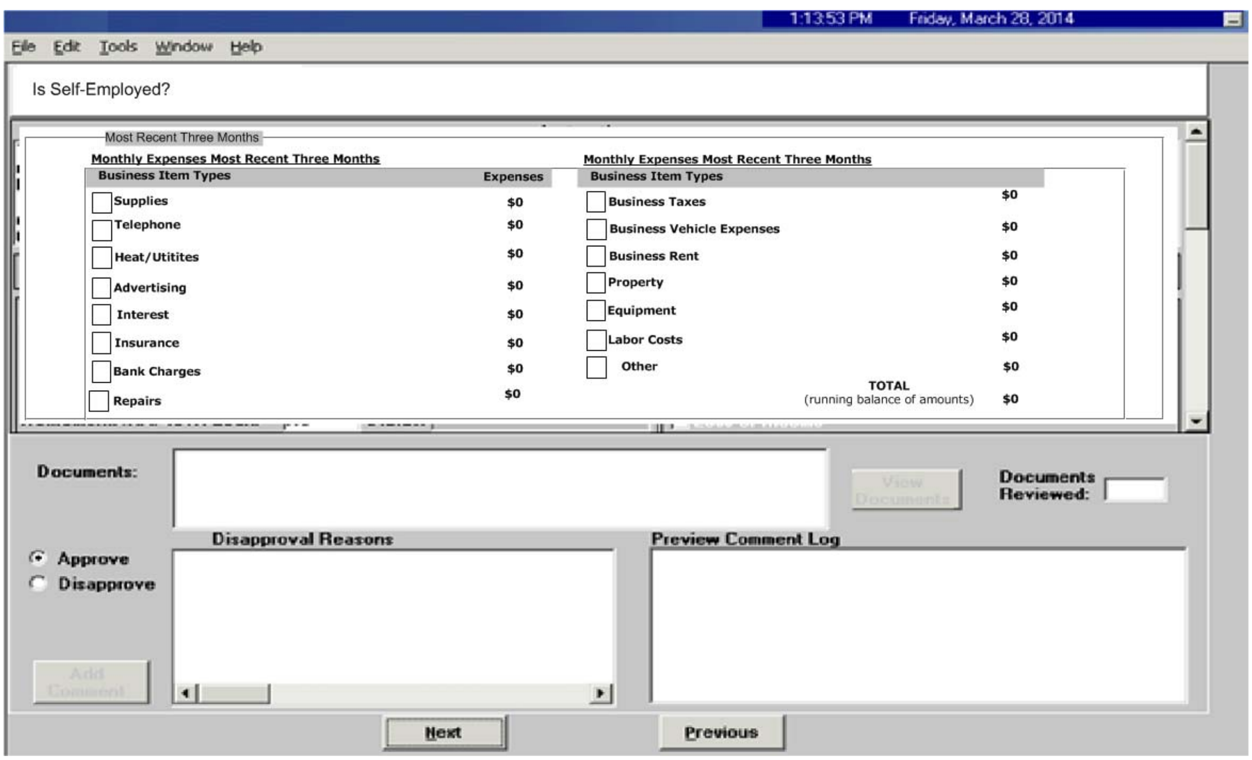
CA POS Release Notes

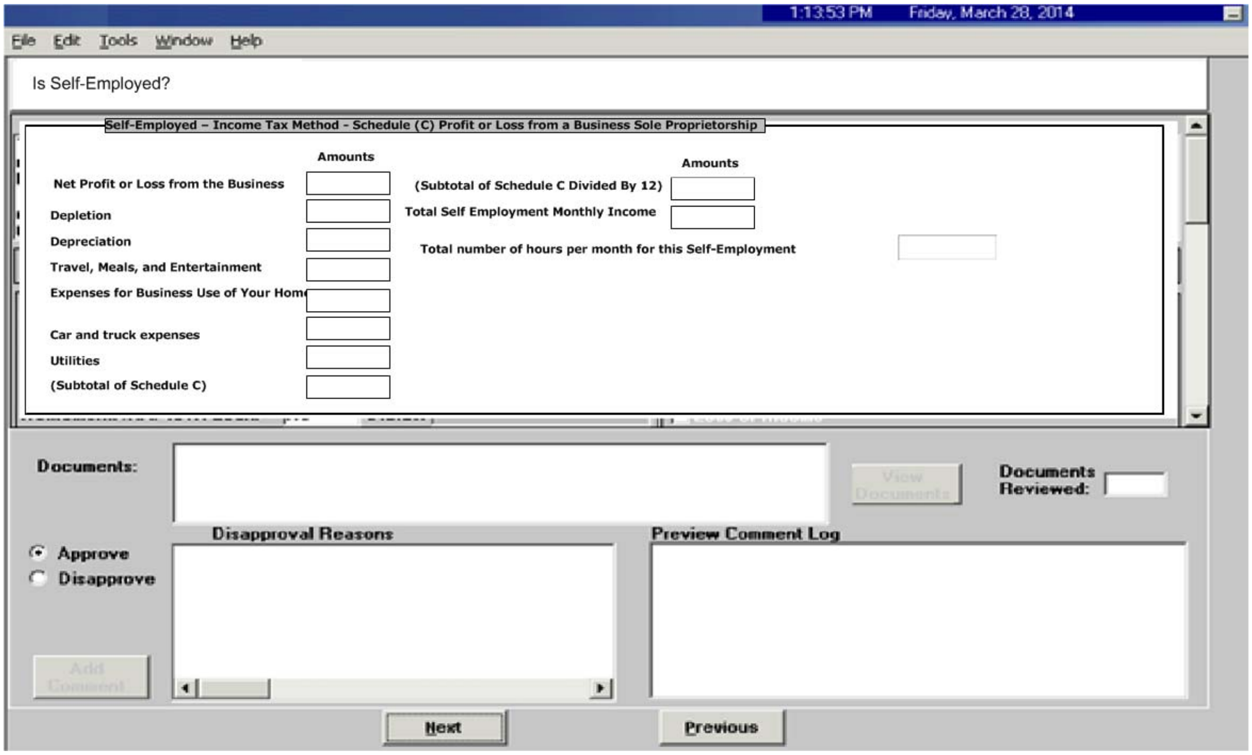
Version 18.3 October 20, 2014

Updated Approval Window

The **Approval** window was updated to accommodate the changes to the self-employment section.







10. Updates to CA Opening Code and Single Issuance Code Edits

The edits for CA opening code and single issuance code combinations were revised to:

- Remove access to Single Issuance Code **31** (Pre-Pa Rent Arrears) when the CA case is changed to Single Issue (SI) status using opening code **Y19** (FA/SNFP/ SNCA/SNNC/ EAF/EAA).
- Add access to Single Issuance Codes **30** (Rent Payments in Excess of Maximum), **43** (Accrued Rent While On PA) and **99** (Other) when the CA case is changed to SI status using opening code **Y38** (FA/SNFP/ SNCA/SNNC/EAF).
- Add access to single issuance codes **07** (Replacement of Lost/Stolen/Undelivered Checks), **08** (Replacement of Lost Check), **09** (Rent Only), **43**, **D0** (One-Shot Deal Rent Replacement Check [Non Recoupable]), **W5** (Supplement Feps Rent Arrears Recoupable) and **W7** (Housing Development Cooperative Unit) when the CA case is changed to SI status using Opening Code **Y39** (SNFP/SNCA SNNC/EAF/EAA)..

11. POS-NYCWAY Update

The POS-NYCWAY table of allowable status for action codes was updated to allow the JOS/Worker to schedule an OCSE referral on an active case when the casehead or payee is in Applying (AP) status for Cash Assistance (CA).

12. RAU Priority Codes

Beginning on Monday, September 8, 2014, new priority codes were implemented for the Rental Assistance Unit (RAU) and new Routing Location codes will be implemented for the Centralized Rent Processing Unit (CRPU) for rent arrears in order to improve processing of checks using the routing option (RO) process.

The following priority codes were implemented for RAU in the Rental Assistance Database (RAD):

- **Priority 1** – this existing code is used when an eviction is imminent;
- **Priority 2** – this new code is used when an eviction is not imminent, but the client has an open case in housing court or is working with an advocate for their housing issue;
- **Priority 3** – this new code is used when an eviction is not imminent and the client is not working with an advocate. If the case does not require a signed repayment agreement, this code indicates that the checks can be mailed by MIS.

13. CRPU Routing Location Codes for RO Checks

Beginning on Monday, September 8, 2014, new Routing Location codes were implemented for the Centralized Rent Processing Unit (CRPU) for rent arrears to improve processing of checks using the routing option (RO) process.

In most cases, when preparing rent arrears checks, the Centralized Rent Processing Unit (CRPU) uses the routing option (RO) process, by selecting Pick-Up Code (PUC) **1** (Special Roll) and entering a Routing Location code in the **POS Grant Data Entry** window (**LDSS-3575**). The following new Routing Location codes were implemented in POS for the CRPU:

- **CRP1** – This code is entered by POS when **Priority 1** was selected by RAU. The checks are picked up by IREA (Investigation, Revenue and Enforcement Administration) from MIS (Management Information Systems). IREA staff is responsible to make arrangements for the disbursement of the rent checks, which may include delivery to the housing court.
- **CRP2** – This code will be entered by POS when **Priority 2** was selected by RAU. The checks are picked up by IREA from MIS. IREA staff is responsible to make arrangements for the disbursement of the rent checks.
- **CRP3** – This code is entered by POS when **Priority 3** was selected by RAU and a repayment agreement is not required. These checks are mailed by MIS mail distribution.
- **CRP4** – This code is entered by POS when **Priority 3** was selected by RAU and a repayment agreement is required for an Emergency Safety Net Assistance (**E-SN**) case. The checks are picked up by IREA from MIS. IREA is responsible for checking the HRA One Viewer to determine if the repayment agreement has been signed. If the signed repayment agreement is in the HRA One Viewer, IREA staff is responsible to make arrangements for the disbursement of the rent checks.

14. CRPU RO Checks Report Update

The CRPU RO Checks report was updated to include the benefit category, routing location code and issuance code for the check.

15. CRPU RAU Approval Report Update

The CRPU RAU Approval report was updated to include the priority code selected by the RAU consultant in RAD.

16. CRPU Aging Report

A new **CRPU Aging Report** was added to the **RAU Approval** in the POS Management Console. This report allows center and central office management to track how long CRPU took to process approved cases.

To access the report, the user must select **Aging Report** in the **RAU Approval** tab. The user must select the Timeframe and can view the detailed data or a summary of the report data.

Filters

The **Rent Arrears Case Status** filter contains checkboxes to filter the output displayed on the Aging report based on Case Not Assigned, Case Completed, Priority 1 Cases, and whether or not the Checks Printed, as shown below:

The **CRPU Processing Time** filter contains checkboxes for the user to select and limit the output to a timeframe based on the calculated number of days old.

The **Checks Printed** filter allows the user to filter for cases with printed checks by clicking **Yes.**

Data View

The data view includes the following information:

- Center
- Case No
- Suffix
- Case Name
- Priority 1
- Priority
- Priority Code
- Action Date
- CRPU Worker Assigned Date
- CRPU Worker Start Date
- CRPU Worker Complete Date
- CRPU Supervisor Start Date
- CRPU Supervisor Approved Date
- Check Printed Date – for RO Checks
- Print Queue Date – for E-Checks
- Special Roll or E-Check
- Completed
- Days Old – dates between RAU approval and CRPU supervisor approved date
- Referral No
- Instance No
- Grant Type
- Approved Amount
- Approved From
- Approved To
- Landlord Name

- Landlord Address
- Landlord Phone
- Homebound Indicator
- CRPU Issued Amount

Summary View

The Summary View allows the Worker to view a summary of outstanding cases and the average processing time for completed cases.

