



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #14-130-SYS

CA POS RELEASE NOTES VERSION 18.3.1

Date: December 12, 2014	Subtopic(s): POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) will migrate to production on December 15, 2014. Descriptions of the changes can be found in POS Release Notes Version 18.3.1 (Attachment A), and Desk Guide: TALX Report in POS Management Console (Attachment B).</p> <p>These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective December 15, 2014</i></p> <p>Attachments:</p> <p>Attachment A POS Release Notes Version 18.3.1 Attachment B Desk Guide: TALX 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

CA POS Release Notes FINAL

Version 18.3.1 December 15, 2014

These Release Notes contain descriptions of changes in Release 18.3.1 for the Paperless Office System (POS) scheduled for Monday December 15, 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>

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CA POS Release Notes FINAL

Version 18.3.1 December 15, 2014

1. POS MKB Update

When an individual has been determined to be an undocumented immigrant, they cannot be assigned to any type of work activity including Work Experience Program (WEP) assignments. To stop the job activity referral and the employment plan POS will transmit the **Action Code 99UI** (Alien Applicant) to NYCWAY (New York City Work Accountability and You) to identify the line of the undocumented immigrant.

2. Selective case review (SCR) updates

SCR sites will now require all cases with a Homebound individual to a supervisory review during his/her recertification interview.

Currently the Welfare Management System (WMS) only collects homebound information from the suffix only. POS will now identify and send NYCWAY the individual homebound data from the line to reflect the individuals homebound status. NYCWAY will change their code posting for HASA (HIV/AIDS Services Administration), APS (Adult Protective Services), one-shot deal cases, and applicants/participants who request a voluntary WeCare (Wellness, Comprehensive Assessment, Rehabilitation, and Employment) referral. This will assist NYCWAY in sending the correct correspondence to those cases that fit the above criteria.

3. BEV Referral Updates

POS will load records from the new BEV (Bureau of Eligibility Verification) version to access the data to run the correct business rules for BEV referrals.

IREA (Investigation Enforcement and Revenue Administration) and FIA (Family Independence Administration) has requested to exclude additional categories of participants from the BEV referral. The following are the categories of participants who do not require a BEV appointment:

- EAF (Emergency Assistance for Families) (19) case type with no FEDS (Front End Detection System) indicators
- E-SN (Emergency Safety Net) (case type **16** in WMS with SNAP (Supplemental Nutrition Assistance Program) in **NA** (Not Applying) status or case type **88** in POS) case type with no FEDS indicators and having at least one child in **AP** (Applying) or **SI** (Single Issue) status less than 18 years old in the month of the BEV referral.

4. HDU/RAU POS Application Reports

A new daily report was developed to track activities completed by HDU (Homelessness Diversion Unit) staff located at PATH (Prevention Assistance and Temporary Housing) and RAU (Rental Assistance Unit) staff located at housing courts. This report will be delivered by email to the HDU and RAU management.

5. POS FEPS Question Update

POS will no longer reset the question for FEPS (Family Eviction Prevention Settlement) in the Interview Section during the **CA Recertification Interview**. The resetting of the FEPS question can lead to the loss of the FEPS rent supplement from the case, including the processing of a incorrect budget and the loss of FEPS benefits for these active participants. POS has been updated to maintain the information recorded in the FEPS question so the participant will continue to receive their benefits when the JOS/Worker starts a new case action on these FEPS cases.

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6. POS Update to Telephone number

In order to stay in sync with new technology, applicants/participants are allowed to use the internet to apply and FIA will be allowed to send text messaging. To accommodate this type of correspondence, the phone field located on the **Address** screen has been updated. POS is now able to use this new telephone format to facilitate the mapping of the data from ACCESSNYC.

The screenshot shows a form with three rows of phone number input fields. Each row has a label on the left, a text input field for the phone number, an 'Ext' label with a text input field, and a dropdown menu for the phone type. The first row is labeled 'Primary Phone #' and has a dropdown menu set to 'Home'. The second row is labeled 'Alternate Phone #' and has a dropdown menu set to 'Cell'. The third row is labeled 'Number for text Messaging' and does not have a dropdown menu.

