FAMILY INDEPENDENCE ADMINISTRATION
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POLICY BULLETIN #15-95-SYS

EASY ACCESS: HRA DOCUMENT UPLOAD FOR MOBILE DEVICES

Date: October 13, 2015	Subtopic(s): Document Return, Re-Engineering
🖥 This procedure can now be accessed on the FIAweb. HRA Document Upload. Refer to PB #08-21-OPE.	The purpose of this policy bulletin is to introduce Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) Center staff to the new HRA Document Upload. This policy bulletin is informational for all other staff. HRA Document Upload is the latest technology development of the Easy Access initiatives released by the Human Resources Administration (HRA). This innovation is intended to provide applicants/participants of NCA SNAP with a document return method that reduces the possibility of their case being rejected/closed for failure to provide documents necessary to verify certain eligibility factors related to their case. HRA Document Upload is a new secure mobile web application, created for HRA that enables individuals to use a camera-equipped mobile device, smart phone or tablet, to submit images of documents to HRA when verification of eligibility factors is required. This alternative method of document submission allows individuals to submit documents without coming into a SNAP Center. **Note**: HRA Document Upload is not intended to be used to submit the SNAP Application/Recertification (**LDSS-4826**), Periodic Report (**LDSS-4310**), SNAP Change Report Form (**LDSS-3151**), and NYSNIP SNAP Benefits Interim Report (NYC) (**LDSS-4836 NYC**). HRA Document Upload is available in English, Spanish, Arabic, Simplified Chinese, Traditional Chinese, Korean, Russian, and French. HRA Document Upload can be accessed using the browser on camera-equipped mobile devices, including Android, Apple, and Windows. The user submits identifying information for any household member on the case.

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

Note: If an individual is not using a mobile device and attempts to access HRA Document Upload, the individual will be directed to an informational web page that includes information regarding the requirement to use a mobile device to access HRA Document Upload.

Initial roll out.

The HRA Document Upload web application was put into production in May, and piloted in May and August 2015 at the Waverly (**S19**) and Crotona (**S46**) SNAP Centers, respectively.

Workers at the SNAP Centers offer the option of HRA Document Upload to applicants/participants that need to submit documents and have a mobile device. A mobile device with a data plan or Wi-Fi network connection is required to access HRA Document Upload.

Individuals are notified by Workers of the option to use HRA Document Upload in the following ways:

- Facilitator in the PC Bank speaks with an individual that has completed an online initial/recertification application for NCA SNAP;
- Eligibility Specialist (ES) gives an individual the web application information during the interview.

Refer to **Attachment A**.

Refer to How to Use the HRA Document Upload on a Mobile Device (**Attachment A**) for detailed instructions on how to navigate the web application.

The HRA Document Upload web application is hosted by the Department of Information Technology & Telecommunications (DoITT). DoITT passes the uploaded images through a virus scanner. If a virus is not detected, the images and associated data are transmitted to HRA's centralized citywide storage folder in the Paperless Office System (POS).

The folder and its images are connected to the applicant/participant's electronic case record using the identifying information that was entered by the applicant/participant when the documents are submitted.

Web Image Indexing tool.

POS or Worker Locates a WMS Case Number

All uploaded images must be indexed to the correct location within the applicant/participant's electronic case record by the NCA SNAP Worker using the **Web Image Indexing** tool in the POS portal. The uploaded images are stored in the Mobile Document (MOBDOC) case list.

- If POS is able to automatically locate a Welfare Management System (WMS) case number using the information submitted by the applicant/participant, the MOBDOC folder is identified by the household's WMS case number.
- If POS cannot locate a WMS case number using the information submitted by the applicant/participant, the MOBDOC folder is identified by a 12-digit numeric placeholder that begins with the last two digits of the current year.

  Note: The MOBDOC folders with a 12-digit numeric placeholder require that the SNAP Worker use the identifying information on the images to conduct a thorough case search using WMS to locate the appropriate WMS case number.

Illegible documents.

All images in the MOBDOC folder must be indexed. If a Worker cannot identify the document type of an uploaded image, s/he must select **Miscellaneous** from the *Document Type* menu and **Unusable Self Service Scanned Document** from the *Document Description* menu. Uploaded images must not be deleted.

Refer to **Attachment B**.

For detailed instructions on indexing uploaded images, refer to the HRA Document Upload Submission Desk Guide (**Attachment B**).

Refer to PB #14-67-SYS.

Note: NCA SNAP Workers at SNAP Centers that currently have the Electronic Document Submission (EDS) option for applicant/participants must continue to index the scanned images that appear in the **SCENDB** folder.

Refer to PB #14-111-SYS.

