POLICY BULLETIN #16-14-SYS

CA POS RELEASE NOTES VERSION 20.1

Date: February 22, 2016	**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 February 22, 2015. Descriptions of the changes can be found in CA POS Release Notes Version 20.1 (**Attachment A**). These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx *Effective Immediately* **Related Item** PB #15-73-OPE **Attachment:** **Attachment A** CA POS Release Notes Version 20.1
🖥 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

CA POS Release Notes
Version 20.1 February 22, 2016

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 20.1 scheduled for February 22, 2016. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes may also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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1. New SNAP Employment Code and ABAWD Code Fields on POS TAD Window

NYC is required to track SNAP (Supplemental Nutrition Assistance Program) Employment and Training compliance. In order to properly track the reasons for exemption and to track Able-Bodied Adults without Dependents (ABAWD) status, two new fields were added to WMS (Welfare Management System) and to the **Individual Data** section of the POS (Paperless Office System) TAD (Turnaround Document) window:

- **SNAP EMP CODE (SNAP Employment Code)**
- **ABAWD**

The following options appear in the **SNAP EMP CODE** field:

- **16** – Work limited/Non-exempt
- **20** – Work required/Non-exempt
- **24** – Pregnant within 30 days of medically verified date of delivery Exempt
- **27** – Employed or self-employed less than 30 hours per week/Non exempt
- **28** – Employed or self-employed 30 or more hours per week/Exempt
- **29** – A parent or household member who is responsible for care of a child under age 6 in the household/Exempt
- **30** – Younger than age 16/Exempt
- **31** – Parent or Caretaker Relative of a child in the household under 12 months of age/Exempt
- **32** – 60 Years of age or older/Exempt
- **35** – A person age 16 or 17 who is not the head of household OR 16 or 17 who is attending school
- **36** – Incapacitated/disabled (more than 6 months)/Exempt
- **38** – Responsible for the care of an incapacitated person full time/Exempt
- **40** – Responsible for the care of an incapacitated person part-time Non-exempt
- **41** – Temporary illness or incapacity 1-3 months exemption Exempt
- **42** – Temporary illness or incapacity 4-6 months exemption Exempt
- **43** – Incapacitated disabled SSI application filed Exempt
- **44** – Incapacitated/Disabled In receipt of Social Security income (SSI) Exempt
- **45** – Full employment waiver/Exempt
- **52** – Receiving or pending receipt of Unemployment Insurance Benefits (UIB) Exempt
- **54** – In receipt of Social Security Disability Income (SSDI) Exempt
- **63** – Regularly participating in an approved alcohol/substance abuse rehabilitation program and determined unable to work/Exempt
- **64** – Substance abuse / Non-exempt
- **70** – Exemption claimed pending medical documentation / Exempt
- **72** – A student enrolled in a recognized school, job skills training or institution of higher education at least half-time / Exempt

The following options appear in the **ABAWD** field:

- **A** – ABAWD-Non Waived Area
- **X** – ABAWD-Excluded
- **W** – ABAWD-Waived Area
- **N** – Non-ABAWD (Exempt from ABAWD Requirements)
- **G** – ABAWD-Grace Period

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2. Medicaid Separate Determination (MSD) Referrals for Basic Health Plan (BHP)

Applicants who apply for Cash Assistance (CA) and are rejected for reason codes that do not reject the applicant for Medicaid are referred to the MSD unit to be evaluated for Medicaid eligibility.

Effective January 2016, Family Assistance (**FA**), Safety-Net Cash Assistance (**SNCA**), Safety-Net Non-Cash Assistance (**SNNC**) and Safety-Net Federally-Participating (**SNFP**) applicants rejected for CA with reasons codes that do not reject the applicant for Medicaid and who meet the BHP criteria have their applications and supporting documentation transferred from POS/EDITS to New York State of Health (**NYSOH**) via the Maximus **Move It** system, where they will be evaluated for Medicaid.

Applicants rejected for CA that do not fit BHP criteria will follow existing MSD case processing rules.

A new system-generated Medical Assistance (MA) rejection code **BH1** (BHP referral to HX) was added in WMS for individuals/lines rejected with a CA reason code that entitles them to be evaluated separately for Medicaid and meet all of the following criteria:

- Age between 21 years old and 64 years and 9 months
- State/Federal Charge code of **60** (Maintenance of Effort (MOE) Qualified Alien with less than 5 years in status), **67** (State Charge/PRUCOL) and **68** (Qualified Alien (No children under 18 or pregnant women)) and are in the 5 year ban
- Individual is in the 5 year non-citizen ban and is not within 90 days of ban end-date;
- SSI Indicator other than **1** (Active)
- Individual category code **09** (Children in Intact Household, No FA/SNFP Deprivation; or Single Person Safety-Net/Adult-Only Households), **14** (Essential Person) or **26** (Parent in an Intact Household)
- Individuals/lines with SSN validation code **8** (SSA Validated SSN)
- Individual is not blind or disabled.
- Individual is not pregnant.

