



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #16-03-SYS
(This Policy Bulletin Replaces PB #15-115-SYS)
SNAP POS RELEASE NOTES VERSION 9.3.1

<p>Date: January 6, 2016</p>	<p>Subtopic(s): POS</p>
<p> This procedure can now be accessed on the FIAweb.</p>	<p>Revisions to the Original Policy Bulletin</p> <p>This policy bulletin has been revised to add text to more accurately describe the V21 (Failure to Provide Verification) code in Attachment A in the section V21 SNAP Notice of Intent (NOI) Update.</p> <p>Purpose</p> <p>This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of the Paperless Office System (POS) migrated to production on December 21, 2015. Descriptions of the changes can be found in SNAP POS Release Notes Version 9.3.1 (Attachment A), Desk Guide: Robocall Report in POS Management Console, Attachment B, and SNAP IVRS On-Demand Desk Guide, Attachment C.</p> <p>These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective Immediately</i></p> <p>Related Item</p> <p>PB #15-111-OPE</p>

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

 Please use Print on Demand to obtain copies of forms.

Attachments:

- Attachment A** SNAP POS Release Notes Version 9.3.1
- Attachment B** Desk Guide: Robocall Report in POS Management Console
- Attachment C** SNAP IVRS On-Demand Desk Guide

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

These Release Notes contain descriptions of changes in Supplemental Nutrition Assistance Program POS Release 9.3.1 scheduled for 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>

Table of Contents

1. SNAP Automated Fair Hearing Compliance.....	2
2. SNAP Fair Hearing Compliance Calendar	2
3. SNAP Automated Fair Hearing Compliance Activities.....	3
4. POS New IVRS On-Demand Telephone Interview.....	9
5. POS Categorical Eligibility Look-up update	9
6. Web Indexing Update	10
7. Forward Document Alert	10
8. V21 SNAP Notice of Intent (NOI) Update	10
9. Case Comments Update	11
10. POS Management Console Update	12
11. POS Business Rule Update	12
12. E-Forms.....	12

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

1. SNAP Automated Fair Hearing Compliance

In order to eliminate the time consuming manual process done by the SNAP Fair Hearing Compliance center, POS has updated the Fair Hearing compliance process by making it automated and by displaying a new point of entry located on the POS portal. SNAP compliance Automation involves communication between FHEMS, FHIS, NYCWAY, POS and WMS.

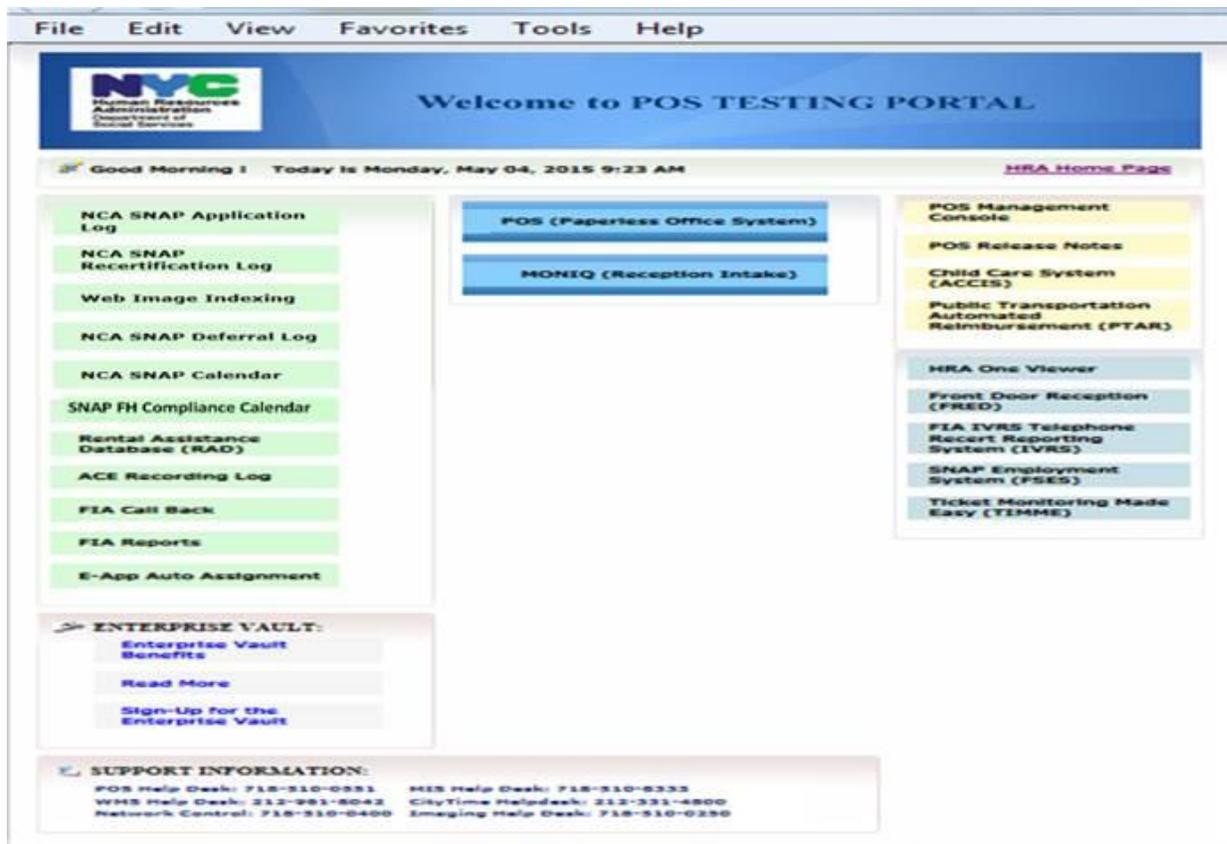
Each morning FHEMS will load **SNAP Change Case Data** activities for the SNAP Fair Hearing decisions into POS.

2. SNAP Fair Hearing Compliance Calendar

The new POS functionality will auto assign SNAP Fair Hearing Compliance cases to workers based on their availability in the round-robin method.