7. CILOCA Updates

POS has been updated to restrict the use of the WMS Codes **M55** (Ineligible for Child Care in Lieu of Temporary Assistance) and **G46** (Ineligible for Child Care in Lieu of Temporary Assistance (Excess) Income) for the Child Care Review team. POS restricts the CILOCA (Child Care in Lieu of Cash Assistance) WMS **F98** (Client Request Childcare in Lieu of TA - PA Only) code for the Childcare Review Team at 109 East 16th Street. These users are enrolled in the citywide center **CA4** (Queens/FSCC Regional Office).

When a denial has been issued from the use of these codes POS suppresses the LDSS 4013 (Data Entry) window which allows the Child care workers to send out the CNS notice based on these codes. When other JOS workers attempt to use these codes and are not part of the Child care review team the following message will be displayed:

- Text for Error Message Inappropriate Access for Code **F98/G46/M55**
- “Error – WMS Codes **F98**, **G46** and **M55** can only be used by the Childcare Review Team.”

The following activities will be affected:

CA Application Interview
EC – CA Application Interview
CA Recertification Interview
EC – CA Recertification Interview
CA Change Case Data
EC – CA Change Case Data
IN/ESNAP Issuance EC - IN/ESNAP Issuance
Close Emergency Assistance Case
EC-Error Correct Close Emergency Case

MIS has created new CILOCA Processing queues in POS for CILOCA job center liaisons to assign cases to the child care review team. There will be one CILOCA Processing queue for each job center to assign these CILOCA cases to the child care review team for processing the CILOCA case.

The ID for the new queues will begin with the letters CHI and will have each center number. For example, Waverly CILOCA cases will have an ID of **CHI013**. These CHI queues are work-only queues that are not associated with specific workers or titles.

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8. POS Updates for Living in the Community (LINC) grants

The new rent subsidy program called LINC has been implemented, this program provides rent subsidies to long term shelter residents to help them obtain and live in a apartment. Staff from Center **39** (Union Square) and ADVENT staff from Center **23**, (East End) **46** (Crotona) and **67** (Clinton Hill) are allowed to process the LINC grants based on their new POS titles, **84** (LINC Worker), **85**,(LINC Supervisor) **86**, (LINC AJOSII and **87** (LINC Field Coordinator).

FIA has requested that LINC cases are prevented from closing. POS will display the following message when the worker or supervisor attempts to close this case:

- This LINC case cannot be closed. Please contact FIA Operations to relax the edit to close this case.

9. Management Console TALX Report

A new Management Console report allows the FIA to track TALX match results for cases processed in the **CA Application Interview** and the **CA Recertification Interview**, Please see **Attachment B**, (TALX Report in Management Console) for detailed instructions on accessing the report.

ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

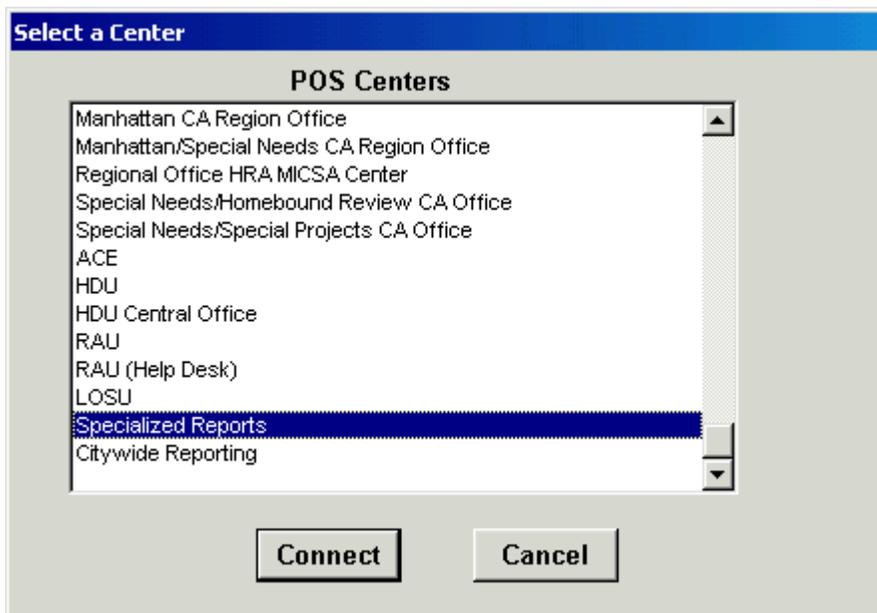
Overview

A new Management Console report allows the Family Independence Administration (FIA) to track TALX / Work Service Number match results for Cash Assistance (CA) and Non-Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) cases processed in the **CA Application Interview**, **CA Recertification Interview**, **SNAP Application Interview** and **SNAP Recertification Interview** activities.