Note: Designated Staff at SNAP Centers that currently have EASY ACCESS self-service scanners for document submission must continue to complete the **Self Service Scanning** activities, which are assigned by their supervisor from the POS **Self-Service** queue, to properly index the scanned images.

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Uploaded images for a Cash Assistance (CA) case.	HRA Document Upload is <u>not intended</u> to be used by Cash Assistance (CA) applicants/participants at this time. In the event that images of documents are received for a CA case via the HRA Document Upload web application, the NCA SNAP Worker must index all of the uploaded images that appear in the MOBDOC folder. The indexed images are committed to the HRA OneViewer in the CA case's electronic record. **Note**: POS does not send an alert to the Job Opportunity Specialist (JOS)/Worker to indicate that documents have been indexed for a CA case. The JOS/Worker must check the HRA OneViewer to see if requested documentation was submitted via HRA Document Upload and indexed by NCA SNAP staff before taking any negative action on a CA case for failure to provide verification.
Documentation Receipt (**EXP-76R**).	The Documentation Receipt (**EXP-76R**) is generated after the worker successfully commits the images contained in the MOBDOC folder to the HRA OneViewer. Management Information Systems (MIS) mails the **EXP-76R** to the applicant/participant through the Print-to-Mail (PTM) process. **Note**: Images that are uploaded using HRA Document Upload are currently not available to the Workers at the SNAP Center to be indexed. If the applicant/participant requests a same day receipt for the uploaded images, s/he must follow the current procedure for returning documents at a SNAP Center. *Effective Immediately* **Related Items:** PB #14-111-SYS PB #14-67-SYS PB #08-21-OPE **Attachments:**
⌨ Please use Print on Demand to obtain copies of forms.	**Attachment A** How to Use the HRA Document Upload on a Mobile Device **Attachment B** HRA Document Upload Submission Desk Guide

Attachment A

How to Use the HRA Document Upload on a Mobile Device

An applicant/participant can submit images of documents to HRA using the HRA Document Upload mobile web application on a camera-equipped Android, Apple, or Windows smartphone or tablet by following the instructions below:

1. Open a web browser (Firefox, Internet Explorer, Safari, or Chrome) on a mobile device and go to www.nyc.gov/hradocs.

2. Tap the **START** button that appears at the bottom of the HRA Easy Access **HRA Document Upload** homepage to open the **Disclaimer** page.
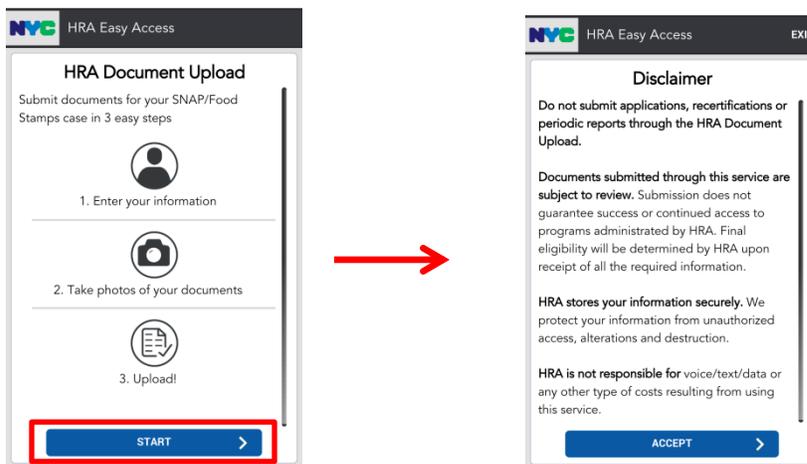
3. Tap the **ACCEPT** button that appears at the bottom of the **Disclaimer** page to open the **How to take good photos:** page.
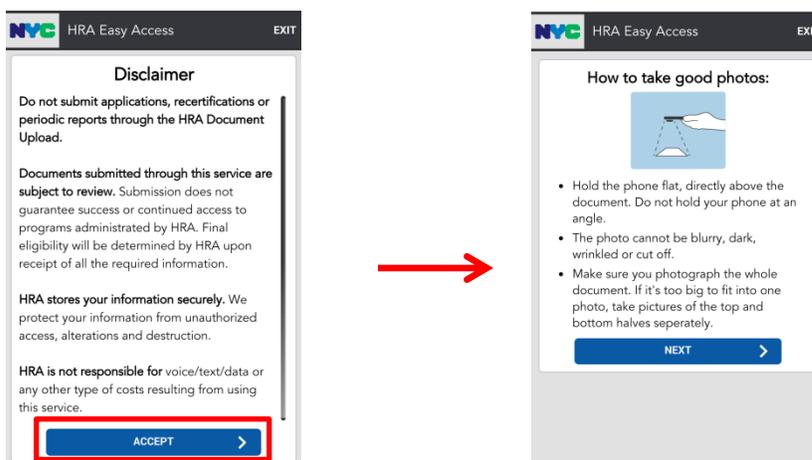
Attachment A

