



OFFICE OF POLICY, PROCEDURES, AND TRAINING

James K. Whelan, Executive Deputy Commissioner

Stephen Fisher, Assistant Deputy Commissioner
Office of Procedures

POLICY BULLETIN #16-18-OPE

(Obsoletes PB#15-73-OPE)

**EXPANSION OF AND REVISIONS TO SELF-SERVICE INITIATIVES
FOR CHECK-IN AND DOCUMENT RETURN**

<p>Date: February 25, 2016</p>	<p>Subtopic(s): Self-Service Check-In Stations, Kiosks, Self-Service Scanning, Re-Engineering, Forms</p>
<p> This procedure can now be accessed on the FIAweb.</p>	<p>Revisions to the Original Policy Bulletin:</p> <p>This policy bulletin is being revised to:</p> <ul style="list-style-type: none"> • Announce the expansion of the Self-Service Check-In initiative to the East River Job Center (#37), Queens Job Center (#53), Queens SNAP Center (S53), and Queens Family Services Call Center (FSCC) Satellite (#17); • Inform staff about changes made to existing Self-Service Check-In station (kiosk) screens; • Introduce new kiosk screens; and • Replace references to the “I Speak” Card for Limited English Proficient Applicant/Participant (MLF) (FIA-1043) form with the You Have a Right to Free Interpretation Services (HRA-125) form. <p>Purpose:</p> <p>The purpose of this policy bulletin is to inform Job Center and Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) Center staff that two self-service technologies, self-service check-in stations and scanners, have been developed and implemented in designated Job and NCA SNAP Centers. This policy bulletin is informational for all other staff.</p> <p>Note: The term individual(s) is used throughout this document to refer to the grouping of applicants, participants, and authorized representatives.</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

Self-Service Clerk (SSC)

The Self-Service Clerk (SSC) is a functional job title used for designated staff at Centers that use self-service technology for check-in and scanning. The main reception and self-service scanning areas are staffed by SSCs. The SSC staff responsibilities that are common to both areas include, but are not limited to:

SSC staff responsibilities for both the main reception and self-service scanning areas.

- Displaying a customer service oriented approach to greeting and interacting with individuals;
- Managing the flow of the customer line and directing individuals to the self-service equipment;
- Triaging individuals to assess if a reasonable accommodation is needed;
- Providing instructions and assistance, as needed, to individuals on how to use the self-service equipment;
- Reminding individuals to take all tickets, visitor passes and other printed materials from the self-service area;
- Familiarizing, and educating individuals on the benefits of using the various types of self-service options available to them at the Centers (PC Bank [for NCA SNAP], Scanners);
- Reporting issues with traffic flow to the Center and/or Deputy Director; and
- Reporting any system or equipment malfunctions to the Center Director Designee and Management Information Systems (MIS).

Self-Service Check-In

Self-service check-in stations (kiosks) and handheld tablets (tablets).

The first area where the individual encounters the self-service technology is in the main reception area of the Center. Kiosks are used by individuals visiting the Center to obtain their routing ticket. Handheld tablets (tablets) are used by the Self-Service Clerk (SSC) to assist with the check-in process for individuals that have disabilities and/or language barriers.

The kiosks and tablets use the Front Door Electronic Reception (FRED) logic to perform searches for existing appointments, to route individuals without an existing appointment to the correct CA or NCA SNAP program area, and to route individuals who have an appointment with other agencies or programs that are located at the Center.

The kiosks are programmed to time out after sixty (60) seconds of inactivity. If the kiosk times out before the individual has completed the check-in process, the kiosk screen returns to the language selection screen.

The required routing ticket, any requested visitor passes, and other related materials for the individual's visit to the Center are printed either at the kiosk printer or a designated printer for the tablet. The routing ticket information created by the kiosk is transferred into the Model Office Numbering Identification Queue (MONIQ) system, which tracks the individual's contact with workers throughout their visit at the Center.

Note: Counter-queue tickets are tickets that are issued to route individuals to ancillary services at the Centers. Counter-queue tickets cannot be tracked in MONIQ to capture an individual's wait, service, or interaction time with a worker.

SSC Responsibilities Specific to the Main Reception Area

The SSC staff responsibilities specific to the main reception area include, but are not limited to:

- Assisting Limited English Proficient (LEP) individuals by utilizing telephone interpretation services;
- Checking in individuals using a handheld tablet if assistance is required with the check-in process and during periods of high check-in volume;
- Providing individuals that are not staying for same day services with application kits and commonly requested forms;

Note: Application kits will be given out at main reception if the individual is not staying to complete the application process. Individuals that want to remain at the Center to complete the CA application process will be given the application kit at Site Determination. Individuals that want to remain at the Center to complete the NCA SNAP application process will be directed to the PC bank where they can use ACCESS NYC to complete an online application, unless a paper application is requested. The SNAP paper application and SNAP application kits are given at the PC Bank.

Check-In for Individuals that Require Assistance

Individuals that require language assistance or have a disability are checked-in at a desk station with the assistance of an SSC. The SSC staff use a tablet and a language line phone, if necessary, at the desk stations to check-in the individual and then print the ticket and other related items at a designated printer.

SSC staff responsibilities specific to the main reception area.

Refer to
[PD #14-24-OPE](#).

If an individual requires language interpretation services, The SSC presents the Language Card (**W-194**) to the individual so that s/he can point to their preferred language. The SSC uses the language line phone at the desk station to contact the vendor that provides telephone interpretation services. The language line phones are equipped with dual handsets, which allow the SSC and the individual to participate in the call simultaneously.

The tablets use the same computer software as the kiosks to perform searches for existing appointments and/or determine the program service area the individual is there to see. If an individual is able to retrieve their printed materials, the SSC will direct the individuals to the associated printer. If an individual is not able to retrieve their printed materials, the SSC will retrieve and provide them to the individual along with directions to the program service area.

Check-In Process Using a Kiosk or Tablet

Each kiosk consists of a 17-inch touch screen monitor and a printer. Each tablet consists of a 10-inch screen and is associated with a designated printer. The individual/Worker must respond to the questions displayed on the kiosk/tablet's touch screen, as follows:

- Select their preferred language from the following options:



Once a language is selected, all of the screens that follow appear in the language selected.