To allow the responsible Supervisor(s) to indicate the Worker's availability, a new **SNAP FH Compliance Calendar** was added in the POS Portal.

The assignment interface will also accommodate workers who have limited availability based on a day or specific range of days.



SNAP POS Release Notes

Version 9.3.1 December 21, 2015



The Initial Navigation window for auto-assignment will have three selection options:

- **View Worker Availability**
- **View Worker Schedule**
- **View Assignment Output**

Supervisors will be instructed at the top of the window: Please select an option below to view and update the worker's availability or schedule, or to generate assignment output. If no Supervisor accesses the SNAP FH Calendar interface by 6 AM, the job to assign cases will run automatically at that time.

Viewing the Worker's availability

When viewing the worker's availability, the window will open if selected by the Supervisor to indicate the worker's availability and/or any proposed updates for the worker (scheduled vacation). To save changes the save changes button must be selected.

The Supervisor will also be able to view and update the workers current schedule and assignment output.

3. SNAP Automated Fair Hearing Compliance Activities

The Food Stamp Hearing (FSH) center will be the originating center for Fair Hearing Compliance and the following activities will be changed to accommodate this new process:

- **SNAP Change Case Data**
- **Approve SNAP Change Case Data**
- **EC-SNAP Change Case Data**
- **SNAP Application Interview**

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

- Approve SNAP Application Interview
- EC-SNAP Application Interview
- Approve EC SNAP Application Interview
- HRA SNAP Outreach Intake (used only for Application registration)

The SNAP Change Case Data will be loaded into each SNAP FH workers queue for processing. The worker will be able to see the detailed FH decision in the HRA One viewer.

The **Changes to Active SNAP case window** will display the following Fair Hearing updates including new FH AID to continue status selections:

- 1- Client has settled in conference
- 2- Aid continuing- pending closing transaction is ignored and remains suspended
- 3- Non-Aid continuing- Closing transaction is applied to the case after 14-day (suspension period) clock expires
- 4- Conditional Aid Continuing- transaction is not processed and remains suspended
- 5- Client lost Fair Hearing Agency upheld
- 6- Client won Fair Hearing, client upheld

After the FH worker selects FH Aid to continue status they must select one of the above reasons from the drop-down menu. Once the supervisor approves and transmits the case the FH update for Aid to Continue will be auto-posted. The automation no longer requires manual use of the Transcan form.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

Note: If the selection of **Re-Appreg** process is found necessary for compliance, the case must be completed as the first part of the process prior to any other changes, If Re-Appreg the case is selected the original FH change case data activity will be suspended until the completion of the application registration. The FH worker will go to the outreach intake activity to complete all required information and register case in WMS. POS will start the SNAP Application interview activity modified specifically for Fair Hearing SNAP compliance.

The worker will open the case reuse window and the system will pre-select the case number of the suspended Change case data activity. The worker will process any other necessary components of the case such as the budget and TAD until the last window sending the case for approval. The worker will return to the suspended FH Change case data activity to complete the Fair Hearing Compliance.

Posting the FH SNAP Compliance codes from POS to NYCWAY via OPEN TI

POS will transmit and post the following five new FH action codes thru **OPEN TI to NYCWAY**:

- **71CA -Compliance Initiated**
- **71CR -Fair Hearing Compliance Documents requested**
- **71CS -Fair Hearing Compliance second request for Documents**
- **71CN- Failed to Respond to Fair Hearing Compliance request and reminder notice**
- **71CE -Compliance Completed**

New Data entry forms for Fair Hearing Requests and Compliance FHA-2, FHA-2A and FHA-2B

The **FHA-2** and **FHA-2A** list the specific documents that need to be satisfied in order to comply with the Fair Hearing decision. The SNAP Compliance Fair Hearing worker will indicate when documents can be returned via mail, fax or in-person drop-off. These forms are used only for the Center ID "**FSH**" and will generate from the **SNAP Change Case Data activity** or the **SNAP Application Interview activity**.

In the SNAP Application Interview, forms FHA-2 and FHA-2A POS will prefill the new notice data entry form "**FHA-2 SNAP Fair Hearing Compliance Request**" with the due date 11 days from the system date and the form will be mailed together with the SNAP Documentation Guide form W-129G via Print To Mail(PTM).All forms will be sent PTM.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

Response to Question

Form FHA-2 and FHA-2A
Fair Hearing Compliance Request Supplemental Nutrition Assistance Program (SNAP)

Instruction:
The system will preselect required documents on the list. If you need to make changes you can choose additional documents by placing a check mark next to appropriate checkbox or eliminate unnecessary selection by clearing a check mark. Click OK button to generate the Form **FHA-2**.
If documentation received is incomplete or insufficient, then select a check box next to the additional document you need to request. Click OK button to generate the Form **FHA-2A** (Reminder Notice).

Fair Hearing Number: Fair Hearing Decision Date: //

Are all received documents and adequate and complete? Yes No

Required Information:
Due Date: 12/21/2015

Enclosed SNAP Application/Recertification Form

Proof of Household composition

Proof that lives in your household.

Proof that you are billed for utilities or fuel for heat separate from your rent.

Proof of your shelter expenses (e.g., rent, mortgage payments, Primary Tenant's Statement Regarding Occupancy of Secondary Tenant).

Proof of your child care or dependent care cost.

Proof of your medical costs.

Proof of income of

Proof of your identity.

Proof of your residence.

Proof of citizenship or alien status of

Other (specify):

Second Request Notice FHA-2A

If the documents are received within 13 days, POS will flag suspended SNAP Change Case Data activity in worker's queue with status "Documents Received" (documents can be received via fax, mail, email, or in person). If the FH worker determines that the documentation received is not adequate or incomplete or documents are not received by the 13th day,

POS will generate the form "**FHA-2A Reminder Notice of Fair Hearing Compliance Request**" that will give the applicant another 11 days to submit documents. **FHA-2A** will be mailed via PTM. POS will post the action code for "Fair Hearing Compliance"-Second Request for Documents with FH number to NYCWAY to indicate that **FHA-2A** is being mailed and documents were again requested.

