FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #14-48-SYS
(This PB replaces PB #14-46-SYS)

CA POS RELEASE NOTES VERSION 18.1.1

Date: May 6, 2014	Subtopic(s): POS
🖥 This procedure can now be accessed on the FIAweb.	**Revisions to Original Policy Bulletin** This policy bulletin is being revised to remove the following CA and SNAP opening codes from the CNS Notice Update section of **Attachment A**. • CA Opening Code **A30** (PA Approval -- same benefit each month) SNAP Opening Code **A30** (SNAP Approval – same benefit each month) • CA Opening Code **A32** (PA Approval -- first month prorated) and SNAP Opening Code **A48** (SNAP Approval - 1st Month Prorated: Applied BEFORE the 16th) • CA Opening Code **A32** (PA Approval -- first month prorated) and SNAP Opening Code **A49** (SNAP Approval - 1st Month Prorated: Applied AFTER the 15th) • CA Closing Code **N17** (Failure to Complete Eligibility Process) **Purpose** This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) was migrated to production on May 5, 2014. Descriptions of the changes can be found in POS Release Notes Version 18.1.1 (**Attachment A**), Desk Guide: SI Emergency Grant Queues (**Attachment B**), and Desk Guide: POS Management Console Usage Report Changes (**Attachment C**). These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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

Effective Immediately

Related Items:

[PB #14-08-OPE](#)
[PB #14-13-SYS](#)

Attachments:

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

Attachment A	POS Release Notes Version 18.1.1
Attachment B	Desk Guide: SI Emergency Grant Queues
Attachment C	Desk Guide: POS Management Console Usage Report Changes

CA POS Release Notes
Version 18.1.1 May 5, 2014

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 18.1.1 scheduled for Monday, May 5,2014. 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. HDU(Homelessness Diversion Unit) and RAU (Rental Assistance Unit) Updates

POS has added the **HDU Decision/Plan Of Action** approval window to the **Approve Non-Food Emergency/Special Grant** and **Approve a Case Action** activities when the referring JOS/Worker's activity displayed the **HDU Decision/Plan Of Action** window**.**

Currently when RAU decisions returns to the center, the grant decision is processed in one of the following activities:

- **Non-Food Emergency** activity
- **Change Case Data** activity.

Both of these activities have the HDU Decision/Plan Of Action window displayed when the RAU decision is processed and the request is an HDU Request.

2. Moving Allowance Updates

The **Moving Allowance** requests windows were updated to accommodate requests for a move out of state and to automate the generation of the Request for Approval of Special Grant Code 22- Moving Expenses (**W-147BB**) Form.

Moving Allowance Drill Down Window

POS has added a new **Moving out of State?** question in the **Moving Allowance Drill Down** window. The JOS/Worker indicates whether the move is out of state. If the answer is **Yes** for **Move out of State**, the request does not require a referral to RAU. These cases are referred to the transportation unit. The JOS/Worker sees the following message in the window :

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Addition of Form W-147BB to Single Issuance Task 8

POS was updated to generate the **W-147BB** when the JOS/Worker clicks **Go** and there is an approved or denied request for an in-state moving expenses in the **Single Issue Task List**. The form is printed when the recommendation is received from RAU and the JOS/Worker processes the decision in the **Request Action** window for denied requests and in the **Request Action** and **Grant Data Entry** windows for approved requests.

The form is printed when the JOS/Worker clicks **Go** for **SI Task 8** (Print Notices and Repayment Agreements) and accesses the **Notice Printing Window**.

3. New Date Edit for Request for Utility Arrears

POS was updated to add a new message when the JOS/Worker enters a future date in the Start or End Dates for the utility arrears request. POS displays the following error message when the Start Date or End Date entered for the utility arrears request is more than 30 days after the recording date of the request:

"The date cannot be in the future."

4. PTM Mailing of FIA-1104 and M-858V for EAA Cases

POS was updated to include the following E-forms in the **Print-to-Mail (PTM)** process for Emergency Assistance for Adults (EAA) applicants that receive Special Grant Codes **10** (Utility Grant to Prevent Turn-Off or Restore Services Prior to CA Acceptance) or **50** (Non-Recoupable Payment of Utility Arrears):

- Notice of Determination Regarding Your Request for a Utility Grant (**FIA-1104**)
- Notification to Utility Company (**M-858V**)

POS submits these forms to MIS distribution for mailing on the next business day when the final level Supervisor approves the utility arrears request(s).

5. New Completion Edits for W-137B and W-145HH for Closed and Rejected Cases

POS was updated to include new completion edits for CA cases that are closed or rejected in POS and have pending grant requests at the time of the closing or rejection.

Applicant Grant Requests

If the Worker processes a CA case denial/closing and there are pending applicant grant requests, the JOS/Worker must complete the grant decision section in the **Request Action** window and the Supervisor must print the Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance For Applicants Only (**W-145HH**).

If the Worker fails to enter the decision, the following message appears:

- "This case will be closed or rejected. The grant decision must be entered for all pending grant requests."

If the Supervisor who is the final level of approval fails to print the decision notice and the center is not a Selective Case Review (SCR) center, the following message appears:

- "This case will be closed or rejected. The grant decision notice must be printed for all pending grant requests."

At SCR centers, the **W-145HH** notice is generated from the **Notice Print Queue**.

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Participant Grant Requests

If the Worker processes a Cash Assistance (CA) case rejection or closing and there are pending participant grant requests, the JOS/Worker must complete the grant decision section in the **Request Action** window and the Supervisor must print the Action Taken on Your Request for Emergency Assistance, Additional Allowances, or Adding a Person to the Case [For Participants Only] (**W-137B**) Form.

If the Worker fails to enter the decision, the following message appears:

- "This case will be closed or rejected. The grant decision must be entered for all pending grant requests."

If the Supervisor who is the final level of approval fails to print the decision notice and the center is not an Selective Case Review (SCR) center, the following message appears:

- "This case will be closed or rejected. The grant decision notice must be printed for all pending grant requests."

At SCR centers, the **W-137B** notice is generated from the **Notice Print Queue**.

6. POS ESNAP Alien Documentation Update

The **IN/ESNAP Issuance** activity in POS has been updated to prevent the removal of **Alien Status** documentation in the **ESNAP Determination window** when an applying alien individual's status changes from Applying (**AP**) to Rejected (**RJ**) status for SNAP.

The eligibility factors requiring verification appear in the **ESNAP Document Completeness** tab

7. ESNAP Benefit Lookup Updates in IN/ESNAP Issuance

The **ESNAP in the Past** benefit lookup in the **IN/ESNAP Issuance** activity was updated to retrieve ESNAP benefits issued on an application registration number or on cases closed more than six (6) months ago.