Check-In process at kiosks or on a tablet.

Updated screen.

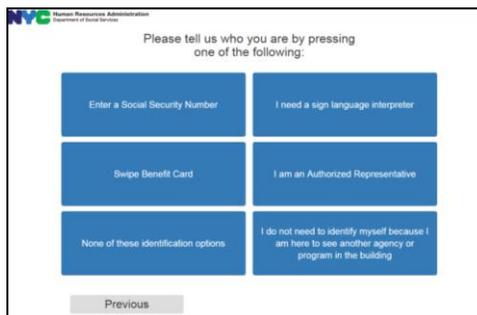
New option “*I need a sign language interpreter.*”

Tablets cannot use the button *Swipe Benefit Card* to search for appointments because the tablet is not connected to a card swipe device.

Refer to [Self-Identification Screens Using an SSN or CBIC Card](#) section beginning on page 7 for screen shots.

Refer to [Routing Options Based on Identification Method Selected](#) section beginning on page 9 for screen shots.

- Select a self-identification option:



- If *Enter a Social Security Number* or *Swipe Benefit Card* is selected on the screen above, the system does a case search to see if an appointment is associated with the SSN entered or the Common Benefit Identification Card (CBIC), card swiped:
 - If an appointment is found, the kiosk generates the corresponding ticket for the appointment. For example, the kiosk generates a **PR** ticket if a recertification appointment for a Cash Assistance (CA) case is found; or
 - If an appointment is not found, the kiosk displays the next screen in the check-in process.
- If *I need a sign language interpreter* is selected on the screen above, the kiosk bypasses the case search and displays the *We are ready to print your ticket* screen. Refer to the screen shot on page 6.

Note: The option “*I do not need to identify myself...*” is displayed on this screen at Centers that have other agencies or programs located within their Center. For example, individuals that report to the Waverly Job Center (#13) may have an appointment with Catholic Charities and not HRA.

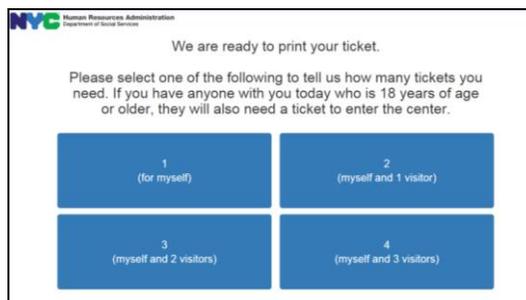
The next screen described is not displayed to individuals who self-identify using an SSN or CBIC card if an appointment is located by the system.

- Select the reason for their visit to the Center. The options displayed on the screen depend on the case status at the time the search is conducted or the self-identification method selected.

- Select a response to the question *Please select one of the following to tell us how many tickets you need.*

Updated screen.

Each button includes wording that indicates for whom the tickets are being printed.



Visitor passes.

Visitor passes are printed when the individual indicates that there is someone with them who is 18 years or older. Individuals can request up to three (3) visitor passes.

After the individual answers the questions above, the required ticket and/or form, any requested visitor passes, and additional materials are printed. The kiosk/tablet screen displays various messages based on the selections made by the individual. If a ticket was generated to a program area, the kiosk/tablet screen displays the following message:



New Information.

If the individual selects "I need a sign language interpreter" on the self-identification screen, the kiosk prints one of the following tickets:

Sign Language ticket.

- CA Sign Language ticket – if the Center is co-located with an NCA SNAP Center or a standalone Job Center; or
- SNAP Sign Language ticket – if the Center is a standalone NCA SNAP Center.

Updated information.

You Have A Right to Free Interpretation Services (**HRA-125**).

If an individual identifies as Limited English Proficient (LEP), the kiosk prints the You Have A Right to Free Interpretation Services (**HRA-125**), in addition to the routing ticket and any requested visitor passes. The **HRA-125** prints once during a three-month period regardless of the number of Center visits made.

Example: A participant visits a Center that has self-service kiosks for the first time on January 20, 2016. The individual is identified as LEP, based on the case's language indicator, and the **HRA-125** is printed. This same participant returns to the Center on March 15, 2016. The **HRA-125** is not printed for this visit to the Center. The same participant next visits the Center on May 4, 2016 and the individual is still identified as LEP. The **HRA-125** is printed for the May 4th visit because there have been more than three (3) months since the **HRA-125** was printed for this participant.

CBIC Referrals.

If an individual has come to the Center to obtain a replacement Common Benefit Identification Card (CBIC), s/he can request a printout of the Need a Replacement CBIC? (**FIA-1059a**) from the kiosk/tablet. This option is only presented if the search is for a case with an active case status.

After the **FIA-1059a** is printed, the kiosk/tablet screen displays the following message:

Updated screen.



Self-Identification Screens Using an SSN or CBIC Card

Enter a Social Security Number

The individual must enter the Social Security Number (SSN) of the casehead on two separate screens.

SSN entry screen:

Note: If the SSN of a household member other than the casehead/ payee is entered to perform this search, FRED may not be able to retrieve the appointment because the appointment is usually associated with the casehead/payee.



SSN re-entry screen:

New screen.

Individual must re-enter the SSN that was entered on the previous screen.



SSNs entered do not match.

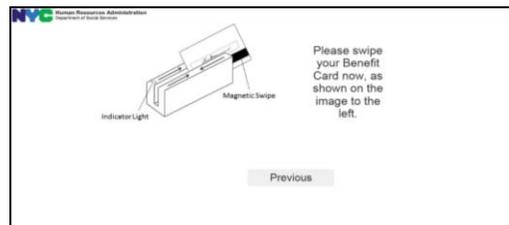
If the two entries do not match, the screen displays the option to *Try Again* or *Start Over*. If the individual selects *Try Again*, the screen returns to the initial SSN entry screen. If the individual selects *Start Over*, the screen returns to the language selection screen.

New screen.



Swipe Benefit Card

The individual must swipe their benefit card.



System not able to read a CBIC card.