3. New POS Questions for BHP Referrals

A new window named **Income Tax Questions for BHP** appears after the TAD window in the **CA Application Interview** when at least one individual on the case meets the criteria for MSD referral to the BHP/NYSOH.

For each individual meeting the BHP criteria, the following questions appear:

- Do you plan to file a federal income tax return NEXT YEAR (2016)? You can apply for coverage even if you don't file for a file a federal income tax return.
- Will you file jointly with (head of household or spouse of head of household)?
- Will you claim any dependents on your tax return?

    - Household member / Relation to the tax filer
    - Non-household member / Relation to the tax filer

- Will you be claimed as a dependent on someone's tax return?

    - Household member / Relation to the tax filer
    - Non-household member / Relation to the tax filer

- Comment

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4. **Action Taken on your Application -Part A-Public Assistance, Supplemental Nutrition Assistance Program (SNAP) and Medical Assistance Coverage (NYC) (LDSS-4013A) Update for BHP Referrals**

   For cases eligible for BHP referral for MSD, the following text appears in the "**MEDICAL ASSISTANCE – OTHER**" section of the **LDSS-4013A**: "**Your eligibility for the Medicaid coverage will be determined by NY State of Health and you will receive a letter from them regarding the next step you will need to take.**"

5. **CIN (Client Identification Number) Re-Use Window Update for BHP Cases**

   BHP cases were added in the **CIN Re-Use** window under case type BHP. The new case type in WMS is **26** (BHP).

6. **Web Indexing Updates**

   The following updates were made for the Web Indexing interface:

   - When the interface is launched from a POS activity, the case number of the activity carries over to the **Case Number** field in the **Retrieved Scanned Case List** section.
   - When the Worker selects the **All Folders** radio button in the **Retrieved Scanned Case List** section, the interface will retrieve all pending unindexed images, regardless of the extension used for the User ID or document source.

7. **Edit for Routing Code D000**

   A new edit was added to limit usage of routing code **D000** (ODV Special Unit) to authorized staff. If staff who are not authorized to use this code attempt to use it in the **Single Issue Data Entry** window, the following error message appears: "**Routing Code D000 can only be used by authorized staff.**"

8. **New Single Issuance Codes B7 and B8 for Special Exit and Prevention Supplement Program (SEPS)**

   NYC (New York City) is currently implementing a new program named Special Exit and Prevention Supplement Program (**SEPS**) to assist particularly single individuals and adult families that may be in shelter or living in substandard living conditions outside of the shelter system.

   Two new single issuance codes were added in POS for this program:

   - **B7 –** SEPS Rent
   - **B8 –** SEPS Bonus

   The following rules were added for code **B7**:

   - Restricted Indicator field must be Direct Vendor (2)
   - Grant Amount must not be greater than $5,000
   - Pick-up Code must be **PUC 1** - Special Roll or **PUC 5** – Auto E Check or **PUC 6** – Manual E Check
   - The From Date cannot be more than 90 days prior to current date

   The following rules were added for code **B8**:

   - Restricted Indicator field must be Direct Vendor (2)
   - Grant Amount must not be greater than $1,000

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- Pick-up Code must be **PUC 1** - Special Roll or **PUC 5** – Auto E Check or **PUC 6** – Manual E Check

9. New Single Issuance Code V1 Fair Hearing Compliance to issue retro benefits beyond 12 months (CA/SNAP) for Fair Hearing

A new Single Issuance Code **V1** was added to the **Single Issue Data Entry** window to allow issuance of retroactive benefits beyond 12 months for CA/SNAP cases. This issuance code requires the entry of a Fair Hearing Number in the data entry window.

10. New City FEPS (Family Eviction Prevention Supplement) Additional Needs Type Code 65

POS was updated to add a new Additional Needs Type Code for City FEPS:

- **City FEPS Shelter Allowance Supplement (Code 65)**

This new code appears in the **Response** window for the question **Has Additional Expenses? Specify.**

When the code is selected, the JOS/Worker must enter the approved City FEPS shelter allowance supplement in the response window.

The entered code and amount appear in the POS budget when the **New Budget** button is clicked.

