POLICY BULLETIN #15-10-SYS

CA POS RELEASE NOTES VERSION 19.1

Date:	**Subtopic(s):**
February 12, 2015	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 February 17, 2015. Descriptions of the changes can be found in POS Release Notes Version 19.1 (**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 17, 2015

Attachment:

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

Attachment A   POS Release Notes Version 19.1

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

CA POS Release Notes
Version 19.1 February 17, 2015

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 19.1 scheduled for Monday, February 17, 2015. 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. Supervisory Review of Adverse Actions for HVN/HB Recertifications

New business rules and interfaces were developed to require review of negative actions taken on cases that have requested a home visit or were approved for status of Home Visit Needed or Homebound (HVN/HB).

The new **Supervisory Review** window appears in the **Approve CA Recertification** activity. A new window appears for each HVN/HB household member with an answer of **Yes** for the question **Is any Adult in the Household Homebound or requesting a home visit?**

The new window appears when the Supervisor clicks **Next** in the **Resources** section and prior to the **Medical** section of the **Approval** activity.

The window displays the following information for each HVN/HB individual:

- Case Number
- Voluntary WeCARE (Wellness, Comprehensive Assessment, rehabilitation, and Employment) Referral Requested
- Identified Homebound Household Member
- Current Homebound Status – if the homebound status from NYCWAY is not found, POS will indicate that the individual was not found.
- RAR (Reasonable Accomodation Request) Status
- Case Comments

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- Adverse Action Code

The **View related documents in HRA One Viewer** button opens the HRA One Viewer and retrieves all documents in the **Home Visit/Homebound Documentation** folder. The **List of Homebound Documents** text box includes the list of scanned HVN/HB documents for the case.

The **View all documents in HRA One Viewer** button opens the HRA One Viewer and retrieves all documents in the viewer.

If the case or individual faces an adverse action (sanction, closing or rejection), the Supervisor must answer the following questions:

- Was the home visit attempted?
- Was the home visit conducted?
- Were RAR's provided?
- Is the negative action valid?

If there is an adverse action for the HVN/HB individual, but the supervisor has not answered the questions above, the following error messages appear:

- You must answer if the home visit was attempted.
- You must answer if the home visit was conducted.
- You must answer if a RAR's provided.
- You must answer if the adverse action is valid.

If there is no adverse action for the HVN/HB individual, these questions are disabled.

After addressing the required questions, the Supervisor must approve or disapprove the window. If the window is disapproved, the Supervisor must enter a detailed comment indicating the reason(s) for the disapproval. If the Supervisor has not approved or disapproved the window, the following error message appears:

- You must approve or disapprove this window.

If the Supervisor indicates that the negative action is invalid, but an invalid closing or rejection code is used, the following warning message appears:

- This case is being closed with a closing code that is not valid for the homebound client. Please return this case to the worker for corrective action.

2. Update to Home Visit Needed/Homebound Completion Edit

POS (Paperless Office System) was previously updated to prevent closings with Cash Assistance (CA) closing code **G10** (Failure to Recertify), **F81** (Refused Photo ID - Single Individual for Home Visit Needed/Homebound (HVN/HB) cases), **M88** (Failure to Comply with Automated Finger Imaging Requirement, Not Homebound or Group Resident) and **N88** (Failure to Comply with the Automated Finger Imaging System [AFIS] Requirements, Homebound or Group Home Resident [HH=1]).

For these cases, CA closing code **G20** (Failure to Recertify – Home Visit) must be used to close the case for failing to keep the recertification appointment.

The edit was expanded to include 2 new denial/closing codes:

- **E18,** Failed to keep BEV Office Appointment (3 months SNAP Transitional Benefits)
- **WX1**, Failure to Comply with Employment Requirements-90 Day Sanction

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When attempting to close the HVN/HB case with an incorrect closing code, POS displays the following error message:

- This homebound case cannot be closed with Closing Codes **G10**, **F81**, **M88**, **N88**, **E18** or **WX1**.