If the system is not able to read the magnetic strip on the CBIC, the kiosk will emit a single beep and display a screen with the following options to self-identify the case:



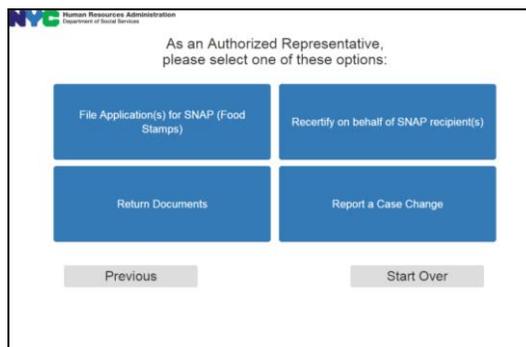
Routing Options Based on Identification Method Selected

Authorized Representative

Authorized Representative.

The following routing options are displayed to individuals that select *I am an Authorized Representative* as an identification method:

Updated screen.

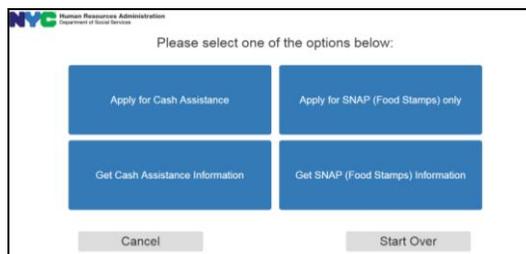


None of these Options

None of these options.

The following routing options are displayed to individuals that select *None of these options* as an identification method:

Updated screen.



I do not need to identify myself because I am here to see another agency or program in the building

I do not need to identify myself because I am here to see another agency or program in the building.

If the individual selects *I do not need to identify myself because I am here to see another agency or program in the building* as an identification method, the individual is brought to a screen that displays Center specific options. The options listed on this screen will vary based on the Center. The screen shot below is a sample of what this screen might display.

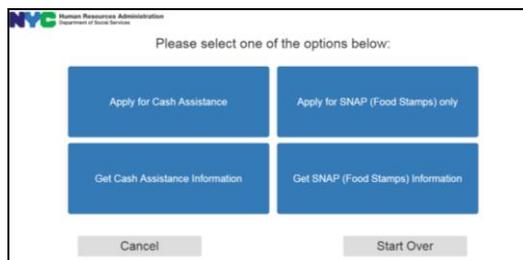


Enter a Social Security Number or Swipe Benefit Card

No appointment found and case/individual is **not** AP, AC, or SI status.

The following routing options are displayed to individuals that select either *Enter a Social Security Number* or *Swipe Benefit Card* as an identification method and an appointment is not found and the case/individual is not in Applying (AP), Active (AC), or Single Issuance (SI) status:

Updated screen.



Enhancement to FRED logic for NCA SNAP cases.

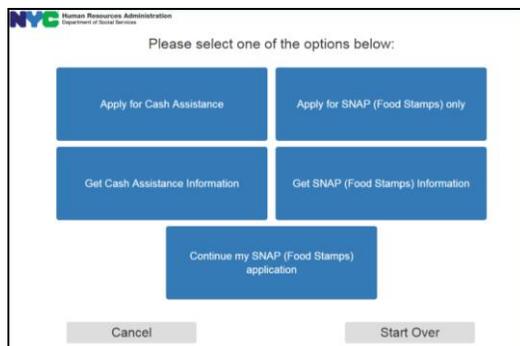
A fifth button appears on the screen displayed on the previous page if FRED determines that the NCA SNAP case is either eligible for reactivation or if the application can be continued. An individual that selects this fifth option is issued an **NCA CSIC General** ticket.

The ability of FRED to locate NCA SNAP applications and cases in the situations described below is an enhancement to the existing FRED logic.

Only one of the following options is presented:

- Continue my SNAP (Food Stamp) application – this option appears for applicants whose case was denied using any rejection code, except **N10** (Failure to Keep/Complete Appointment), between days 31-60 after the application file date; or

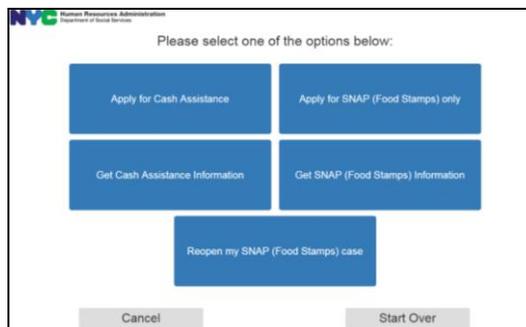
Updated screen.



Refer to [PD #13-15-ELI](#).

- Reopen my SNAP (Food Stamps) case – this option appears for participants whose case was closed within the last 30 days and the case meets the reactivation criteria to be reopened without completing a new application.

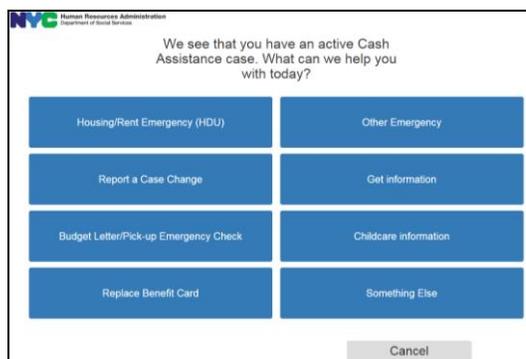
Updated screen.



No appointment found and CA case/individual is in SI or AC status.

The following routing options are displayed to individuals that select either *Enter a Social Security Number* or *Swipe Benefit Card* as an identification method and an appointment is not found and the CA case/individual is in AC or SI status:

Updated screen.

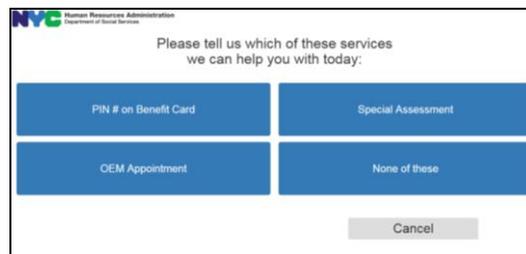


Note: Centers that contain either the Parks Opportunity Program (POP) or Family Services Call Center (FSCC) will have nine options on this screen. The POP or FSCC option appears under the *Replace Benefit Card* option.

Something Else selected by an individual with a CA case/application.

If a user selects *Something Else*, the screen displays the following routing options:

Updated screen.



