




# OFFICE OF POLICY, PROCEDURES, AND TRAINING

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## POLICY BULLETIN #15-104-OPE (This Policy Bulletin Replaces PB #14-85-OPE)

### REVISION TO CASH ASSISTANCE ROBO-CALLS FOR SCHEDULED INTERVIEWS AND THE ELIGIBILITY MAILER

Date:	Subtopic(s):
November 06, 2015	CA Eligibility Appointments, CA Recertification Appointments, Missed Appointments, Eligibility Mailer
<p> This procedure can now be accessed on the FIAweb.</p> <p>Revised</p> <p>Revised</p>	<p><b>Revisions to the Original Policy Bulletin</b></p> <p>This policy bulletin is being revised to include the automated telephone call (robo-call) process for the Cash Assistance (CA) Program Eligibility Mailer which began on October 2, 2015.</p> <p><b>Purpose</b></p> <p>The purpose of the policy bulletin is to inform Job Center staff that the Family Independence Administration (FIA) and Management Information Systems (MIS) have expanded the automated telephone call system, referred to as robo-calls. In addition to Robo-calls being used to remind Cash Assistance applicants/participants of their upcoming and missed application and recertification interviews, robo-calls will now also be made to participants identified as not returning the Mail-in Recertification/Eligibility Questionnaire (<b>M-327h</b>).</p> <p>The robo-call process uses an Interactive Voice Response System (IVRS) which does the following:</p> <ul style="list-style-type: none"> <li>• Places a call to the CA applicant/participant as a reminder of an upcoming application or recertification interview the day before their scheduled appointment.</li> <li>• Places a call to the CA applicant/participant to inform them of a missed application or recertification interview the day after if they failed to keep their scheduled appointment. In this missed scheduled interview call, the applicant/participant will be given a central telephone number to call if he/she wishes to reschedule his/her missed interview and will be informed that he/she has five days to reschedule.</li> </ul>

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

New information

- Begins calling CA participants on the 2<sup>nd</sup> day of the month following the due date of the form **M-327h** if it has not yet been received by the Income Clearance Program (ICP). The calls will be made in ascending TOE digit order. These calls will also provide a central telephone number that participants may call to ask questions about the completion of the form.

Example: The **M-327h** has a due date of 8/31. There is no entry in ICPWeb to indicate that the mailer was received. On 9/2, robo- calls will be made for cases with a TOE digit of 0. On 9/3, robo-calls will be made for cases with TOE digit of 1.

Robo calls are available in English, Spanish, Russian, Chinese, Arabic, Haitian-Creole and Korean languages depending on the language indicator in the Welfare Management System (WMS).

Refer to [PD #11-15-OPE](#)

**Note:** The term application interview in this procedure is referring to applicants who filed a Cash Assistance application but were unable to stay for the interview and a **99AI** (Applicant Interview Scheduled) Action Code is posted in New York City Work, Accountability and You (NYCWAY).

Appointment Validation

Centralized Interview Rescheduling Unit

The CA Centralized Interview Rescheduling Unit (CIRU) will handle the rescheduling of application and recertification interviews resulting from the robo-calls for missed scheduled interviews. Additionally, CIRU staff will provide information to participants with questions regarding the completion of the **M-327h**.

Revised

When the applicant/participant calls the centralized telephone number, the applicant/participant will be asked to enter an identifier such as the CA case number, or Social Security Number (SSN).

Revised

IVRS will connect to POS and ICPWeb to verify whether the applicant/participant is scheduled for a CA application or recertification interview or if the participant has an eligibility mailer due.

If the applicant/participant is not scheduled for an application/recertification interview, or if an eligibility mailer is not due, IVRS plays the appropriate message indicating that there is no application/recertification appointment available for rescheduling or that the individual is not expected to return the eligibility mailer.

If an application/recertification interview is scheduled or the eligibility mailer is due, IVRS places the applicant/participant in the call queue and the applicant/participant is then connected to the Rescheduling Agents at the Centralized Interview Rescheduling Unit (CIRU).

#### Rescheduling of Application Interview

The Rescheduling Agents at the CIRU will record the applicants request to reschedule an application interview by taking the following actions:

- Work with the applicant to determine the new appointment date and time.