Details

The following edits were implemented for this report:

1. Access is limited to authorized users.
2. Retrieval of data is available for all Job Centers and SNAP Centers via a connection to centralized POS tables.
3. The user is able to select data for the entire city or for a specific center.
4. The user is able to save the report output to text or Excel files.



ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

Filters

The following filters are available for this report:

- **Timeframe Selection:** This filter allows the user to select the period for the report. The options available are: **Yesterday**, **Past 7 Days**, **Past 4 Weeks**, **A Month** and **Specify Range**.
- **Workers:** This filter allows the user to retrieve the report for entire city, specific caseloads/worker or for sections. The options available are: **City-Wide**, **Unit/Worker** and **CMU**.
- **Case Status:** This filter allows the user to select one or more case status. For CA cases, the status used is the CA case status. For SNAP cases, the status used is the SNAP case status. The options are: **AC** (Active), **AP** (Applying), **CL** (Closed) and **RJ** (Rejected).
- **Display:** This filter allows the user to toggle between the **Data** view and the **Calculation** view. The options are: **Data** and **Calculation**.
- **Case Type:** This filter allows the user to select one or more case type. The options are: FA (Family Assistance), NCA SNAP, SNFP (Safety Net Federally Participating Non Cash Assistance) and SNNC Safety Net Non Cash Assistance).
- **Case Action Initiated:** This filter allows the user to select cases where an action was initiated due to the TALX match. The options are: **RJ**, **CL** or **NA** (Not Applying).
- **POS Activity:** This filter allows the user to toggle between the POS activities where the results were received. The options are: Application Interview and Recertification Interview.

When changing selections in the filters, the user must re-run the report by clicking on the **Retrieve** icon.

Timeframe Selection

Today

Yesterday

Past 7 Days

Past 4 Weeks

A Month

Specify Range

to

Workers

City-Wide

Unit/Worker

CMU

Case Status	Display	Case Type	Case Action Initiated	POS Activity
<input type="checkbox"/> AC	<input checked="" type="radio"/> Data	<input type="checkbox"/> FA	<input type="checkbox"/> RJ	<input type="radio"/> Recert Interview
<input type="checkbox"/> AP	<input type="radio"/> Calculation	<input type="checkbox"/> NCA FS	<input type="checkbox"/> CL	<input type="radio"/> Application Interview
<input type="checkbox"/> CL		<input type="checkbox"/> SNCA	<input type="checkbox"/> NA	
<input type="checkbox"/> RJ		<input type="checkbox"/> SNFP		
		<input type="checkbox"/> SNNC		

ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

Report Screenshot:

Data

Row	Pos Activity	Case Number	Case Name	Case Status	Household Size Ca	Household Size Fs	SSN	Name	F
Total Rows:- 0									

Columns:

- Case Number
- Case Name
- Case Status
- Household Size-Number of applying household member for CA
- Household Size-Number of applying household member for FS
- SSN of Individual
- Name-Last name, First name of individual related to case head
- Relationship to Individual case head
- Hits
- No Hits
- Medical Insurance Provider Name
- Enrolled
- RFI
- FIA-3A
- Recoupment
- Case Action Initiated-Resolution (RJ/CL/or NA)
- Last Ca Grant
- Last FS Grant
- Amount of CA Budget Change
- Amount of FS Budget Change
- Comments

ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

Calculation

Recertification and Application	Count	Percentage	Color Code
Recertification			
Total # of Cases			
Hits	0	N/A	95% - 100%
No Hits	0	N/A	90% - 94%
RFI Hit	0	N/A	< 90%
FIA3A Completed			Not Applicable
Case Closed as a result of Talk Data			
Case Rejected as a result of Talk Data			
No Action taken as a result of Talk Data			
Application			
Total # of Cases			
Hits	0	N/A	95% - 100%
No Hits	0	N/A	90% - 94%
RFI Hit	0	N/A	< 90%
FIA3A Completed			Not Applicable
Case Closed as a result of Talk Data			
Case Rejected as a result of Talk Data			
No Action taken as a result of Talk Data			