4. Tap the **NEXT** button on the **How to take good photos:** page to open the **Personal Details** page.
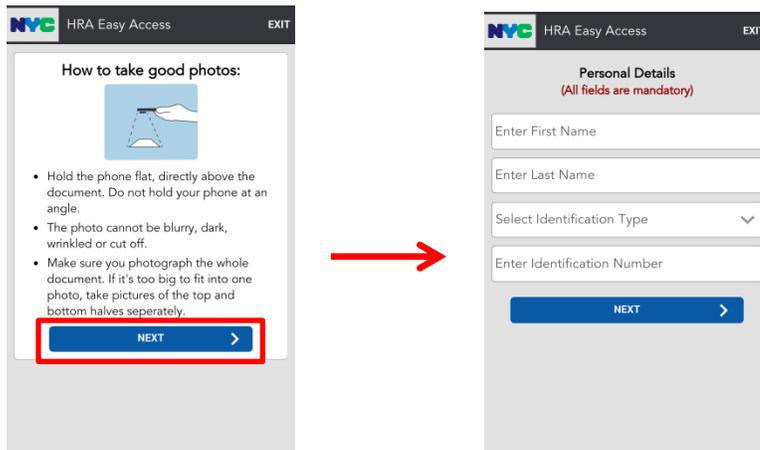
5. Complete all the fields on the **Personal Details** page, and then tap the **NEXT** button.

- Enter the *First Name* and *Last Name* of any household member using the English keyboard on the mobile device.
- Select a value from the *Select Identification Type* dropdown.

  - Dropdown values include: Social Security Number, Client Identification Number (CIN), SNAP Case Number, and ACCESS NYC Confirmation Number.

- Enter the value that corresponds to the *Select Identification Type* chosen in the *Enter Identification Number* field.
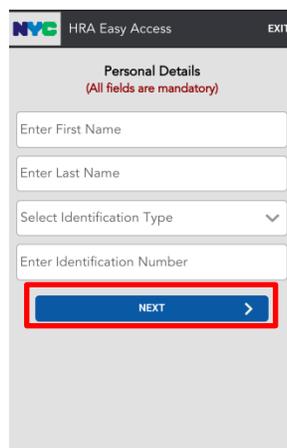
Attachment A

6. On the **Choose the document you want to upload** page:

    - Select a value from the *Select Document Type* dropdown.

        - Dropdown values include: Bills/Expenses, Birth Certificate, Child Care Bills, Child Support, Immigration Documentation, Income/Paystubs, Lease, Passport, Photo ID, Rent/Landlord Letter, Savings/Bank Statements, Social Security Card, Social Security/SSI Benefits, Unemployment Benefits, and Other.

    - Tap the **NEXT** button to launch the mobile device's camera.
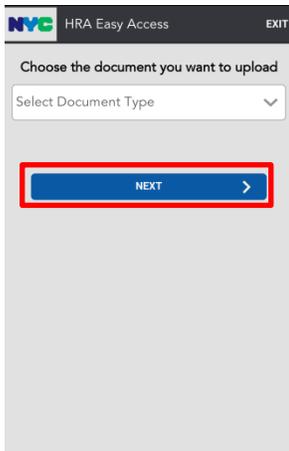
7. Take a photo, or choose to use an existing photo, of one page of the document.

    Note: This step will vary based on the mobile device being used. For example:

    - iPhones and iPads will display three options – **Take Photo**, **Choose Existing**, and **Cancel**.
    - Android phones (including Samsung and Motorola) the camera function will launch automatically.

8. Choose to accept the image taken ("Use Photo" or icon), or take a new photo ("Retake" or icon).
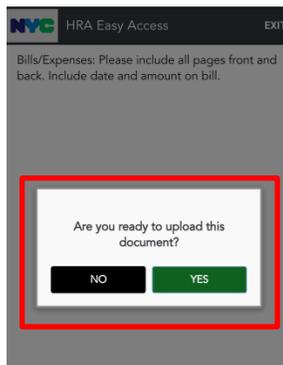
Attachment A

9. Prepare to upload the document type image(s):

    - If the document type has **only one** page:
        - Tap the **DOCUMENT COMPLETE, UPLOAD** button that appears in the bottom right corner of the page to submit the image to HRA.