**Note:** The worker should attempt to reschedule the applicant for the earliest possible date but cannot exceed 10 calendar days from the date of the call.

- Enter Action Code **99AR** (Applicant Interview Rescheduled) and the new appointment date and time in NYCWAY.
- Record the new appointment date and time in POS (See **Attachment B**).
- Print the Important Information About Your Application (**W-531**) form.
- Manually complete the **W-531**.
- Scan and index the **W-531** into the case record.
- Mail the **W-531** to the applicant

#### Rescheduling of Recertification Interview

The Rescheduling Agents at the CIRU will record the participant's request to reschedule a recertification interview by taking the following actions:

- Work with the participant to determine the new appointment date and time.

**Note:** The worker should attempt to reschedule the participant for the earliest possible date, but it cannot exceed 10 calendar days from the date of the call.

- Enter new Action Code **908U** (Request for CA Recertification Rescheduling) and the new appointment date and time in NYCWAY.

**Note:** The new Action Code **908U** is only for the use of the CIRU.

After the **908U** is posted, NYCWAY updates the appointment time and date in POS. The Notice of Rescheduled Appointment for Recertification Interview (**W-908CC**) is mailed to the participant through Print-to-Mail (PTM).

#### Assisting with the **M-327h**

New information

If the participant is calling for assistance with completion of the **M-327h**, the Rescheduling Agent will provide the participant with the general requirements for completing the form and, if necessary, assist with specific questions related to the mailer.

New information

Additionally, if the participant indicates that he/she did not receive the mailer, CIRU staff must:

- Check HRA OneViewer for the **M-327h**.
- Confirm that the mailing address on the form is current.
- Print the form from the HRA OneViewer.
- Mail the participant a copy of the mailer.

#### Failure to Keep Interview Appointment

When the applicant fails to keep an application interview, the JOS/Worker at the Job Center must wait 6 days (5 days after the robo-call) to process the failed to keep action

The following message will appear if the JOS/Worker attempts to process the failure to keep the application interview before the sixth day:

*“The grace period is 5 days for applicants who fail to keep the initial interview. The failed to keep action cannot be processed until the applicant has an opportunity to reschedule their appointment.”*

**Note:** These applications will be rejected using code **F10** (Failed to Keep Appointment for Eligibility Interview).

When the participant fails to keep a recertification interview, the JOS/Worker at the Job Center must wait 6 days (5 days after the robo-call) to process the **G10** (Failure to Recertify) or **G20** (Failure to Recertify – Home Visit).

*“The grace period is 5 days for clients who fail to keep the recertification interview. The failed to keep action cannot be processed until the client has an opportunity to reschedule their appointment.”*

### New Work List and Appointment Slots in NYCWAY for Action Code 908U

A new work list, the **FFRRR**, and appointment grids for use with the new Action Code **908U** were created in NYCWAY for each Job Center. The Center Director or their Designee is responsible for the maintenance of the appointment grids assigned to their Center.

### Rescheduling Home Visit Needed/Homebound (HVN/HB) and Residential Treatment Service Center (RTSC) Cases

For HVN/HB participants, NYCWAY will display a message that the JOS/Worker must contact the HVN/HB liaison at the Job Center to reschedule the appointment.

For RTSC participants that request a rescheduling of their recertification interview, NYCWAY will display a message that the JOS/Worker must contact RTSC to reschedule the appointment. In these situations, the JOS/Worker must take the call back information from the caller. The JOS/Worker must then contact the Administrative Assistant (AA) to the Director of RTSC and provide the call back information.

### FIA Call Back List

When the applicant/participant contacts the centralized telephone number and is placed in the call queue with the CIRU and cannot be connected to the Rescheduling Agent, IVRS will ask the applicant/participant to leave his/her call back telephone number, case number or Social Security Number and preferred rescheduling date and time. These applicants/participants are placed on the new FIA Call Back List. The Rescheduling Agents at the CIRU will access this report through a link in the POS Portal.