Example of Outstanding Cases

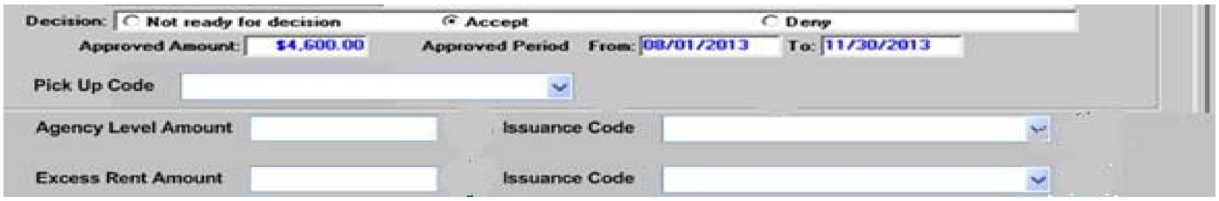
Days Outstanding	Count
10	3
8	2
7	4
5	34
4	15
3	39
2	10
1	48

Example of Completed Cases

Completed Cases	Average Processing Time
104	4.25 days

17. Updates to Request Action Window for Rent Arrears

The **Request Action** window in the **SI Task List** was updated for approved requests for back rent, mortgage arrears and property tax arrears in order to allow grouping of grants into larger amounts:



1. **Pick-Up Code**: The JOS/Worker selects the Pick-Up Code for the approved grant request.
2. **Agency Level Amount**: POS calculates the agency level portion of the approved grant request.
3. **Issuance Code** for the Agency Level Amount: The JOS/Worker selects the issuance code for the agency level amount.
4. **Excess Rent Amount:** POS calculates the excess rent portion, if any, of the approved grant request.
5. **Issuance Code** for the Excess Rent Amount: The JOS/Worker selects the issuance code for the excess rent amount.

When the JOS/Worker selects Pick-Up Code **1** (Special Roll Check), the grants are grouped up to $5,000 per check if one of the following issuance codes is used: **07**, **08**, **09**, **20** (Dispossed Fees/Related Costs), **30** (Rent Payments in Excess of Maximum), **31** (Pre Pay Rent Arrears), **40** (Rent in Advance to Avoid Eviction), **43** (Accrued Rent While on PA), **48** (Disaster Shelter Temporary Housing), **59** (NYCHA Rent Arrears), **73** (Supplementation of Regular Grant), **74** (Benefit Restoration), **99** , **D0**, **W5**, **W6** (Supplement FEPS Rent Arrears Non-Recoupable) or **W7**.

For CRPU, the RO checks are prepared using Pick-Up Code **1** and are grouped up to $5,000 if the one of the following issuance codes is used: **07**, **08**, **09**, **20**, **30**, **31**, **40** and **59**. For CRPU, E-Checks are grouped up to $3,000.

18. Automated Storage Fees for Participants in DHS Shelters

In September 2014, POS was updated to automate the payment of storage fees for active cases residing in a New York City Department of Homeless Services (DHS) shelter.

Checks were issued using issuance code **21** (Storage Fees) through a regular monthly process for cases where the monthly storage fee amount was recorded in the POS response window for **Storage of Furniture and Personal Belongings**.

Payment Process

Each month, POS verifies that the case is Active (AC) for CA and that the storage fees were not issued by a Job Center for the following month. POS submits the records to the MIS benefit issuance group for processing, including the monthly storage fee amount, participant information and vendor information.

The MIS benefit issuance group verifies that the household resides in a DHS (Department Homeless Services) shelter and submits the case to WMS for generation of the checks. The MIS benefit issuance group generates the following notices for the case at the time of the first payment to the vendor:

- **FIA-1127** Notice to Household of Storage Fee Payment to Vendor
- **FIA-1127b** Notice to Vendor of Storage Fee Payment

Payment Termination

If the case received a payment in the previous month, but will no longer receive the automated storage fee payment because the participant no longer resides in a DHS shelter, the following notices are generated by the MIS benefit issuance group:

- **FIA-1127a** Notice to Household of Storage Fee Payment Termination
- **FIA-1127c** Notice to Vendor of Storage Fee Payment Termination

19. CA Application Process at Housing Court

In November 2014, RAU staff located at the Housing Courts will now take new CA emergency assistance applications using the **POS CA Application Intake** activity. For full details of the CA application intake changes for this process, please refer to the policy bulletin for the **CA Application Intake at Housing Courts which will be released at a later date.**

20. CA Application Process at PATH and Shelter Sites

In November 2014, Homeless Diversion Unit (HDU) staff at PATH and 2 shelter sites will now take new applications for CA, Medical Assistance (MA) and Supplemental Nutrition Assistance Program (SNAP) using the **POS CA Application Intake**, **CA Application Interview** and **IN/ESNAP Issuance** activities. For full details of the CA application changes for this process, please refer to the policy bulletin for the **CA Application Process at PATH and Shelter Sites which will be released at a later date.**

21. Updates to LDSS-4013 Spanish Template

The **LDSS-4013** form template was updated to accommodate English reason text in the English language template and Spanish reason text in the Spanish language template.

22. Update to Budget Business Rules

The POS budget business rules were updated to allow selection of the **SPEC** indicator **E** for individuals less than 19 years of age.

23. Changes to BEV Referral Window in POS

The **POS BEV Referral** window was updated in this version.

FEDS code 50 matches

POS runs business rules to determine whether there is a match for FEDS code **35** (Evidence of real property ownership) or FEDS code **89** (PARIS Match - Active recipient in another state; current status unresolved) for any household member. If a match found, POS select FEDS Code **35** and/or **89** in the **BEV Referral Reasons (FEDS Codes)** window.

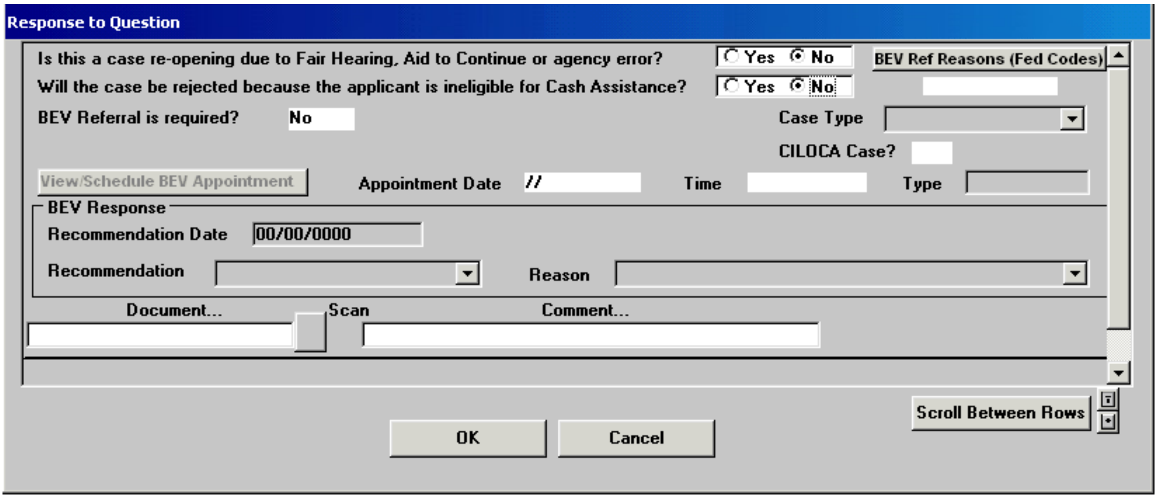
POS was updated to add a new FEDS code to this lookup: FEDS Code **50** (Prior history of denial, case closing or overpayments resulting from an investigation). If a match found, POS selects the FEDS Code **50** in the **BEV Referral Reasons (FEDS Codes)** window.

New edit for One Shot Deal for Rent Arrears question

POS was updated to validate that rent arrears were recorded at the time that the JOS/Worker clicks “**Yes**” for the question “One Shot Deal for Rent Arrears?”

New edit for congregate care cases

POS was updated to prevent a Bureau of Eligibility Verification (BEV) referral for a case in congregate care.



24. Reminder- Entering Case Comments in POS

Case Comments

When the JOS worker enters a case comment in POS those comments are added to the case record permanently. To confirm the correctness of the comments please review and edit all statements prior to saving them permanently.

Supervisor Guide
Contact Center Manager Administration (CCMA)

Launch Contact Center Manager

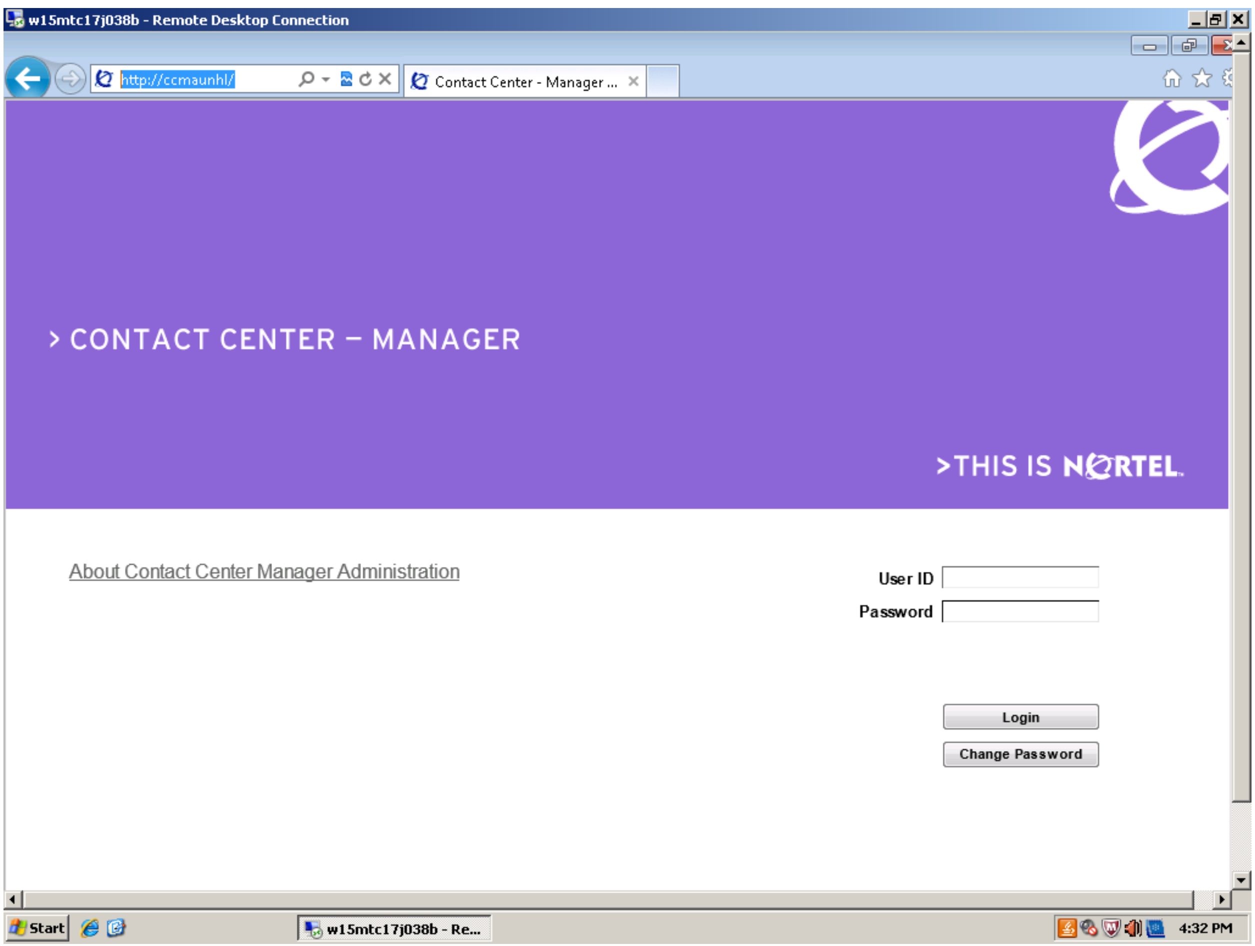
1) Launch Internet Explorer browser. On the address bar, type in the link to Contact Center Manager http://ccmaunhl

2) Enter login credentials on the CCMA homepage.