    - If the document type has **more than one** page:
        - Tap the **NOT DONE, ADD MORE PAGES** button that appears in the bottom left corner, and take a picture of the next page (follow steps 7 and 8).
        - Repeat the previous step until a photo has been added for all pages of the document type.
        - Then Tap the **DOCUMENT COMPLETE, UPLOAD** button to submit the images to HRA.

OR
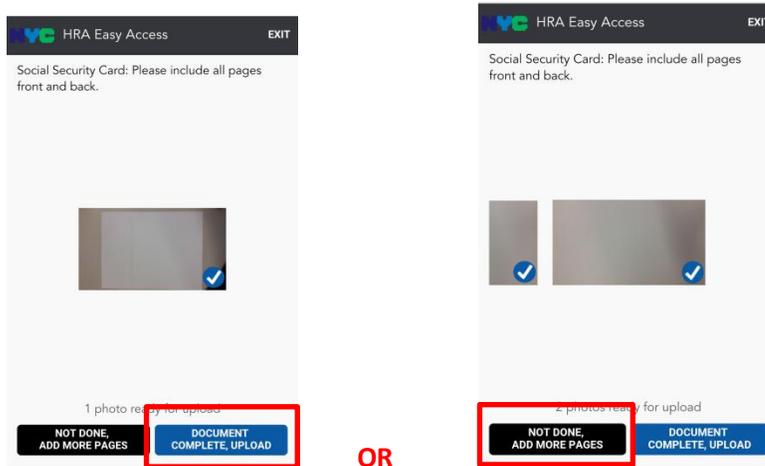
10. A confirmation message is displayed on the screen that asks the user "*Are you ready to upload this document?*" Select the **YES** button to continue with the upload process, or select the **NO** button to go back to the previous page.

11. Tap the square next to "*I'm not a robot.*" If a Google reCAPTCHA challenge appears, follow the onscreen instructions, and then tap the **Verify** button

OR
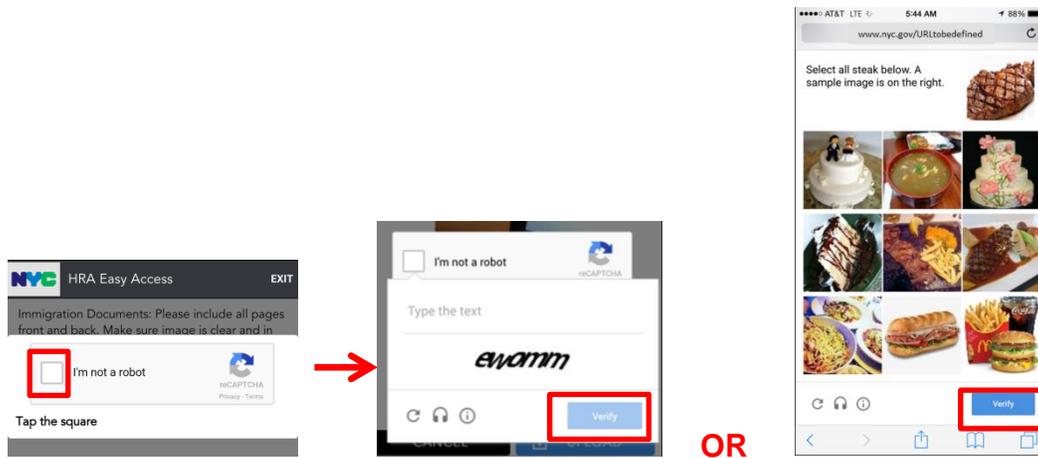
12. Tap the **OK** button when the submission message is displayed. (See examples on page 6.)

13. Tap the **EXIT** button at the top of the **Upload another document?** page to be logged out and returned to the **HRA Document Upload** homepage.

    Note: See page 8 for instructions on how to submit multiple document types during the same HRA Document Upload session.
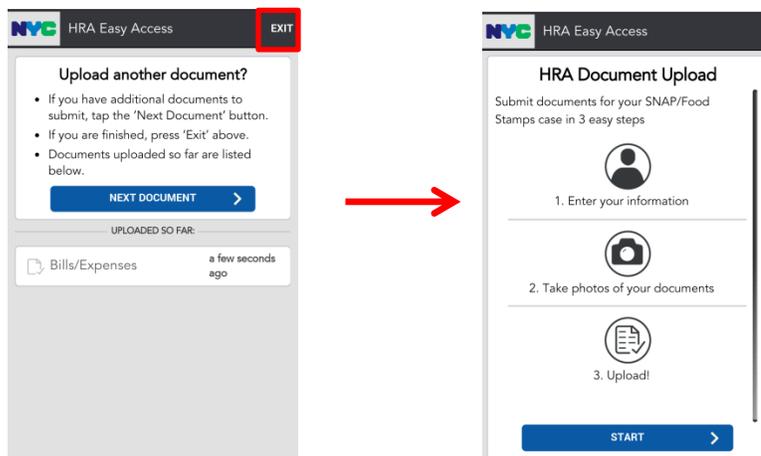
Attachment A