**Note:** Data is available for the past 90 days. Access requests for the FIA Call Back List can be submitted via the POS Help Desk

When the CIRU Rescheduling Agent logs into the FIA Call Back List, the following message will appear:

*“The Call Back application lists call back numbers of all applicants/participants who requested to reschedule their appointments and were required to leave a call back number with case information as agents were not available to reschedule their appointments over the phone”*

New information

The following information will display on the screen:

- Request Date – this field indicates the date that the applicant/participant called FIA to reschedule.
- SSN – this field indicates the Social Security Number entered by the applicant/participant who must be called back. (If the applicant/participant chose this field.)
- CaseNo – this field indicates the case number entered by the applicant/participant who must be called back. (If the applicant/participant chose this field.)
- Phone – this field indicates the call back telephone number entered by the applicant/participant who must be called back.
- Language – this field indicates the preferred spoken language for the applicant/participant who must be called back.
- Center – this field indicates the case type (CA or SNAP) for the applicant/participant who must be called back.
- Req. Appt. Date/Req. Appt. Time – this field indicates the requested rescheduling date and time entered by the applicant/participant who must be called back.

The CIRU Rescheduling Agent can filter this information by:

- Date
- Language
- Call Center (Case Type)

The CIRU Rescheduling Agent can also export the data to Excel by clicking on the Export to Excel button.

The CIRU Rescheduling Agent will be responsible for returning the call and rescheduling the applicant/participant on this list within five days from the date that the applicant/participant called to request the rescheduling of his/her application/recertification interview.

The CIRU Rescheduling Agent will call the applicant/participant up to three times and keep a record of contact attempts.

#### Reminder letter for missed appointments

Applicants/participants who miss an application/recertification interview will also receive a reminder letter, the “Important Information about Your Case Notice of Missed Cash Assistance Appointment” (**FIA-1124**). The **FIA-1124** will be mailed to the applicant/participant the day after his/her missed interview and will offer him/her the opportunity to reschedule the interview. This letter is mailed to the applicant/participant in addition to the missed interview robo-call.

New information

*Effective Immediately*

**Related Item:**  
[PB #15-62-OPE](#)  
[PD #11-15-OPE](#)

**Attachments:**

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

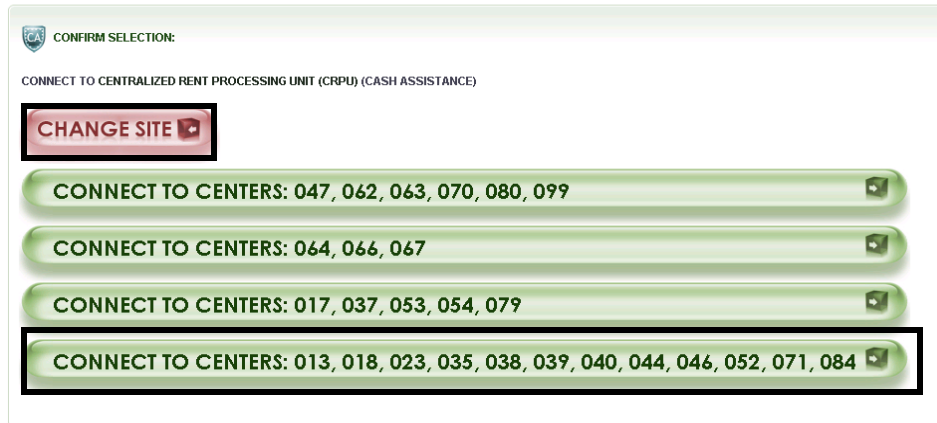
- |                     |  |
|---------------------|--|
| <b>Attachment A</b> | Instructions to the Centralized Interview Rescheduling Unit for Rescheduling a CA Application Interview in POS |
| <b>FIA-1124 (E)</b> | Important Information About Your Case Notice of Missed Cash Assistance Appointment (7/31/14)                   |
| <b>FIA-1124 (S)</b> | Important Information About Your Case Notice of Missed Cash Assistance Appointment (Spanish) (7/31/14)         |
| <b>W-531</b>        | Important Information About Your Application (Rev. 8/21/12)  |
| <b>W-531 (S)</b>    | Important Information About Your Application (Spanish) (Rev. 8/21/12)  |