8. SNAP Benefit Lookup Updates in CA Application Interview and IN/ESNAP Issuance

The SNAP benefit lookup in the **CA Application Interview** and the **IN/ESNAP Issuance** activities was updated to retrieve benefits issued in the current month on an application registration number or on cases closed more than six (6) months ago. The **SNAP Benefits This Month Response** window has been updated with two (2) new questions:

- "Were the benefit issued under an application registration number? (Benefits do not appear in WMS benefit issuance history)" – If POS finds SNAP benefits issued in the current month under an application registration number, it marks the **Did anyone who is applying receive SNAP benefits this month** and this new question as **Yes.**
- "Were the benefits issued for a case closed more than six (6) months ago?" – If POS finds SNAP benefits issued in the current month under a case closed more than six (6) months, it marks the **Did anyone who is applying receive SNAP benefits this month** and this new question as **Yes.**

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SNAP Benefits This Month Response Window

Supervisor Approval ESNAP window

The new questions were added to the approval window.

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9. Earned Income Documentation Edits

New completion edits have been added to POS to ensure that cases with earned income documentation scanned but not recorded are being processed correctly and timely.

Earned Income Edit for Workers

POS connects to the HRA One Viewer to verify whether any of the following documents were scanned for the case in the past 60 days:

- Pay Stubs
- Pay Stubs Last 4 Weeks of Pay
- Job Letter
- Tax Return
- Quarterly Estimated Tax
- Records & Related Mat'l Concerning Earnings & Expenses
- Tax Return Check or Copy
- **M-30t** Verification of Unreported Employment
- **W-515R** SSA 40 Quarters Release
- **W-912HH** Request for Information From Employer
- **MAP-2050A** Declaration of Income or Support For Medical Assistance
- **W-648B** Alien Sponsor or Step-Parent Budget Worksheet
- **W-575T** Declaration of Employment
- Pay Envelope
- W-2 Form
- The Work Number Income Verification Print-Out
- **DOH-5017** Verification of Employment
- **DOH-4469** Financial Status Form

If POS finds the documents above and no earned income is recorded in the Employment Information window, the following message appears if the JOS/Worker clicks **Next** on the **Current Income** window:

- "An Earned Income document has been scanned and Indexed but there is no Income reported in the Employment window. You must view the documents and determine if you need to update the Employment window AND Answer questions "Does the earned income document in the viewer reflect reported income that needs to be budgeted for this case?" If you select 'No' you must enter a detail comment in the comment box before you can complete this activity."

The following **Employment/Self-Employment Scan Document** window appears for the JOS/Worker:

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The JOS/Worker must answer the question **Does the earned income document in the viewer reflect reported income that needs to be budgeted for this case?**

- If the JOS/Worker selects **Yes**, they must update the **Employment Information** window and complete an updated budget.
- If the JOS/Worker selects **No**, they must enter a detailed case comment before completing the activity.

If the JOS/Worker fails to record the income or fails to enter a case comment indicating why the income will not be added, the following error appears at activity completion:

- An Earned Income document has been scanned and Indexed but there is no income reported in the POS interview. You must go to the Employment window and update the interview before you can complete this activity.

Supervisor Approval

If the **Employed/Self-Employment Scan Document** window appears for the JOS/Worker, it also appears in the Supervisor's activity after the **Current Income** window.

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10. Unearned Income Documentation Edits

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- Loan Statement
- Adoption Subsidy Benefit Statement
- Adoption Subsidy Check or Copy
- Trust Fund Income Statement
- Other Income Statement
- Stock Certificates
- Savings Bonds
- Burial Fund Trustee Statement
- Annuity Statement
- Trust Agreement
- Court Records Trust Trust Fund Settlement Inheritance
- Statement from expected Other Income Source
- Other Resource Statement
- In-Trust Account Statement
- Sponsor's Income or Resource Statements or Verification
- SSA Survivor's Benefits Letter for Minor
- Statement from Employer
- **W-532** Letter to Past/Present Employer
- **W-532f** Financial Institution Inquiry
- Proof of Income & Resources-3 Months Prior to Application
- Verification Income Resources Stopped Exhausted
- **LDSS-4530** Assignment of Wages Salary Other Compensation for Services
- **SSA-L8151** Change of Payment-SSI Notice of
- Social Security Administration Supplemental Security Income Notice PI
- **SSA-L815** Changes in your Supplemental Security Income Payment Letter
- **SSA-8001**-ES Receipt for Claim for Supplemental Security Income
- **SSA-L634** Social Security Benefit Information
- Report of Support Collected
- Retirement Survivors and Disability Insurance Important Information
- **DSS-4300** Assignment of Wages Salary other compensation for Services
- **DSS-4636** Assignment of Wages Salary other Compensation for Services
- **W-205A** Checks Receipt
- **WR2** Concealed Income Worksheet
- **DSS-4310A** Follow-up to the quarterly contact report
- **W-912AA** Follow-up to the quarterly contact report
- **W-636B** Request for Information about Recurring Pension
- **SSA-2708** Social Security Administration Important Information
- **SSA-8166** Social Security Administration Supplemental Security Income
- **SSA-8009** SSI Allowance Unit
- **SSA-L8166** Supplemental Security Income Important Information
- **SSA-1** Application for Widow's or Widower's Insurance Benefits
- **MAP- 2039** Attestation as to Used of Educ Grant or Loan
- **DSS-3715 EL** SSI Benefits Levels
- **SSA-L8457** SSI Notice of Reconsideration
- **DSS-517** Budget Worksheet-Medical Assistance
- **SSA-45** Receipt for Your Claim for S-S Retirement Insurance Benefits
- **MAP 2071A** Assignment of Support from Community Spouse

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- **W-128HH** Notice to Recipients SSI Check Retro Benefit Calc
- Job Notice FIA-3A
- **DOH-676** Income and Residency Verification
- **M-322k** Transmittal of Funds Received Through US Mail
- **W-112E** Wage Reporting Clearance
- Notice of Employment of PA Recipient
- Worker's Compensation WCB New Claim - Bi weekly payment status
- Worker's Compensation WCB New Claim - Bi weekly status
- **W-587G** Real Property and Assets Inquiries
- **W-648A** Step-Parent Income Budget Worksheet
- **W-648D** Budget Worksheet for Families w/ Income in Temp Housing
- Current Award Letter VA Benefits
- Sales Slips
- Statement from Family Court Child Support
- Statement from Person Paying Child Support
- Current Award Certificate UIB
- Statement from Broker or Agent re Interest or Dividends or Royalties
- Current Award Certificate/letter VA Benefits
- Current Award Certificate or letter other income
- Official correspondence from source of income Other income
- Current wage stubs and Statement of Tips
- Records related materials concerning self-employment earnings expenses
- Income tax records
- Proof of SSA or SSI benefits for disability or blindness
- **W-274U** Attestation of Employment: Informal Child Care Provider
- Support Check Stubs
- Statement from Tax Office
- EITC check or copy
- Statement from source of payment
- Transcript or financial aid breakdown
- Dated pay envelopes
- Employer letter indicating the number of hours worked and rate of pay
- Current income tax return
- Statement from applicant participant attesting to unverifiable income
- Statement from Agency Administering Educational Grant or Award
- Contact with source of unearned income
- Lump sum check or copy
- Statement from Daycare Center or Other Child Care Provider
- VA Spinal Bifida Award Letter or Certificate
- VA Spinal Bifida Disability Check or Copy
- VA Spinal Bifida Statement
- **BFI-150** Settlement Agreement
- **FIA-1042** Notice of Employment