The following business rules were added for the new Additional Needs Type Code **65**:

- Additional Needs Types **65** require Shelter Type to be **01** (Unfurnished Apartment or Room) only.
- Additional Needs Type **65** is valid for CA case statuses **AC** (Active) and **SI** (Single Issuance) only.
- Additional Needs amount is required for Additional Needs Type **65**.
- More than one Additional Needs Type **65** is not allowed.
- Additional Needs Type **65** (City FEPS) and **47** (FEPS) cannot be issued simultaneously.
- Amount is out of range for Additional Needs code **65.**
- For additional needs type **65**, the PA Shelter Amount should be greater than the standard shelter allowance with children.
- Additional needs type **65** is invalid for case without the presence of a child.

11. Allowance Table Update for City FEPS Supplement

The POS Allowance table was updated to track the maximum shelter amounts for City FEPS.

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12. Important Information about Your Case Notice of Missed Cash Assistance Appointment (FIA-1124) Update

The **FIA-1124** notice was updated to include the Bureau of Eligibility Verification (BEV) central rescheduling unit telephone number for cases where the recertification is scheduled with BEV staff in a Bronx community-based organization (CBO) and the participant missed their interview: **(718) 254-0400 Operator R**.

13. Validation of Calls to the CA Centralized Interview Rescheduling Unit (CIRU) for Mail-In Recertification/Eligibility Mailer (M-327h)

The CA CIRU provides information to participants with questions regarding the completion of the **M-327h** mailer. When the participant calls the centralized telephone number, the applicant/participant is asked to enter an identifier such as the CA case number, or Social Security Number (SSN). IVRS (Interactive Voice Response System) connects to POS and ICPWeb to verify whether the participant has an eligibility mailer due. If an eligibility mailer is not due, IVRS plays the appropriate message indicating that the individual is not expected to return the eligibility mailer.

14. E-Form Updates

The following forms were updated:

- **W-680FF**, Language Questionnaire
- **LDSS-3938 NYC,** Supplemental Nutrition Assistance Program (SNAP) Application Expedited Processing Summary Sheet

15. New Preview Button for CA Print-to-Mail (PTM) Forms

A new **Preview** button in the **Print Forms** window was added to allow the Workers and Supervisors to preview the forms that will be mailed via PTM:

- The Worker or Supervisor must select the form and click on the **Preview** button to view the form.

16. New Home Visit Needed/RAR Center 090

A new center named **Home Visit Needed/RAR** was added to POS and WMS in January 2016. This center is responsible for home visits for FIA (Family Independence Administration). The new center is located on the 3rd and 11th floors at 109 East 16th Street in Manhattan. The staff at this center has citywide access for FIA CA and NCA (Non-Cash Assistance) SNAP cases.

New applications requesting home visits for the application interview through the Office of Constituent Services (OCS) and Infoline will be registered at Center **090**. Cases that are approved for Home Visit Needed/Homebound (HVN/HB) status with NYCWAY(New York City Accountability and You) Action Code **192U** (HVN/HB Status Approved for More Than 365 days) will remain in that center.

Cases where HVN/HB status is denied or approved for no more than one year will be transferred to the appropriate home center based on zip code after case activation.

17. HASA (HIV/AIDS Services Administration) Center Number Changes

The following center number changes were implemented for the HASA:

- Richmond Center changed from center number 099 to **093**.
- Coney Island Center changed from center number 063 to **049**.

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18. Repayment Agreement Mailer for Emergency Safety-Net Assistance (ESNA) Applicants

MIS (Management Information Systems) completed a mailer for ESNA applicants who received shelter arrears payments through the Centralized Rent Processing Unit (CRPU) from May to June 2015. This mailer includes the Notice of Requirement for a signed repayment agreement for payment of rent arrears indicating the requirement to sign a repayment agreement, the Emergency Safety Net Assistance (ESNA) Shelter Arrears Repayment Agreement (**W-147H**) repayment agreement form, the Information About Repaying the Department of Social Services for Rental Arrears (**W-147PP**) notice and a business reply envelope.

Applicants who have not signed the repayment agreement must sign the enclosed repayment agreement and mail it to HRA (Human Resources Administration) within the enclosed envelope.

- When the repayment agreement is returned, the responsible HRA staff must scan and index the <u>entire</u> signed repayment agreement into the electronic case record.

- If an applicant walks into the center with their signed repayment agreement, the center must route the applicant to the Customer Service and Information Center (CSIC) in Model Centers and to the Reception area in Non-Model Centers in order to have the signed repayment agreement scanned and indexed into the electronic case record.

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19. Self-Service Updates

The changes below for Self-Service were deployed on February 1, 2016. Refer to PB #15-73-OPE for details on the Self-Service Initiative.