Note: Individuals with a CA case in AC or SI status that select *None of these* are issued a ticket to CA CSIC General.

CA child care return appointment found.

The following questions are displayed to individuals for whom the system finds a CA child care return appointment:

New screen.

The screenshot shows a kiosk interface from NYC Human Resources Administration. It asks two questions: "Were you required to return any childcare forms?" and "Do you have the completed forms with you?". Each question has "Yes" and "No" buttons. At the bottom, there are "OK" and "Start Over" buttons.

If the individual selects *Yes* to both questions, the kiosk generates a ticket to the Women’s Housing and Economic Development Corporation (WHEDCo). If the individual selects *No* to one or both questions, the kiosk generates a ticket to CSIC Child Care.

No appointment found and NCA SNAP case is in AC or SI status.

The following routing options are displayed to individuals that select either *Enter a Social Security Number* or *Swipe Benefit Card* as an identification method and an appointment is not found and the NCA SNAP case is in AC or SI status:

Updated screen.

The screenshot shows a kiosk interface with the heading "We see that you have an active SNAP (Food Stamp) case. What can we help you with today?". It features six blue buttons in a 3x2 grid: "Report a Case Change", "Get information", "Replace my Benefit Card", "Pin # or Photo ID or Benefit card", "Apply for Cash Assistance", and "Something else". A "Cancel" button is at the bottom.

Something else selected by an individual with an NCA SNAP case in AC or SI status.

If the user selects *Something else*, the screen displays the following routing options:

New screen.

The screenshot shows a kiosk interface asking "Please tell us which services we can help you with today.". It features six blue buttons in a 3x2 grid: "Cash Assistance Document Return", "Homelessness Diversion Unit (HDU) Appointment", "Pick-up Emergency Check", "Cash Assistance Information", "Cash Assistance Childcare", and "None of these". A "Cancel" button is at the bottom.

Note: Individuals with an NCA SNAP case in AC or SI status that select *None of these* are issued a ticket to NCA CSIC General.

No appointment found and application is in AP status.

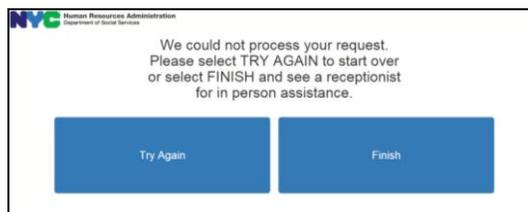
Individuals that select either *Enter a Social Security Number* or *Swipe Benefit Card* as an identification method and an appointment is not found and the application is in AP status will automatically be routed to the Customer Service and Information Center (CSIC) area. The CSIC worker will determine the required service area for the individual's visit.

Miscellaneous Screens

We could not process your request

System is unable to process an individual's request.

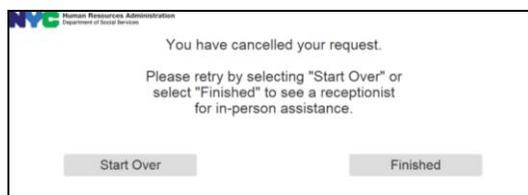
If the system cannot process the individual's request, the screen displays the option to *Try Again* or *Finish*. If the individual selects *Try Again*, the screen returns the self-identification screen. If the individual selects *Finish*, the screen returns to the language selection screen.



You have cancelled your request

Individual cancels their request.

If the individual cancels their request at any point during the check-in process, the screen displays the following message:



Note: The screen returns to the language selection screen when the user selects either *Start Over* or *Finished*.

Manual Check-in Process

Manual check-in process. Refer to the [FIA Model Center Handbook](#).

If the kiosks are not working, the SSC staff will issue manual tickets per the existing manual ticketing process. Refer to the FIA Model Center Handbook for detailed instructions (Section 5 – Ticketing, Visitor Policy and Children's Corner Passes).

Self-Service Scanners for Document Return

Self-service scanners.

The second area where the individual encounters the self-service technology is in the CSIC waiting area at Job Centers and in either the PC Bank or the NCA CSIC area at NCA SNAP Centers. Some co-located Job and NCA SNAP Centers will have a combined self-service scanning area in the Job Center's CSIC waiting area rather than separate self-service scanning areas for each program.

Revised information.

Individuals have the option to use the self-service scanners or wait to see a Customer Service Representative. The scanners are used to submit documents that the household is voluntarily providing or that HRA is requesting for a case using an agency document request form (examples of document return notices include the Documentation Requirements and/or Assessment Follow-Up [**W-113K**], Action Is Required! You Must Submit Documents For Your SNAP Case [**FIA-1146**], Notice of Documentation required – Change In Household Circumstances [**W-132S**], and Fair Hearing Compliance Request [**W-186D**]). Some document return notices indicate that the individual must see a worker. These individuals are routed at the kiosks to the Case Management Unit (CMU). If one of these individuals attempts to use the self-service scanners, the system will not be able to identify the case because it is an invalid appointment type for use at the scanners.

Individuals are routed to CMU if the notice indicates that they must be seen by a Worker.

NCA SNAP application completed at PC Bank.

Individuals who apply for NCA SNAP at the PC Bank and want to submit documents on the same day should be instructed to choose the *Enter my ACCESS NYC Confirmation Number* option when identifying their case at the self-service scanners.

Ticket status during use of self-service scanners.

When an individual uses the self-service scanners, the ticket status is changed to **ANSWER** in MONIQ. This status change occurs once the individual has identified the case at the scanner. The CSIC worker cannot call the ticket while the status of the ticket is **ANSWER**. This status occurs regardless of the option used to identify the case. The status of the ticket remains **ANSWER** until the individual makes a selection at the end of their scanning session. The selection options to end the self-service scanning session and the impact to the ticket status for each option are described on page 16.

SSC Responsibilities Specific to the Self-Service Scanning Area

The SSC staff responsibilities specific to the self-service scanning area include, but are not limited to:

SSC staff responsibilities specific to the self-service scanning area.

- Helping individuals with the preparation and/or drop off of documents;
- Reminding individuals to take all original documents from the self-service scanning area.

Scanning Process at the Self-Service Scanners

Each scanner is a multi-function product (MFP) with a 10-inch touch screen. The individual must respond to the questions displayed on the touch screen, as follows:

Scanning process at self-service scanners.