3. IVRS (Interactive Voice Response System) Robo-Call Updates for Recertifications

The IVRS Robo calls for CA recertification reminders and missed interview reminders for were updated to provide additional information on reasonable accommodations for participants who were referred to or open for WeCARE since September 2013 and for applicants and participants who were denied home visit or homebound status since September 2013.

NYCWAY passes a daily file to POS of all participants who are currently open for WeCARE, were open for WeCARE or were referred to WeCARE since September 2013. NYCWAY also passes a daily file to POS of all applicants/participants who were denied homebound or home visit status since September 2013.

These cases receive an updated robo-call when they are scheduled for a recertification interview or miss their recertification interview.

Updated Robo Call Reminder Script:
Hello, this is an automated reminder call from the Human Resources Administration. You are scheduled to have a Cash Assistance recertification interview tomorrow. You must come to the Job Center for this Interview. If you cannot keep this appointment or if you miss the appointment, please call 212-835-7304 between 8:30 am and 5:00 pm to reschedule it. When you call, please let us know if a health problem will make it difficult to keep the recertification appointment at the Job Center, and we can provide you with an accommodation to help you. That number again is 212-835-7304. Goodbye.

Updated Robo Call Missed Appointment Script:
Hello, this is an automated call from the Human Resources Administration. You were scheduled to have a Cash Assistance recertification interview at your Job Center yesterday. Our records show that you did not keep this appointment. To keep your benefits you must have a recertification interview. Please call 212-835-7304 between 8:30 am and 5:00 pm within the next five business days to reschedule your appointment. When you call, please let us know if a health problem will make it difficult to keep an appointment at the Job Center, and we can provide you with an accommodation to help you. That number again is 212-835-7304. Goodbye.

For further details please refer to the FIA Robo call policy directive.

4. Con Edison EFT Payments

A new process has been developed by Management Information Systems (MIS) to send single issue payments for utility arrears to Con Edison via an Electronic Funds Transfer (EFT). POS now has the ability to send payments to Con Edison using a Routing Option (RO) instead of issuing e-checks.

The new EFT process rolled out at the Crotona Job Center on January 26, 2015, and is expected to roll out citywide in the middle of February 2015. Utility grants that were processed prior to the new process will not be impacted. MIS sends a file to Con Edison that lists all of the single issue payments made. Con Edison uses the file to compare the payments received with the Con Edison PAC system entries to reconcile the accounts of their clients.

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The new process applies to the following special grant codes:

- **Code 10** – Utility Grant to Prevent Turn Off/Restore Services (prior to CA);
- **Code 41** – Utility Grant to Prevent Turn Off or Restore Utility Services (Mismanagement); and
- **Code 50** – Non-Recoupable Utility Grant (No Mismanagement)

There is no change to the process used by the JOS/Worker to generate the initial request for a utility grant.

If the utility service has already been shut off or if there is a pending shut off, Con Edison will begin the restoration of the utility service once the Utility Liaison enters the grant information into the Con Edison PAC system.

Gas/Electric Expense Window – Arrears/Clearance Information

- The JOS/Worker must ensure that the correct 15-digit Con Edison account number is entered in the **Account Number** field on the **POS Arrears/Clearance Information** window, see screen shot above, before submitting the case to the Group/Unit Supervisor for approval.

The Group/Unit Supervisor must confirm that the correct 15-digit Con Edison account number was entered by the JOS/Worker when s/he completes the approval activity.

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SI Grant Requests – Outstanding Requests Window

SI Grant Requests – Request Action Window

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SI Grant Requests – Management Test Window

SI Grant Requests – Single Issue Grant Summary Window

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POS pre-fills the Issuance code, Routing code and Pick up code fields on the **SI Grant Benefit Data Entry** window:

- **Issuance code**: The issuance code is pre-filled based on the results of the management test.
- **Routing code**: The routing code is pre-filled with a value of **RO94**.
- **Pickup code:** The pickup code is pre-filled with a value of **1** (Special Roll)

Single Issue Benefit Data Entry Window

Note: The Utility Liaison/Supervisor must enter the same grant information into PAC from POS. The Utility Liaison accesses the PAC system online at http://www.coned.com/pac.