Submission Attempt Messages & Google reCAPTCHA Challenges

The following messages or Google reCAPTCHA challenges may be displayed to the user after s/he taps **UPLOAD** on the **ADD PHOTO** page:

- Images uploaded successfully *("Document Uploaded Successfully! We will mail your receipt to the address on file."*):
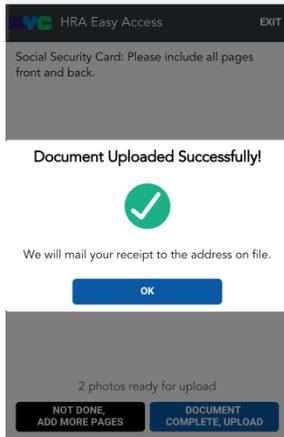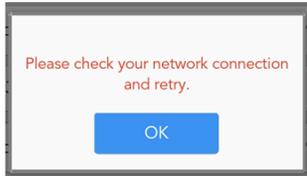

- Images failed to upload ("*Document Uploaded Failed! Failed to upload the document due to server error*"):
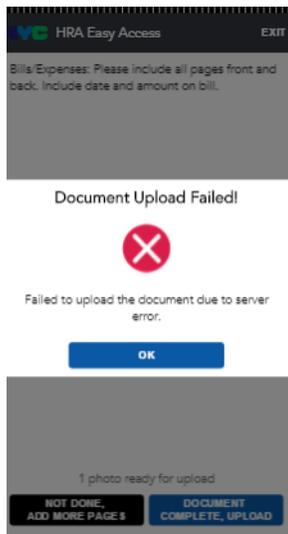
Attachment A

- Mobile device is not connected to a network (*"Please check your network connection and retry"*):
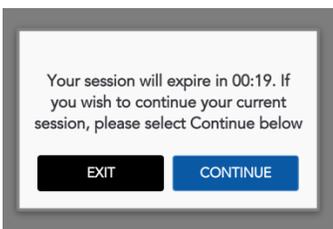
  Please check your network connection and retry.

  OK

- There is a problem with the HRA server (*"Unfortunately, the server seems to be down. We will have it fixed soon. Please try again later"*):

  Unfortunately, the server seems to be down. We will have it fixed soon. Please try again later.

  OK
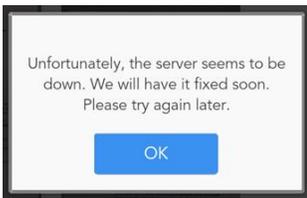
Session Expiration Messages

The user does not have an indefinite amount of time to upload each document type. If the user takes more than four and a half minutes to upload a document type, the system displays the message below in a pop up window. The message notifies the user that their session will expire and includes a clock countdown. The user must choose either the **EXIT** or **CONTINUE** button to avoid being logged out of their session.

  Your session will expire in 00:19. If you wish to continue your current session, please select Continue below

  EXIT   CONTINUE

Once the user's session expiration clock countdown reaches zero, the system automatically returns the user to the HRA Document Upload homepage and displays the message below in a pop up window. The user must select the **OK** button to close the pop up window.

  1. Enter your information

  Your session expired due to inactivity.