Compliance/Completion Notice FHA-2B

POS will prefill the next data entry notice window form "**FHA-2B Fair Hearing Compliance Statement SNAP**" with the FH Number and FH Decision Date. POS will change activity due date in the queue to a day after due date on forms FHA-2 or and FHA-2A. If the requested documents are not received by the 13th day due date, POS will flag the case as overdue.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

Response to Question

Form FHA-2B

Fair Hearing Compliance Request Supplemental Nutrition Assistance Program (SNAP)

Fair Hearing Number: Fair Hearing Decision Date:

Here is how we have complied with your Fair Hearing decision:

We have re-evaluated your eligibility for SNAP benefits and have determined that you are eligible.
As of your monthly SNAP benefits will be You will be sent a separate notice of our determination

We are issuing you in retroactive SNAP benefits for
This SNAP benefits will be available to you after

Immediately before your Fair Hearing request, your monthly SNAP benefits were
As of your monthly SNAP benefits will be will be sent a separate notice of these changes.

The restored SNAP benefits mentioned above are being offset by recoupment(s) not an issue in this Fair Hearing.
This will reduce your ongoing SNAP benefit to You will be sent a separate notice of this changes.

You did not lose any SNAP benefits because you received aid-continuing during the Fair Hearing process.

However:

The case/line for is now active for requiring benefits.

OR

The case/line for remains closed/sanctioned because of an unrelated closing/sanction for which you have received a separate notice.

We added removed from your SNAP household budget.

We have re-evaluated your eligibility for SNAP benefits and have determined that you are not eligible.
You will be sent a separate notice of our determination.

Since you did not response to our Fair Hearing Compliance Request and Reminder Notice, we are unable to comply with the Fair Hearing decision. You will be sent a separate notice of determination, if we are denying your application or recertification.

Your SNAP benefits remain unchanged.

Other:

The **FHA-2B** will be mailed via PTM to indicate that HRA is unable to comply with the Fair Hearing decision. POS will post action code with FH number to NYCWAY (71CN) to indicate that the client did not comply with our requests for documentation. POS will also post action code (71CE) with FH number to NYCWAY to close out compliance. If requested documents are received, POS will flag the case as Documents Received to notify the SNAP worker that the case is ready for processing.

The Worker will review the documentation to determine if adequate. If documents are inadequate or incomplete, the **FHA-2B** will be mailed out and POS will post action code 71CE with FH Number to NYCWAY to close out FH compliance. POS will add the SNAP Compliance Comments field into the Change action activity and the SNAP FH worker will be required to enter action details into this field.

If the documents received are sufficient or if documents were not requested from the client, and HRA is able to comply with the Fair Hearing decision, POS will add SNAP Compliance Comments field into the Change action activity and worker will be required to enter action details into this field. After the worker completes required actions in POS such as Budget, TAD and grant issuances, POS will transmit TAD, grants and/or FH indication update directly to WMS after the change case action is approved by the supervisor.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

POS will add the SNAP Fair Hearing Compliance and the required Comments field. POS will post the completion action code 71CE with fair hearing number, benefit issued details and the FH workers comments to NYCWAY after transactions are showing error free on the WMS Error report (WINRO352). The Fair Hearing Compliance Statement FHA-2B will be mailed to the applicant via PTM.

POS Completion Edits for Fair Hearing SNAP Compliance Workers

The new Fair Hearing Compliance process will encompass completion edits to ensure an action is taken by the SNAP FH Compliance worker at the time the case is forwarded for supervisory approval and also actions taken by the POS SNAP Supervisors before the case is transmitted to WMS.

In the **SNAP Change Case Data** activity when the worker clicks on File, selects Close and clicks on Complete Activity or Close > Complete Activity button and the POS case status in AP/CL/RJ the worker can receive one of the following completion edits:

- **'Documents requested in this activity were received. You must answer if all documents are adequate and complete in the FHA-2 data entry window'.**
- **'You must select status code for FH Aid to Continue Status'.**
- **'You must enter Comments'.**

POS Completion Edits for Fair Hearing SNAP Supervisors

In the Supervisory Review window in POS, when the Supervisor clicks on Next button and POS case status is AP/CL/RJ:

- **'Disapproval reason must be selected'.**
- **'Comments must be entered'.**

For FSH (Food Stamp Hearing) centers; all the cases will go to supervisory approval before the case is transmitted to WMS. All screens displayed to the supervisor will be read-only.

When disapproving a case and/ or line, the Supervisor must click on Disapprove radio button and select reason(s) from the "Supervisory Disapproval Reason" pop-up window.

The screenshot shows a dialog box titled "Supervisory Disapproval Reason". It has a list of three options with checkboxes:

- Supporting documents provided are not sufficient
- Documentation requested but not received
- Other

 Below the list is a text input field. At the bottom of the dialog are "OK" and "Cancel" buttons.

Supervisory disapproval reason pop-up window will include the following disapproval reasons:

- **Supporting documents provided are not sufficient.**
- **Documentation requested but not received.**

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

- Other

When an appropriate disapproval reason is not listed, the Supervisor must select 'Other' and enter comments in the text box and click OK to save the selection and the comments entered Or click Cancel to Delete the comments and uncheck the selection of disapproval reasons.

4. POS New IVRS On-Demand Telephone Interview

FIA is implementing a new method of handling telephone Applications and Recertification Interviews. Instead of calling the client (current IVRS ACE Telephone Interview Technology), FIA is telling the clients to call HRA (new IVRS On-Demand Telephone Interview Technology). The new Avaya Telephony is being installed and POS is being modified to accommodate the new Avaya CTI Solution.

Starting January 2016, an On-Demand (OD) Pilot will use the new OD IVRS processes and ACD Call Center technology needed to route selected Client callers to assigned workers who will conduct On-Demand Interviews in POS. Initially, FIA SNAP Home Center (F99) and one interview type (the SNAP Recertification Interview) are included in the OD Pilot. Gradually, the OD Pilot will expand to other centers and other interview types (SNAP Application, CA Application, and CA Recertification). **For details please see Attachment C, IVRS On-Demand telephone Interview.**

5. POS Categorical Eligibility Look-up update

POS will include 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.