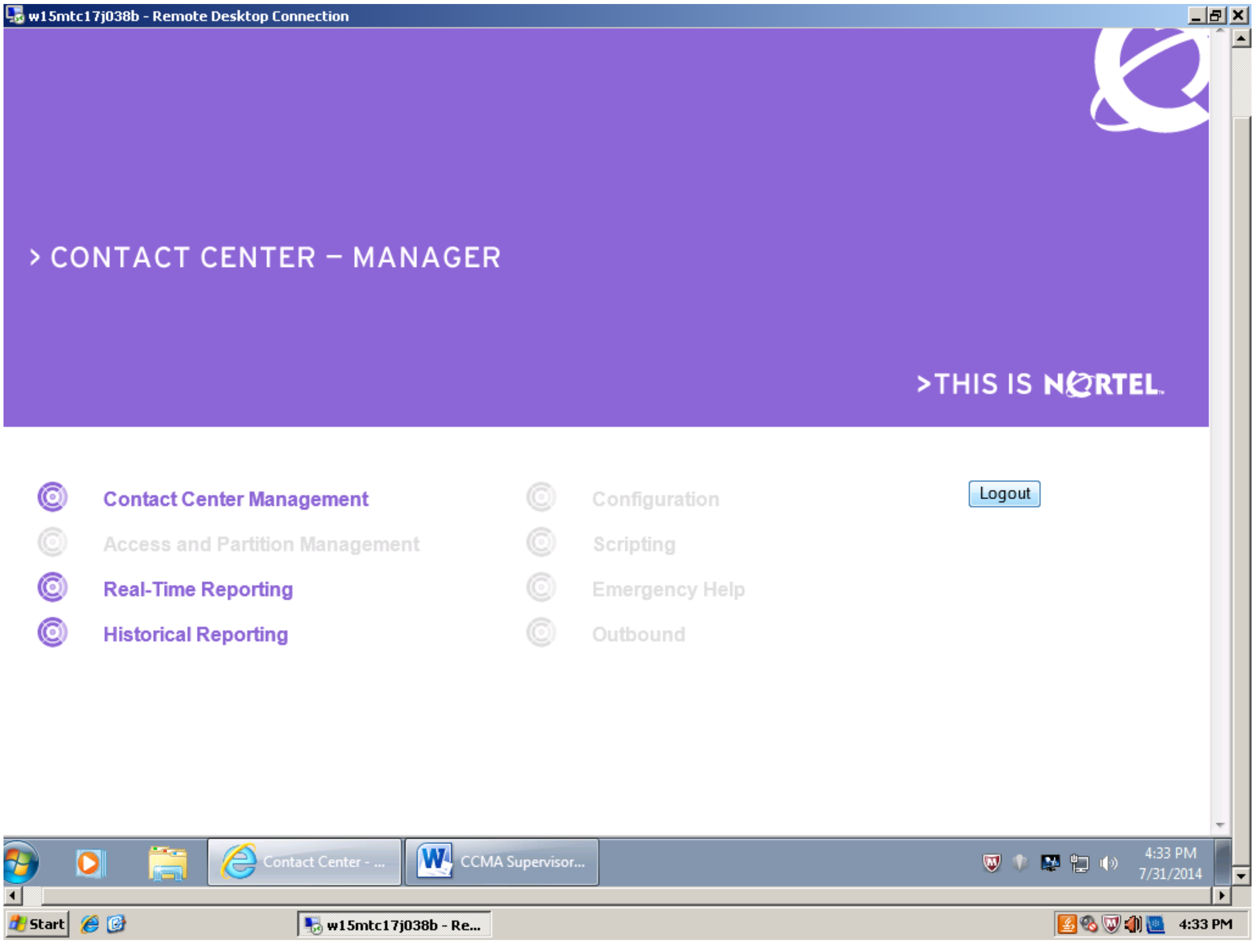
User ID: User ID for Supervisor is first initial of first name followed by last name. For example, the User ID for John Smith is **jsmith**

Password: Default password is set up as the same as User ID. For example default password for John Smith is **jsmith**

Note: To reset a new password, select the Change Password tab on the CCMA homepage.



After logging in, the CCMA homepage looks like the one below.



ATTACHMENT B

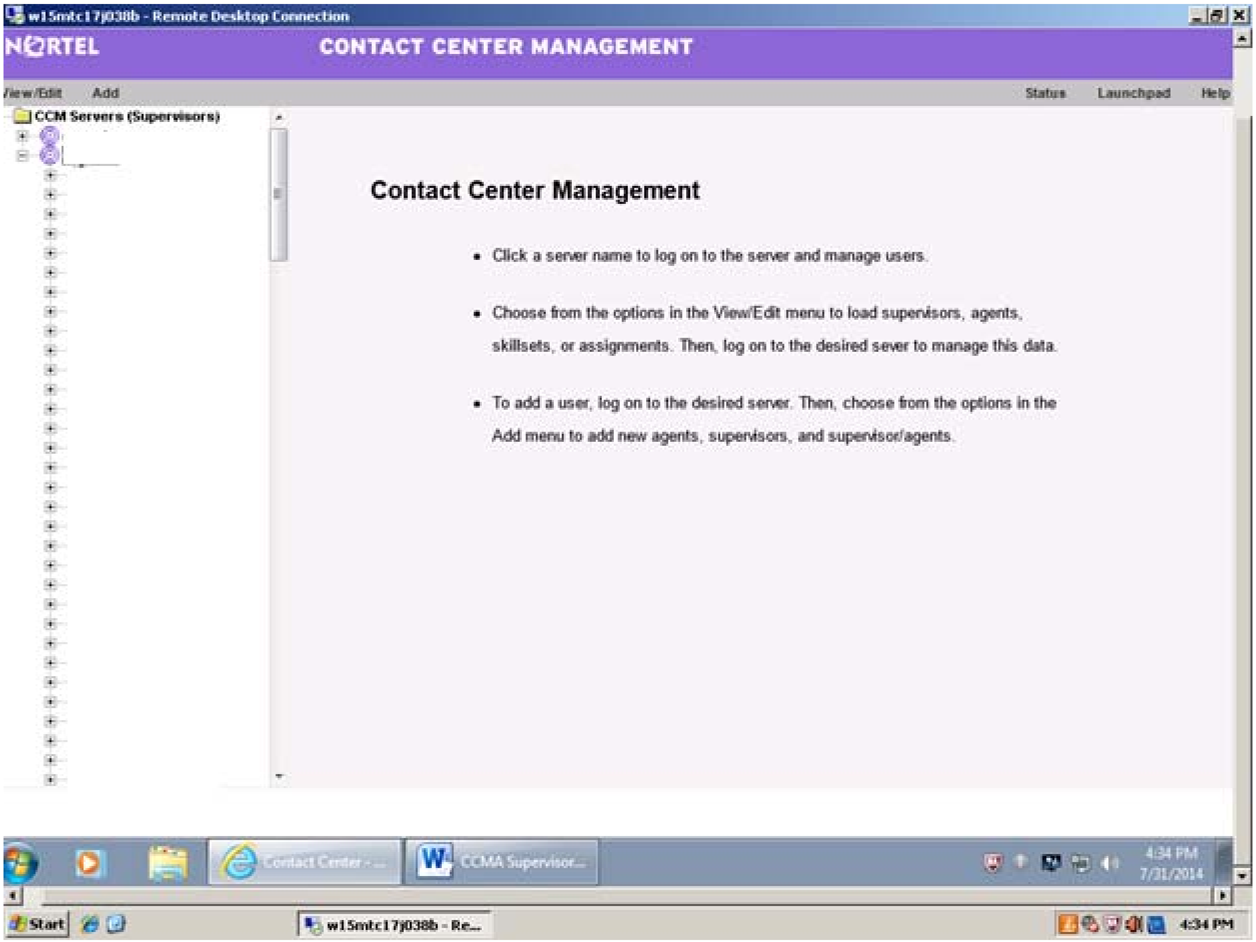
Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014

View Agent Profile

This section describes the step by step procedure to view user profile in Contact Center Management.

1) From the Contact Center Manager Administration window, launch **Contact Center Management**

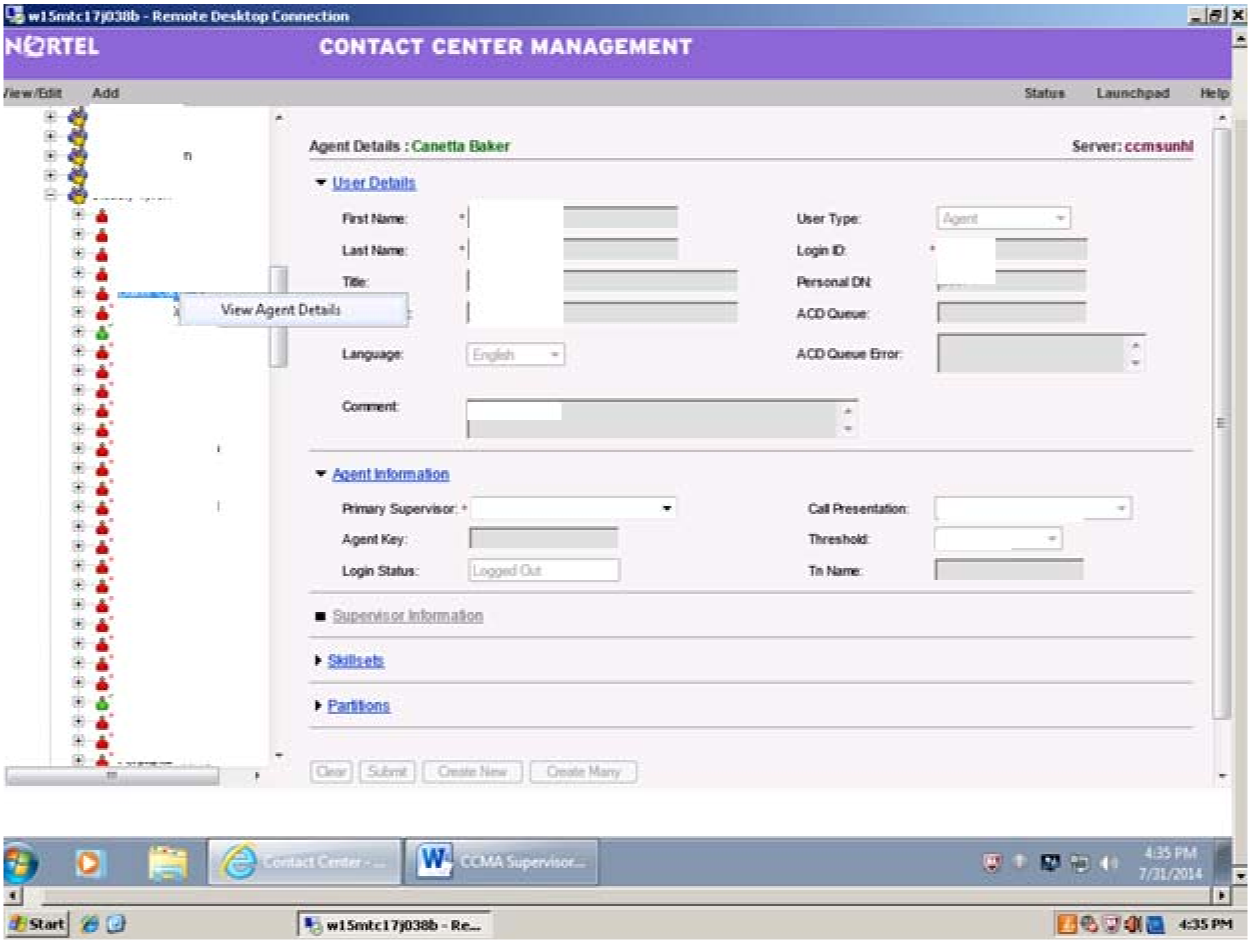
2) Select server name **ccmsunhl** from the system tree on the top left of the screen.



3) From the list of all CCMA Supervisors, click on the **supervisor name** under whom the agent is assigned. All the agents listed under the Supervisor populate.

4) Right click on the agent name and from the options, select **View Agent Details**

5) The CCMA Agent profile looks like the one below.



Launch Real-time Displays

This section describes step by step procedure to launch real time displays from the Real Time Reporting component. There are two standard displays to view: standard agent display and standard application display.

Standard agent display provides real time information on the in call status of the agents (example idle, busy, active on skillset call, not ready) as well as the time in state etc.

Standard application displays provides real time information on the calls offered to the queue, calls answered, calls abandoned, calls terminated, maximum wait time, average answer delay etc.

1) From the Contact Center Manager Administration window, launch **Real-Time Reporting**

2) Select server name **ccmsunhl** from the system tree on the top left of the window. Select **Public Tabular Displays** tab

3) Select the type of display to launch.

