FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #14-15-SYS

PAM RELEASE NOTES VERSION 18.1

Date: February 11, 2014	Subtopic(s): POS
🖳 This procedure can now be accessed on the FIAweb.	This policy bulletin is to inform Cash Assistance (CA), Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff, Income Clearance Program (ICP) staff, Office of Central Processing (OCP) staff, and Landlord Ombudsman Service Unit (LOSU) staff that the latest version of the Paperless Alternate Module (PAM) will migrate to production on February 18, 2014. Descriptions of the changes can be found in PAM Release Notes Version 18.1 (**Attachment A**). These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx *Effective February 18, 2014* **Related Item:** PB #13-90-SYS **Attachment:** **Attachment A** PAM Release Notes Version 18.1
🖳 Please use Print on Demand to obtain copies of forms.	

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*

Distribution: X

Attachment A

PAM Release Notes
Version 18.1 February, 24, 2014

These Release Notes contain descriptions of changes in the PAM Release scheduled for February 24, 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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1. Change of PAM Pick-Up Codes (PUC) Selection from Grant to Activity Level

WMS does not allow combining different PUC Codes within one PAM Activity Currently, Workers can selected different PUC Codes for different grants within the same PAM Activity. To correct the situation, PAM has changed PUC Codes selection from the individual grant level to Activity Level. This change results in:

- Addition of Pick-Up Codes (PUC) Section in the Activity Details

PUC Codes	Codes Description
PUC 1	Special Roll Check
PUC 2	Pended Until 45th Day of SNFP/SNCA/SNNC Eligibility
PUC 4	Same Day Immediate Needs
PUC 5	Emergency Public Assistance Check (E-Check)
PUC 7	Emergency Cash Payment Check (E-Cash)
PUC 9	EBT Emergency PA Single Issue Special Grant

- Display of Cash Assistance (CA) Issuance Codes (drop down list) based on the PUC Code selected for all the grants in the Activity
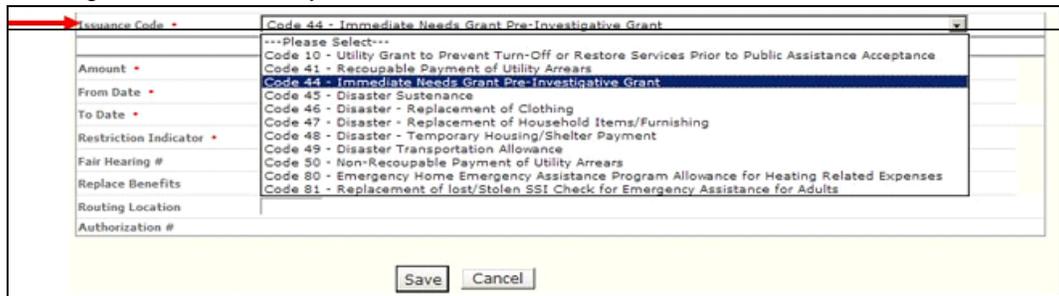
- When a worker clicks on [Add New Grant] button and **no** PUC code is selected, PAM will display the following error message: 'Please select PUC Code.'

2. D &C Operators: New Functionality with Auto E-Check or Manual E-Check

Currently, when creating Activity Type (e.g. CA Grant), Workers must select Auto E-Check or Manual E-Check by checking off the box. Based on their selection, the **CA Grant Activity** is forwarded to the D&C Operator in **read only** mode.

The PAM process of E-Checks issuance has been changed:

- The Auto E-Check and Manual E-Check boxes have been **removed** from the **Worker** and **Supervisor Inbox** screens
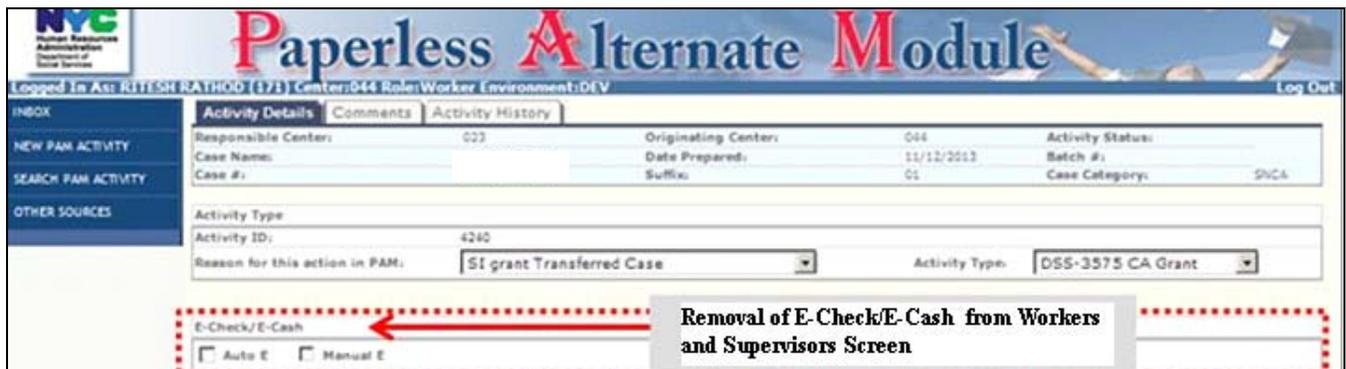
- Activity with PUC Codes **5** or **7** will be forwarded to the D&C Operator.

NOTE: If PUC Codes selected are **not 5** (Emergency Public Assistance Check [E-Check])or **7** (Emergency Cash Payment [E-Cash]), the PAM will forward the activity to the **Data Entry Supervisor's Inbox** in "Pending Assignment" status for data entry into the WMS.

- The D&C Operator must select either Auto E-Check or Manual E-Check.

D&C Operators Screen

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Change from Auto E-Check to Manual E-Check

- If the D&C Operator changes **Auto E-Check** to **Manual E-Check,** the PAM will display the **EPA Check # field** and will **require** the D&C Operator to enter the EPA Check # for each CA Grant in the Activity that is <u>successfully</u> entered in WMS.

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Change from Manual E-Check to Auto E-Check

- If the D&C Operator changes Manual E-Check to Auto E-Check, and selects **No** to the 'Check Issued'Question, PAM will **not** display the EPA Check # field.

The PAM Issuance of E Check (s) Workflow:

Worker's Actions:

1. **Wor**ker creates a new PAM **activity**
2. Worker submits the Activity for approval to her/his Supervisor
3. Supervisor before approving the activity, must determine what activity and PUC Code(s) have been selected:
   - If the grant is **CA** and the selected PUC Codes are **5 or 7,**
     - Forward the activity to the **D&C Operator** Inbox

   - If the grant is **not** CA grant and the selected PUC codes are **not** 5 or 7,
     - Forward the activity to the **Data Entry Supervisor** Inbox

D&C Operator's Actions:
Upon receipt of the activity and in order to start the E-check issuance, the D&C Operator must:

4. Select the PAM activity by clicking on the case # hyperlink. The screen will display the selected PAM Activity case details
5. Select either Manual E-Check or Auto E-Check:

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The **Manual E check** is selected:
- Enter all relevant information from PAM to **Manual Typewriter**
- If the issuance is successful,
  - Check off **YES** to the '**Check Issued**?' question and enter the **EPA Check #**
- If issuance is **not** successful,
  - Check off **NO** to the '**Check Issued?** question

6. Confirm if there is another check in this PAM activity
   - If **Yes**, start form item # 4
   - If Not**,** click on the **Submit** button
7. If validation failed, return the activity to the D&C Operator.

The **Auto E-Check** is selected:
- Enter all relevant information from PAM to the **Auto E- Check System**
- If issuance is successful,
  - Check **YES** to the '**Check Issued?'** question
- If issuance is **not** successful,
  - Check **NO** to the **'Check Issued?'** question

8. Confirm if there is another check in this PAM activity
   - If **Yes**, start from item #4
   - If Not, click on the **Submit** button

9. If validation failed for Auto E-Check, display the error message

3. PAM Detail and Summary Reports

The **PAM Detail and Summary** reports will be provided based on user selected criteria and will be accessible based on the User Title.