The screenshot displays the SNAP POS application interface with the following sections:

- Suffix/Individual:** Inquiry Code WMS Message via OLTP, NQCS02 A0274 FS EXPIRED AUTHORIZATION
- Control Information:** District, Center, Worker: POSDP, Case Number
- Present Address:** Street Number, Direction (None), Name, Type, Apt #, City, State, Zip Code, Phone
- Suffix Information:** Active (selected), Applying, No FS IPV or Sanction Found (checked)
- FS Suffix:** 1, FS Status: AC, FS # AC: 2
- Table:**

Suff	Case Name	Cat	Stat	# AC	Stat	# AC	Monthly Rent	Actual Rent [Less Any Contributions]	PA H/H RENT	PA Level Rent
1		SNCA	AC	2	AC	2		0		0
- Recertification Dates:** Next PA Recert date 08/22/04, Last PA Recert date 07/24/03, Last MA Recert date / /
- Case Member Information Table:**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citn / Ntd	HB	PA	MA	FS	AFIS
1	1		Casehead			1	M	✓		AC	AC	AC	
1	2		Natural Sister			1	F	✓		AC	AC	AC	
1	3		Natural Nephew			1	M	✓		AP	AP	AP	
- Buttons:** Next, Previous, Print Case Comments, OK, Cancel

Affected Activities – FS Cases

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

- **FS Application Interview**
- **FS Recertification Interview**
- **FS Change Case Data**
- **EC – FS Application Interview**
- **EC – FS Recertification Interview**
- **EC – FS Change Case Data**

6. Web Indexing Update

FIA staff is reporting that it is very cumbersome to leave the indexing windows to search for a case when trying to find the case the documents belong to. This happens when the workers are working on the Mobile Document Upload (MOBDOC) or Right Fax submissions.

Currently the WEB Indexing Application is used for MOBDOC, some CBO Indexing, and shortly Right Fax indexing. To assist the workers a “WMS” case search has been added 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**

7. Forward Document Alert

The POS indexing windows have been updated to generate a “Forward Document” alert to all workers and their 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.

8. V21 SNAP Notice of Intent (NOI) Update

POS currently receives a daily file of all SNAP NOI pending transactions, POS will filter the NOI file to look for the specific closing/rejection code **V21**. If the **V21** is found, POS will check the indexed documents to determine if one or more “Core” (eligibility) documents have been indexed for the applicant/case since the transmission of the **V21** closing/rejection. POS will also check the deferral list to determine if the eligibility factor is outstanding. If one or more of the Core documents is found, POS will insert the case into one of the following queues “**V21 Application Review**” queue for the SNAP Application Interview activity or “**V21 Recertification Review**” queue for the SNAP Change Case Data activity. The SNAP supervisor will be responsible for this review.

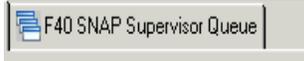
Supervisor Review Process for Settle in Conference Cases

If the supervisor determines that the case should not be closed or rejected based on their Core document review they will make a case comment, suspend the activity and then remove it from the queue.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

Once the case is removed from the **V21 Application/Recertification** queue, the supervisor must **note the case number** to locate the case and bring it into their queue by selecting the supervisor tab,



entering the case number and selecting the case to prepare for the SIC assignment.

The supervisor will then tab to the action menu,  select SNAP settle in conference



Assign the SIC activity to the worker to process the settle in conference.

Supervisor Review Process Documentation not Sufficient

If the supervisor determines the documentation is not sufficient or inadequate and the case must continue to clock down, the supervisor must make a case comment, suspend the case and remove it from the **V21 Application Review** or the **V21 Recertification** queue. No action will be taken to stop the NOI clocking down of the closing/rejection.

9. Case Comments Update

POS users will 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 to the previous, the user will be able to add a comment type, outreach type and outreach outcome. The user can also view the history of comments made by the previous users, staff member, case comments and date entered.

The screenshot shows the 'Case Comments' application window. The top section contains fields for 'Selected Case' information: Case No., Case Name, CIN, Primary Phone #, Suffix (set to 1), Casehead Name, SSN, and Secondary Phone #. Below these are fields for 'Residential Address', 'Mailing Address', and 'Email Id' (with a placeholder '@gmail.com').

The middle section is for adding a new comment, with fields for 'Staff Member', 'Outreach Outcome' (set to 'Email not responded'), 'Date Entered' (07/19/06 05:06 PM), 'Comment Type' (set to 'HVN'), and 'Outreach Type' (set to '2nd email'). A large text area for 'Case Comments' is provided.

The bottom section displays a list of existing comments:

Staff Member	Case Comments	Date Entered
[Dropdown]	HVN : 1st call : Number not reachable : Dialed multiple times.	07/19/06 05:06 PM
[Dropdown]	HVN : 2nd call : Call not picked up : Dialed multiple times.	07/19/06 05:23 PM
[Dropdown]	HVN : 1st email : Other : No response for the email sent.	07/31/06 01:54 PM

At the bottom of the window are buttons for 'Print Case Comments', 'OK', and 'Cancel'.

SNAP POS Release Notes

Version 9.3.1 December 21, 2015

10. POS Management Console Update

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

11. POS Business Rule Update

POS has updated the business rule for SNAP issuance code 22. The updated rule will warn the worker to limit the periods for the grant code 22 to one month instead of 12 months.