New Button for Hearing-Impaired Applicants/Participants
A button named **I need a sign language interpreter** for hearing impaired applicants/participants was added to the **Identification** screen. In co-located buildings or stand-alone Job Centers, the applicant/participant is issued a CA Sign Language ticket. In stand-alone SNAP Centers, the applicant/participant receives a SNAP Sign Language ticket.

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Entry of Social Security Number (SSN)
Applicants/participants selecting a Social Security number as their means of self-identifying are now required to re-enter his/her SSN a second time. If the second entry does not match the first, the applicant/participant sees a screen telling them that the SSNs did not match and that they must re-enter his/her SSN or start the session over from the **Language** screen. This change is being made in an effort to reduce CA CSIC traffic for known applicants/participants that misidentify.

Enter your social security number on the pad below:
(Please re-enter your social security number on the pad below:)

1	2	3
4	5	6
7	8	9
X	0	<

Previous   Next

The Social Security numbers that you entered do not match.

Please press TRY AGAIN to re-enter your Social Security number or press START OVER for other identification options.

TRY AGAIN   START OVER

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Apply for SNAP (Food Stamps) Button Update
Applicants/participants who are not known to the system that get to the screen with application or information only options have a small change in the button **Apply for SNAP (Food Stamps)**; the word "only" was added to distinguish NCA SNAP from CA SNAP.

Childcare Return Appointment Update
Applicants and participants with a Childcare Return appointment (Action Codes **933D** [Documentation Required]; **933S** [Provider Needed and Documentation Required], **133D** [Documentation Required]; and **133S** [Provider Needed and Documentation Required]) now see a new screen where they are asked if they "were required to return any Childcare forms" and 'if they actually have the forms with them". If the applicant/participant responds **Yes** to both questions, they are routed to the Enrollment Agency; if the applicant/participant responds **No** to one or both questions, they are routed to CSIC Childcare. This change is being made in an effort to reduce inappropriate CSIC Childcare traffic.

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New Options for CA Applicants/Participants without Appointments
Active CA participants without an appointment see an updated screen with new routing options. The new options are **Budget Letter/Emergency Check Pick-up** and **Childcare Information**. This change is being made to reduce CA CSIC traffic.

New Options for Active SNAP Participants Requiring Routing to Job Centers
Active SNAP participants have the option to get a ticket to the Job Center without having to go to SNAP CSIC as per the first screen on the next page.

In the prior version of the screen that active SNAP participants without an appointment saw, selecting the **Something Else** button issues a **CSIC NCA General** ticket.

This has changed so that the applicant/participant is presented with a screen that has a series of CA options as per the second screen on the next page. Selecting any of those options routes the applicant/participant to the appropriate Job Center area.

If the applicant/participant selects **None of these** on this screen, they are issued a **CSIC NCA General** ticket. This change is being made in an effort to reduce SNAP CSIC traffic by allowing applicants/participants that may be in the process of applying for CA or have business with a co-located Job Center to route themselves there.

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Visitor Pass Update
The screen where applicants/participants currently select the number of Visitor passes that they need was changed in an effort to make the selection of passes less confusing for applicants/participants.

> We are ready to print your ticket.
>
> Please select one of the following to tell us how many tickets you need. If you have anyone with you today who is 18 years of age or older, they will also need a ticket to enter the center.

1 (for myself)	2 (myself and 1 visitor)
3 (myself and 2 visitors)	4 (myself and 3 visitors)

Correction: CSIC Special Queue for Veterans
A new CSIC Special queue with a corresponding center-specific **Veteran Referral** button was created for veteran applicants/participants at the East River Job Center. The prior release notes incorrectly indicated that the new queue was created for the Veterans Job Center.

Please select one of these options.

Bureau of Eligibility Verification (BEV)	Office of Child Support Enforcement (OCSE)
Medicaid Information	Medicaid Appointment
Veteran Referral	
Previous	Start Over

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20. POS Sign-On Page Update

The POS Sign-On page was updated on February 10, 2016 to migrate to the new generation of Citrix software, to prevent slowness and outages.

The **HRA Portal** opens when the Worker clicks on the **POS (Paperless Office System)** link on the POS Portal. The other applications, such as the POS Management Console, will be accessible from both the Welcome page and the new POS Portal page for those with permissions

To sign into POS, staff will click on the icon for their area:

- **POS_CA** for Job Center, Central Office, HPA (Homelessness Prevention Administration) and Fair Hearing staff
- **POS_FS** for SNAP Center staff
- **POS_HASA** for HASA Center staff
- **POS_TRAINING** for Training

Bookmarks for the old POS sign-on page should be changed to the following URL:
http://hraportal.hra.nycnet

POS Portal Page

Attachment A

HRA Portal Page