  OK
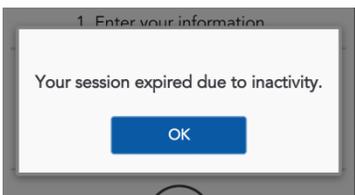
Attachment A

Submission of Multiple Document Types in the Same HRA Document Upload Session

A participant is able to submit multiple document types in the same HRA Document Upload session. After each document type is successfully submitted, the user is brought to the **Upload another document?** page. The **Upload another document?** page displays a list of the document types that have already been submitted to HRA. If the user has additional document types to upload, s/he selects the **NEXT DOCUMENT** button on the **Upload another document?** page to begin the upload process. The information that was previously entered by the user on the **Personal Details** page is saved for the duration of the session. The user is directed to the **Choose the document you want to upload** page. Follow the instructions that begin at the top of page 3 to continue uploading documents.
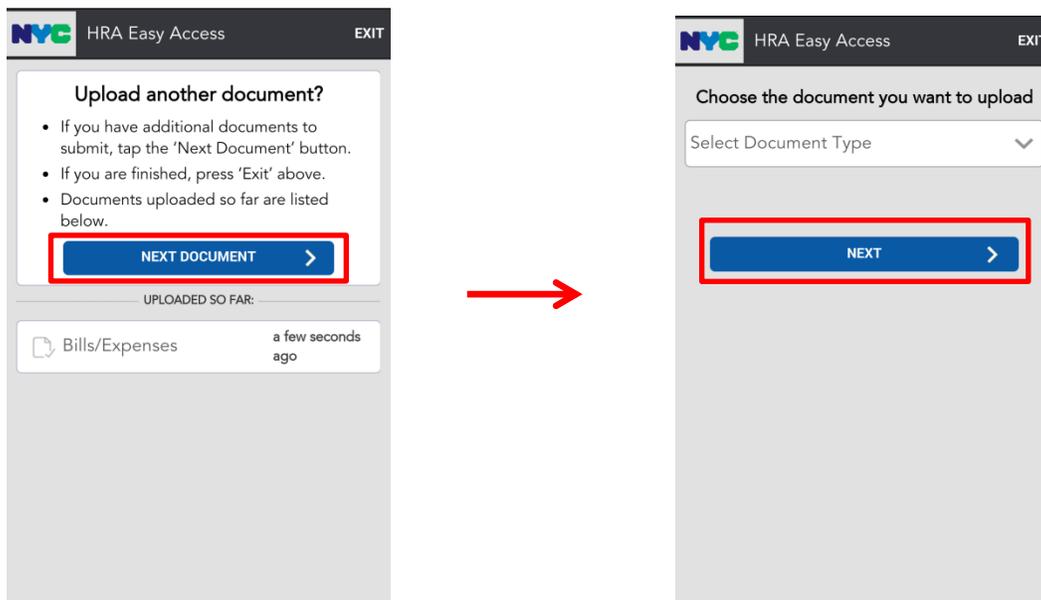
HRA Document Upload Submission Desk Guide

Attachment B

HRA Document Upload Submission Desk Guide

It is now possible for Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) applicant/participants to upload images of their documents using the HRA Document Upload web application on a camera-equipped mobile device.

HRA Document Upload interfaces with the Web Image Indexing portal application to transmit high quality files of the uploaded images to a centralized citywide NCA SNAP folder. Images of verification documents that are submitted using HRA Document Upload do not require printing because the images are received as an electronic file.

This desk guide provides an overview of retrieving and indexing the uploaded images of verification documents.

Requesting Documentation

The SNAP Worker is responsible for providing the applicant/participant with a form that lists which verification documents are required to make an eligibility determination for the case. Individuals that apply/recertify online are provided with a list of possible verification documents that may be required for their case after their online application/recertification is submitted.

Retrieving the HRA Document Upload Folders

Images that are submitted using HRA Document Upload are stored in the centralized citywide folder named **MOBDOC**. Follow the steps listed below to access the **MOBDOC** folder case list.

- Open the POS Portal window.

- Click on **Web Image Indexing** in the POS Portal window.

Attachment B

HRA Document Upload Submission Desk Guide

- Enter your **User ID**, **Password**, and select **SNAP Central Office (FRO)** from the **Sites** drop down menu on the **Web Image Indexing** login page and then click the **LOGIN** button.

The previous action opens the **Web Image Indexing** window, a portion of which is shown below.

- Replace your WMS User ID with **MOBDOC** in the field under **Retrieve Scanned Case List** and then click the **Search for Folders** button.

Note: The **Retrieve Scanned List For Center** field is defaulted to **F29** and the field is protected to prevent the user from selecting a different Center.

Attachment B

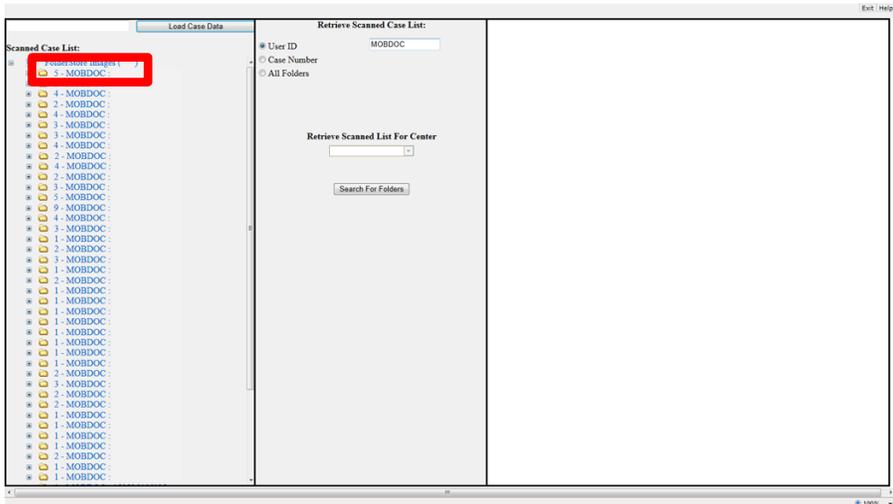**HRA Document Upload Submission Desk Guide**

The previous action loads the **MOBDOC** folders into the **Scanned Case List** pane, a portion of which is shown below.