12. E-Forms

The following E-Forms have been updated:

FHA-2, Fair Hearing Compliance Request SNAP
FHA-2A, Reminder Notice of Fair Hearing Compliance Request SNAP
FHA-2B, Fair Hearing Compliance Request SNAP

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console

Date: December 2015

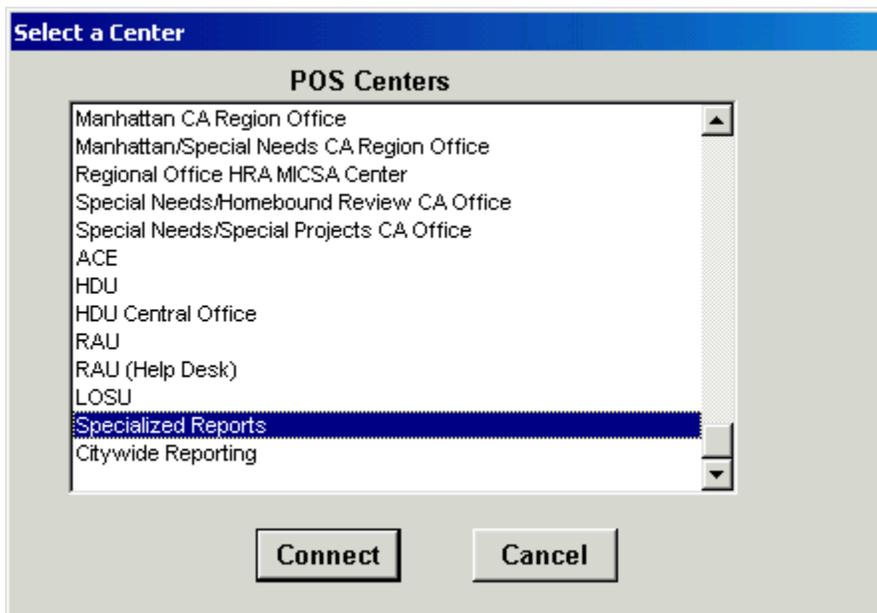
Overview

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.



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.

The screenshot displays a filter interface with the following components:

- Timeframe Selection:** A group of radio buttons for 'Today', 'Yesterday', 'Past 7 Days', 'Past 4 Weeks', and 'Specify Range'. The 'A Month' option is selected, with a dropdown menu showing 'October 2015'. Below it are two date input fields in '00/00/00' format, separated by 'to'.
- Case Type:** A dropdown menu currently showing 'CA'.
- Appointment Type:** A dropdown menu currently showing 'Recertification'.
- Filter:** A rectangular button located to the right of the Case Type and Appointment Type dropdowns.

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console

Date: December 2015

Report Screenshot:

Data

Signature Capture | WINRO643 | PC Bank | MA FFRs | TALX | **Robocall**

Timeframe Selection
 Today
 Yesterday
 Past 7 Days
 Past 4 Weeks
 A Month: October 2015
 Specify Range: 00/00/00 to 00/00/00

Case Type: CA
Appointment Type: Recertification
Filter

	Case No	Case Name	Center	Appointment Date	Appointment Type	Case Type	Interview Type
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
Total : 17212							

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

ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console

Date: December 2015

- 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

Date: December 2015

- 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:

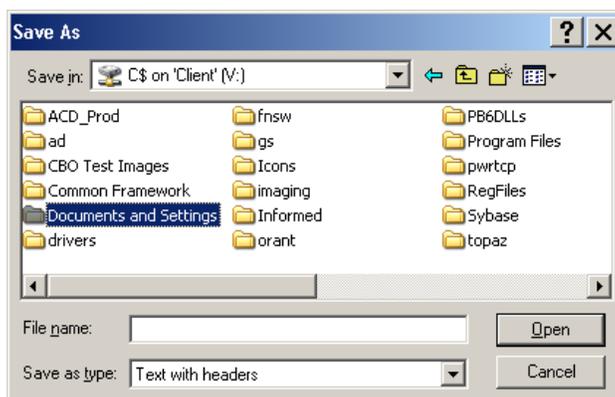
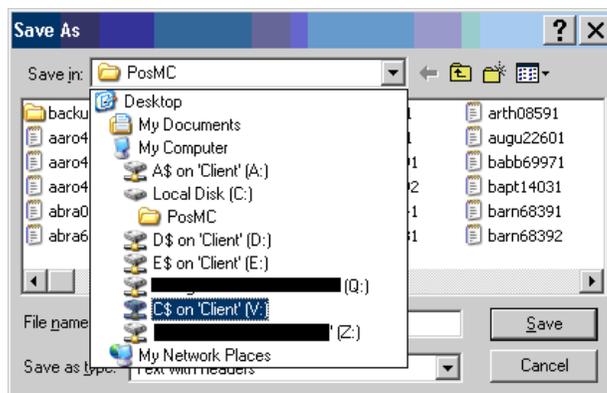
1. Set the filters and retrieve the report data by clicking on the **Retrieve** icon.



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.



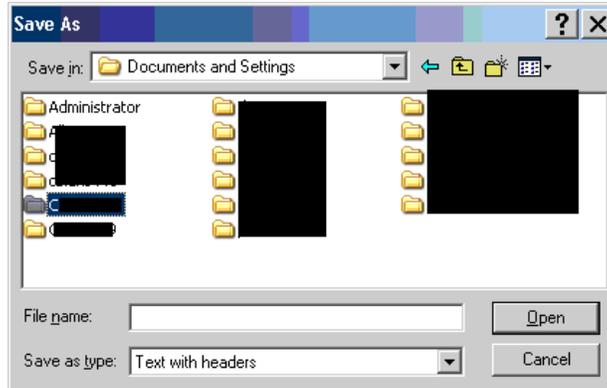
ATTACHMENT B

Desk Guide: Robocall Report in POS Management Console

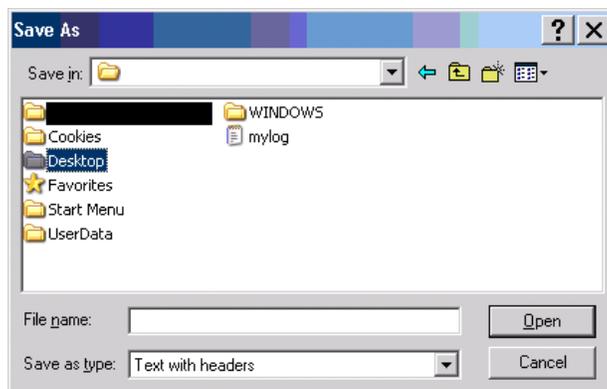
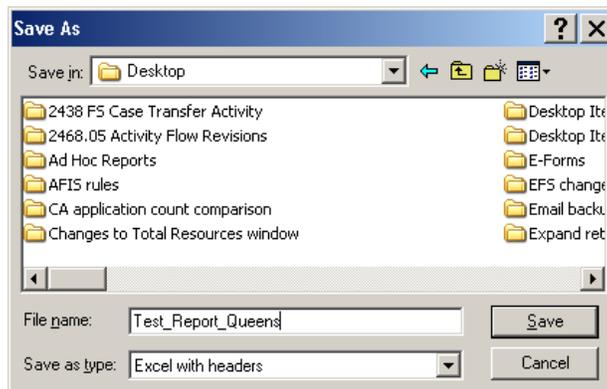
Date: December 2015

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.



