OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #15-113-SYS

CA POS RELEASE NOTES VERSION 19.3.1

Date: December 21, 2015	**Subtopic(s):** 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) migrated into production on December 21, 2015. Descriptions of the changes can be found in CA POS Release Notes Version 19.3.1 (**Attachment A**), and Desk Guide: Robocall Report in POS Management Console, **Attachment B**. These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx *Effective Immediately* **Attachments:** **Attachment A** CA POS Release Notes Version 19.3.1 **Attachment B** Desk Guide: Robocall Report in POS Management Console,
🖥 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

CA POS Release Notes
Version 19.3.1 December 21, 2015

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 19.3.1 scheduled for Monday, December 21, 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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CA POS Release Notes
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1. POS (Paperless Office System) Categorical Eligibility Look-up update

POS includes the new Intentional Program Violation (IPV) flag from the Federal and State clearance report which will update the No IPV/ Sanction checkbox on the SNAP application.

Affected Activities – CA Cases
- **Application Interview**
- **Recertification Interview**
- **Change Case Data**
- **EC – Application Interview**
- **EC – Recertification Interview**
- **EC – Change Case Data**

2. POS Robo-Call Appointment Update

POS has updated the robo-call recertification reminder and missed recertification for LINC (Living in Communities) or CITYFEPS (City Family Eviction Prevention Supplement) participants with the following scripts:

Reminder Script
Hello, this is an automated reminder call from the Human Resources Administration. You are scheduled to have a Cash Assistance recertification in center interview tomorrow. This important appointment is to discuss your continued eligibility for Cash Assistance benefits. This includes your eligibility for LINC or CITYFEPS payments. You have to come to the location on your appointment notice for this Interview. Goodbye.

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Missed Recertification Script

Hello, this is an automated call from the Human Resources Administration. You were scheduled to have a Cash Assistance recertification application interview at the job center yesterday. According to our records you did not keep this appointment. This important appointment was to discuss your continued eligibility for Cash Assistance benefits. This includes your eligibility for Living in Communities (LINC) or City Family Eviction Prevention Supplement (CITYFEPS) payments. You must have a recertification interview. Please call 212-835-7304 during normal business hours 8:30 am to 5:00 pm within the next 5 business days to reschedule your appointment. That number again is 212-835-7304. Goodbye.

The data entry windows in POS for the An HRA Representative is Coming to Your Home to Recertify You form (**FIA-1148**) and the Notice of Missed Cash Assistance recertification Home Visit Appointment form (**FIA-1148a**) have also been updated to reflect these new robo-call updates.

3. Web Indexing Update

FIA (Family Independence Administration) staff is reporting that it is very cumbersome to have to leave the indexing windows to search for a case when trying to find the case the documents belong too. This is most common when they are working on the Mobile Document Upload (MOBDOC) or Right Fax submissions.

Currently the WEB Indexing Application is used for MOBDOC, some CBO (Community Based Organization) Indexing, and shortly Right Fax indexing. This design will add a "WMS" case search to the WEB Indexer.

Two new sections will be added to the window:

- **Fields will display the 'Case Number' and 'Case Name'**
- **New field will display user enters case or case selected from the search option**

Section to allow user to search case for indexing, Case Search, the input parameters will be (only one):

- **Case Number**
- **SSN**
- **CIN**
- **ANYC Confirmation Number**

4. POS Single Issuance Code Updates

POS has been updated to display a new program called the (Special Exit and Prevention Supplement Program). This program will assist single individuals and adult families who may live in substandard living conditions. The new codes are listed below:

Action	Subsection	New POS Code	New WMS Code	Description
Add Code	SIIS_ISSUANCE_CODE	CB7	B7	Special Exit and Prevention Supplement Program
Add Code	SIIS_ISSUANCE_CODE	CB8	B8	Special Exit and Prevention Supplement Program

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5. Case Comments Update

POS users must be able to view additional information such as Primary Phone number, Secondary Phone number, Residential Address, Mailing address, and Email ID in the **POS Case Comments** interface. In addition, the Worker will be able to add a Comment Type, Outreach Type and Outreach Outcome. The Worker will also be able to view the history of comments made by the previous Workers, staff member, case comments and date entered.

6. Forward Document Alert

The **POS Indexing** windows have been updated to generate a "Forward Document" alert to all Workers and his/her queues. After the document has been indexed the system will check POS to determine if there are any pending activities (interview, approval, error correction etc.) for the case. If pending activities are found, POS will send an alert (highlighted in blue) when the Worker completes indexing outside of the **Document Intake** activity.

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7. POS Management Console

The POS Management Console includes the new Robo-Call Report that allows HRA (Human Resources Administration) tracking ability for application and recertification robo call data for Cash Assistance and Non-Cash Assistance SNAP (Supplemental Nutrition Assistance Program) Cases. For details please see **Attachment B**, Robo Call Report in Management Console.