## Attachment A

### Instructions to the Centralized Interview Rescheduling Unit for Rescheduling a CA Application Interview in POS

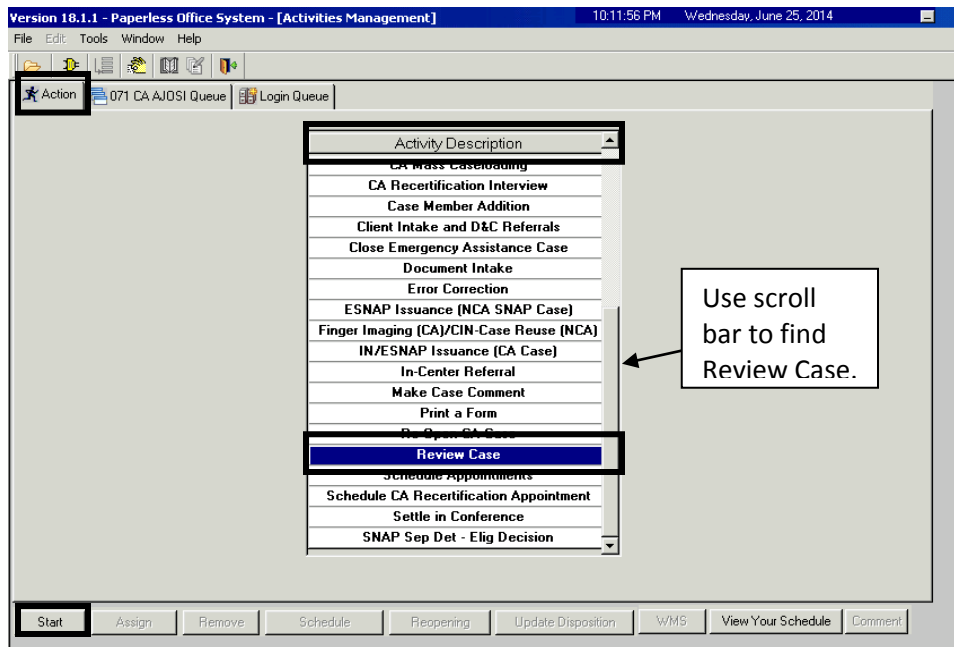
Once in POS do the following:

- Click on Change Site.
- Select the Center where the case originates from. (In our example, the case originates from Center 40.)



Once in the Activities Management Screen do the following:

- Click on the Action Tab.
- Under Activity Description select Review Case. (Use Review Case to determine the queue in which the case is pending).
- Click Start.





## Attachment A

In the Choose A Case screen, enter the case number and click Search.  
The case information will appear in the bottom portion of the window.  
Click on the case information to highlight and select Perform Specified Action.

Version 18.1.1 - Paperless Office System - [Choose A Case] 10:18:15 PM Wednesday, June 25, 2014

File Edit Tools Window Help

Review Case

Specify Case:  
Enter One or More of these Items

Case Number: [input field]  
Case Name: [input field]  
First & Last Name: [input field]  
SSN: [input field]  
CIN: [input field]

[input field]

Search

Case Number	Suf	Case Name	Casehead Name	CIN	SSN	File Date
1	1	[redacted]	[redacted]	[redacted]	[redacted]	6/25/2014

[input field]

Perform Specified Action Previous Add Action to Queue

The Pending Activities Notification window will open and the CA Application Interview activity should be listed in this window. The worker must annotate the worker's name from the Worker field and the caseload number from the Caseload field and click Cancel.

Pending Activities Notification

Case Number [redacted] has the following activities currently pending. Any activity highlighted in green means that the activity you are attempting to perform is already suspended in that person's queue.

Worker	Caseload	Activity
[redacted]	[redacted]	CA Application Interview

Proceed Cancel

This will shut down the Case Review activity and bring you back to the Activities Management Screen.

## Attachment A

Once at the Activities Management Screen, the worker can access the queue where the case is pending by doing the following:

- In the Unit Filter section:
  - The option of Worker should be selected (if not selected, click on that option).
  - Click on the drop down arrow and type the first three letters of the worker's last name. When the worker's name appears, select the worker's name.


The screenshot shows the 'Unit Filter' section with the following options:

- Worker
- CMU
- Uncovered
- Center: 040 TDEV
- Worker Name: [Redacted]

- In the Activity Type Filter section select Application Interview.