**ATTACHMENT C
SNAP IVRS ON-DEMAND DESK GUIDE
JANUARY 2016**

Overview

Starting January 2016, a chosen On-Demand (OD) SNAP (Supplemental Nutrition Assistance Program) site will use the new OD IVRS (Interactive Voice Response System) processes and ACD (Automated Call Distribution) Call Center technology needed to route selected applicant/participant callers to assigned Workers who will conduct On-Demand Interviews in POS (Paperless Office System). Applicant/participant will be told to call HRA (Human Resources Administration) using the New IVRS On-Demand Telephone Interview Technology. Initially, the OD IVRS process will only cover one FIA (Family Independence Administration) SNAP Richmond Home Center (**F99**) and one interview type (the SNAP Recertification Interview). Gradually, the OD Pilot will expand to other centers and other interview types (SNAP Application, CA (Cash Assistance) Application, and CA Recertification).

To support this OD IVRS process, applicant/participant of the chosen OD SNAP Home Center that are due for SNAP Recertification Interviews in January will be sent a different SNAP recertification notice instructing them to call a specific HRA phone number for their interview (**718**) SNAP-NOW (**762-7669**), or make an appointment for an in-person interview at their Home Center.

An applicant/participant wishing to have an On-Demand SNAP Recertification Interview will call the HRA phone number assigned to the On-Demand IVR System listed in the Notice they received. After validation by IVRS, the Avaya Call Center System will deliver these calls to the appropriate, available On-Demand (OD) Agent or Information Services (IS) Agent who is logged into Avaya's ACD telephone device.

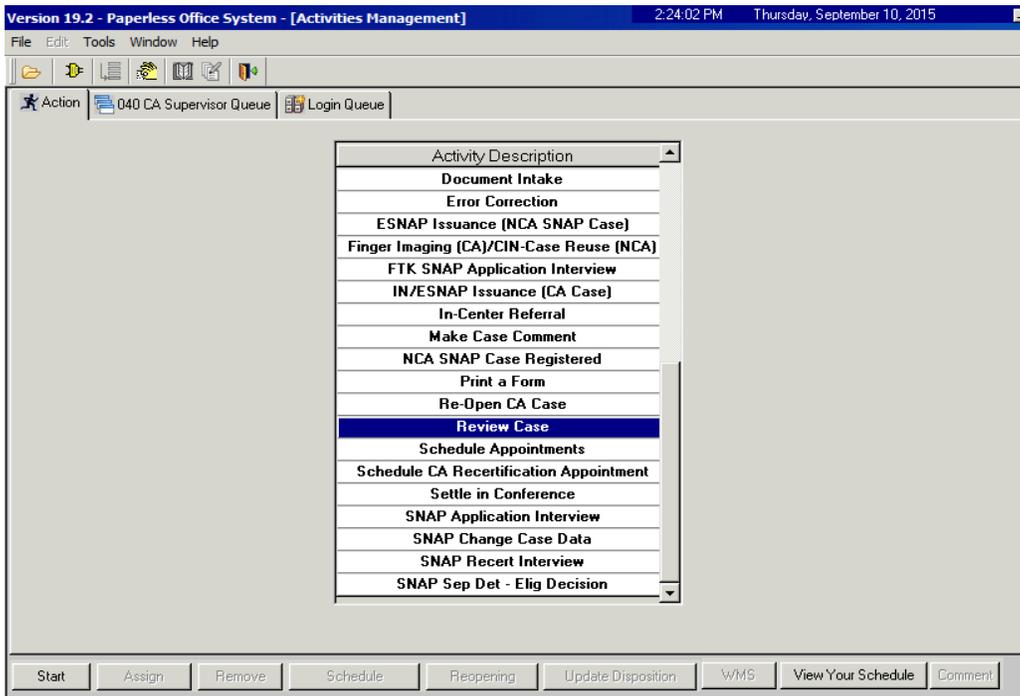
The OD Agent Normal queue gets the call when IVRS can access the Caller's Case Number in POS and validate that the applicant/participant /Caller and POS Case are eligible for a SNAP Recertification On-Demand Interview. The IS Agent queue gets the call when IVRS cannot gather all the data needed.

The IS Agent answers calls on the IS Agent queue using the ACD phone set. The IS Agent attaches an interpreter if needed, qualifies the caller, captures the caller's POS Case information, searches POS manually, and determines if the client/caller is eligible for an On-Demand SNAP Recertification Interview.

Information Services (IS) Agent POS Work Flow Process:

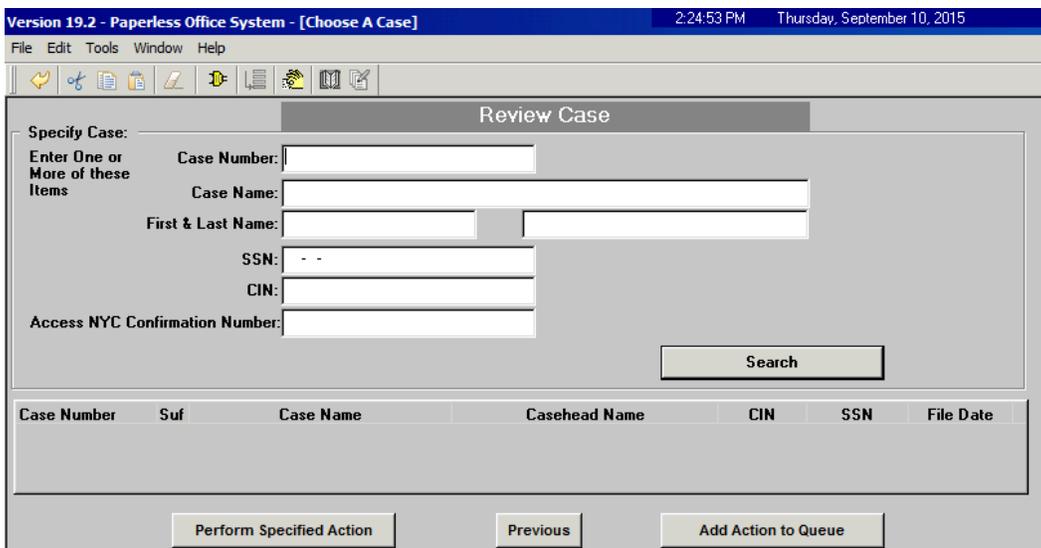
1. Launch POS (if not open).
2. Navigate to POS Action Tab.
3. IS Agent answers the ACD phone, and asks the caller for POS Case Identifier number.
4. IS Agent uses the ACD phone to add an interpreter to the call line (if needed).
5. On the Activity List: Click to select Review Case.

POS Action Tab Activity List Screen Used by IS Agent



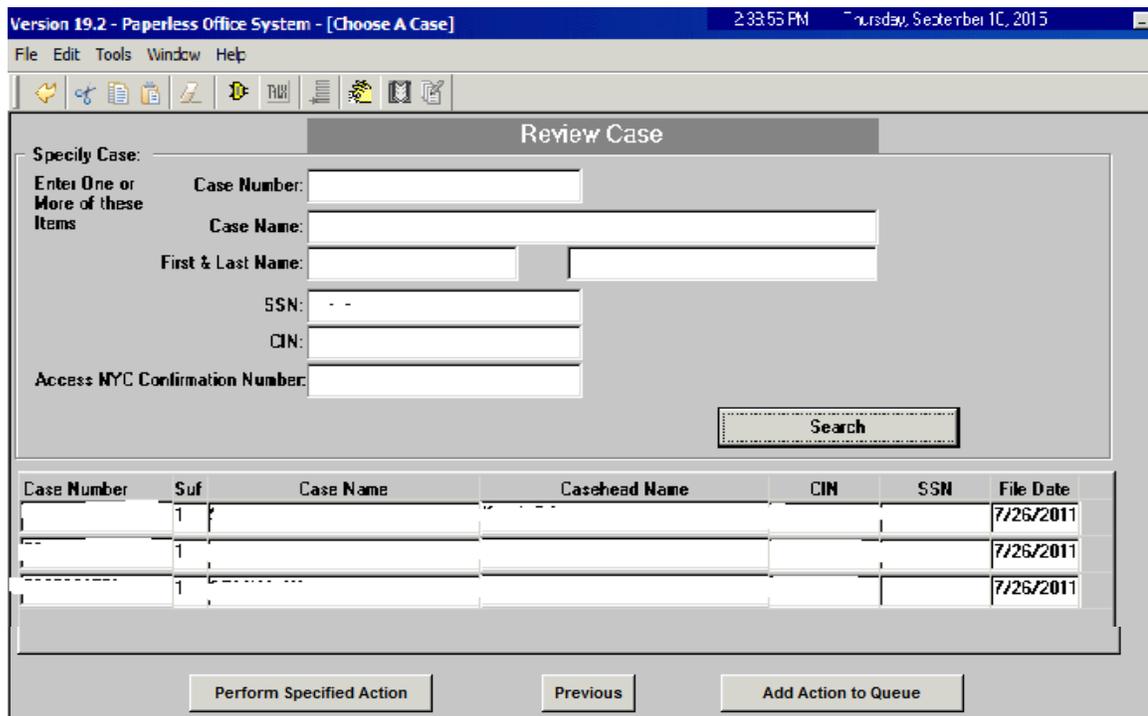
6. The **Review Case** Screen opens.

POS Review Case Screen



7. Enter the Case Identifier provided by the applicant/participant t/Caller in the appropriate field (POS Case number, Client SSN, or E-Recertification ACCESS NYC Confirmation number). Click Search Button.
8. Search Results are displayed.

POS Review Case Search Results Screen



9. From the information on the new **POS Review Case Search Results** Screen, the IS Agent will determine if the Applicant/participant /Caller is eligible for the Pilot OD SNAP Recertification Interview:
 - a. **Transfer the Call to OD Agent:** If the Applicant/participant t/Caller is eligible for an OD Interview, the IS Agent will use the Avaya ACD phone buttons to **Hold** the Client Caller, **Release** any Interpreter added to the call, **UnHold** the Client Caller, and **Transfer** the call to the OD Priority Queue.
 - b. **End the Call with the Applicant/participant:** If the Applicant/participant /Caller is not eligible for an OD Interview, the IS Agent will explain to the Applicant/participant t/Caller why they are currently not eligible for an OD Interview, and use the Avaya ACD phone buttons to **Release** the Client Caller.
10. The IS Agent will be able to click the POS Screen **Previous** button to return to a blank **Review Case** Screen to help the next Client/Caller.

POS SNAP Recertification Interview Household Screen

Control Information E-Recertification
 District : [] Center : [] Worker : [] Case Number : []

Present Address
 Street Number [] Direction [S] Name [] Type [] Apt # [12A] City [BROOKLYN]
 State: [NY] Zip Code: [112010000]

Suffix Information Active Applying No FS IPV or Sanction Found
 SNAP Suffix [1] SNAP Status [AC] SNAP# AC [2]

Case Member Information

Suff	Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	SNAP	AFIS/S	
1				Casehead			1	M	<input type="checkbox"/>	AC	AC	AC
1				Legal Spouse			1	F	<input checked="" type="checkbox"/>	AC	AC	AC
1				Undefined Relatio			1	F	<input type="checkbox"/>	AP	AP	AP

Next Previous

- If eligible, the IS Agent transfers the call to the OD Agent Priority queue. If not eligible, the IS Agent ends the call.
- The OD Agent answers calls on the OD Agent queue using the ACD phone set. The OD Agent attaches an interpreter if needed, qualifies the caller, captures the caller's POS Case information, searches POS manually, and determines if the applicant/participant /caller is eligible for an On-Demand SNAP Recertification Interview. If eligible, the OD Agent conducts the interview. If not eligible, the OD Agent ends the call.