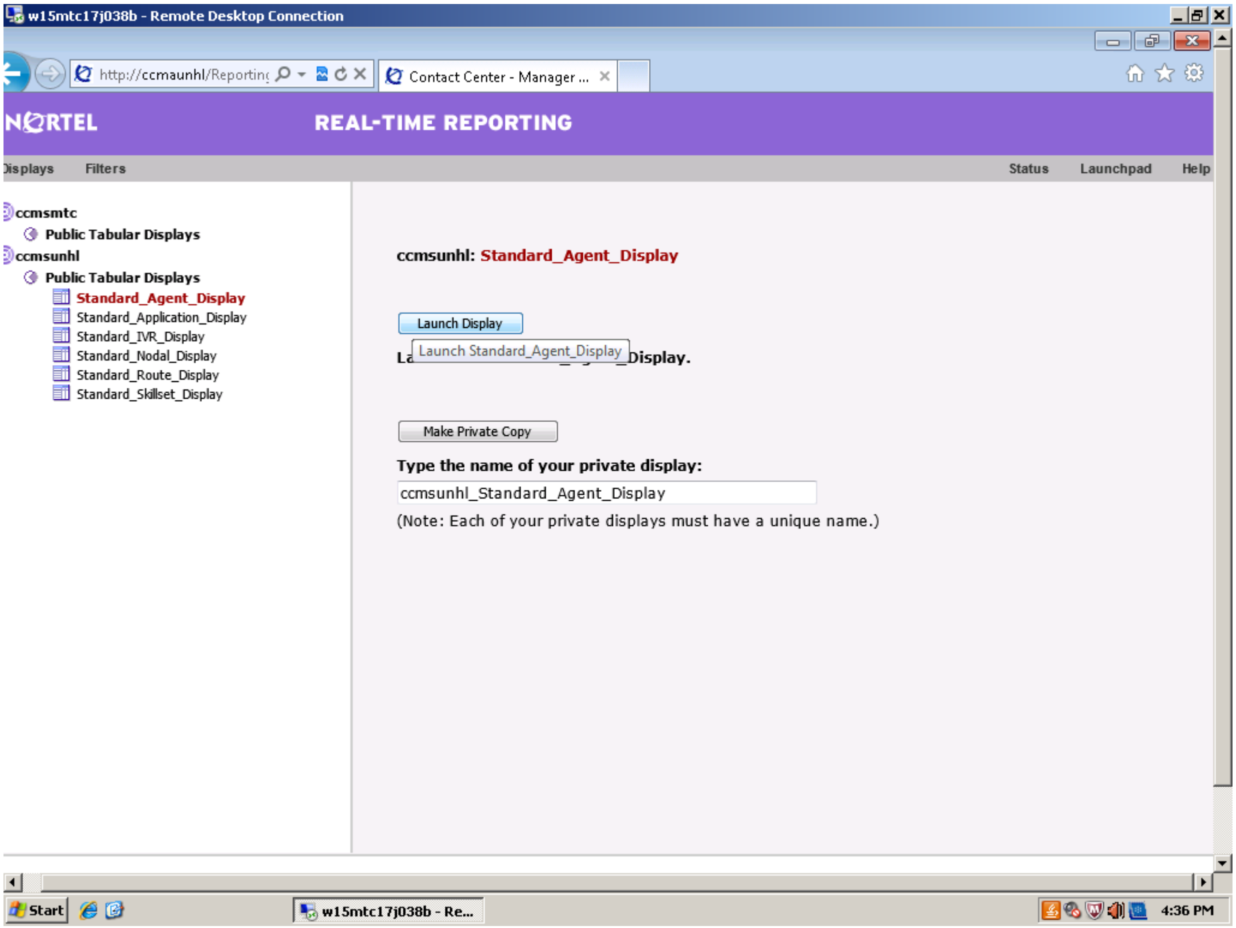
For example: To monitor agent real time activity, select Standard Agent Display. To monitor queue related activity, select **Standard Application Display**.

4) Click on the **launch display** tab on the screen. A new window launches in Internet Explorer for the display and information is populated.

Standard Agent Display

ATTACHMENT B

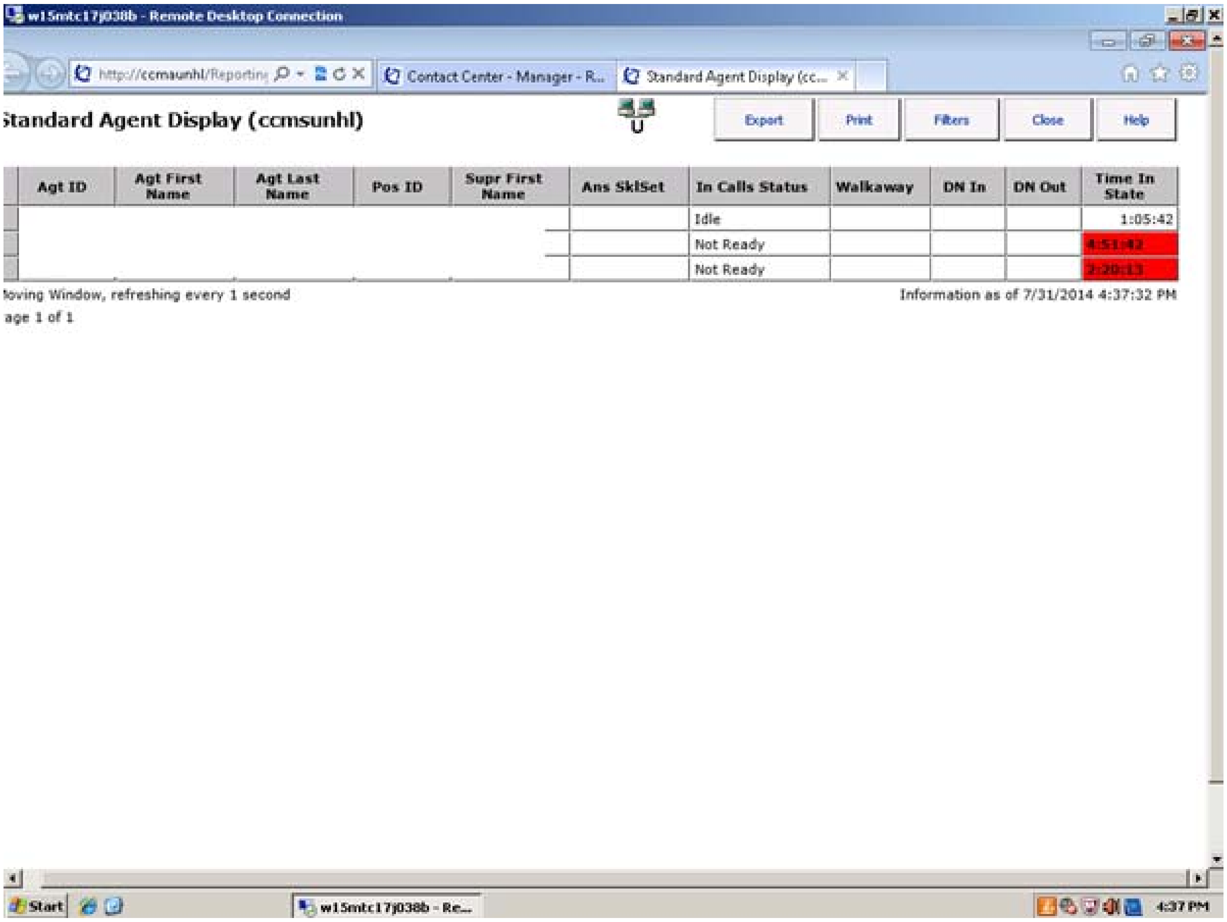
Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014



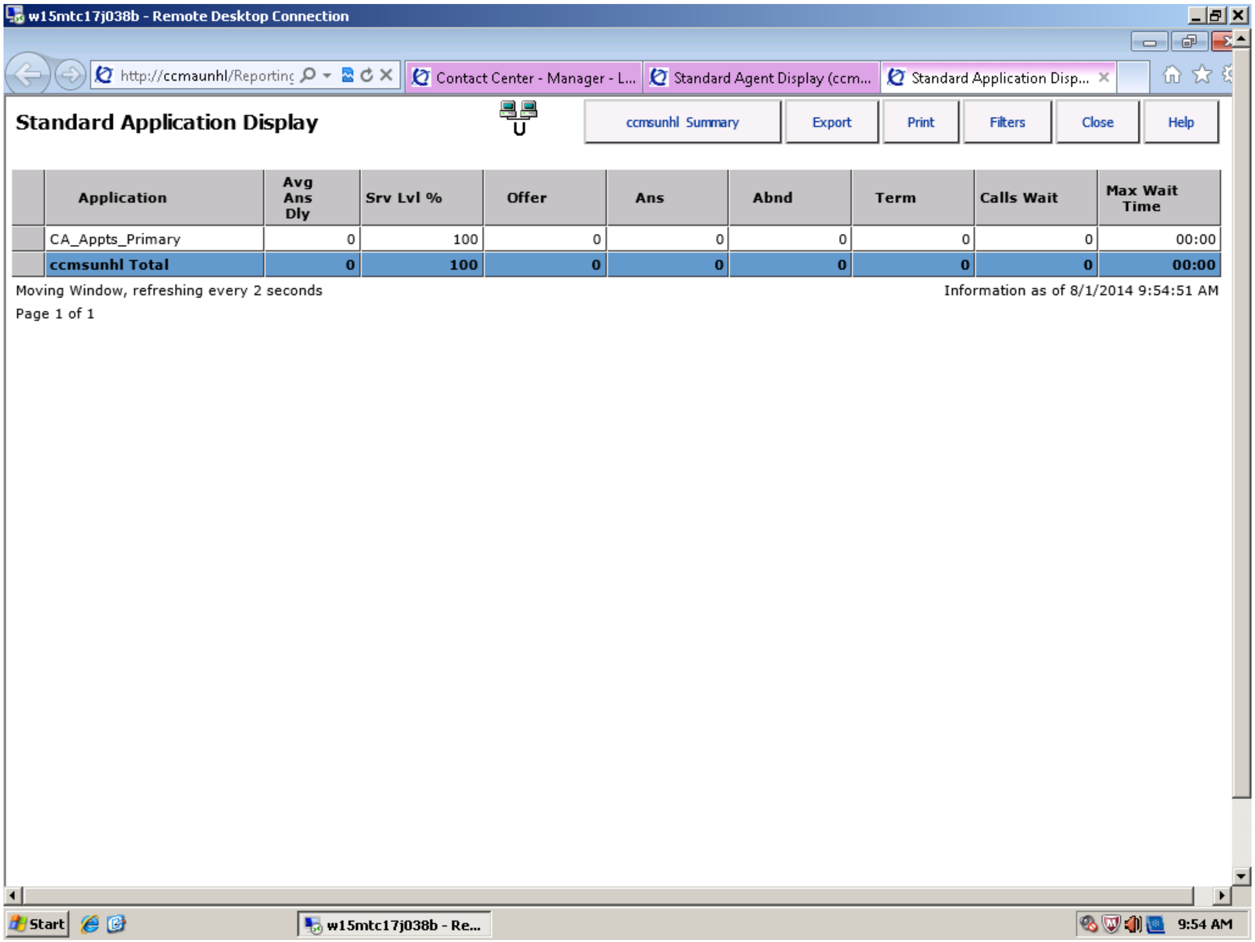
ATTACHMENT B

Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014

Standard Agent Display (con't)