Note: If the system <u>was able</u> to locate a case in WMS, that WMS case number appears after "MOBDOC :". If the system <u>was unable</u> to locate a case in WMS, a 12-digit numeric placeholder that begins with the last two digits of the current year appears after "MOBDOC :". For example, images that were uploaded in 2015 have a placeholder that begins with "15".

- Double click the first unopened folder icon in the **Scanned Case List**.

  Note: The field to the left of the **Load Case Data button** is then prefilled with either the WMS case number or the 12-digit numeric placeholder that appears after "MOBDOC:" for the selected folder.

If the previous action opens a MOBDOC folder that has a numeric placeholder, the Worker must:

- Click on a single file to display the uploaded image in the right pane of the **Web Image Indexing** window;
- Perform a search in WMS, to identify the correct WMS case number using demographic information contained in the image(s);
- Remove the placeholder number displayed within the field next to the **Load Case Data** button on the **Web Image Indexing** window;
- Enter the correct WMS case number in the field next to the **Load Case Data** button, and then proceed to the next step.
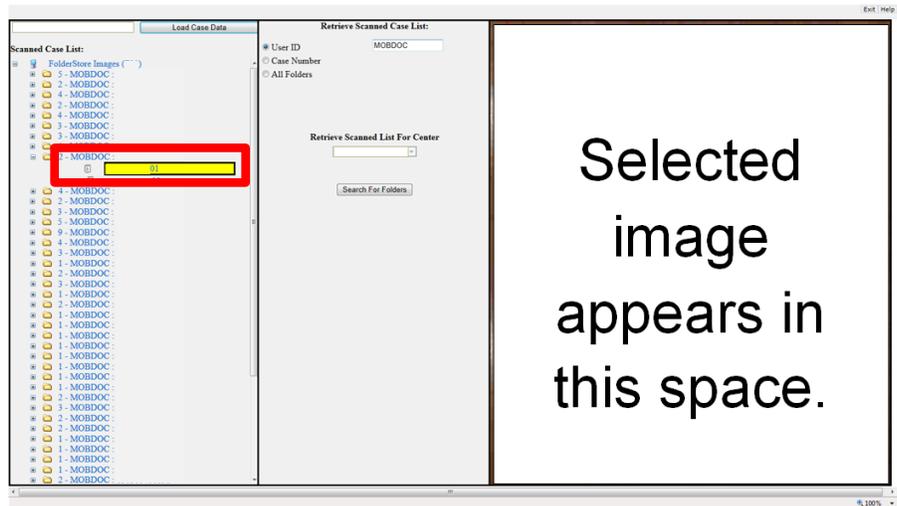
- Click the **Load Case Data** button.
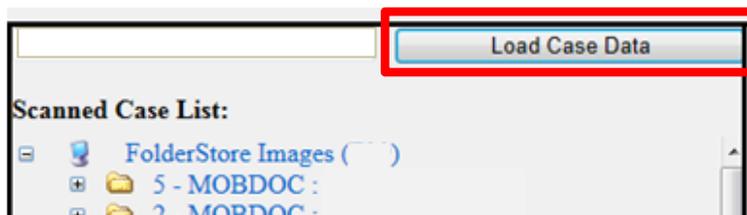
Attachment B

HRA Document Upload Submission Desk Guide

- Click on either the **Yes** or **No** button after reviewing the information that is displayed in the pop up window that asks "*Is this the correct Case?*" as follows:

  - Click **Yes** if the WMS case number displayed is correct.
  - Click **No** if the WMS case number displayed is incorrect.

    Note: If the user clicks **No**, the system returns to the original **Web Image Indexing** window shown at the top of page 4.

Indexing and Committing the Uploaded Document Images

Each uploaded image for the case appears as a numbered thumbnail on the left side of the **Web Image Indexing** window below the WMS case number, shown on the following page. When you click on a thumbnail, the full image appears in the viewing pane on the right side of the window. The uploaded images must be viewed individually to determine which images make up a document type. If there are multiple images for a single document, the images must be indexed and committed at the same time so that they appear as a single document in the HRA OneViewer. Follow the steps listed below to index and commit the uploaded images to the case.