On-Demand (OD) POS Work Flow Process:

Avaya ACD selects an available OD Agent with the appropriate skills for the Applicant/participant /Caller and rings the OD Agent's ACD phone.

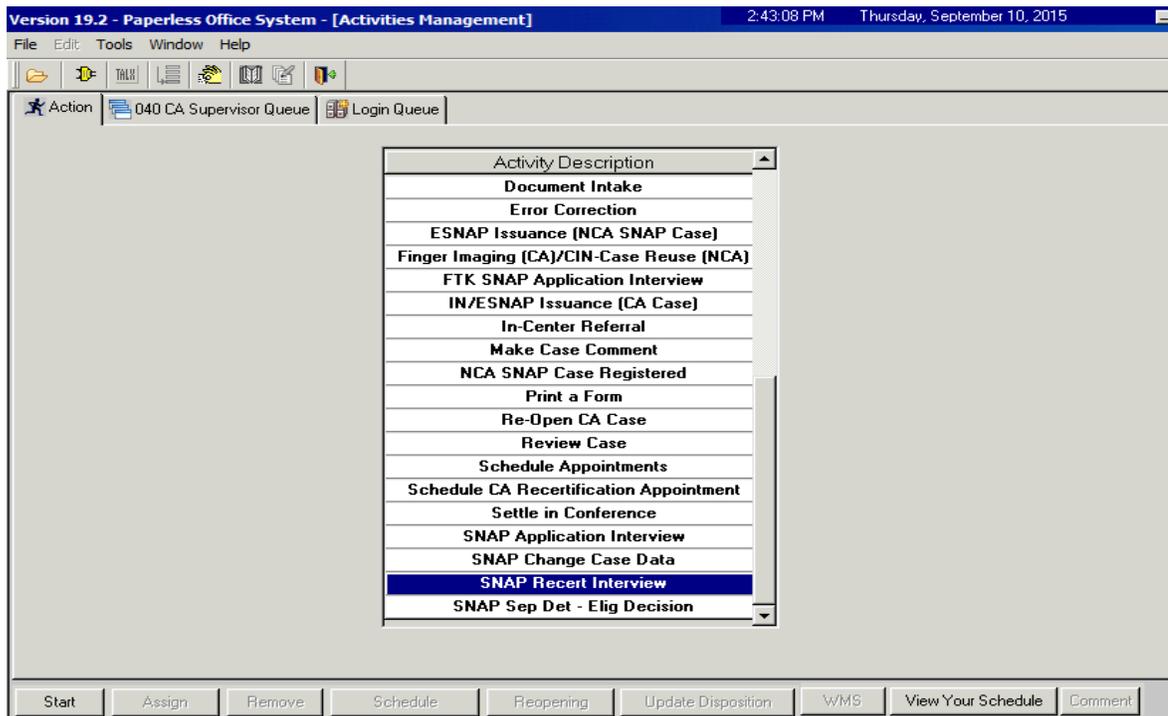
OD Agent ACD Hand Set Work Flow:

1. OD Agent answers the ACD phone.
2. OD Agent speaks to the Applicant/participant /Caller. and asks the caller for a valid POS Case Identifier to search POS with (POS Case Number, Client SSN (Social Security Number), or Client e-Confirmation Number (ANYC confirmation number from their online application).).
3. OD Agent adds an interpreter to the call line if needed.
4. OD Agent captures a valid POS Case Identifier to search POS with (POS Case Number, Client SSN, or Client e-Confirmation Number).

OD Agent POS Work Flow:

1. Launch POS (if not open).
2. Navigate to POS Action Tab.
3. OD Agent answers the ACD phone, and asks the caller for POS Case Identifier number.
4. OD Agent uses the ACD phone to add an interpreter to the call line (if needed).
5. On Activity List: Click to select SNAP Recertification Interview.

POS Action Tab Activity List Screen Used by OD Agent



6. SNAP Recertification Interview Screen opens.

POS SNAP Recertification Interview Screen

7. Enter the Case Identifier provided by the Applicant/participant /Caller in the appropriate field (POS Case number, Client SSN, or E-Recertification ACCESS NYC Confirmation number). Click Search Button.
8. Search Results are displayed.

POS SNAP Recertification Interview Results

Case Number	Suf	Case Name	Casehead Name	CIN	SSN	File Date
1						7/26/2011
1						7/26/2011
1						7/26/2011

9. Click to select the line with the desired POS Case Number.
10. The Case opens.

POS SNAP Recertification Interview Household Screen

Version 19.2 - Paperless Office System - [Household Screen] 2:45:01 PM Thursday, September 10, 2015

File Edit Tools Window Help

Control Information E-Recertification
 District : [] Center : [] Worker : [] Case Number : []

Present Address

Street Number	Direction	Name	Type	Apt #	City
[]	S	[]	[]	12A	BROOKLYN

State: NY Zip Code: 112010000

Suffix Information Active Applying No FS IPV or Sanction Found

SNAP Suffix: 1 SNAP Status: AC SNAP# AC: 2

Suff	Case Name
1	SRI KANTH

Case Member Information

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	SNAP AFIS/S
1	[]	[]	Casehead	[]	[]	1	M	<input type="checkbox"/>	AC AC AC
1	[]	[]	Legal Spouse	[]	[]	1	F	<input checked="" type="checkbox"/>	AC AC AC
1	[]	[]	Undefined Relatio	[]	[]	1	F	<input type="checkbox"/>	AP AP AP

Next Previous

11. OD Agent conducts the interview.

Note; The Failed to Keep (FTK) log will process the OD cases for closing in the following month after the scheduled recertification interview. For example, scheduled OD January recertification cases will be marked for closing after February 15 provided they fail to keep their January scheduled recertification appointment. To support this process the contact log was updated for OD cases to allow two unsuccessful contacts without marking and setting up the case for FTK.