If POS finds the documents above and no unearned income is recorded in the **Unearned Income** and **Current Income** windows, the following message appears if the JOS/Worker clicks **Next** on the **Current Income** window:

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- "A Unearned Income document has been scanned and Indexed but there is no unearned income reported in the Current Income question set. You must view Document and determine if you need to update the Unearned Income question set AND Answer questions "Does the unearned income document in the viewer reflect reported income that needs to be budgeted for this case?" If you select 'No' you must enter a detail comment in the comment box before you can complete this activity."

The following **Unearned Income Scan Document** window appears for the JOS/Worker:

The JOS/Worker must answer the question **Does the unearned income document in the viewer reflect reported income that needs to be budgeted for this case?**

- If the JOS/Worker selects **Yes**, they must update the **Unearned Income** and/or **Current Income** windows and complete an updated budget.
- If the JOS/Worker selects **No**, they must enter a detailed case comment before completing the activity.

If the JOS/Worker fails to record the income or fails to enter a case comment indicating why the income will not be added, the following error appears at activity completion:

- An Unearned Income document has been scanned and Indexed but there is no income reported in the POS interview. You must go to the Current Income window and update the interview before you can complete this activity.

Supervisor Approval

If the **Unearned Income Scan Document** window appears for the JOS/Worker, it also appears in the Supervisor's activity after the **Current Income** window.

11. Approval of Income Completion Edits for Supervisors

New completion edits have been added to POS to ensure that those identified cases with earned or unearned income are being processed correctly and timely. Supervisors are required to approve the income, budget and TAD sections when the case has earned or unearned income at the time of the application or recertification interview.

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This completion edit affects the following list of unearned/earned income:

- Alimony
- Boarder/Lodger Income
- Contributions
- Child Support
- Dividends/Interest
- Ed Grants/Loans
- Foster Care Payment (Received)
- GI Allotments
- Loans
- NYS Disability
- No Fault Insurance
- Other Income
- Insurance Policy Income
- Pensions
- Rental income
- Railroad Retirement
- Self-employment
- SS Dependent Benefits
- SS Disability Benefits
- SS Income Benefits
- SS Retirement Benefits
- SS Survivor's Benefits
- Union Benefits
- Unemployment Insurance Benefit
- VA Benefits
- Workers Compensation
- Wages

POS will run the rules to identify these earned/unearned income cases when the JOS/Worker selects **Close** and clicks on **Complete Activity** or **Close > Complete Activity** button or clicks the **Xmit** button.

If there is an answer of **Yes** for any of the preceding earned/unearned income and the Supervisor has not approved the income window, budget and/or TAD the following error message will be displayed:

- "This case has income. The income, budget and TAD sections must be reviewed and approved or disapproved by the Supervisor. If any of these sections are disapproved, the case must be returned to the Worker."

The Supervisor will have to approve or disapprove the income and/or return the case back to the JOS/Worker with a case comment.

12. Prevent In-Center Referral of HDU Intake Activity

POS was updated to prevent an In-Center Referral of the HDU Intake when there is no pending grant request that has a value of **Yes** for HDU. POS displays the following error message:

"You cannot start the HDU activity because the case does not have any pending HDU grant requests. To record an HDU grant request, please access the SI Grant Request Task List in the Non-Food Emergency/Special Grant activity."

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13. Expansion of FEPS Processing for Bushwick and St. Nicholas Job Centers

In order to allow processing of FEPS E-Check grants for Brooklyn Job Center cases, the Bushwick Job Center FEPS unit and the St. Nicholas Job Center FEPS unit were granted access to multiple centers.

Bushwick FEPS Unit

Bushwick staff processing FEPS requests must select the proper center in the POS Sign-On page. In order to access these centers, the staff must select the option of **Regional Bronx/Queens/FSCC (CA4)** in the **CA SITES** menu on the POS Sign On site:

- For Job Centers **047** (Refugee), **063** (Coney Island) and **070**(Bayridge), click on **Connect to Centers: 047, 062** (Michael Handy Veterans Center)**, 063, 070, 080 (, 099** (Richmond).
- For Job Centers **064** (Dekalb), **066** (Bushwick) and **067** (Clinton Hill), click on **Connect to Centers: 064, 066, 067**

St. Nicholas FEPS Unit

St. Nicholas staff processing FEPS requests must select the proper center in the POS Sign-On page. In order to access these centers, the staff must select the option of **Regional Bronx/Queens/FSCC (CA4)** in the **CA SITES** menu on the POS Sign On site:
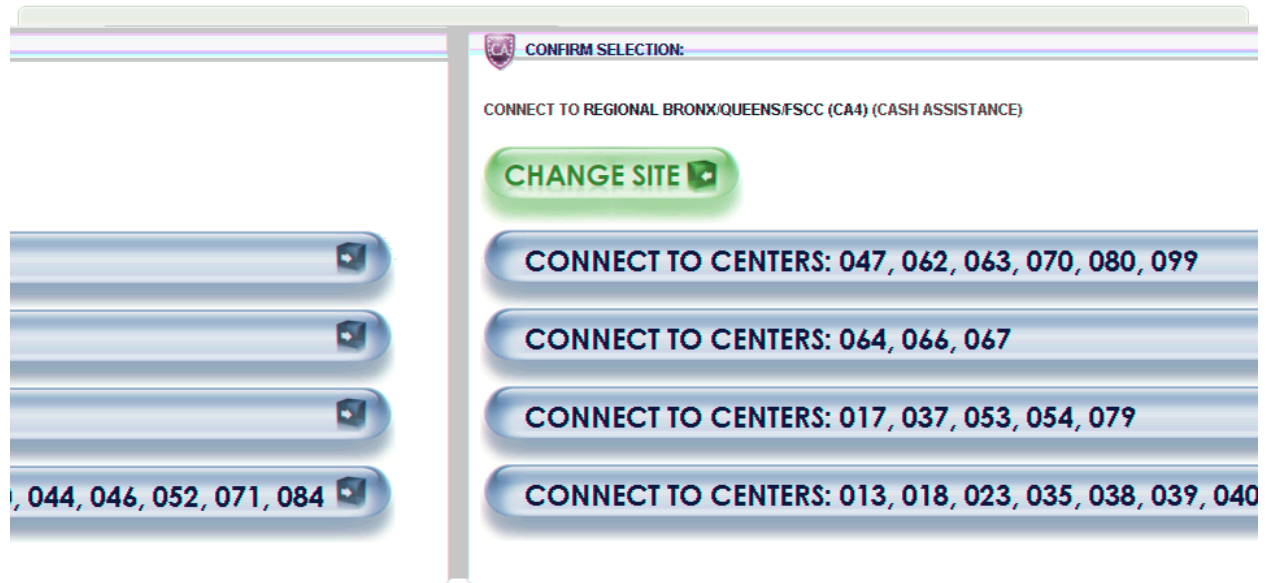
- For Bronx or Manhattan, select **Connect to Centers: 013** (Waverly)**, 018** (St. Nicholas)**, 023** (East End)**, 035** (Dyckman)**, 038** (Rider)**, 039** (Union Square)**, 040** (Melrose)**, 044** (Fordham)**, 046** (Crotona)**, 052** (Residential Treatment Services Center)**, 071** (Intensive Services Center)**, 084** (SENIORWORKS).