PAM Detail Report Sample:

Responsible Center	Case #	Suff#	Case Name	ActivityType	Grant #	E-Check	Activity Status	Act. ID	Created by	Created On	Approved by (1st)	Approved On (1st)
71	(			TAD	0		Complete	159	SYSTEM SYSTEM	10/23/2013 13:21	SYSTEM SYSTEM	10/23/2013 13:21
38	(			CA	3	MANUAL E	Complete	97	SYSTEM SYSTEM	10/22/2013 15:14	SYSTEM SYSTEM	10/22/2013 15:14
44	(			CA	1	AUTO E	Complete	124	SYSTEM SYSTEM	10/23/2013 9:08	SYSTEM SYSTEM	10/23/2013 9:08
44				TAD	0		Pending Approval	158	WALLACE BERTHA	10/23/2013 13:24	WALLACE BERTHA	10/23/2013 13:24

PAM Summary Report Sample:

A	B	C	D	E
Center	PAM Reason	Activity Type	Activity Status	Count of Activities
44	Not Aviable in POS	LDSS 3575 CA Grant	Complete	50

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4. Electronic Data Entry Forms

Five Electronic Data Entry Forms (e-Forms) have been added to the PAM Activity Details. PAM Users will now be able to fill out these forms in PAM instead of scanning and Indexing. They are:

1. **LDSS- 3722** Fair Hearing Update
2. **LDSS- 4962** Infraction Deletion
3. **LDSS- 3774** EPFT Benefits to be Pulled
4. **LDSS- 3652** Transaction Cancellation
5. **LDSS- 3573** PA Recoupment

Each of these of these forms displays ParticipantHeader (for view and read only); the rest of the fields, such as Reason for this action in PAM, fields with the drop down list, Save or Cancel buttons , etc. require User entry, others are system generated (e.g. Authorization Number).

LDSS -3722 Fair Hearing Update Overview

- **Client information:** View and read only
- **Activity ID:** System generated
- **Reason for this Action in PAM**: Fair Hearing Update
- **Original Authorization Number:** Entered by User
- **AID Status:** Selected by User from one of the statuses:

   1   Client has settled in conference

   2   Aid Continuing

   3   Non-aid continuing

   4   Conditional aid-continuing

   5   Client lost fair hearing, agency upheld

   6   Client won fir hearing, client upheld

   7   Erroneous closing entered, administrative error

   8   Case has been suspended by an immediate closing

   9   Settled in conference, Agency Favor. (This applies only to employment-related closings.)

- o **Close/Change or FS Recoupment**: Selected by User

LDSS-4962 Infraction Deletion Overview

Step 1

Step 2

Step 3

Step 4

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Client information: View and read only
- **Reason for this Action in PAM**: Infraction Deletion

- **Infraction Deletion:** Selected by User (PA or FS)

- **Item Number:** Auto populates based on the infraction deletion selection

    ➢ If **PA** is selected then **399** is displayed and

    ➢ If **FS** is selected then **400** is displayed

- **Line Number:** Entered by User

- **Authorization Number:** Entered by User

- **Close/Change or FS Recoupment:** Selected by User

- **Save:** Selected by User

- **Cancel:** Selected by User

LDSS 3774 - EPFT Benefits to be Pulled Overview

- **Client information:** View and read only
- **Reason for this Action in PAM**: EBT Pull
- **Activity ID:** System generated
- **Action:** Selected by User from the drop down list of C, S, O:

    C = PA Pull
    S = PA - FS Pull
    O = NPA - FS Pull
- **Amount:** Entered by User
- **Benefit Number:** Entered by User
- **LDSS 3652 Transaction Cancellation Overview**

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- **Client information:** View and read only
- **Activity ID:** System generated
- **Reason for this Action in PAM**: Trans Cancelation
- **Original Authorization Number:** Entered by User
- **TX Type:** Selected by User from the drop down list:

107	Eligibility
108	Eligibility Error Correction
109	Undercare Maint
110	Undercare Error Correction
118	Trans Cancel
119	FH Update
120	Expedited Closing
201	PA Single Issuance
202	FS Single Issuance
203	PA Recoup
204	FS Recoup

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LDSS 3573 PA Recoupment Overview

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- **Client information:** View and read only
- **Activity ID:** System generated
- **Reason for this Action in PAM**: Recoupment
- **Authorization Number:** System generated
- **Action Code:** User selects from the drop down menu

0	Reversal of Voluntary Repayment Transaction
1	New Claim
2	Change in Data
3	Suspend Claim
4	Delete Claim
5	Fair Hearing-Aid to Continue
6	Lift Fair Hearing-Aid to Continue
7	Transfer Recoupment to New Case
8	Reinitialize Claim
9	Voluntary Repayment

- **Recoupment ID Number**: Entered by User
- **Hardship Authorization Comments:** Entered by User
- **Recoupment %:** Selected by User from the drop down list of **10%** or **15%**
- **Offense Date:** Entered by User
- **Offense Type:** Entered by User