- Select their preferred language from the following options:
 - English;
 - Spanish;
 - Russian;
 - Korean;
 - Chinese;
 - Arabic; and
 - Haitian-Creole.

Once a language is selected, all of the screens that follow appear in the language selected. If the individual requires a language that is not one of the seven Local Law 73 languages, s/he must be seen by a CSIC worker.

- Select a self-identification option:
 - Enter my Ticket Number;
 - Enter a Case Number;
 - Swipe my Benefit Card;
 - Enter a Social Security Number;
 - Enter my ACCESS NYC Confirmation Number; and
 - I am an Authorized Representative;
- Enter the information to identify the case based on the option selected on the previous screen;

Note: If the system is not able to identify the case, the user is prompted with a screen that allows them to try again or give them the option to see a Customer Service Representative.

- Select a response to the question “*Is this correct?*” when the system displays information for the case it has identified;
- Follow the on-screen directions on how to scan the documents for the case.
- Select one of the following options to the question “*Have you finished scanning all of the pages of all of your documents?*”:
 - **No, I have more documents to scan** – The user is returned to the screen which gives instructions on how to scan documents. The status of the ticket remains **ANSWER** until the individual selects a different option from this screen.
 - **Yes, but I still need to see a Customer Service Representative** – The screen displays a message instructing the user to have a seat and wait for their ticket to be called. The status of the ticket is changed to **WAIT** in the appropriate MONIQ queue. The individual does not lose their place in the queue because they chose to use the self-service scanner.
 - **Yes, I am finished** – The screen displays a message thanking them for using the self-service scanning station and notifies them that a receipt for their transaction will be mailed to the address on file for the case. The status of the ticket is changed to **FINISH** in the appropriate MONIQ queue.

Indexing of Images Scanned at the MFPs

Indexing scanned images.

Self Service Scanning activity.

A single file is transmitted to POS with all of the scanned images for each case on that same day. POS creates a **Self Service Scanning** activity for each file that is transmitted from the scanners. POS loads this activity into the POS **Self-Service** queue for the Job or SNAP Center that is associated with the applicant/participant’s case. All scanned images must be indexed.

Supervisor Responsibilities

POS **Self-Service** queue.

The POS **Self-Service Scanning** queue must be monitored throughout the day by the designated Supervisor. The FIA Supervisor is responsible for assigning the activities from the POS **Self-Service Scanning** queue to the designated staff’s queue for indexing.

Worker Responsibilities

The designated staff must review and index all of the scanned images. Scanned images must not be deleted.

- If the scanned image does not fit the criteria for the document that was requested, the JOS/Worker must contact the applicant/participant to inform them that the scanned image is not adequate.
- If a Worker cannot identify the document type of a scanned image, s/he must select **Miscellaneous** from the *Document Type* menu and **Unusable Self Service Scanned Document** from the *Document Description* menu.

Refer to
Attachment A.

Refer to the Self-Service Scanning Submission Desk Guide (**Attachment A**) for detailed instructions on how to index the scanned images.

Documentation Receipt
(**EXP-76R**).

The Documentation Receipt (**EXP-76R**) is generated after the worker successfully indexes the images contained in the **Self-Service Scanning** activity to the HRA OneViewer. MIS mails the **EXP-76R** to the applicant/participant using the Print-to-Mail (PTM) feature.

Note: Applicants/participants that want a same day receipt for the documents they return must wait to be seen by a CSIC Representative and should not be directed to use the self-service scanners.

Who to Contact When Technological Issues/System Outages Occur

Refer to
[PB #15-116-SYS](#)
for instructions on
outages and technical
issues.

If there are technological issues or system outages that affect the kiosks/tablets/scanners, the Center Director Designee should be notified. The Designee must contact the MIS Help Desk, and then contact the local System Admin via email so that s/he is aware of the issue. Refer to Reporting System Outages and Broken Machinery (PB #15-116-SYS) for detailed information

Notice to Participants Regarding Self-Service Initiatives

FIA-1139 notice.

The HRA is Changing for You (**FIA-1139**) notice informs participants about the self-service initiatives that will be implemented at their respective Centers. Two weeks prior to the roll out of the self-service initiatives at each Center MIS will mail the **FIA-1139** to participants with an active case. Samples of the notice are attached.

Log to Track Self-Service Check-In Tablets

FIA-1145 form.

The Self-Service Check-In Tablet Log (**FIA-1145**) form tracks the tablets used by the SSCs to check-in individuals in the main reception area. The **FIA-1145** captures the tablet identification/serial number, printed name of the SSC, sign out information (date, time, SSC signature, Supervisor initials), and return information (date, time, SSC signature, Supervisor initials).

The **FIA-1145** is kept at Disbursement and Collection (D&C). The D&C Associate JOS I/Associate JOS II is responsible for maintaining the **FIA-1145**, including the completed **FIA-1145** forms, and providing the forms to the Center Director upon request. A sample of the form is attached.

Effective Immediately

Related Item:

[PB #16-15-SYS](#)

[PB #15-116-SYS](#)

[PB #13-114-SYS](#)

[PD #14-24-OPE](#)

[PD #13-15-ELI](#)

[FIA Model Center Handbook](#)

Attachments:

 Please use Print on Demand to obtain copies of forms.

Attachment A	Self-Service Scanning Submission Desk Guide
FIA-1059a (E)	Need a Replacement Common Benefit Identification Card (CBIC)? (6/4/2015)
FIA-1059a (S)	Need a Replacement Common Benefit Identification Card (CBIC)? (6/4/2015) (Spanish)
FIA-1139 (E)	HRA is Changing for You (7/1/15)
FIA-1139 (S)	HRA is Changing for You (7/1/15) (Spanish)
FIA-1145 (E)	Self-Service Check-In Tablet Log
HRA-125 (MLF)	You Have A Right to Free Interpretation Services

Self-Service Scanning Submission Desk Guide

Attachment A

Self-Service Scanning Submission Desk Guide

It is now possible for Cash Assistance (CA) participants and Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) applicant/participants to provide images of their documents using self-service scanners at designated Job and NCA SNAP Centers.