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POS Sign-On Page

Recording the FEPS Request

- To record the FEPS request, the Worker must access Task 2 (Recording Special Grants) in the **Single Issue Grant Request Task List** and click **Yes** for **Rent Supplementation or FEPS Approval**.

Accessing the Single Issue Print Queue

After the grants are approved by the appropriate supervisors, the E-Check is submitted to the **Print Queue**. The staff completing printing of the Public Assistance Single Issuance Authorization (**LDSS-3575)** Form and data entry from the POS windows must monitor and access the **Print Queue** in each database from the **POS Sign-On** page in order to complete printing and processing of the **LDSS-3575**.

14. New FEPS (Family Eviction Prevention Supplement) Worker Title

A new title (FEPS Worker) has been added in POS to accommodate the expansion of the Bushwick Job Center's FEPS to access all Brooklyn Job Centers and the expansion of the St. Nicholas Job Centers FEPS Unit to access all Manhattan and Bronx Job Centers. The Bushwick and St Nicholas FEPS units are now able to process the FEPS E-Check grants in POS.

15. POS Single Issue Emergency Queue Rollout

The POS Emergency Check ("E-Check") queues will roll out at all Job Centers. These queues allow processing of Auto E-Checks and Manual E-Checks without the current required printing of the **LDSS-3575**.

The rollout schedule will be published by FIA Operations and Training.

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16. Transmission Rule Update for Removed (RM) Individuals

Removed (**RM**) is an inactive individual status rarely found in WMS. POS transmission rules were updated to prevent transmission to WMS for an individual with this inactive status.

17. Worker Completion Edit for Addition to the Case

POS was updated in the February 2014 release to add a completion edit in the **CA Recertification Interview** for newly added individuals. If the JOS/Worker did not complete the **Add a person to the Case or Has Anyone Moved Into The Household In The Past Year?** response for a new individual on the case, the following message appears at the completion of the activity:

- "Information about person who is added to the case is not complete"

This message no longer appears for cases closed with status reasons **G10** (Failure to Recertify) or **G20** (Failure to Recertify – Home Visit).

18. Supervisor Completion Edit for MKB Re-Evaluation

POS was updated in the February 2014 release to add a completion edit in the Approve CA Recertification for re-evaluated non-citizens and newly added individuals. If the center is not a Selective Case Review (SCR) center and the Supervisor who is the final level of approval did not print the Action Taken on Your Request for Emergency Assistance, Additional Allowances, or Adding a Person to the Case [For Participants Only] (**W-137B**), the following message appears at the completion of the activity:

- "Ineligible Immigrant Re-Evaluation was done and W-137B has to be printed before completing this activity"

At SCR centers, the **W-137B** notice is generated from the **Notice Print Queue**.

19. Reminder: Updates to POS Usage Report in Management Console

The POS Management Console Usage report was updated in March 2014 to allow HRA management to track new transaction types and to track work completed by the Job Centers and the Supplemental Nutrition Assistance Program (SNAP) Centers in the Paperless Alternate Module (PAM). The changes to the report will allow HRA Job Center and Supplemental Nutrition Assistance Center Directors or Center Director Designees to retrieve the list of actions for the audit of imaging of manually prepared data-entry documents that are entered directly into the Welfare Management System (WMS), as detailed in FIA Policy Bulletin 14-08-OPE Imaging Manually Prepared Data-Entry Document Audit Tool.

The attached desk guide details the changes made in the Management Console report.

20. Reminder: CA Recertification Interview Parents' Information in POS

In Cash Assistance POS Version 18.1 on February 18, 2014, the **Recertification Interview** was updated in order to ensure that new case members are added to the case. If the Worker indicates on the **Individual Detail** window that the parent is residing in the household, POS will confirm whether that parent is already on the case. If POS does not find the parent on the case, POS will display the following message:

"You have indicated that a parent(s) of the children on the case or another individual is residing in the household. This individual must be added to the case and his/her eligibility has to be evaluated. POS will now suspend the current activity and start the Case Member Addition activity. Click OK if you want to proceed. Click Cancel if you want to return and change your answers."

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If the parent resides in the household, but the message above appears, the Worker must click the **Cancel** button and select the parent's name using the drop-down menu that appears under Mother's First Name or Father's First Name:

If the Worker made a mistake and the parent does not reside in the household, the Worker must click the **Cancel** button and click **No** for the question "Residing in the household?"

For additional details regarding the new POS edits, please refer to Policy Bulletin 14-13-SYS (CA POS Release Notes Version 18.1).

21. Reminder: Manhattan Database Move in March 2014

On Sunday, March 2nd, 2014 MIS moved the following centers onto a new database server platform that offers increased reliability and stability for the Paperless Office System. The following centers were moved:

- Waverly Job Center (**013**)
- Waverly SNAP Center (**S19**)
- East End Job Center (**023**)
- East End SNAP Center (**S02**)
- Dyckman Job Center (**035**)
- Washington Heights Job Center (**S13**)
- Union Square Job Center (**039**)
- RTSC (**052**)
- Intensive Services Center (**071**)
- Senior Works (**084**)
- St. Nicholas Job Center (**018**)
- St. Nicholas SNAP Center (**S14**)
- RTSC SNAP Separate Determination Center (**S41**)

22. Reminder: Change of Phone Numbers of FIA Sign Language Interpreter Liaisons

The telephone numbers for the Family Independence Administration (FIA) Sign Language Interpreter Liaisons have been changed effective March 2014. The new numbers are: Joanne Kent **929-221-6958** and Luis Caballero **929-221-6918**. The telephone numbers listed in the pop-up message for applicants/participants who require sign language interpretation as a reasonable accommodation were revised.