- Click on a numbered thumbnail to view the uploaded image.

  Note: A text field appears to the right of each thumbnail. If an image has not yet been indexed, the field contains the phrase "**Not Indexed**". Once the image has been indexed, the field contains the following information: Document Description, name and CIN of the household member, and page number of the image.

Attachment B

- Adjust the image for readability and select the area of the image to be committed.

  Note: If there are multiple images submitted for a document type, all images must be adjusted and selected before proceeding to the next step. Examples of document types that can be submitted with multiple images include bank statements, leases, and immigration documents.

- Click the arrow in the **CIN** box and select the household member's CIN from the drop down menu that corresponds to the image that was submitted.
- Click the arrow in the **Document Type** box and select a value from the drop down menu that corresponds to the image that was submitted.
- Click the arrow in the **Document Description** box and select a value from the drop down menu that corresponds to the image that was submitted.
- Click the **Commit Images** button, located at the bottom of the **Image Indexing** window.

  Note: If there are multiple images submitted for a document type, all of the associated images must be committed in the same action. To do this, select the first image, hold down the **Ctrl** key, click on all of the associated images that are part of the same document type, and then click the **Commit Images** button. If there are multiple submissions of the same document type for a household, be sure to index and commit the images that are associated with the selected household member as a separate document from the other household members. For example, a household submits images of passports for three different individuals. When the Worker completes the indexing process for the submission, three separate documents should have been committed to the HRA OneViewer.
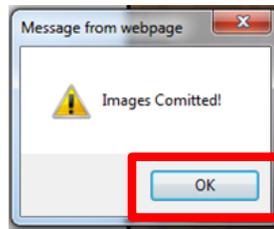
Attachment B

HRA Document Upload Submission Desk Guide
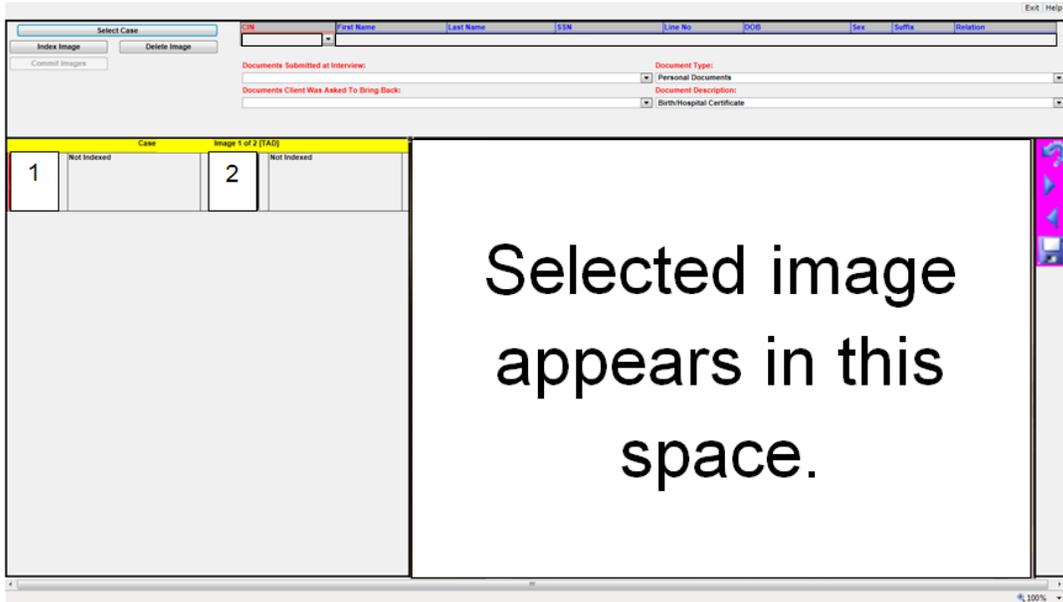
- Click the **OK** button on the **Message from webpage** window to return back to the window that displays the remaining images that have not been indexed.

  Note: The **Message from webpage** window, shown below, is displayed if the selected image(s) was successfully committed to the HRA OneViewer.

Repeat the steps above until you have indexed all images that were uploaded for the case.

You must use the same steps, described on pages 4 – 8, to process each **MOBDOC** folder until you have completed the entire batch.

Printing of the Documentation Receipt (EXP-76R)

The Documentation Receipt (**EXP-76R**) is generated after the worker successfully indexes and commits all of the uploaded images to the HRA OneViewer. Management Information Systems (MIS) mails the **EXP-76R** to the applicant/participant through the Print-to-Mail (PTM) process.