The Paperless Office System (POS) creates a single **Self-Service Scanning** activity that bundles all of the images scanned by the applicant/participant for that day. Images of the documents that are submitted using the self-service scanners do not require printing because the images are received as an electronic file.

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

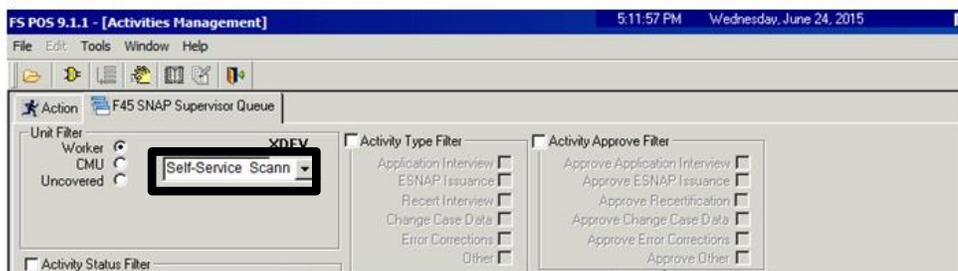
Requesting Documentation

The Job Opportunity Specialist (JOS)/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 for SNAP are provided with a list of possible verification documents that may be required for their case after their online application/recertification is submitted.

Assigning the Self-Service Scanning Activities

Images that are submitted using the self-service scanners appear in a **Self-Service Scanning** activity in the **Self-Service Scanning** queue. The **Self-Service Scanning** queue is monitored by Supervisors in each of the program areas and assigned to designated staff for indexing to the OneViewer.

Note: In some Centers, designated workers have been assigned to the **Self-Service Scanning** queue. These designated workers are able to start a **Self-Service Scanning** activity directly from the **Self-Service Scanning** queue.



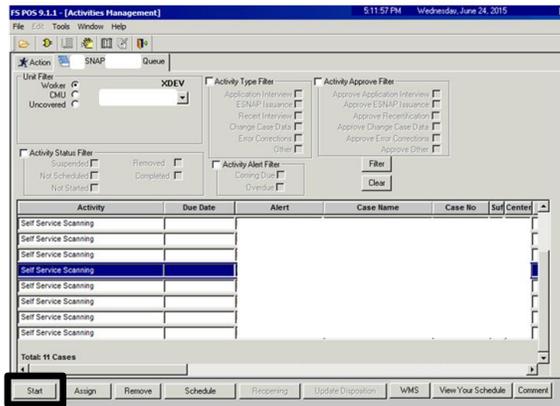
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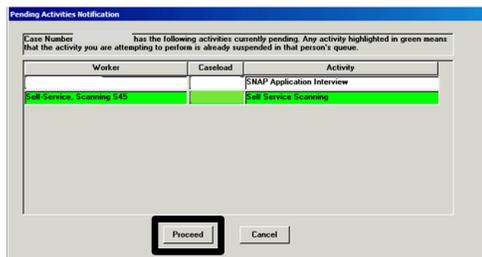
Retrieving the Self-Service Scanning Activity

The designated staff member must follow the steps listed below to index the scanned images in each **Self-Service Scanning** activity.

- Open POS.
- Select the first **Self-Service Scanning** activity from your queue or the **Self-Service Scanning** queue (for designated workers) and click the **Start** button.

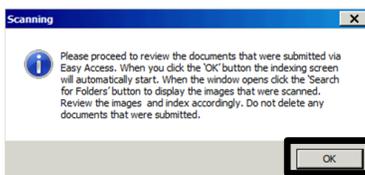


- Click the **Proceed** button when the **Pending Activities Notification** window opens.



This action opens the **Self-Service Scanning** activity and brings you to the **Household** screen.

- Read the message in the **Scanning** pop up window, and then click the **OK** button.



This action automatically launches the POS **Image Indexing** tool.

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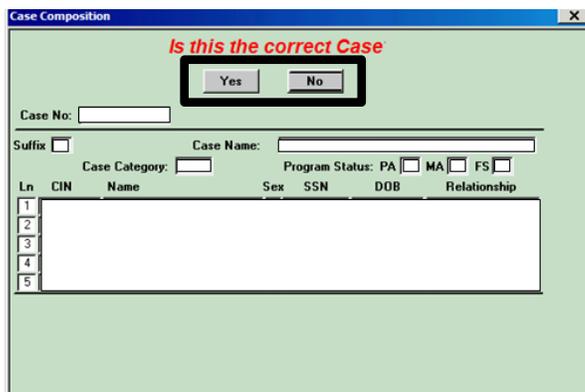
- Click the **Load Case Data** button on the **Image Indexing** window.

Note: The field to the left of the **Load Case Data** button is prefilled with the Welfare Management System (WMS) case number that was associated with the documents during the scanning process.



- 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 **Image Indexing** window shown above.

A screenshot of a pop-up window titled "Case Composition". The window has a green background and a blue title bar. The main heading is "Is this the correct Case" in red. Below the heading are two buttons: "Yes" and "No", which are highlighted with a black box. The window contains several input fields: "Case No:", "Suffix" (with a checkbox), "Case Category:", "Case Name:", and "Program Status: PA" (with a checkbox), "MA" (with a checkbox), "FS" (with a checkbox). Below these fields is a table with columns: "Ln", "CIN", "Name", "Sex", "SSN", "DOB", and "Relationship". The table has five rows, with the first row containing the number "1" in the "Ln" column. The rest of the table is empty.

Indexing and Committing the Scanned Document Images

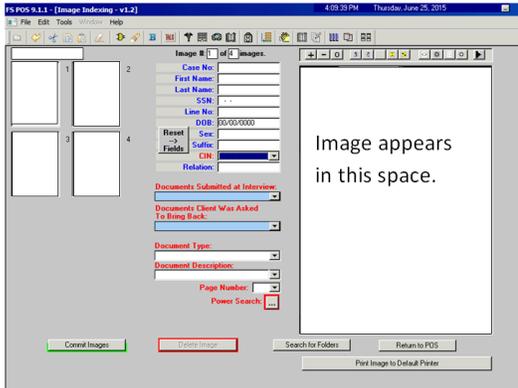
Each scanned image for the case appears as a numbered thumbnail on the left side of the **Image Indexing** window below the WMS case number, shown on the following page. When you click on a thumbnail, the full image appears in the viewing pane on the right side of the window. The scanned images must 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 scanned images to the case.