Staff are reminded that whenever a sign language interpreter is needed to serve an applicant/participant, the Center's sign language liaison must contact Ms. Kent or Mr. Caballero to assist in obtaining sign language interpretation services. Workers will be required to provide the date, time and location of the interpretation appointment needed.

Additionally, applicants/participants with TTY equipment should be informed that they may communicate with HRA staff through HRA'S contracted TTY relay operator by calling **(800) 662-1220**. Applicants/participants

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must have the telephone number to the HRA location/staff member that they wish to reach available to provide the relay operator.

23. Paperless Alternate Module (PAM) Rollout

PAM rolled out in the following locations in March and April 2014:

- On March 24, 2014, PAM rolled out in the following centers:

	Center Names	Center Number
1	Richmond Job Center 99	**099**
2	Richmond SNAP 99	**S99**
3	Jamaica JC 54	**054**
4	Jamaica SNAP 54	**S54**
5	FSCC Back office	**017**
6	Concourse SNAP 45 incl. TIP 43 staff	**S45**
7	Union Square JC 39	**039**
8	RTSC 52	**052**
9	ISC 71	**071**
10	Senior Works 84	**084**
11	FHU	**1FH**
12	Veteran's JC 62	**062**

- On April 28, 2014, PAM rolled out in the following centers:

	Center Names	Center Number
1	Melrose JC 40	**040**
2	Melrose SNAP 40	**S40**
3	FSCC Bronx Satellite	**017**
4	Fort Greene SNAP 20	**S20**
5	Center 17 Brooklyn Satellite	**017**
6	Queens JC 53	**053**
7	Center 17 Queens Satellite	**017**
8	St. Nicholas JC 18	**018**
9	St. Nicholas SNAP 14	**S14**
10	Center 17 Manhattan Satellite	**017**
11	Dyckman JC 35	**035**

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

ATTACHMENT B

Desk Guide: SI Emergency Grant Queues
Date: May 2014

Overview

FIA has requested to electronically forward authorization forms for single issuance emergency checks from the approving Supervisor directly to the D&C (Disbursement and Collections) Unit. POS has added new **SI Emergency Grants** queues to the existing print queues. These new queues are the **SI Emergency Grant D&C Queue** and the **SI Emergency Control Queue.**

To prepare for the new **SI Emergency Grant** queues, Staff must be enrolled with special tasks to allow access to the POS emergency check (echeck) queues and recognize the user's role in assigning, processing and completing the e check. Those centers that currently have the Paperless Alternate Module (PAM) system will receive the POS SI emergency check queue since the previously installed dual monitors are also required to process the POS E checks. The SI Emergency Queues retrieve grants with pick-up code 5 (Emergency Cash Assistance Check) and Pick-up Code **7** (Emergency Cash Payment). The Public Assistance Single Issuance Authorization (**LDSS-3575)** (Form is displayed on the POS screen and will no longer print for centers with these new queues.

Note: The POS E check Queue does not process benefits from PAM. Only POS E checks will be sent to the POS SI Emergency Queue.

Enrollment

All individuals that work in the D & C or Control unit must be enrolled to process emergency benefits sent directly to the new queues. All staff must be identified and must have one of the following selections:

- PAM Data Entry Supervisor
- PAM Data Entry Operator or
- PAM D&C Operator

In addition to the PAM title selected all enrollees must have the task, **Single Issue Print queue User** selected to gain access to the e check.

Note: The Data-entry Supervisor task is the correct selection for the D & C supervisor**.**

Please confer with your center's enrollment coordinator to assist with the enrollment process for the e check queue. To access the enrollment table you must go to **Tools** on top of the POS menu and select **Enrollment**:
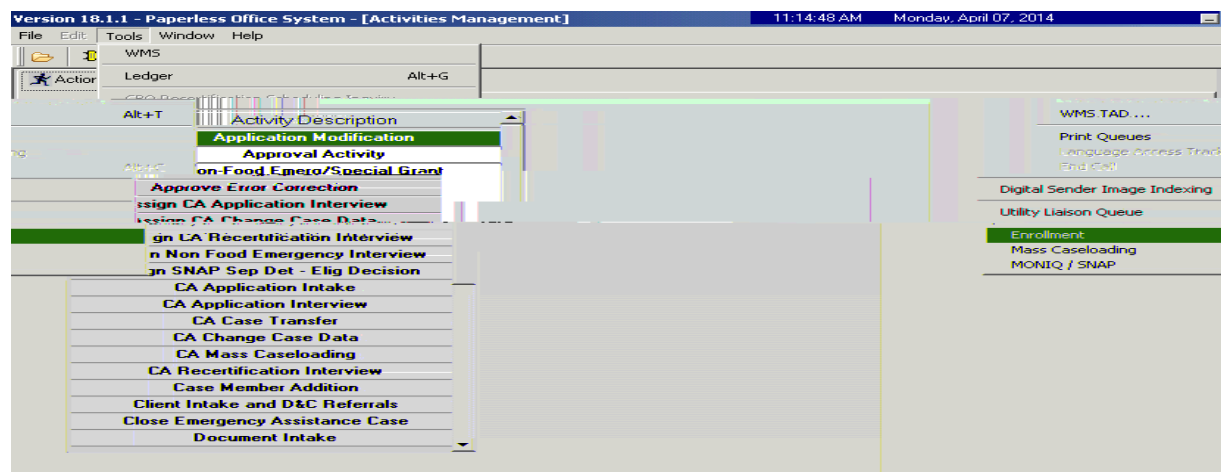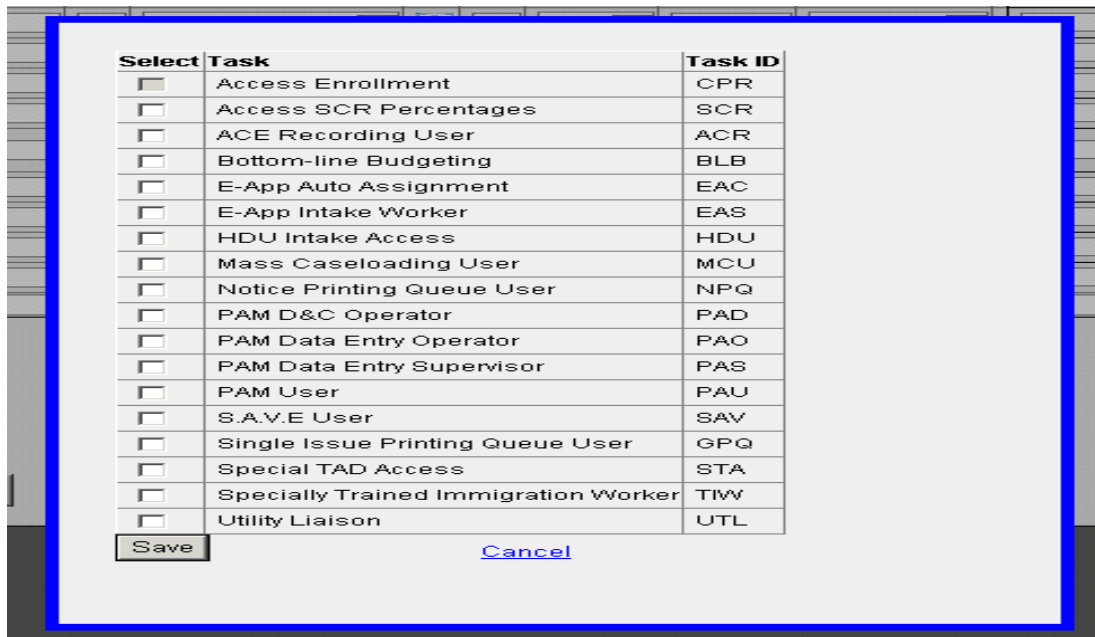
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- Select **TASK** button;