Calculation View

- Total # of Cases
- Hit count = Total # of Cases with Hit equal to Yes within the specified date range
 - Hit percentage = Hit Count / (Hit Count + No Hit Count)
- No Hits count = Total # of Individual with Hit equal to 'No' within the specified date range
 - No Hits percentage= No Hit Count / (Hit Count + No Hit Count)
- RFI count= Total # of Individual with (RFI = Yes) within the specified date range
 - RFI percentage = RFI Count / (Hit Count)
- FIA3A Completed count = Total # of Cases with at least one individual has (FIA3A completed = 'Yes') within the specified date range
 - FIA3A percentage = FIA 3A Completed Count / (Count of cases where at least one individual has 'Hit' is 'Yes')
- Case Closed count= Total # of cases where (TALX resolution = '002') within the specified date range
- Case Closed percentage = Case Closed Count / (Count of cases where at least one individual has 'Hit' is 'Yes')
- Case Rejected count= Total # of cases where (TALX resolution = '003') within the specified date.
 - Case Rejected percentage = Case Rejected Count (Count of cases where at least one individual has 'Hit' is 'Yes')
- No Action Taken = Total # of cases where at least one individual has (TALX resolution = '001' or '005' or '006')
 - No Action Taken percentage = Count total # of no action taken divided by count of (Hits = 'Yes')

ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

Saving report output to an Excel file

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

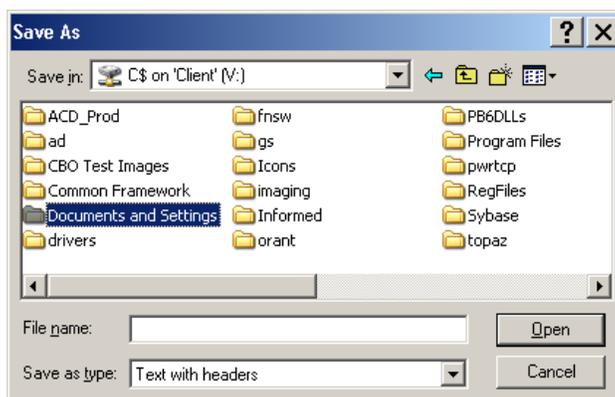
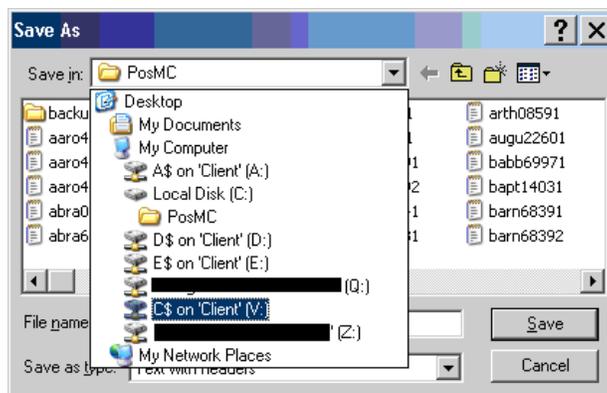
1. Set the filters and retrieve the report data by clicking on the **Retrieve** icon.



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.



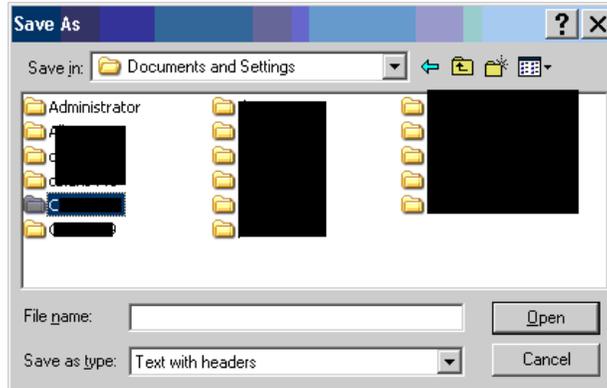
ATTACHMENT B

Desk Guide: TALX Report in POS Management Console

Date: November 2014

Saving report output to an Excel file (continued)

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.