Standard Application Display



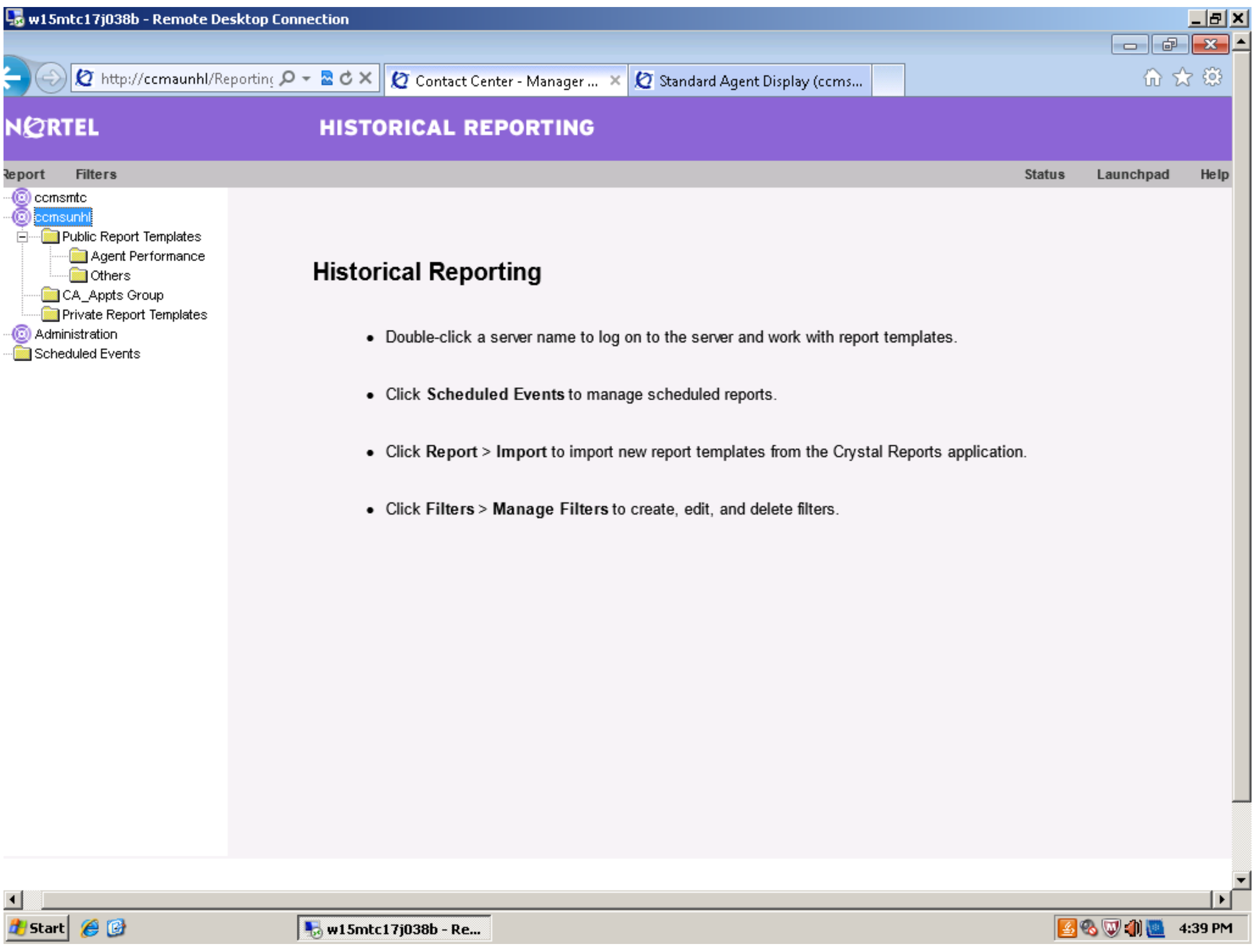
Launch Historical Report

Agent Performance Report

This section describes step by step procedure to launch agent performance report and save it in either public **(CA_Appts Group)** or private folder **(Private Report Templates)** in historical reporting. The saved report templates can be used anytime to run historical reports.

1) From the Contact Center Manager Administration window, launch **Historical Reporting**

2) Select the server name **ccmsunhl** from the list of servers under the system tree. A list of reports populates.

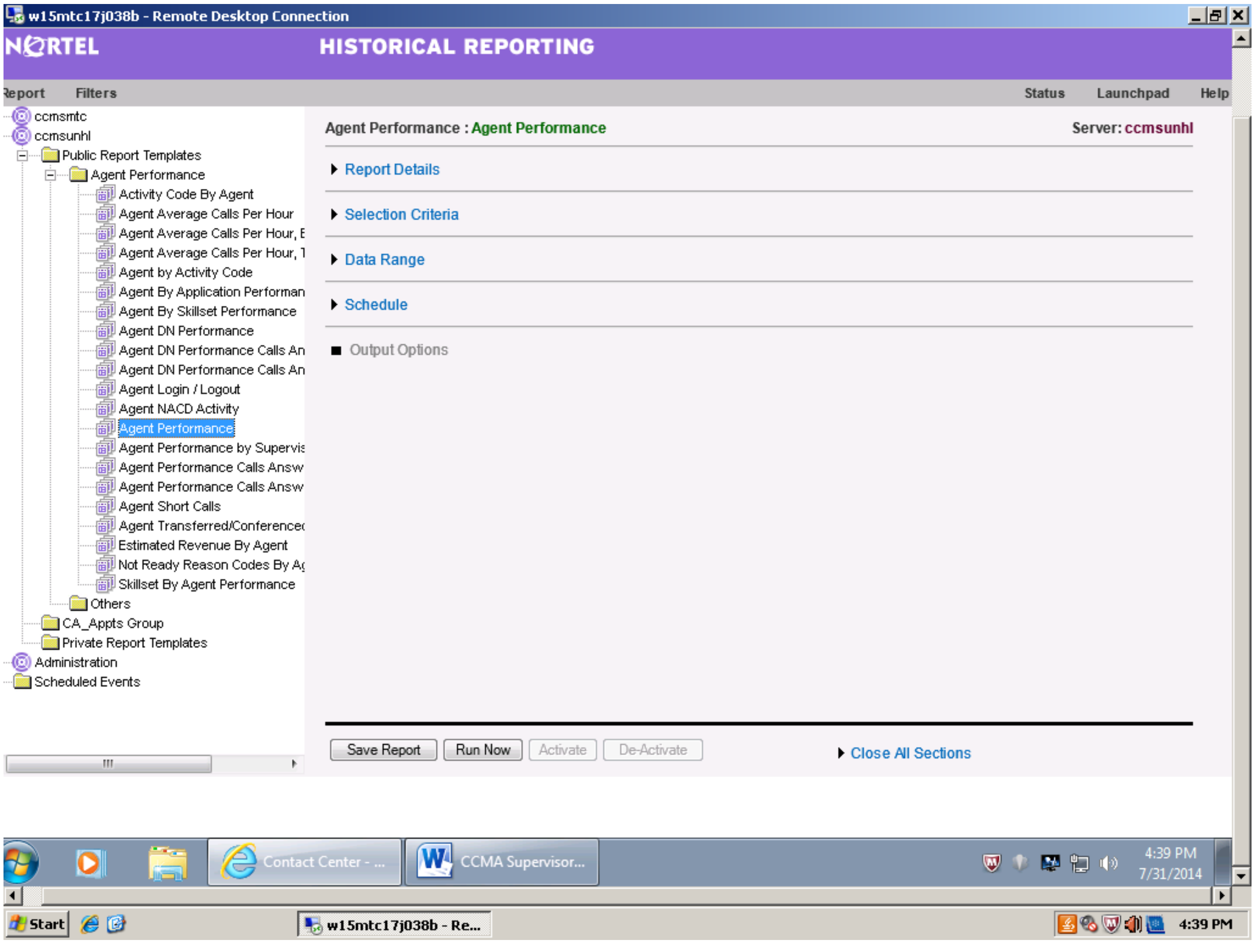


3) Under Public Report Templates, select **Agent Performance**. From the drop down list of all available templates select **Agent Performance**

The Agent Performance Report template appears on the screen with sections **Report Details, Selection Criteria, Data Range and Schedule**

ATTACHMENT B

Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014



4) Click on the **Report Details** tab.

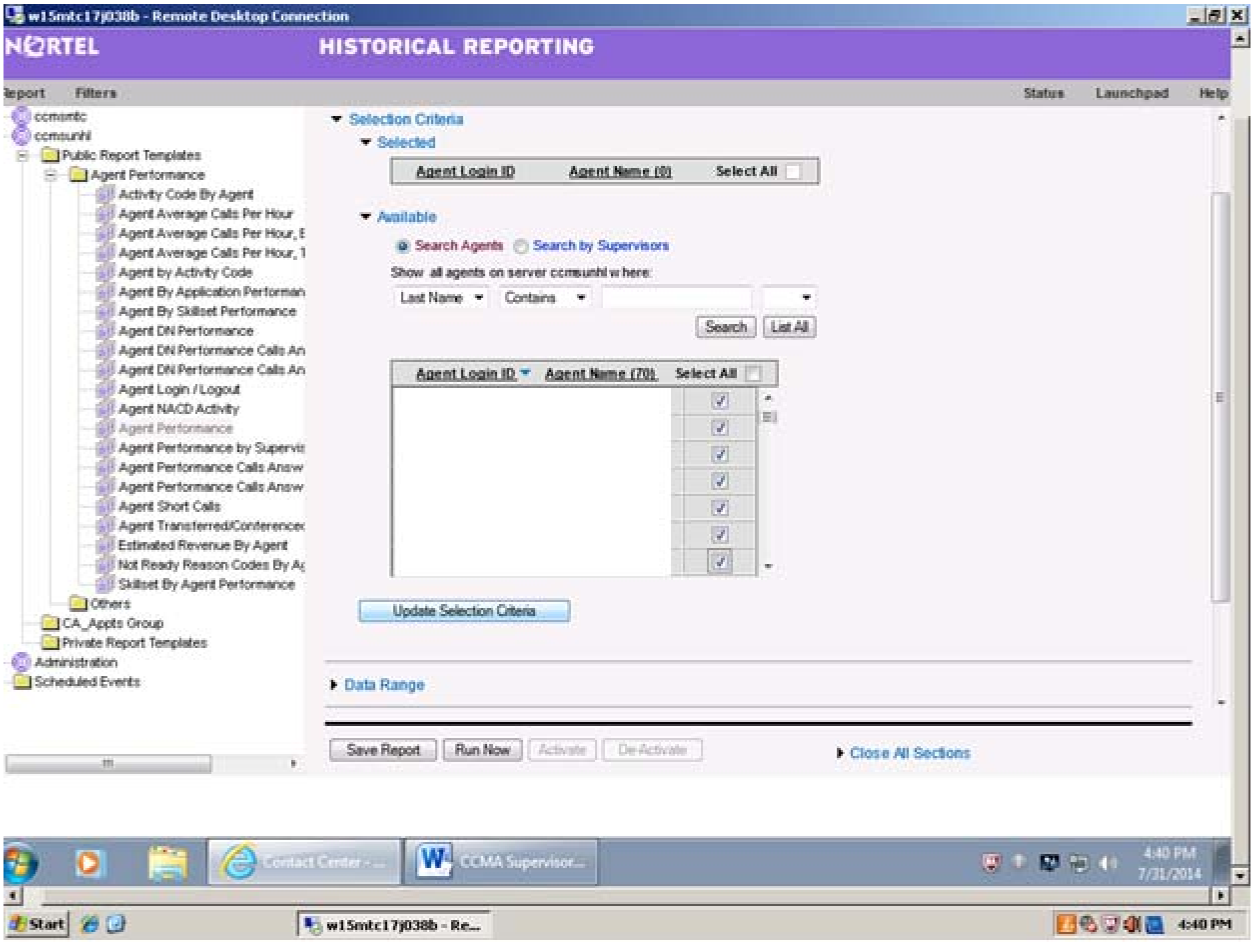
Assign a name for report in the **Save As** tab.

Assign a location to save the report by clicking on the drop down menu on the **Location** tab (either public folder or private). For example select **CA_Appts Group** to save report under the public folder.

5) Click on the **Selection Criteria** tab. Next select the **Available** tab.

- Click on the **List All** tab.

- Select the agents from the list and click on **Update Selection Criteria.**



5) Click on the **Data Range** tab.

Select the range (time interval) for which to run the report. Reports are available on an interval range (15 min intervals), Daily (on a daily basis), Weekly (on a weekly basis) and Monthly (on a monthly basis).

7) Click on **Save Report.**

The report template now appears under the assigned folder (public or private report folder) and is available to run anytime.