- Select the tasks to allow access to the **SI Emergency Queues** and processing of the emergency benefits :

Select	Task	Task ID
☐	Access Enrollment	CPR
☐	Access SCR Percentages	SCR
☐	ACE Recording User	ACR
☐	Bottom-line Budgeting	BLB
☐	E-App Auto Assignment	EAC
☐	E-App Intake Worker	EAS
☐	HDU Intake Access	HDU
☐	Mass Caseloading User	MCU
☐	Notice Printing Queue User	NPQ
☐	PAM D&C Operator	PAD
☐	PAM Data Entry Operator	PAO
☐	PAM Data Entry Supervisor	PAS
☐	PAM User	PAU
☐	S.A.V.E User	SAV
☐	Single Issue Printing Queue User	GPQ
☐	Special TAD Access	STA
☐	Specially Trained Immigration Worker	TIW
☐	Utility Liaison	UTL

Save   Cancel

- Save all changes to the enrollment table and have the individual restart POS to accept the added tasks.

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SI Emergency Grants D&C Queue

Instructions:

This tab shows cases that need emergency checks, D& C supervisors must select Auto E-check or Manual E-Check before assigning the case to the operator typist.

- To view pending emergency grants, you must select the Open checkbox and Click ***Open Selected Forms*** button.

D & C Supervisor Responsibilities

- The D& C supervisor will select the tab **SI Emergency Grant D & C Queue** to view and assign the E checks for processing by the D& C operator or typist. Prior to assigning the case to the operator, the D & C supervisor must check to determine if the echeck was issued previously and the type of e check being issued, auto-e or manual. Once the operator has completed the assigned cases by selecting **Done**, the D &C supervisor will be required to complete and remove the case from the **SI Emergency D& C Queue.**

SI Emergency Grant D& C Queue

Complete – this checkbox allows designated supervisors to complete and remove cases from the queue once all pending grants are done.
Case No –indicates the case number for which the forms will be open.
Case Name –indicates the case name for which the forms will be open.
Activity –indicates the activity in which the JOS/Worker prepared the grants.
Acty End Date-Time –indicates the end date and time of the activity in which the JOS/ Worker prepared the grants.
From –indicates the name of the JOS/Worker who prepared the grants.
Caseload –indicates the current caseload for the case
Assn Operator –indicates a drop down list box displaying operators/typist awaiting assignment of emergency grants.

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Emergency Checks Details section

Open – this checkbox allows designated staff to select grant to be opened
Grant Issuance Code-Description –displays pending grant issuance code and code description
Done – this checkbox allows designated operator\typist to select grants that were done
Date Completed –displays date when designated operator checked "Done" checkbox

Command Buttons

Open Selected Form –this button generates the e-form and open it in the window for user to view.
Refresh – this button removes the case were marked as complete ("Complete" checkbox is selected) from the queue
Close – this button closes the **Emergency Checks Queue**.

Open Selected Form Window

The following window opens when the supervisor or operator/typist clicks on **Open Selected Form** button in the **SI Emergency D& C Queue**. POS will **enter the authorization number** on the window when an e-form is generated.

LDSS 3575

Was this grant previously issued – Allows the operator to answer if grant on the form was previously issued.
Auto E-Check – radio button that is selected by the operator to indicate that the grant is an auto e-check

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Manual E-Check – radio button that is selected by the operator to indicate that the grant will be manually typed.
D & C Check # - this field is enabled and required only if the **Manual E-Check** radio button is selected.
Grant 1 of MM – this field depicts the count of emergency grants on the case.
Close button – this button will be enabled only on the last SI Emergency Grant. Click on Close to close the window.
Back Arrow –   this arrow opens the previous SI Emergency Grant for the case.
Forward Arrow – this arrow opens the next SI Emergency Grant for the case.

D&C Operator Completion

- The D&C supervisor (or assigned operator) selects the Auto E or manual E Check description. If it is a manual E check the operator must enter the D&C check number. If the **Manual E-Check** radio button is selected and **D & C Check #** field is left empty, the operator will see the following:

  "You must enter check number for all Manual E-Checks"

After the D& C operator processes all the pending E-checks he/she was assigned, he/she will go back to the **SI Emergency Grant D & C Queue** and select done. The date will be displayed (system output) in the Date Completed field.

Removal of E-Check cases from D& C Emergency Queue

- Once the data entry operator or typist completes their processing of the E checks from the queue, the Supervisor is responsible for completing and removing the case from the queue by selecting the **Complete Checkbox** and the **Refresh** button.

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SI Emergency Grants Control Queue

Instructions:

This queue shows cases with Manual E-Checks issued at D& C.

- The Control Supervisor must select the data-entry operator in Assn Operation. To view grants, select **Open** and click **Open Selected Forms**. After data entry is complete, the operator selects the **Done** checkbox. After all manual e checks for the case are data entered, the Supervisor selects the **Complete** checkbox and clicks **Refresh** to remove the case from the queue.

Desk Guide: SI Emergency Grant Queues
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Control Supervisor Responsibilities

- The control supervisor will select the tab **SI Emergency Control Queue** to view and assign the Manual E checks issued previously by the D& C unit. These cases must be assigned to the Data entry operator who will enter the D& C check information into welfare management system for batch processing. Once the operator has completed entering the e check information they will return to the **SI Emergency Grants Control Queue** to select **Done** to complete their part of the e check process. The Control Supervisor will complete and remove those cases to clear their queue. Once the operator has completed the cases by selecting **Done**, the Control Supervisor will be required to complete and remove the case from the **SI Emergency Control Queue**.