A	Excess Resources
C	Concealment
D	Duplicate Check Fraud
E	Agency Error
F	Fraud (Conviction by a court or recipient admission of fraudulent receipt of benefits. Can be entered only by CFI –The Bureau of Client Fraud Investigation
Q	Utility Direct Vendor (System Generated)
R	Rent Advance
S	Rent Payments in Access of Maximum
U	Utility Advance
X	Contested Reduction

- **Offense Sub-Type:** Entered by User (Please refer to **Workers Guide to Codes**)
- **Offense Amount:** Entered by User
- **Data Overpayment Began:** Entered by User
- **Data Overpayment Ended:** Entered by User
- **Is M-3E signed?:** Selected by User (Yes and No)
- **M3ca Date (manual):** Entered by User
- **Description of Offense:** Entered by User
- **Replace Check Number:** Entered by User
- **Original Check Number:** Entered by User
- **Replace Check Amount:** Entered by User
- **BYPASS Restriction:** Selected by User (Yes and No

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- ▪ **Restriction/Direct Two- Party Indicator:** Selected by User (Direct Restriction and Two-Party Restriction)
- ▪ **Landlords' Name:** Entered by User
- ▪ **Landlord's Address:** Entered by User
- ▪ **Two-Party Designation:** Entered by User

5. PAM Updates December 2013 to Jan 2014

Data Entry for Fair Hearing Staff (FSH)

Centralized SNAP Fair Hearing (FSH) staff is now able to submit PAM Activities to staff at **S15** for data entry into WMS

The LDSS-3573 PAM Activity in OCP-SNAP-CR

The **LDSS-3573 Recoupment** was added as one of the Activity Types for the **OCP-SNAP-CR Unit**

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PAM has given the selected Training Staff the ability to refresh training environment by clicking on the **Refresh** button to refresh the training environment through UI

Originating Center

The Originating Center Column has been added and is currently displayed in the **Search PAM Activity** result

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Validation rule correction: Issuance Codes 50, 59, 82, and 90

The Validation Rule for the PAM issuance codes **50 (Non-Recoupable Payment of Utility Arrears), 59 (NYCHA Rent Arrears) , 82 (Direct HEAP Payment to LIPA)** , and 90 **(Direct HEAP Payment To Con Ed)** has been corrected and reads as follows:
If the Issuance Codes are 50, 59, 82, or 90 then select PUC 1 - Special Roll or PUC 5-E Check

However, if a Worker selects a different Pick-Up code (e.g. PUC **2** [Pended Until 45th Day of SNFP/SNCA/SNNC Eligibility] or PUC **4** [Same Day Immediate Needs]) the system will display the error message in red: '**Pick- up Code must be PUC 1- (**Special Roll Check)'

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54 Child Support Bonus Payment-Manual Issuance code l

If a worker needs to use **54** Child, s/he must select:

- "**Other Allowances**" in the Issuance Category section | Issuance Category * | Other Allowances |
- Code **54** in the Issuance Category field.

Responsible center:	055	Originating center:	025		Activity Status:		Draft		
Case Name:	SPEARS,BRITNEY	Date Prepared:	1/30/2014	Batch #:					
Case #:	00030008214G	Suffix:	01	Case Category:		EAF			

Activity Type

Activity ID:	8272		
Reason for this action in PAM:	SI grant Sep Det case	Activity Type:	DSS-3575 CA Grant

E-Check/E-Cash

☑ Auto E   ☐ Manual E

List of Grants

Grant #	Code	Description	From Date	To Date	Amount	Grant Status	Edit	Delete
1	59	Code 59 - Direct payment to NYC Housing Authority to Cover Rent Arrears	1/1/2014	1/31/2014	$50.00	DRAFT	Edit	Delete

Grant Count: 1

Total Amount: $50.00

CA Grant Details

Pick-Up Code *	PUC 5 - Emergency Public Assistance Check (E-Check)
Issuance Category *	Other Allowances
Issuance Code *	Code 54 - Child Support Bonus Payment - Manual Issuance