The screenshot shows the 'Activity Type Filter' section with the following options:

- Application Interview
- Schedule Recert
- IN & ESNAP
- Recert Interview
- Change Case Data
- Error Corrections
- Reop
- Other

- Click on the Filter button. 
- Select the case by clicking on it to highlight
- Click the Schedule button at the bottom of the screen.

The screenshot shows the 'Activities Management' screen with the following components:

- Version 18.1.1 - Paperless Office System - [Activities Management]
- 10:14:27 PM Wednesday, June 25, 2014
- File Edit Tools Window Help
- 071 CA AJOSI Queue Login Queue
- Unit Filter: Worker  Center: 040 TDEV
- Activity Type Filter: Application Interview  Schedule Recert  IN & ESNAP  Recert Interview  Change Case Data  Error Corrections  Reop  Other
- Activity Approve Filter: Approve Appl Inter  Approve Recert  Approve IN & ESNAP  Approve Error Cor  Approve Change  Approve Other  Approve Reop
- Activity Status Filter: Suspended  Removed  Not Scheduled  Completed  Not Stated
- Activity Alert Filter: Coming Due  Overdue
- Filter button
- Clear button
- Table with columns: Activity, Due Date, Alert, Case Name, Case No, Suf, Center
- Total: 5 Cases
- Buttons: Start, Assign, Remove, Schedule, Reopening, Update Disposition, WMS, View Your Schedule, Comment

Activity	Due Date	Alert	Case Name	Case No	Suf	Center
CA.Application Interview		No AFIS Result Received		1		040
CA.Application Interview		NA		1		040
CA.Application Interview		NA	One Shot One Shot	1		040
CA.Application Interview		NA		1		040
CA.Application Interview		NA		1		040

## Attachment A

When the Absence Calendar screen appears, take the following actions to reschedule the appointment:

- Select the requested date in the Calendar section by clicking on the date (A blue box will appear around the date selected).
- Click into the “Scheduled Time” box at the bottom of the screen and enter the new appointment time.
- Click OK.

The screenshot shows the 'Absence Calendar' window from the 'Paperless Office System'. The window title is 'Version 18.1.1 - Paperless Office System - [ABSENCE CALENDAR]'. The top right corner displays the time '10:15:32 PM' and the date 'Wednesday, June 25, 2014'. The main area is divided into two sections. On the left is a calendar for 'June 2014'. The calendar grid shows days from Sunday to Saturday. The date '26' is highlighted with a blue border, indicating it is selected. Below the calendar are two radio buttons: 'Weekends+Holidays' (which is selected) and 'Absence'. On the right side of the window, there is a table with columns: 'Case Name', 'Case No', 'Suffix', 'Type', and 'Tickler Time'. Below the table, there are two input fields: 'Schedule Date : 06/26/2014' and 'Schedule Time : 10:00 AM'. At the bottom of the window are 'OK' and 'Cancel' buttons.

Date: \_\_\_\_\_  
Case Number: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Center: \_\_\_\_\_

**IMPORTANT INFORMATION ABOUT YOUR CASE**

**NOTICE OF MISSED CASH ASSISTANCE APPOINTMENT**

Our records indicate that you missed your scheduled recertification/application appointment on \_\_\_\_\_. This important appointment was to discuss your eligibility or continued eligibility for Cash Assistance benefits.

**If you have not already called to reschedule your appointment, please call us at \_\_\_\_\_ by \_\_\_\_\_ to set up another appointment.**

It is important that you call to reschedule this appointment and keep the new appointment in order to avoid a possible loss of benefits.

SAMPLE

Fecha: \_\_\_\_\_  
Número del Caso: \_\_\_\_\_  
Nombre del Participante: \_\_\_\_\_  
Centro: \_\_\_\_\_

**INFORMACIÓN IMPORTANTE SOBRE SU CASO**  
**AVISO DE CITA FALTADA DE ASISTENCIA EN EFECTIVO**

Según nuestros archivos, usted faltó a su cita de recertificación/solicitud programada para el \_\_\_\_\_. Esta cita importante era para tratar el tema de su elegibilidad o elegibilidad continua para beneficios de Asistencia en Efectivo.