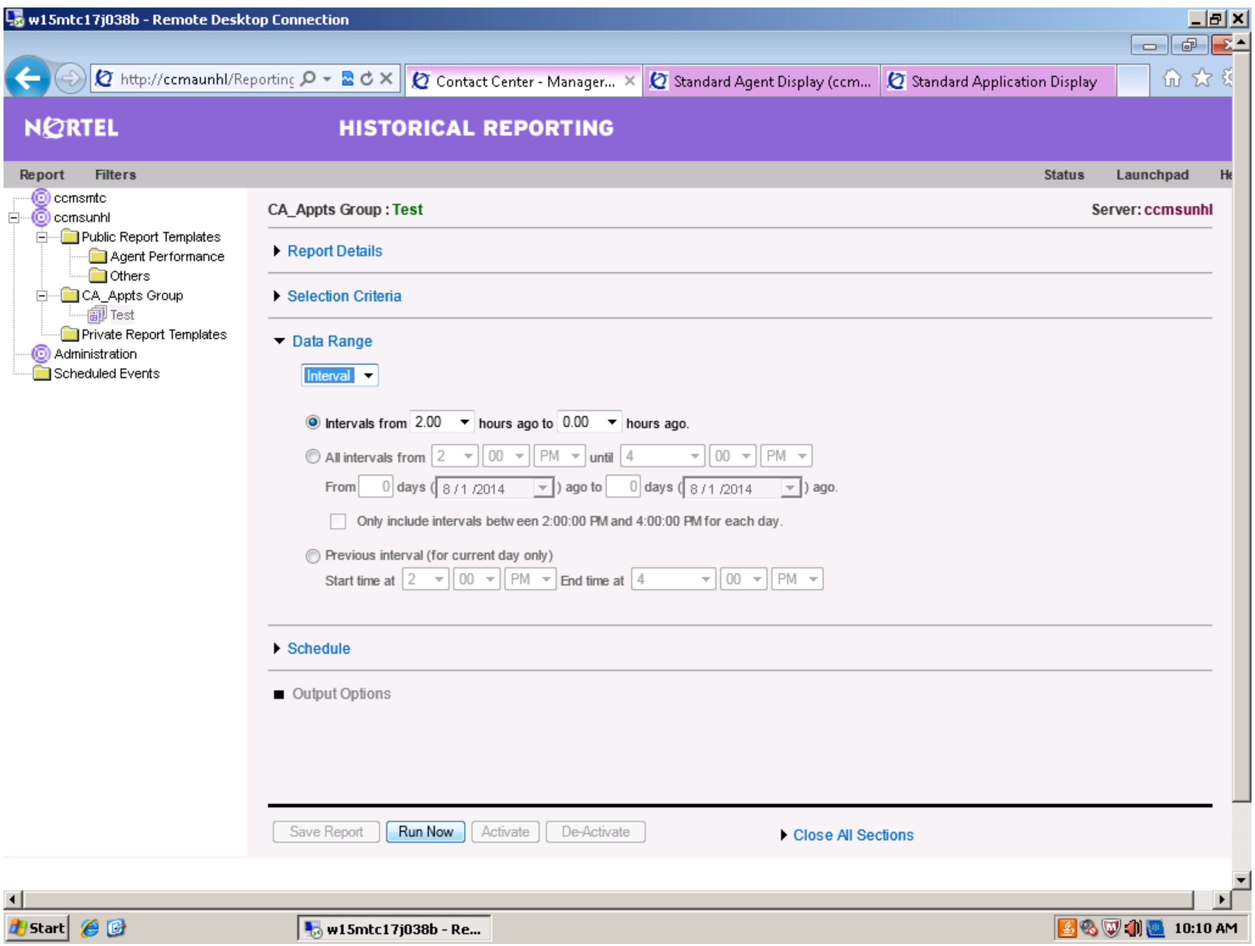
Launch historical report

1) To launch the report, launch historical reporting then click on server name **ccmsunhl** from the system tree

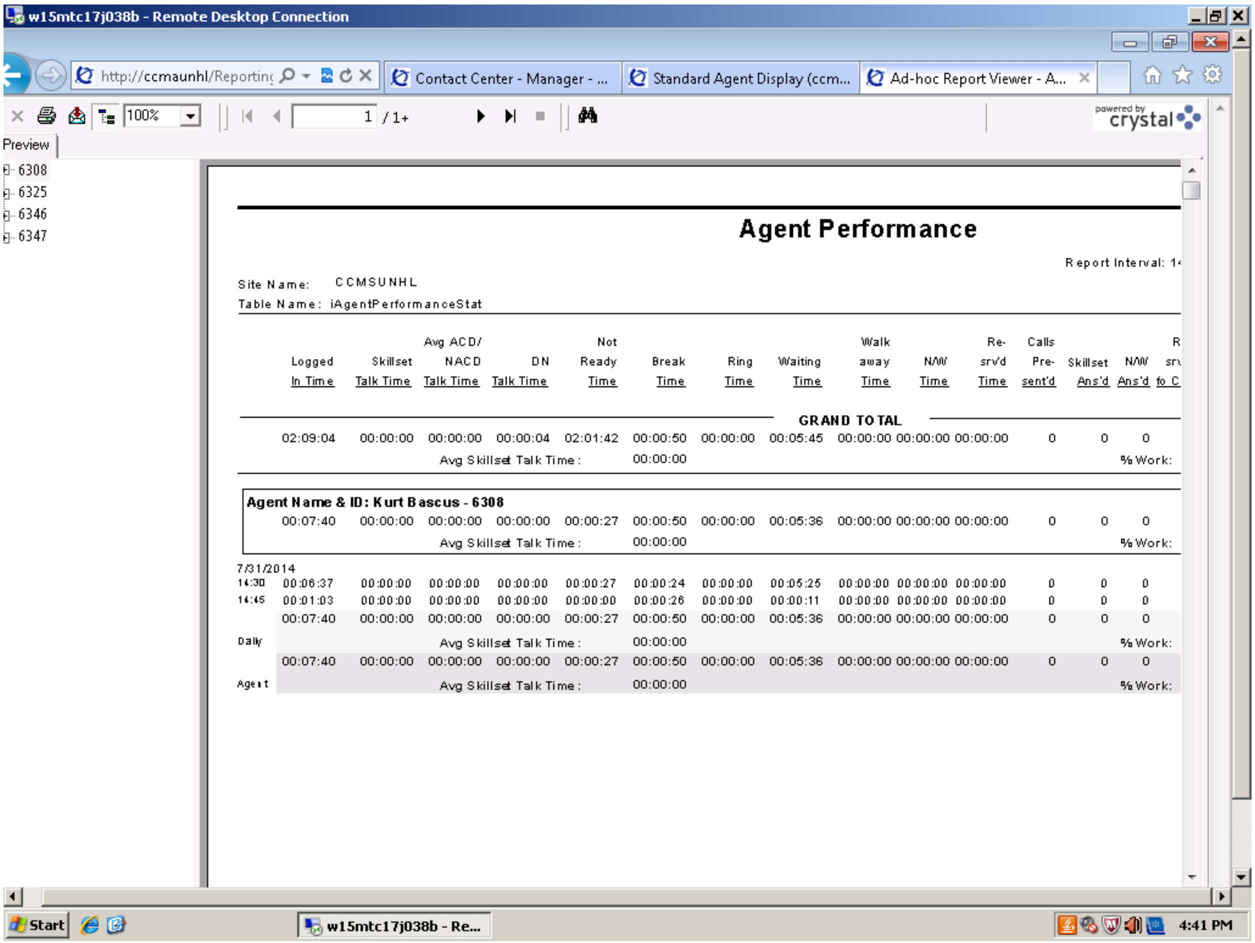
2) Select the report template to run either from public report folder **(CA_Appts Group)** or from private folder **(Private Report Templates)**.

3) Enter the desired **data range** i.e. data on interval, daily, weekly or monthly basis.

4) Click on the **Run Now** tab to launch the report in the internet explorer browser.



The agent performance report looks like the one below.



The column descriptions for the agent performance report are listed below.

Logged In Time: Total time an agent is in the logged in state and starts when an agent logs in and ends when the agent logs off

Skillset Talk Time: Total time agent spent handling incoming queue calls

DN Talk Time: Total time an agent spent on personal extension calls (DN calls)

Not Ready Time: Total time an agent spent in not ready state

Break Time: Total time an agent is in the break state after each call answered

Ring Time: Total time an agent spends in the ringing state before answering a call

Waiting Time: Total time an agent spends waiting for a call, waiting time begins when agent enters the idle state

Calls Presented: Total number of incoming queue calls presented to the agent.

Skillset Answered: Total number of incoming queue calls answered by the agent

Short Calls Answered: Total number of calls answered that have a short duration of talktime

DN Calls: Total number of personal extension calls handled by the agent, includes both incoming and outgoing calls

Conferenced Out: Total number of incoming queue calls and private extension (DN) calls conferenced by the agent

Transferred Out: Total number of incoming queue calls and private extension (DN) calls transferred by the agent

Return to Queue: Total number of calls that the agent returned to the queue for reasons other than time out, for example an agent presses the Not Ready or DN key while the queue call is presented

Return from Time Out: Total calls that the agent returned to the queue due to time out

Average Skillset Talk Time: The average talk time of all calls answered. This statistic is calculated by dividing the Skillset talk time by the number of calls answered

% Work: Percentage of work done by agent.

Launch/Save historical report
Application Performance Report

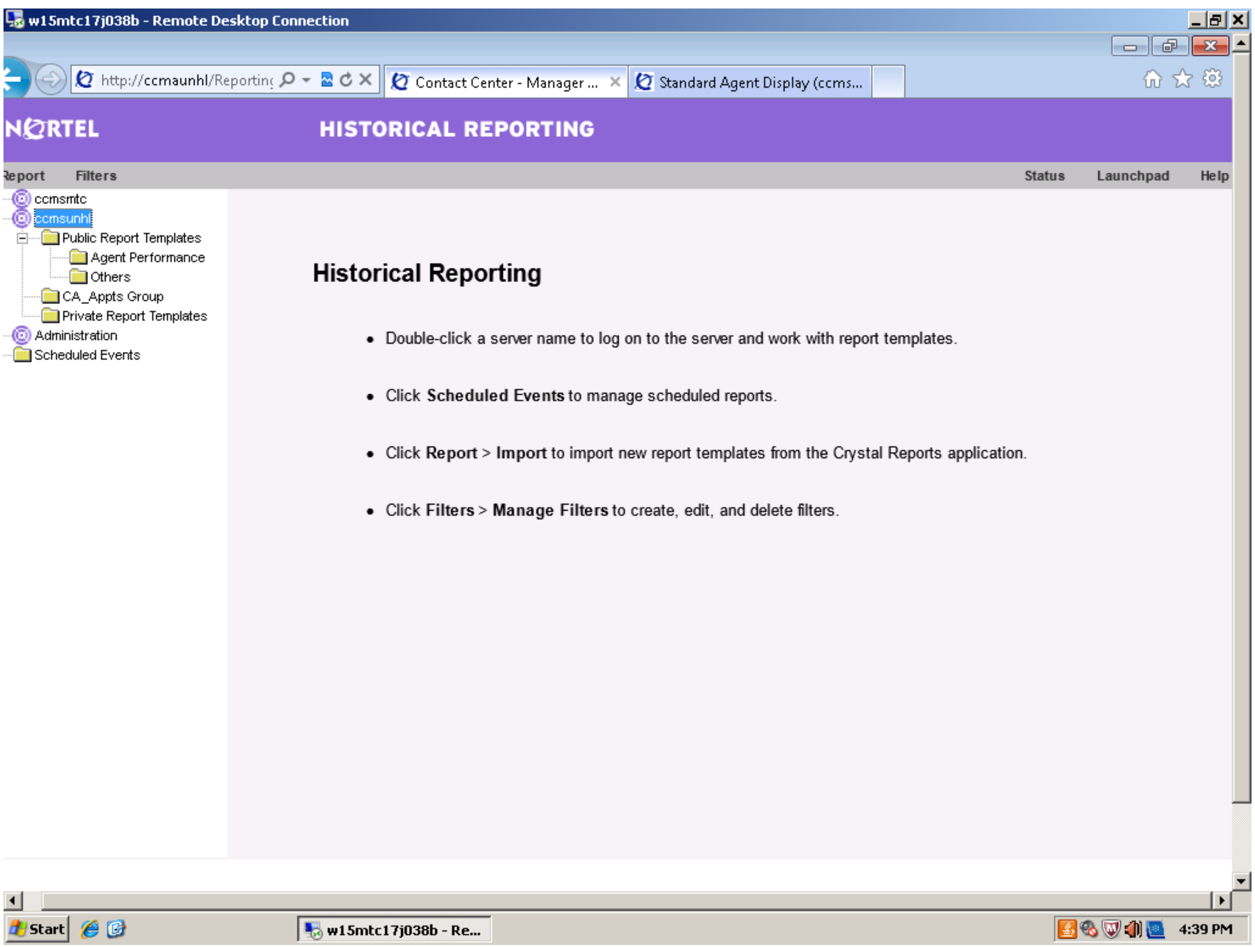
This section describes step by step procedure to launch application performance report and save it in either public **(CA_Appts Group)** or private folder **(Private Report Templates)** in historical reporting. The saved report templates can be used anytime to run historical reports.