8. New HDU (Homelessness Diversion Unit) Sites

The following two new HDU locations have been added to the CA Site Determination window:

- **Borden Shelter**
- **Porter Shelter**

9. POS E-Forms

The following E-forms were updated (additional languages and combinations):

W145F, Recoupment Worksheet to Determine Undue Hardship
FIA-1125, Request for Determination of Undue Hardship
FIA 1125ac, Outcome of Review of Undue Hardship Claim/W145F Recoupment Worksheet,
FIA 1125a, Outcome of Review of Undue Hardship
FIA 1125e, Request for Documentation of Expenses Undue Hardship Determination
LINC FIA-1148, A HRA Representative is coming to Your Home to Recertify You
LINC FIA-1148A, Notice of Missed Cash Assistance Recertification Home Visit Appointment

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console
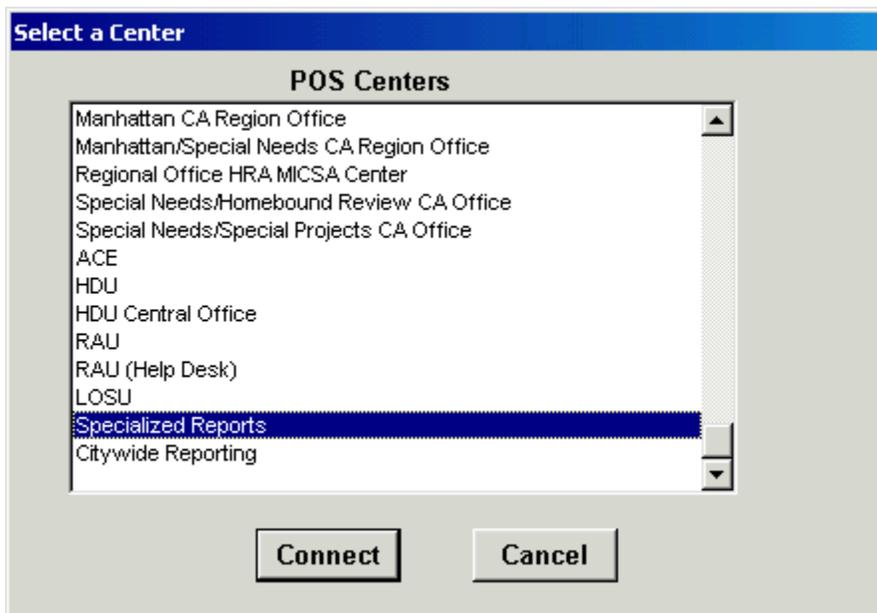**Date: December 2015**

Overview

A new Management Console report allows HRA (Human Resources Administration) to track application and recertification robocall data for Cash Assistance (CA) and Non-Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) cases. The data is loaded on a monthly basis on the 15th day for the prior month's robocalls.

Details

The following edits were implemented for this report:

1. Access is limited to authorized users.
2. Retrieval of data is available via a connection to centralized POS (Paperless Office System) tables.
3. The user is able to select data for the entire city by case type (CA, SNAP or ALL) and by appointment type (Application, Recertification or All).
4. The user is able to save the report output to text or Excel files.

Select a Center

POS Centers

Manhattan CA Region Office
Manhattan/Special Needs CA Region Office
Regional Office HRA MICSA Center
Special Needs/Homebound Review CA Office
Special Needs/Special Projects CA Office
ACE
HDU
HDU Central Office
RAU
RAU (Help Desk)
LOSU
Specialized Reports
Citywide Reporting

[Connect]   [Cancel]

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console
Date: December 2015

Filters

The following filters are available for this report:

- **Timeframe Selection**: This filter allows the user to select the period for the report. The options available are: Yesterday, Past 7 Days, Past 4 Weeks, A Month and Specify Range.
- **Case Type**: This filter allows the user to select CA, SNAP or ALL.
- **Appointment Type**: This filter allows the user to toggle between the appointment types. The options are: Application, Recertification and All.

When changing selections in the filters, the user must re-run the report by clicking on the **Filter** button. If the time frame selection is changed, the **Retrieve** icon must be clicked.

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Desk Guide: Robocall Report in POS Management Console
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Report Screenshot:

Data

Columns:

- Case No
- Case Name
- Center
- Appointment Date
- Appointment Type
- Case Type
- Interview Type
- Date Of Robocall
- Call Outcome
- Case No
- Suffix
- Case Type
- Language Indicator
- Ethnic Affl
- Appreg Suf
- Case Status
- Case Status Date
- Reason
- Auth From Date
- Auth To Date
- Shelter Type
- Hmbound
- SNAP Indicator
- Application Date
- Case Name