5. Update to BEV Referral Reason Instruction Text

The instructions for the **BEV Referral Reason** window were updated:

- Please select a FEDS indicator only when appropriate. You may select up to three. If none of the reasons apply, please select "**None of the above.**"

6. Update to BEV Referral Available Appointments Window

The **BEV Referral Available Appointment** window for in-office appointments was updated to display all available appointment slots in the chronological order. The window previously displayed the earliest available appointment and a "Change Appointment" selection section.

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7. Alert for BEV Field Visit Appointment Selection

If a worker did not select the homebound indicator and selects **Field Visit**, a message will appear indicating that **BEV** field only appointments are primarily reserved for homebound participants. The Worker can continue with the selection, but this alert reminds them that they're making a homebound appointment for a non-homebound participant:

- Warning! The 'Field Visit' appointment is primarily reserved for the homebound clients. Please change the selection if 'In office' appointment slots are available.

8. Update to 3 Months Drill-Down Window for Self-Employment

The **3 Months Drill-Down Window** for Self-Employment has been updated to separate the business expenses into three separate tabs named **Month 1, Month 2 and Month 3.**

The **Total Expenses** field will now track the combined expenses recorded in each tab.

Updated 3 Months Drill-Down Window

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9. Updates to Expense Type in Household Expenses Windows

POS updated the **Expense Type** field within the **Response to Question** window of the **Yes/No** radio button question set "Does any Person, Group or Organization Outside The Household Pay Any of The Household Expenses?"

POS now allows the Eligibility Specialist (ES) to make more than two selections within the "Expense Type" drill down field.

10. CRPU (Centralized Rent Processing Unit) Aging Report

A new report named **CRPU Aging** was added to the Rental Assistance Unit (RAU) reporting portal. This report allows the CRPU to track the completion of rent arrears approvals.

The report includes two views: Data and Summary. The report users can filter using the:

- **Rent Arrears Case Status**: Case Not Assigned, Case Completed, Priority 1 Cases
- **Checks Printed**: Yes, No, ALL (default is ALL)
- **CRPU Processing Time**: 0-5 Days Old, 6-11 Days Old, 12-17 Days Old, 18-23 Days Old, 24-29 Days Old, 30+ Days Old

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Filters

Report Data Elements:

- Center
- Case Number
- Suffix
- Case Number
- Priority 1 (Yes/No)
- Priority (Assigned by RAU: e.g. Eviction Scheduled, Post-Eviction)
- Priority Code (RAU priority 1, 2 or 3)
- Action Date (RAU approval date)
- CRPU Worker Assigned Date
- CRPU Worker Start Date
- CRPU Worker Complete Date
- CRPU Supervisor Start Date
- CRPU Supervisor Approval Date
- Check Printed Date
- Print Queue Date
- Special Roll or E-Check
- Completed (Yes/No)
- Days Old (from Action Date)
- Referral No (from RAD)
- Instance No (from RAD)
- Grant Type
- Approved Amount
- Approved From
- Approved To
- Landlord Name
- Landlord Address
- Landlord Phone
- Homebound Indicator
- Issued Amount

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Data View

Summary View

11. Updates to Chinese Language Read and Preferred Language for Written Notices

For WMS release 2015.1, two new language codes were added in the **Language Read** and **Preferred Language for Written Notices** fields:

- **CT** Chinese Traditional
- **CS** Chinese Simplified

The following language codes were removed from the **Language Read** and **Preferred Language for Written Notices** fields:

- **C** Chinese Mandarin
- **2** Chinese-Cantonese
- **3** Chinese-Other
- **CH** Chin-Toisanese

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12. New Edit for M-528n Form

A new edit was added to the Request for Child Care Assistance or Request to Close My Cash Assistance (CA) Case) Form (**M-528n)** to prevent the Worker from selecting both the applicant and participant checkboxes and to prevent selection of both the applicant and withdrawal checkboxes.