Listed below is a step by step procedure to save an application performance report in private folder.

1) From the Contact Center Manager Administration window, launch **Historical Reporting**

2) Select the server name **ccmsunhl** from the list of servers under the system tree.

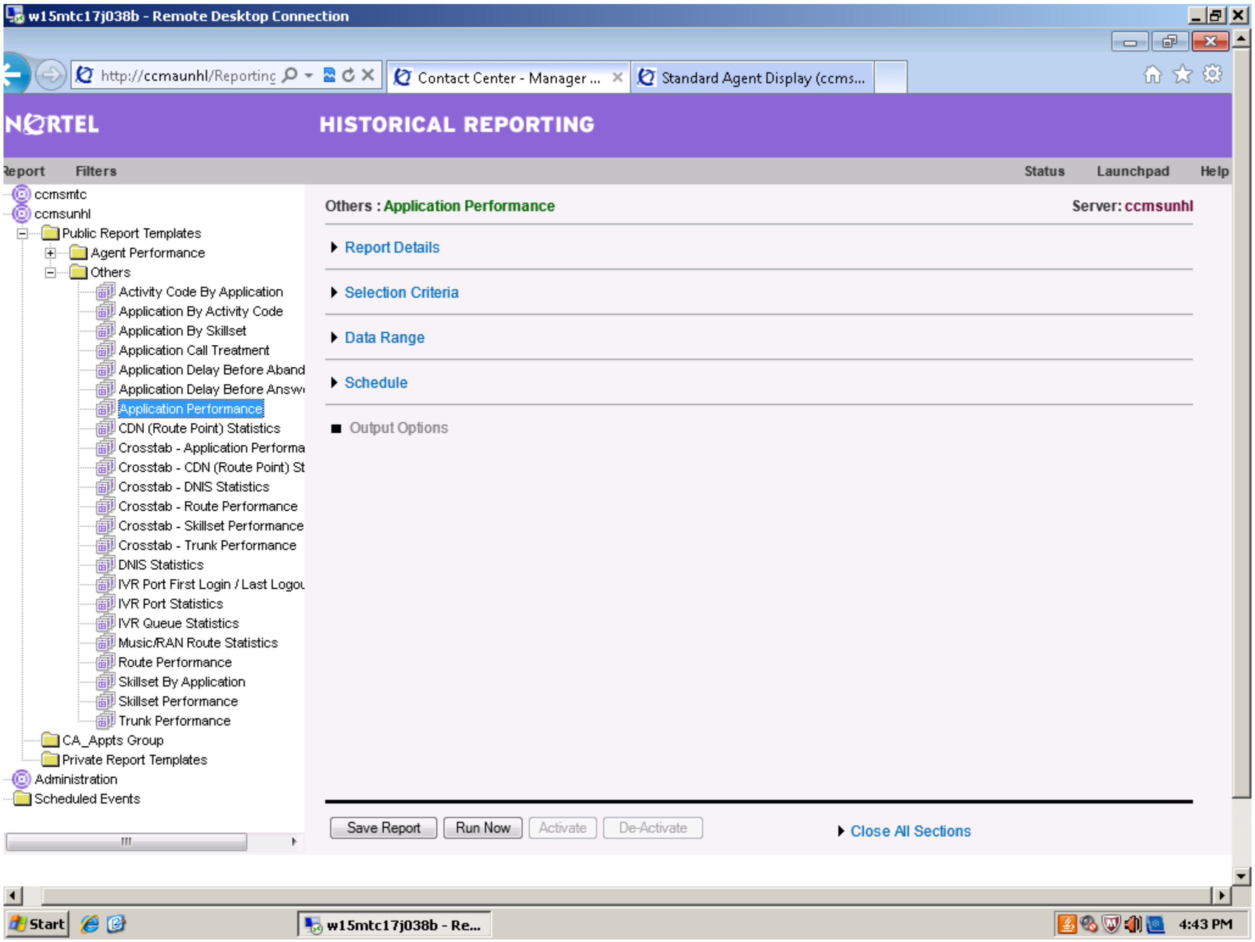
A list of public report folders and private report folders populates on the screen.



3) Under Public Report Templates, select **Others** folder. From the drop down list of all available report templates select **Application Performance**

The Application Performance Report template appears on the screen with sections **Report Details, Selection Criteria, Data Range and Schedule**

Historical Reporting (con't)



4) Click on the **Report Details** tab.

Assign a name for report in the **Save As** tab.

Assign a location to save the report by clicking on the drop down menu on the **Location** tab (either public folder or private). For example select **CA_Appts Group** to save report under the public folder.

5) Click on the **Selection Criteria** tab. Next select the **Available** tab.

Select the application **CA_Appts_Primary** from the list of available applications and click on **Update Selection Criteria.**

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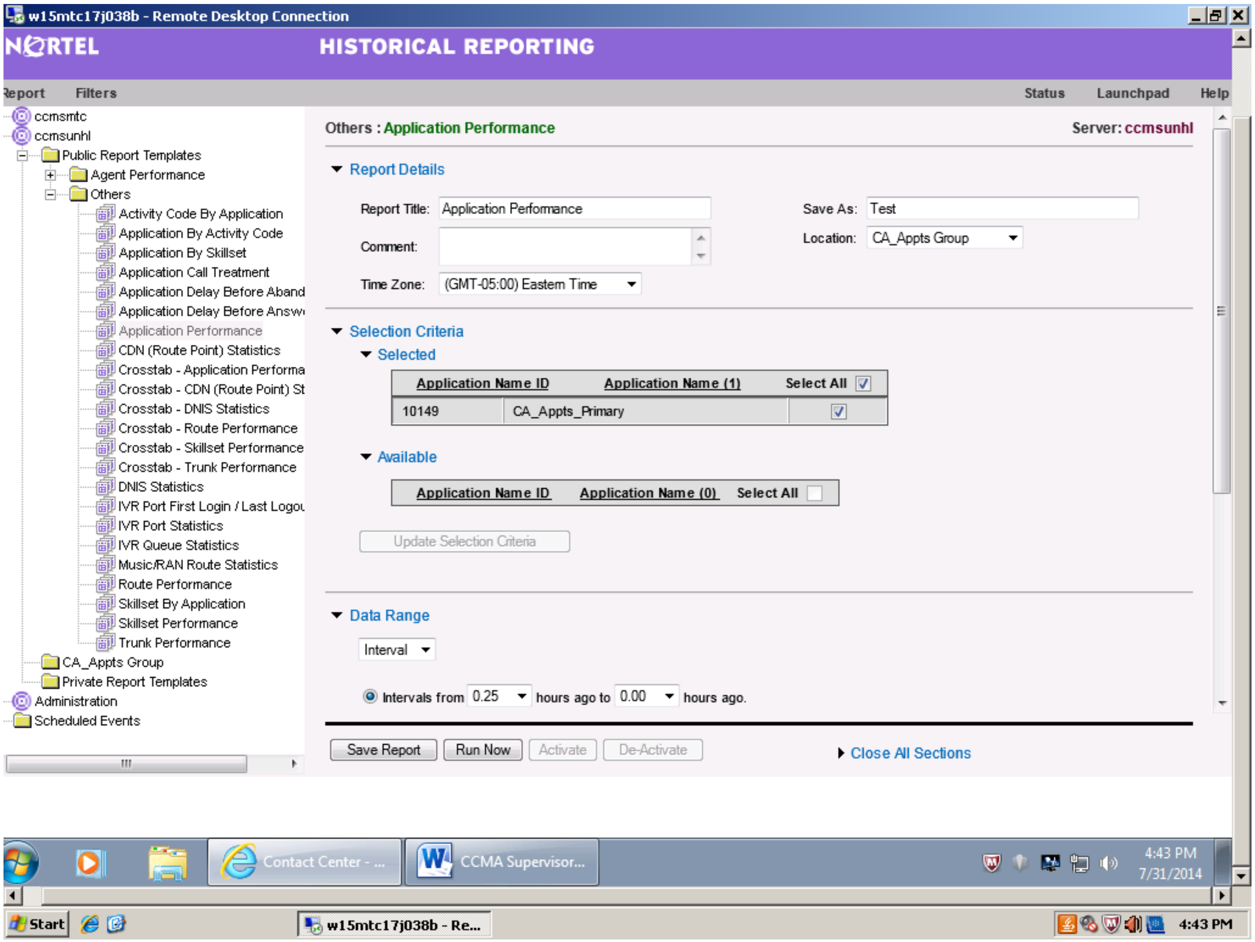
Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014

Historical Reporting (con't)



6) Click on the **Data Range** tab.

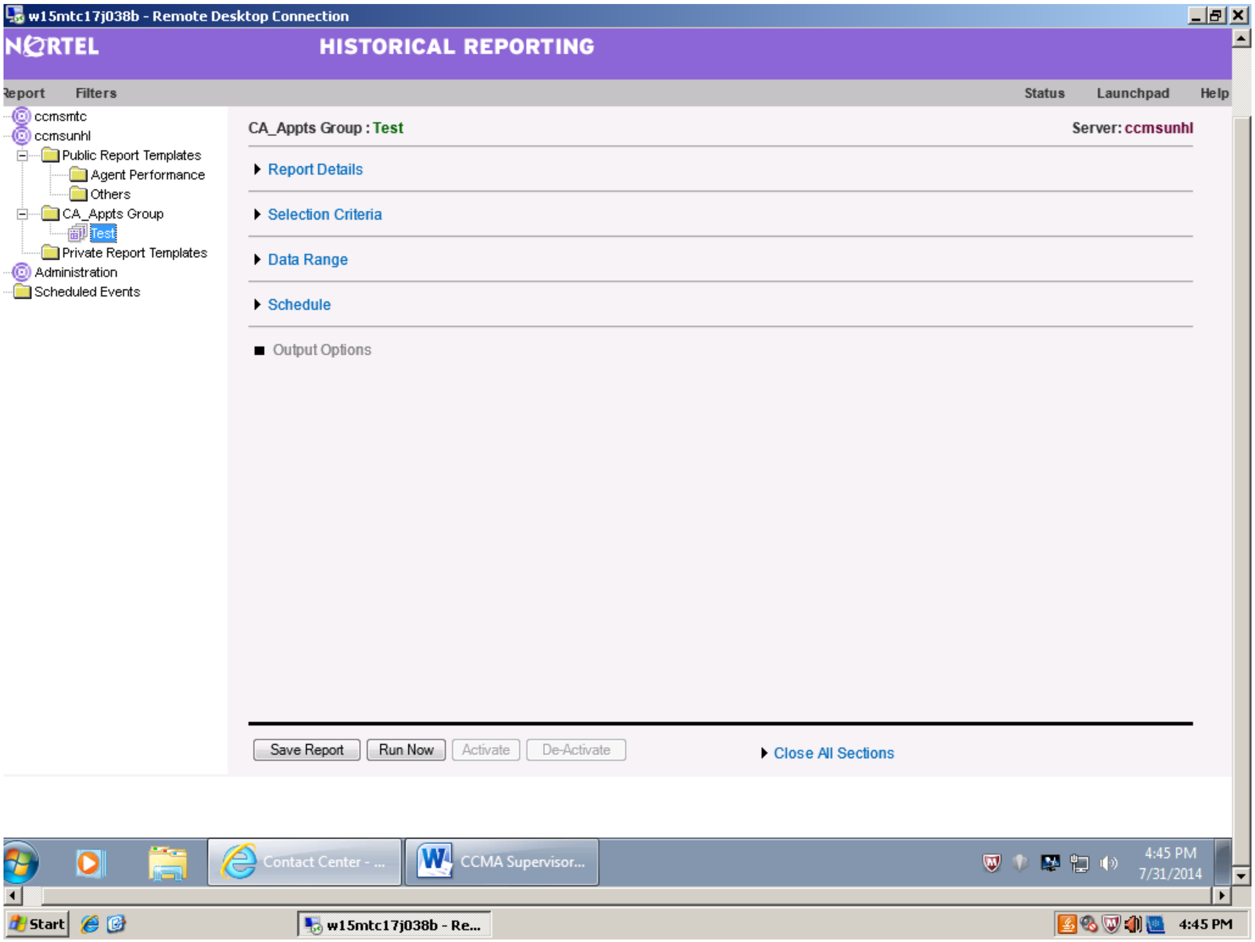
Select the range (time interval) for which to run the report. Reports are available on an interval range (15 min intervals), Daily (on a daily basis), Weekly (on a weekly basis) and Monthly (on a monthly basis).