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ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console
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- Date Time Stamp
- Key1 Case No
- Key1 Line No
- Key1 Tran Date
- Key1 Tran Type
- No Parents Household
- Next Recert Date
- Notice Lang
- FA Allot Amt
- No Pers FS Case
- SNAP Case Status
- MA Case Status
- CA Activation Date
- Interim Date
- SNAP Activation Date
- FA Interim Date
- PA Benefit Issue Date
- SNAP Benefit Issue Date
- Bad Flg
- SNAP Issue Code
- Aid Status
- Lang Read
- MA Reason
- MA Auth From
- MA Auth To
- SNAP Reason
- SNAP Auth From
- SNAP Auth To
- Shelter Contribution Amount
- Safety Net Ind
- Case Status M2
- Last Recert Date
- CA CLRJ Dt
- Last Inactive Status
- Center Id
- Case No
- Appointment Dt
- Appt Status
- Cns Notice No
- Transmission
- Transmission Date
- Pers Id
- Appointment Type
- Ldss4826 Date
- Telephone Interview
- IVRS
- Phone No
- Extension
- Contact 1
- Contact Date 1
- Contact 2
- Contact Date 2
- Contact 3
- Contact Date 3
- Contact 4
- Contact Date 4
- Requested Call Dt
- Mail Returned
- Mail Returned Date
- Signed Ldss4826

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console
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- Mail Postmark Date
- Original Appointment Date
- No Change
- Closing Requested
- CBO
- Auth Rep
- Auth Rep Name
- Ra Type
- Flex Trav Days
- Ra Message
- Ra Type
- Priority
- FlagDB
- Case Status
- Reason
- Reason Status
- SNAP Case Status
- SNAP Reason
- Key1 Tran Date
- Tele Ind
- Resc Flg
- Missed Appt
- Next Day
- SNAP File Date
- Decision Status
- Decision Code
- Is Tel Interview
- CA Proc Date
- SNAP Proc Date
- City
- County
- Casehead SSN

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console
Date: December 2015

Saving report output to an Excel file

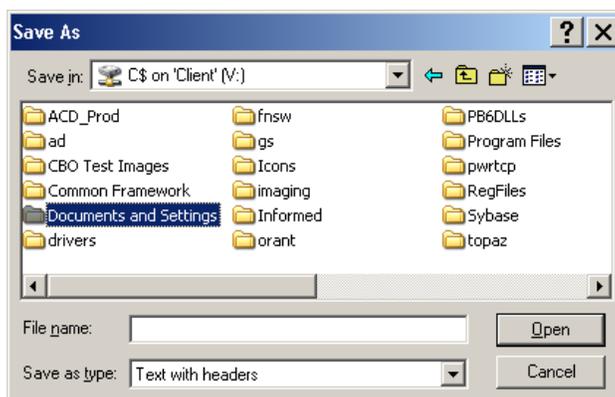Please complete the following steps to save the report data to a text or Excel file:
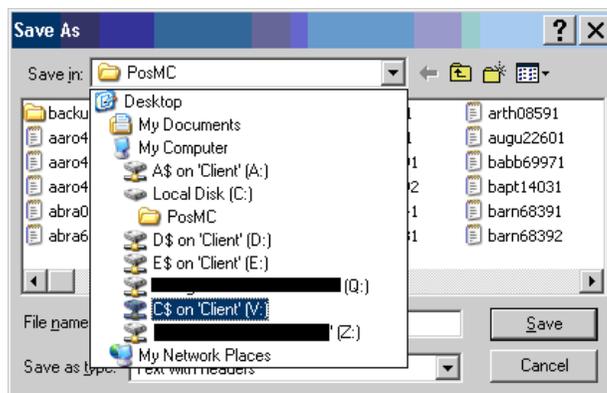
1. Set the filters and retrieve the report data by clicking on the **Retrieve** icon.

2. Click on the **Save As** icon.

3. The **Save As** window will appear.
4. Select **C$** on '**Client' (V:)** in the **Save in** menu.
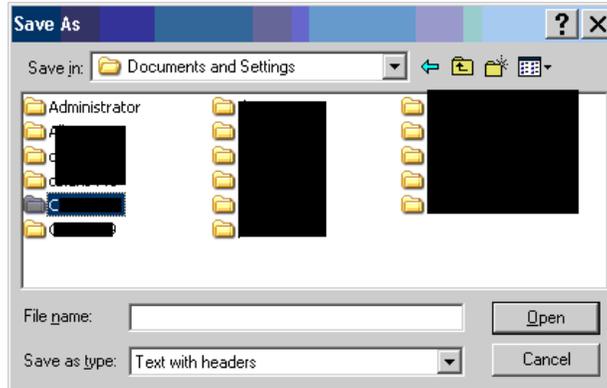5. Double click on the **Documents and Settings** folder.

Desk Guide: Robocall Report in POS Management Console
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Saving report output to an Excel file (continued)

6. Double click on the folder with your Network ID.
7. Double click on the **Desktop** folder.

8. Type the File Name.
9. Select **Excel with headers** in the **Save as type** menu.
10. Click the **Save** button.