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Self-Service Scanning Submission Desk Guide

Note: If POS does not retrieve any images when the Image Indexing window opens, the images may have been indexed using a different POS activity. The Worker must check the HRA OneViewer to confirm that scanned images were recently indexed to the case.

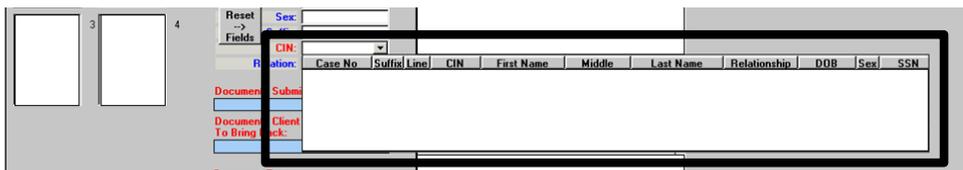
- Click on a numbered thumbnail to view the scanned image.



- 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 pay stubs, leases, and immigration documents.

- Click the arrow in the **CIN** box and select the household member's Client Identification Number (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.

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Self-Service Scanning Submission Desk Guide

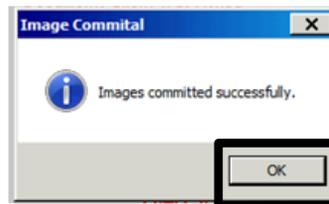
- Click the **Commit Images** button, located at the bottom of the **Image Indexing** window.



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 for each corresponding CIN to the HRA OneViewer.

- 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 scanned for the case.

You must use the same steps, described on pages 3 – 6, to process each **Self-Service Scanning** activity 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 scanned images to the HRA OneViewer. The **EXP-76R** will be produced and mailed to the applicant/participant via the Print to Mail Process.

Need A Replacement Common Benefit Identification Card (CBIC)?

If your case is active and you need a replacement Common Benefit Identification Card (CBIC) right away, you can go to one of the Over-the-Counter (OTC) sites listed below, Monday through Friday, 8:30 AM to 7:15 PM (Closed on Holidays).

You must bring valid proof of identity with you.

If your CBIC was lost, stolen, or damaged, you must have a stop placed on the card by calling **1-888-328-6399**, 24 hours a day, 7 days a week. You can also request that a new card be mailed to you at the same time. It will take 7-10 days to receive your new card in the mail.

People with disabilities may use the following numbers for assistance:

TTY Users: 1-800-662-1220
Non TTY Users: 1-800-421-1220
VCO Users: 1-877-826-6977

SAMPLE

Manhattan*

109 East 16th Street, Ground Floor
(between Union Square East and Irving Place)
New York, NY 10003

Travel Directions

By Bus:

M1, M2, M3, M5 to 5th Avenue and W. 17th St
M14A or M14D to 4th Avenue and W. 14th St
M101, M102, M103 to 3rd Avenue and E. 14th St

By Train:

N, Q, R, L, 4, 5, 6, to 14th Street-Union Square

Brooklyn*

227 Schermerhorn Street, Ground Floor
(between Bond Street and Hoyt Street)
Brooklyn, NY 11201

Travel Directions

By Bus:

B25, B26, B38, B52 to Fulton and Bond St
B62, B57 to Smith and Livingston St
B41, B45 to Livingston and Bond St

By Train:

2, 3 to Hoyt Street
4, 5 to Nevins Street
A, C, G to Hoyt-Schermerhorn Street
R, F to Jay Street-Metrotech
Q to DeKalb Avenue

You can call the MTA at 511 or (718) 330-1234 for travel directions from where you live.

*Because space is limited at these locations, we ask that you limit the number of people that accompany you.

¿Necesita Usted un Reemplazo para su Tarjeta de Identificación de Beneficios Comunes (CBIC)?

Si su caso está activo y usted necesita de inmediato un reemplazo para su Tarjeta de Identificación de Beneficios Comunes (CBIC), puede presentarse en uno de los locales con mostrador (OTC) listados más abajo, de lunes a viernes, de 8:30 AM a 7:15 PM (cerrados los días feriados).

Usted debe traer consigo prueba válida de identidad.

Si su CBIC se perdió, se dañó, o se la robaron, usted debe congelar la tarjeta al llamar al **1-888-328-6399**, las 24 horas del día, los 7 días de la semana. Usted también puede solicitar que se le envíe por correo una nueva tarjeta en ese momento. En tal caso, usted recibirá su nueva tarjeta en el correo en 7-10 días.

Para asistencia las personas discapacitadas pueden llamar a los siguientes números:

Usuarios de teletipo (TTY): 1-800-662-1220
No usuarios de teletipo (TTY): 1-800-421-1220
Usuarios de transferencia vocal (VCO): 1-877-826-6977

Manhattan*

109 East 16th Street, planta baja
(entre Union Square East y Irving Place)
New York, NY 10003

Indicaciones de Viaje

Por autobús:

M1, M2, M3, M5 a 5th Avenue y W. 17th St
M14A o M14D a 4th Avenue y W. 14th St
M101, M102, M103 a 3rd Avenue y E. 14th St

Por metro:

N, Q, R, L, 4, 5, 6, a 14th Street-Union Square

Brooklyn*

227 Schermerhorn Street, planta baja
(entre Bond Street y Hoyt Street)
Brooklyn, NY 11201

Indicaciones de Viaje

Por autobús:

B25, B26, B38, B52 a Fulton y Bond St
B62, B57 a Smith y Livingston St
B41, B45 a Livingston y Bond St

Por metro:

2, 3 a Hoyt Street
4, 5 a Nevins Street
A, C, G a Hoyt-Schermerhorn Street
R, F a Jay Street-Metrotech
Q a DeKalb Avenue

Para indicaciones de viaje desde su casa, usted puede llamar a la MTA al 511 o (718) 330-1234.

*Debido a que el espacio en estos locales es limitado, le pedimos que limite el número de sus acompañantes.

HRA is Changing for You

The Human Resources Administration (HRA) is changing for you! There will be new self-service options at the _____ in _____ .
These changes may reduce the amount of time you spend at the Center.