7) Click on **Save Report.**

The report template now appears under the assigned folder (public or private report folder) and is available to run anytime.

To **launch** the report, select the report template from the CA_Appts Group folder or the Private Reports folder. Enter the desired data range i.e. interval, daily, weekly or monthly basis then click on the **Run Now** tab.

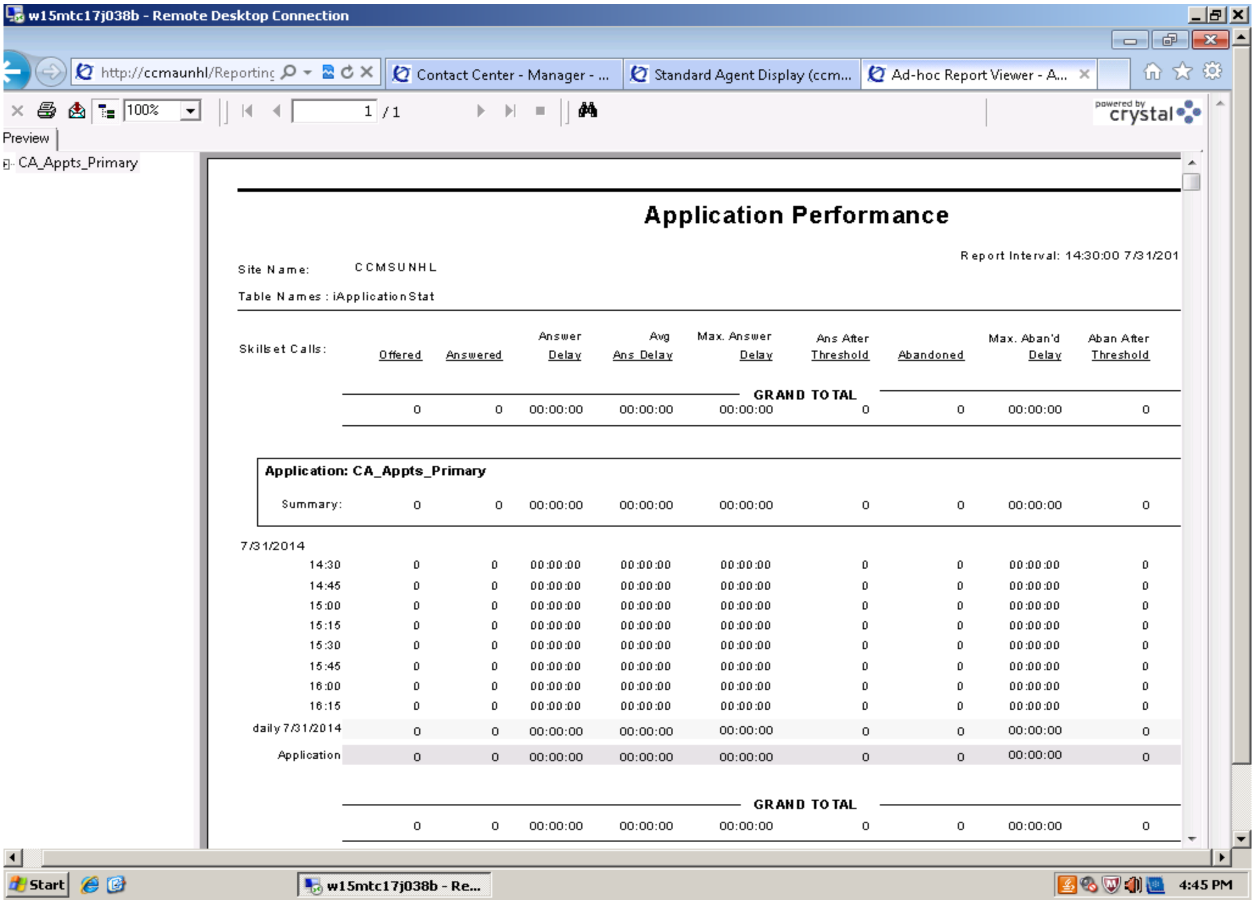
Historical Reporting (con't)



ATTACHMENT B

Desk Guide: Centralized Interview Rescheduling Unit (CIRU) CCMA Supervisor Desk Guide
Date: October 2014

Application Performance



Application Performance

Site Name: CCMSUNHL

Report Interval: 14:30:00 7/31/201

Table Names : iApplicationStat

Skillset Calls:	Offered	Answered	Answer Delay	Avg Ans Delay	Max. Answer Delay	Ans After Threshold	Abandoned	Max. Aban'd Delay	Aban After Threshold
GRAND TOTAL	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
Application: CA_Appts_Primary									
Summary:	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
7/31/2014									
14:30	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
14:45	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
15:00	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
15:15	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
15:30	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
15:45	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
16:00	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
16:15	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
daily 7/31/2014	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
Application	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0
GRAND TOTAL	0	0	00:00:00	00:00:00	00:00:00	0	0	00:00:00	0

The column descriptions for the application performance report are listed below.

Offered: The number of calls offered to the queue

Answered: The number of calls answered for the queue

Answer Delay: The wait time experienced by all calls for the queue

Average Answer Delay: The average answer delay of all calls answered. This is calculated by dividing the answer delay (total wait time) by the number of calls answered

Maximum Answer Delay: Wait time experienced by the call out of all calls answered that waited the longest before the agent answered it

Answer After Threshold: The number of calls answered for the queue after a wait time greater than or equal to the service level threshold i.e. greater than or equal to 20 seconds

Abandoned: The number of calls that enter the queue and are released before answered

Maximum Abandoned Delay: Wait time experienced by the call out of all calls abandoned that waited the longest before the caller abandoned it

Abandoned After Threshold: The number of calls abandoned for the queue after a wait time greater than or equal to the service level threshold i.e. greater or equal to 20 seconds

Answer Delay at Skillset: The total wait time experienced in the skillset queue by calls answered

% Service Level: Service Level percentage formula to calculate number of calls answered and/or abandoned within the service level threshold i.e. within 20 seconds

Attachment C
RAD Dashboard and Decision Detail Updates
September 2014

Overview

Effective September 29, 2014, the Rental Assistance Database (**RAD**) was updated to add a **Supervisor/Clerk Name** drop-down menu, improve retrieval speed of the **Dashboard** window, and add a new edit and sort order for the **Instructions** section of the **Decision Details** window for approved back rent, mortgage arrears and property tax arrears.

RAD Dashboard Retrieval Update

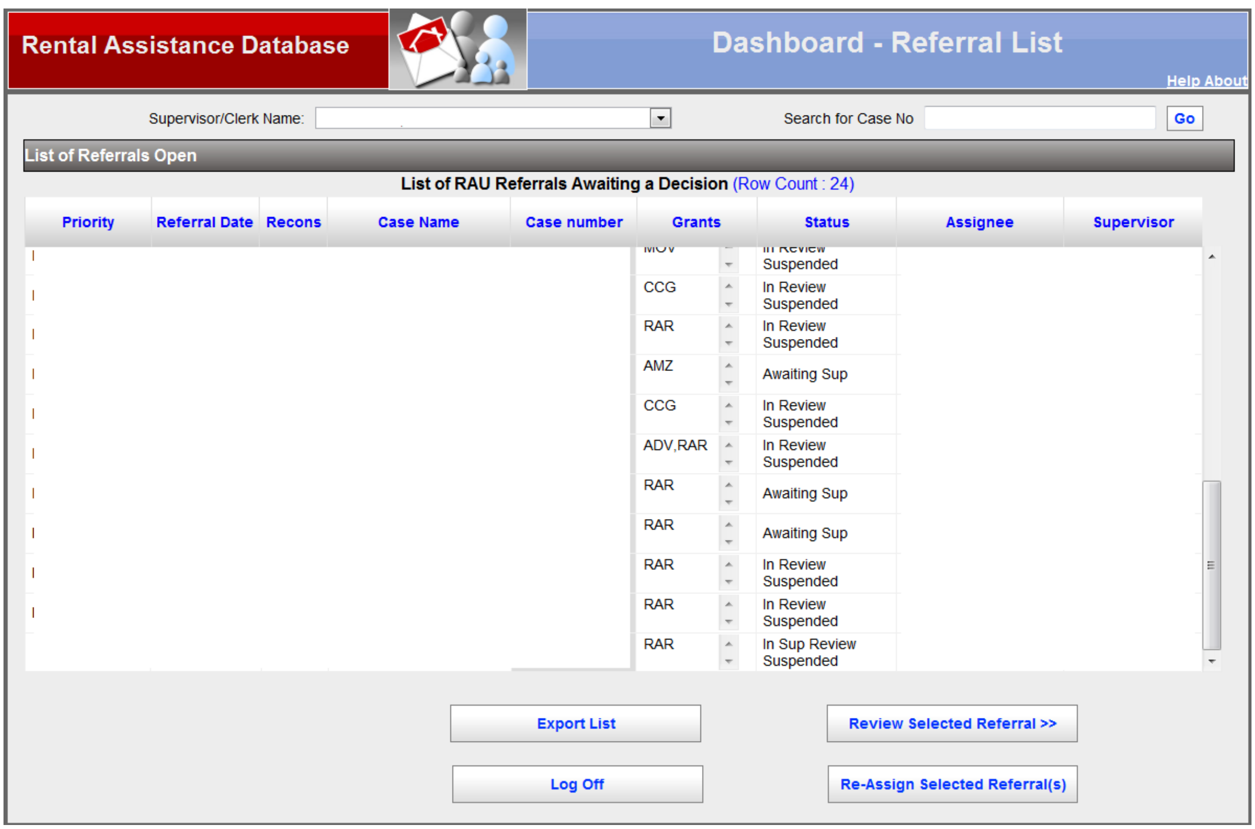
For supervisors, the **Dashboard** was updated to retrieve open referrals designated to the supervisor when the window opens. This includes referrals assigned to RAU consultants designated to the supervisor and referrals started by the supervisor. For clerks, the **Dashboard** was updated to retrieve open referrals started by the clerk.

RAD Window Updates

The **Dashboard** was also updated to add two new fields for supervisors, managers and clerks:

- **Supervisor/Clerk Name** – this new menu allows the Supervisors and Clerks to view open referrals designated to other Supervisors or Clerks. The final option in the menu ("Show All Supervisors/Clerks") allows the supervisor or clerk to view all open referrals
- **Row Count –** this new field allows the Supervisor or Clerk to view how many open referrals are listed in the queue for the supervisor or clerk selected in the **Supervisor/Clerk Name** menu.

Dashboard window



Attachment C
RAD Dashboard and Decision Detail Updates
September 2014

New Edit in Decision Details Window

The **Decision Details** window was updated to add a new edit requiring the selection of a priority in the **Instructions to Referrer** section for approved requests for back rent, mortgage arrears or property tax arrears. If the consultant fails to select a priority, one of the following error messages appears:

- You must select **Priority 1**, **Priority 2** or **Priority 3** in the Instructions to Referrer section for the approved [request type].

New Sort Order for Instructions to Referrer Section in Decision Details Window

The **Decision Details** window was updated to add a new sort order for the **Instructions to Referrer** section for requests for back rent, mortgage arrears or property tax arrears. The **Priority 1**, **Priority 2** and **Priority 3** checkboxes appear at the top of the section.

Decision Details window