---Please Select---
Code 63 - Emergency Grant to Cover Mismanagement of Cash
Code 99 - Other Agency Approved Issuance
Code L7 - Lovely H Lawsuit
Code L9 - Hercules Lawsuit
Code W3 - MKB Retroactive Payments
Code W4 - MKB Retroactive SNAP Issued as cash
Code W5 - Supplement FEPS Rent Arrears (Recoupable)
Code W6 - Supplement FEPS Rent Arrears (non recoupable)
Code W7 - Housing Development Cooperative Unit
Code 54 - Child Support Bonus Payment - Manual Issuance
Code 05 - Pregnancy Allowance
Code 15 - Payment of Installment Debt (EAA)
Code 16 - Transportation outside New York City

Amount *	
From Date *	
To Date *	
Restriction Indicator *	
Fair Hearing #	
Replace Benefits	
Routing Location	
Authorization #	

Save   Cancel

Forwarding Activities to Supervisors

The following rule applies to staff of various units in regards to forwarding activities for approval:

- **ICP workers** have to forward activities to **ICP Supervisors** only
- **OCP workers** have to forward activities to **OCP Supervisors** only
- **ICP-SNAP-CR workers** have to forward activities to **OCP Supervisors** only
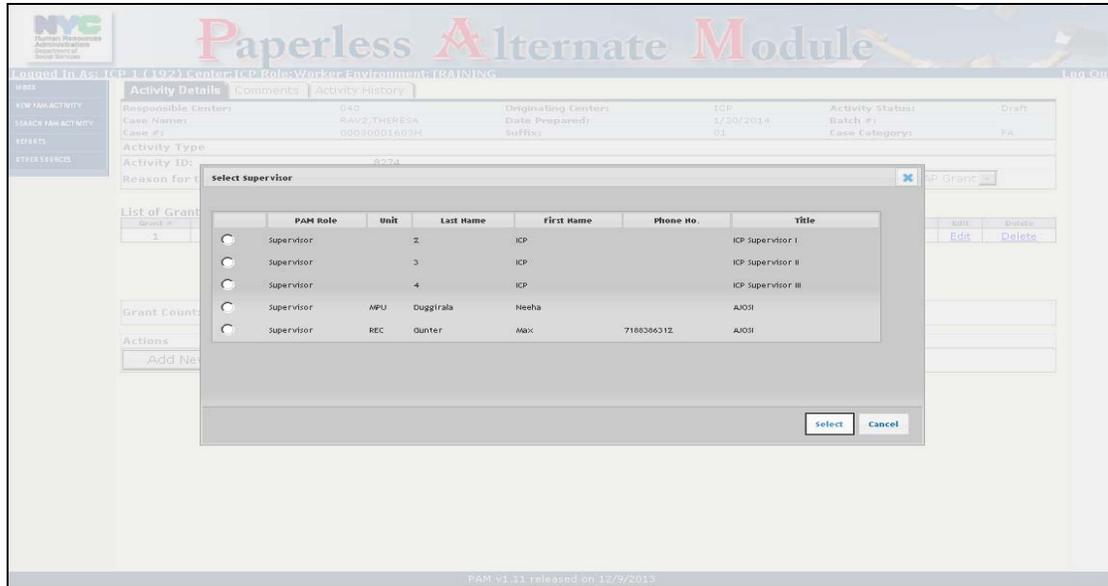
6. PAM Rollout January and February 2014

January 2014

In January 2014, PAM rolled out in the following locations:

- Clinton Hill Job Center (**067**)
- Crotona Job Center (**046**)
- Crotona SNAP Center (**S46**)
- East River Job Center (**037**)
- Queens SNAP Center (**S53**)
- Refugee Job Center (**047**)
- Rockaway Job Center (**079**)
- Rockaway SNAP Center (**S79**)
- TIPS 24 (**S24**)
- TIPS 43 (**S43**)
- Waverly Job Center (**013**)
- Waverly SNAP Center (**S19**)

February 2014

- Bushwick Job Center (**066**)

- Williamsburg SNAP Center (**S21**)

- Dekalb Job Center (**064**)

- North Brooklyn SNAP Center (**S26**)

- East New York SNAP Center (**S28**)

- TIPS 11 (**S11**)

- Coney Island Job Center (**063**)

- Coney Island SNAP Center (**S22**)

- Bay Ridge Job Center (**070**)

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

7. Synchronization of Enrollment Information between POS and PAM

The following updates were made to the POS Enrollment window for PAM:

- POS was updated to transmit updates made in the **POS Enrollment** window to PAM every 15 minutes

- The **POS Enrollment** window was also updated to track PAM usage when POS determines whether the User's ID should be deactivated for lack of activity.