New easy-to-use ticket machines in the main reception area

Just answer a few questions to get your ticket for HRA services:

- Choose your language
- Enter information to locate your case
- Tell us what you need to do at the Center

SAMPLE



Easy-to-use scanners for a speedier document drop-off

Use the scanners to submit documents for your case.

Answer a few questions, scan your documents, and the images get linked directly with your case record.

HRA staff will be in the self-service areas to help you if you need assistance, if you have a disability, or if you read or speak a language that is not available at the ticket machines or scanners.

General Center Information

Location: _____

Business Hours: _____ through _____, _____ AM to _____ PM

If you need travel directions, call NYC Transit Information at (718) 330-1234 or visit the MTA website at www.mta.info.

La HRA está Cambiando para Usted

¡La Administración de Recursos Humanos (HRA) está cambiando para usted! Habrá nuevas opciones de autoservicio en el _____ en _____. Estos cambios pueden reducir la cantidad de tiempo que usted pase en el Centro.



Nuevas y fáciles de usar máquinas de boletos en la recepción principal

Usted sólo tiene que responder a unas pocas preguntas para obtener su boleto para los servicios de la HRA:

- Elija su idioma
- Ingrese información para ubicar su caso
- Díganos lo que usted necesita hacer en su Centro

SAMPLE



Escáneres fáciles de usar para depósito más rápido de documentos

Use los escáneres para presentar documentos para su caso.

Responda a unas pocas preguntas, escanee sus documentos, y las imágenes se conectan directamente con su expediente de caso.

El personal de la HRA estará presente en los lugares de autoservicio para prestarle asistencia si usted la necesita, si tiene una discapacidad, o si lee o habla un idioma que no esté disponible en las máquinas de boletos o escáneres.

Información General sobre el Centro

Local: _____

Horas de Servicio: _____ a _____, _____ AM a _____ PM

Si usted necesita indicaciones de viaje, llame a la línea Informativa sobre el Tránsito de la Ciudad de Nueva York al (718) 330-1234 o visite el sitio Web de la MTA en www.mta.info.

You Have a Right to Free Interpretation Services

We have free interpretation services available. Please tell a worker if you want to speak with us in a language other than English or in sign language. In a Center, you can simply show a worker the “I Speak” card below. If you have a question, comment or complaint about the interpretation services provided, please call 311. Filing a complaint will not affect your case.

Usted tiene derecho a recibir servicios de interpretación gratuitos

Contamos con servicios de interpretación gratuitos. Si desea hablar con nosotros en un idioma distinto al inglés o en lenguaje de señas, hágaselo saber a un empleado. Si está en un Centro, simplemente muéstrele a un empleado la tarjeta “I Speak” que aparece a continuación. Si tiene alguna pregunta, comentario o queja acerca de los servicios de interpretación que brindamos, llame al 311. La presentación de una queja no tendrá incidencia sobre su caso.

您有權利使用免費口譯服務

我們提供免費的口譯服務。如果您希望用英語以外的語言或手語和我們溝通，請告訴我們的工作人員。在中心裡，您只要向工作人員出示底下的「我說」(I Speak) 卡就可以了。如果您對我們提供的口譯服務有疑問、評論、或申訴，請致電 311。提交申訴將不會影響您的個案。

Вы имеете право на бесплатные услуги устного перевода

Мы предоставим вам бесплатные услуги устного перевода. Сообщите сотруднику, если вы хотите общаться с нами не на английском, а на другом языке или на языке жестов. В центре вы можете просто предъявить сотруднику карту I Speak, представленную ниже. С вопросами, отзывами и жалобами в отношении предоставленных услуг устного перевода звоните по номеру 311. Подача жалобы не повлияет на рассмотрение вашего дела.

무료통역 서비스를 받을 권리가 있습니다

당국은 무료 통역 서비스를 제공해 드립니다. 영어 이외의 언어 또는 수화로 상담하시려는 경우 직원에게 말씀하시기 바랍니다. 센터에 방문하시는 경우 아래에 있는 “I Speak” 카드를 직원에게 보여주시면 됩니다. 제공되는 통역 서비스와 관련해 문의사항, 의견 또는 불만사항이 있는 경우 311 번으로 전화해 주십시오. 불만 제기는 귀하의 케이스에 영향을 주지 않습니다.

لديك الحق في الحصول على خدمات الترجمة الفورية المجانية

توجد لدينا خدمات ترجمة فورية مجانية متاحة لك. من فضلك أخبر أحد الموظفين إذا رغبت التحدث معنا بلغة أخرى غير اللغة الإنجليزية، أو في لغة الإشارة. في المركز، تستطيع أن تشير البطاقة المسماة “I Speak” الموجودة أدناه إلى أحد الموظفين. إذا كان لديك سؤال أو تعليق أو شكوى بشأن خدمات الترجمة الفورية المقدمة، يُرجى الاتصال بالرقم 311. لن يؤثر تقديم شكوى على قضيتك.

Ou Gen yon Dwa pou Resevwa Sèvis Entèpretasyon Gratis

Nou gen sèvis entèpretasyon gratis ki disponib. Tanpri fè yon anplwaye konnen si ou vle pale avèk nou nan yon lang ki pa Anglè oswa nan yon langaj siy. Nan yon Sant, ou kapab senpleman montre yon anplwaye kat “I Speak” (Mwen Pale) ki anba la a. Si ou gen yon kesyon, yon kòmantè oswa yon plent sou sèvis entèpretasyon nou bay yo, tanpri rele 311. Si ou fè yon plent sa p ap gen konsekans sou dosye ou.



NYC Human Resources
Administration
Department of
Social Services
HRA-101(MLF)

I speak ...

Attention Agency employee: Please call an interpreter. This customer requires language assistance. See reverse side for language.

Arabic / احتاج إلى خدمات ترجمة فورية مجانية.

Haitian Creole / Mwen bezwen sèvis entèpretasyon gratis.

Korean / 무료 통역 서비스가 필요합니다.

Chinese / 我需免費的口譯服務。

Russian / Мне нужны бесплатные услуги переводчика.

Spanish / Necesito servicios de interpretación gratis.

Other / _____