SI Emergency Grants Control Queue

Complete – this checkbox allows designated supervisors to complete and remove the case from the queue once all pending grants are done.
Case No –indicates the case number for which the forms will be open.
Case Name –indicates the case name for which the forms will be open.
Activity –indicates the activity in which the JOS/Worker prepared the grants.
Acty End Date-Time –indicates the end date and time of the activity in which the JOS/ Worker prepared the grants.
From –indicates the name of the JOS/Worker who prepared the grants.
Caseload –will indicate the current caseload for the case
Assn Operator indicates a drop down list box displaying operators/typist awaiting assignment of emergency grants.

Emergency Checks Details section

Open – this checkbox allows designated staff to select grants to be opened
Grant Issuance Code-Description –displays pending grant issuance code and code description
Done – this checkbox allows designated operator\typist to select grants that were done
Date Completed –displays date when designated operator checked "Done" checkbox

Command Buttons

Open Selected Form –this button generates the e-form and opens it in the window for the user to view.
Refresh – this button removes the case were marked as complete ("Complete" checkbox is selected) from the queue
Close – this button closes the **Emergency Checks Queue**.

Control data-entry operator

- Once the data entry operator completes their processing and batching of the assigned manual E checks, theyhe/she will return to the **SI Emergency Control Queue** and select **Done.**

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Removal of Manual E Check cases from SI Emergency Control Queue

The Control supervisor will remove the case from the queue by selecting the **complete** checkbox on the top of screen and the **Refresh** button.
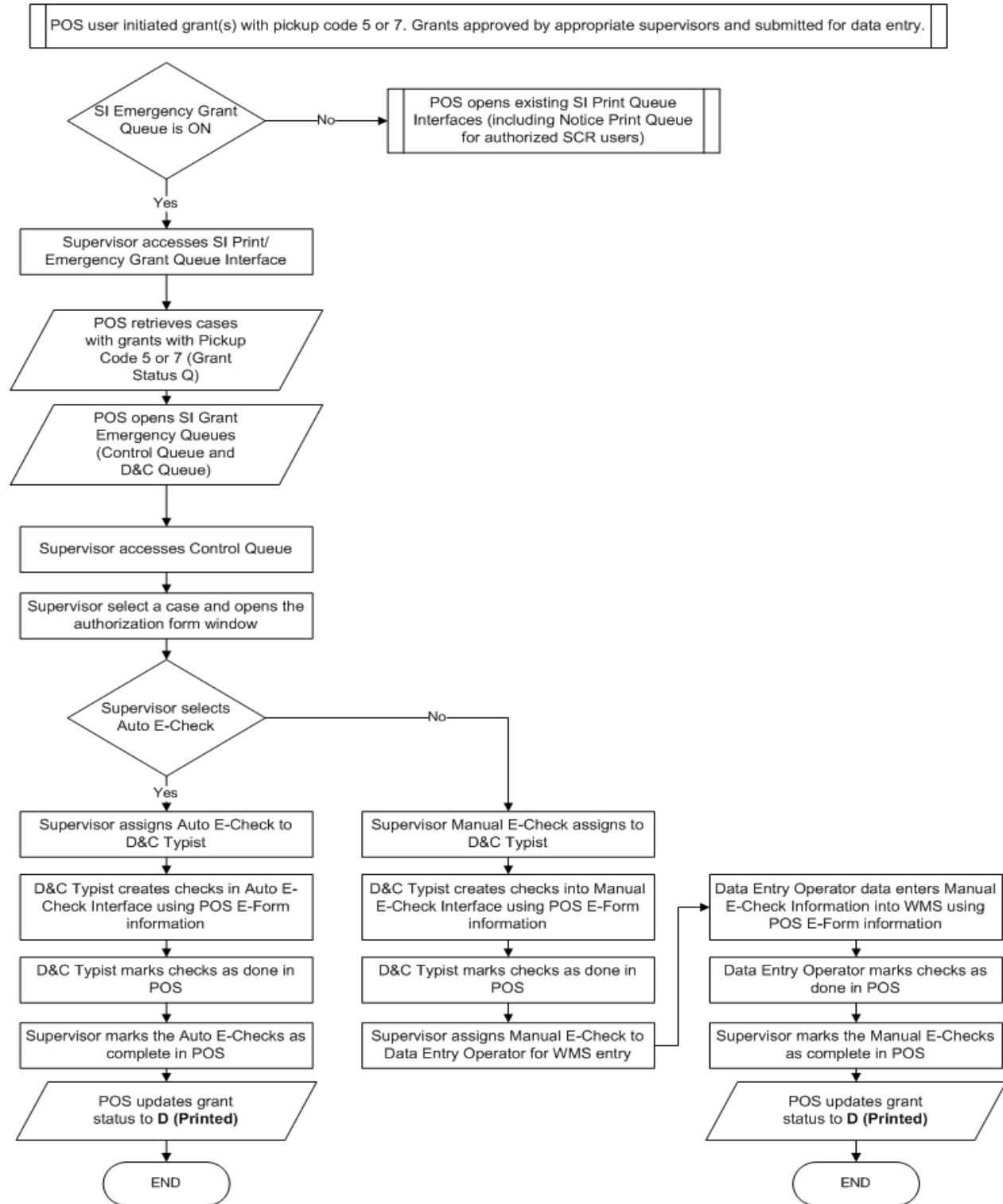

Note: Each individual must log in using their password to access the system to retrieve his/her correct tasks to complete their part of the e check process. For instance, a Supervisor cannot complete cases unless they have signed in as the Supervisor and have accessed the e check queue after the operator has checked done on their assigned cases.

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SI EMERGENCY GRANT QUEUE WORKFLOW

POS user initiated grant(s) with pickup code 5 or 7. Grants approved by appropriate supervisors and submitted for data entry.