**Si usted aún no ha llamado para reprogramar su cita, por favor llámenos al \_\_\_\_\_ para el \_\_\_\_\_ para fijar otra cita.**

Es importante que usted llame para reprogramar esta cita y que la cumpla para evitar una posible pérdida de beneficios.

SAMPLE

Date: \_\_\_\_\_  
Center Number: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Applicant Address: \_\_\_\_\_  
\_\_\_\_\_  
Application File Date: \_\_\_\_\_

### Important Information About Your Application

**Note:** As of August 29, 2012, any reference to the Food Stamp Program in this notice shall mean the Supplemental Nutrition Assistance Program (SNAP), and any reference to Food Stamps shall mean SNAP benefits.

Since you need to leave the Job Center today before seeing a Worker to complete the electronic application and interview process, we have accepted a paper Statewide Common Application (Form **LDSS-2921**) in order to protect your application filing date. The day after you turn in (file) your application counts as day 1 of your application-filing period.

When you return to the Job Center, please *bring* this form with you and present it to the Receptionist. Please tell the Receptionist that you have already filed an application and need to complete an initial eligibility interview. In order for this agency to process your Cash Assistance application, your interview has been scheduled as follows:

Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

#### Cash Assistance Eligibility

When you submit an application for Cash Assistance you must complete an initial eligibility interview within seven (7) business days from your application filing date. Failure to complete an initial interview, without good cause, within the seven (7) business days may result in the DENIAL of your Cash Assistance application.

#### Supplemental Nutrition Assistance Program (SNAP) Eligibility

Failure to complete the initial eligibility application process and interview, without good cause, within thirty (30) calendar days from the date your application is filed may result in the DENIAL of your application for SNAP.

If you need to reschedule your appointment, please contact the Job Center at the telephone number provided above.

Fecha: \_\_\_\_\_  
Número del Centro: \_\_\_\_\_  
Nombre del Caso: \_\_\_\_\_  
Dirección del Solicitante: \_\_\_\_\_  
Fecha de Presentación de la Solicitud: \_\_\_\_\_

### Información Importante Sobre su Solicitud

**Nota:** A partir del 29 de agosto, toda referencia al Programa de Cupones para Alimentos en este aviso se denominará el Programa de Asistencia de Nutrición Suplementaria (SNAP), y toda referencia a Cupones para Alimentos se denominará beneficios de SNAP.

Debido a que usted necesita irse del Centro de Trabajo hoy antes de reunirse con un Trabajador para llevar a cabo el trámite de solicitud y entrevista electrónicas, hemos aceptado el formulario en papel Estatal de Solicitud Común (**LDSS-2921-SP**) para salvaguardar a fecha de entrega de su solicitud. El día en que usted entrega (presenta) su solicitud se considera el día 1 de su período de solicitud.

Al regresar al Centro de Trabajo, favor de *traer* este formulario con usted y presentarlo a la Recepción. Favor de informar a la Recepción que usted ya ha presentado solicitud y necesita llevar a cabo una entrevista inicial de elegibilidad. Para que esta agencia pueda tramitar su solicitud de Asistencia en Efectivo, su entrevista ha sido programada según se indica a continuación:

Fecha de la Cita: \_\_\_\_\_ Hora: \_\_\_\_\_ Teléfono: \_\_\_\_\_  
Dirección: \_\_\_\_\_  
Ciudad: \_\_\_\_\_ Estado: \_\_\_\_\_ Código Postal: \_\_\_\_\_

#### Elegibilidad de Asistencia en Efectivo

Al usted presentar solicitud de Asistencia en Efectivo, debe llevar a cabo una entrevista inicial de elegibilidad dentro de siete (7) días laborables de la fecha en que usted presentó su solicitud. El no llevar a cabo la entrevista inicial, sin motivo justificado, dentro de siete (7) días laborables puede resultar en el RECHAZO de su solicitud de Asistencia en Efectivo.

#### Elegibilidad del Programa de Asistencia de Nutrición Suplementaria (SNAP)

El no llevar a cabo la entrevista inicial, sin motivo justificado, dentro de treinta (30) días de la fecha en que usted presentó su solicitud puede resultar en el RECHAZO de su solicitud del SNAP.

Si usted necesita reprogramar su cita, favor de comunicarse con el Centro de Trabajo al número de teléfono indicado más arriba.