SI Emergency Grant Queue is ON — No → POS opens existing SI Print Queue Interfaces (including Notice Print Queue for authorized SCR users)

Yes ↓

Supervisor accesses SI Print/ Emergency Grant Queue Interface

↓

POS retrieves cases with grants with Pickup Code 5 or 7 (Grant Status Q)

↓

POS opens SI Grant Emergency Queues (Control Queue and D&C Queue)

↓

Supervisor accesses Control Queue

↓

Supervisor select a case and opens the authorization form window

↓

Supervisor selects Auto E-Check — No →

Yes ↓

Auto E-Check path:

Supervisor assigns Auto E-Check to D&C Typist

↓

D&C Typist creates checks in Auto E-Check Interface using POS E-Form information

↓

D&C Typist marks checks as done in POS

↓

Supervisor marks the Auto E-Checks as complete in POS

↓

POS updates grant status to **D (Printed)**

↓

END

Manual E-Check path:

Supervisor Manual E-Check assigns to D&C Typist

↓

D&C Typist creates checks into Manual E-Check Interface using POS E-Form information

↓

D&C Typist marks checks as done in POS

↓

Supervisor assigns Manual E-Check to Data Entry Operator for WMS entry

→

Data Entry Operator data enters Manual E-Check Information into WMS using POS E-Form information

↓

Data Entry Operator marks checks as done in POS

↓

Supervisor marks the Manual E-Checks as complete in POS

↓

POS updates grant status to **D (Printed)**

↓

END

Attachment C
Desk Guide: POS Management Console Usage Report Changes
May 2014

Overview

The POS Management Console Usage report was updated to allow HRA management to track new transaction types and to track work completed by the Job Centers and the Supplemental Nutrition Assistance Program Centers in the Paperless Alternate Module (PAM).

New Transaction Types

Previously, the POS Usage report tracked application registrations (Transaction Code **0101**), eligibility determination (Transaction Code **0107**) and undercare determinations (Transaction Code **0109**). The following new transaction types were added in the POS Usage report:

Transaction Code	Transaction Description
0104	Application Maintenance/Modification
0108	Eligibility Error Correction
0110	Undercare Error Correction
0118	Transaction Cancellation
0119	Fair Hearing Update
0120	Expedited Processing
0201	Cash Assistance Single Issuance
0202	Supplemental Nutrition Assistance Issuance
0203	Cash Assistance Recoupment
0204	Supplemental Nutrition Assistance Recoupment
0402	Worker Case Update/Case Member Addition
0801	Manual EBT Pull

Label Change – POS/PAM/Other

The **POS or Paper** column was changed to **POS/PAM/Other**. Transactions initiated through POS have a value of POS in this column and transactions initiated through PAM have a value of PAM. All other non-POS transactions have a value of **Other**.

System-initiated non-POS transactions are excluded from the report.


New Filter button

The new **Filter** button allow the user to change the selected filters in the window without needing to retrieve all report data.

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Desk Guide: POS Management Console Usage Report Changes
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New Transaction Filter in POS Usage Report

The new **Transactions** filter allows the user to view **All**, **POS** and **Non-POS** transactions. Within the Non-POS option, the user can select **PAM** or **Other**.

```
Transactions
  (•) All
  ( ) POS
  ( ) Non-POS
      [ ] PAM
      [ ] Other
```
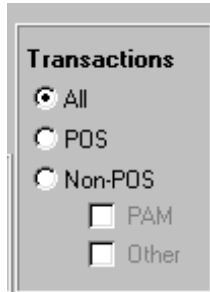
Changes to Display Pie Chart Option

The **Display Pie Chart** view previously displayed application registration (App Reg), Eligibility and Undercare transactions for POS and Paper. This view was updated to display App Reg, Eligibility, Undercare and Other transactions for **POS**, **PAM** and **Paper/Other**.

The main summary includes three rows:

```
2480 Transactions
    2221 POS   ( 89.6%)
     100 PAM   (  4.0%)
     159 Other (  6.4%)
```

The tally and legend includes the **PAM**, **POS** and **Paper** transactions split into the following types:

- App Reg Processed
- Eligibility Error
- Eligibility Processed
- Undercare Error
- Undercare Processed
- Other Error
- Other Processed

|	
■ (red)	4 = 0.2% PAM Eligibility Processed
■ (green)	77 = 3.1% PAM Other Processed
■ (blue)	6 = 0.2% PAM Undercare Error
■ (yellow)	13 = 0.5% PAM Undercare Processed
■ (cyan)	520 = 21.0% POS App Reg Processed
■ (magenta)	52 = 2.1% POS Eligibility Error
■ (dark red)	403 = 16.3% POS Eligibility Processed
■ (dark green)	688 = 27.7% POS Other Processed
■ (navy)	40 = 1.6% POS Undercare Error
■ (olive)	518 = 20.9% POS Undercare Processed
■ (teal)	151 = 6.1% Paper Other Processed
■ (purple)	2 = 0.1% Paper Undercare Error
■ (magenta)	6 = 0.2% Paper Undercare Processed

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Desk Guide: POS Management Console Usage Report Changes
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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.
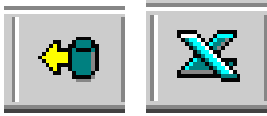
3. The **Save As** window will appear.
4. Select **C$ on 'Client' (V:)** or **Local Disk (C: on YourComputerName)** in the **Save in** menu.
5. Double click on the **Documents and Settings** folder.
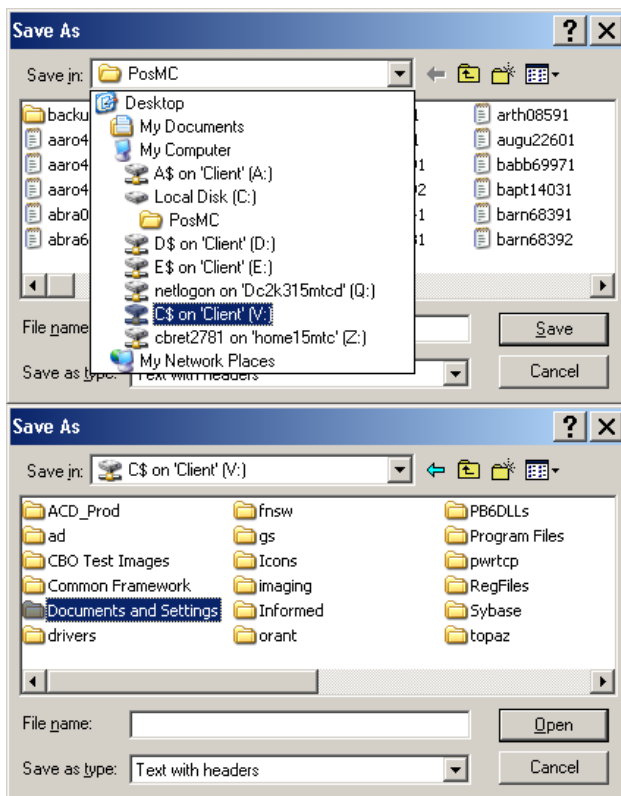
6. Double click on the folder with your network ID.
7. Double click on the **Desktop** folder.
8. Type the file name.
9. Select **Excel with headers** in the **Save as type** menu.
10. Click the **Save** button.

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Desk Guide: POS Management Console Usage Report Changes
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