



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #06-124-SYS

WELFARE MANAGEMENT SYSTEM (WMS) WILL RETAIN BUDGETS

Date: September 1, 2006	Subtopic(s): WMS
<p> This procedure can now be accessed on the FIAweb.</p>	<p>The purpose of this policy bulletin is to inform users of the Welfare Management System (WMS) that WMS will retain saved and authorized budgets for cases in receipt of public assistance and food stamp benefits (PA/FS), non-public assistance food stamps (NPA FS) and PA only beginning September 18, 2006.</p> <p>Previously, WMS retained saved budgets for up to 45 days, after which the budget was deleted from the system. Beginning September 18, 2006, any budget saved or authorized from this date forward will be retained in one of the following areas in the budgeting subsystem of WMS:</p> <ul style="list-style-type: none"> • Pending (P) – this will retain any budget that was saved but not authorized; • Authorized (A) – this will retain any budget that has been stored by the system either through an Eligibility, Undercare or a Mass Rebudgeting action; • Archived (Z) – this will retain budgets that have aged out of the Authorized area. <p>Note: There are currently no archived budgets.</p> <p>A new field, AREA, will be added below the budget number (BUDGET #) field on the Budget Menu (NSBL00) screen. When an entry of P, A or Z is made in the AREA field, WMS will display a list of the saved, authorized or archived budgets, respectively. The number of the budget needed should be recorded and entered in the BUDGET # field and the area the budget is in should be entered in the AREA field when ready to display and/or print the budget.</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 2 at the prompt followed by 765 or
send an e-mail to *FIA Call Center*

Staff will be able to access budgets in any of the three areas. To access the stored budgets proceed as follows:

- On the **NSBL00** screen enter:
 - **04** (Display Saved Budgets) in the **TYPE OF ACTION** field;
 - Case number in the **CASE/REG #** field;
 - Enter **P, A** or **Z** in the **AREA** field;

Enter P, A or Z

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NSBL00 [P]                BUDGET MENU                08/14/06
06.201                    TD

TYPE OF ACTION 04        EFFECTIVE DATE / /- / /
BUDGET #                CASE/REG # 0002431
AREA  A
01  CALCULATE PA/FS BUDGET
02  CALCULATE PA    BUDGET
03  CALCULATE FS    BUDGET
04  DISPLAY SAVED BUDGETS
05  PRINT BUDGET SUMMARY REPORT
06  DISPLAY BUDGET RESULTS SCREEN
07  CHECK ISSUANCE SUMMARY
08  RECALCULATE
09  PROCESS PA CALCULATOR
10  PRINT BUDGET CALCULATION REPORT -ENGLISH
11  PRINT BUDGET CALCULATION REPORT -SPANISH
    
```

- Transmit to display the list of budgets on the Saved Budgets (**NSBL35**) screen;

Note: The title of the **NSBL35** screen will change depending on the entry made in the **AREA** field. For example, if “A” is entered in **AREA** field, after transmitting the Authorized Budgets (**NSBL35**) screen is displayed. If “P” is entered in **AREA** field, after transmitting the Saved Budgets (**NSBL35**) screen is displayed. If “Z” is entered in the **AREA** field, after transmitting the Archived Budgets (**NSBL35**) screen is displayed.

- Record the number of the budget you wish to view.

Option 04 with AREA Entry of "A"

Authorized budgets displayed

NSBL35 [P] AUTHORIZED BUDGETS 08/14/06
CASE/REG # 00002431F

BUDGET

BUDGET NO	BUDGET TYPE	DATE SAVED	EFFECTIVE DATE	AUTH #	SRC
2	PA/FS	07/05/06	08/A/06- / /	00000705	X
1	PA/FS	06/07/06	05/B/06- / /	00033333	X

- Transmit to return to the **NSBL00** screen and enter:
 - **05** (Print Budget Summary Report) in the **TYPE OF ACTION** field;
 - Number of the budget in the **BUDGET #** field;
 - Case number in the **CASE/REG #** field;
 - **P, A or Z** in the **AREA** field;

NSBL00 [P] BUDGET MENU 08/14/06
06.201 TD

TYPE OF ACTION 05 EFFECTIVE DATE / / - / /

BUDGET # 0002 CASE/REG # 0002431

AREA A

- 01 CALCULATE PA/FS BUDGET
- 02 CALCULATE PA BUDGET
- 03 CALCULATE FS BUDGET
- 04 DISPLAY SAVED BUDGETS
- 05 PRINT BUDGET SUMMARY REPORT
- 06 DISPLAY BUDGET RESULTS SCREEN
- 07 CHECK ISSUANCE SUMMARY
- 08 RECALCULATE
- 09 PROCESS PA CALCULATOR
- 10 PRINT BUDGET CALCULATION REPORT - ENGLISH
- 11 PRINT BUDGET CALCULATION REPORT - SPANISH

- Transmit to print the budget summary report.

Whenever a question mark (“?”) is entered in the **AREA** field, the following Help message is displayed at the bottom of the **NSBL00** screen:

“AREAS: P=PENDING/SAVED, A=AUTHORIZED, Z=ARCHIVED.”

Entry of “?” in the **AREA** field displays the Help text at the bottom of the screen after transmitting.

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NSBL00 [P]                                BUDGET MENU                                08/14/06
06.201                                     TD

TYPE OF ACTION 04                          EFFECTIVE DATE 08/A/06- / /

BUDGET #                                     CASE/REG # 0002431
AREA ?

01  CALCULATE PA/FS BUDGET
02  CALCULATE PA BUDGET
03  CALCULATE FS BUDGET
04  DISPLAY SAVED BUDGETS
05  PRINT BUDGET SUMMARY REPORT
06  DISPLAY BUDGET RESULTS SCREEN
07  CHECK ISSUANCE SUMMARY
08  RECALCULATE
09  PROCESS PA CALCULATOR
10  PRINT BUDGET CALCULATION REPORT - ENGLISH
11  PRINT BUDGET CALCULATION REPORT - SPANISH

Areas: P=Pending/Saved, A=Authorized, Z=Archived
    
```

Help text

If no entry is made in the **AREA** field, WMS will attempt to retrieve the budget from the Authorized area.

- If the budget number does not exist in the Authorized area, WMS will look in the Pending area.
- If the budget number exists in the Pending and Authorized areas, WMS will retrieve the authorized budget since it is the more current of the two budgets.

If no entry is made in the **BUDGET #** or **AREA** fields, the most current budget in WMS will be retrieved for the case.

To determine the area the returned data came from, the designations “PEND/SAVED,” “AUTHORIZED” and “ARCHIVED” will be displayed on the following screens:

- Household/Suffix Financial Data (**NSBL02**)
- Individual Income/Needs (**NSBL06**)
- Saved Budgets (**NSBL35**)
- Semi-Monthly Public Assistance Budget Calculation Report (**WINR0146**)
- Food Stamp Calculation for PA & PA-SSI Cases Report (**WINR0154**)
- Food Stamp Budget Calculation for NPA & NPA-SSI Cases Report (**WINR0153**)
- Budget Entry Supervisor Summary Report (**WINR0027**)

WMS will not allow staff to save a new budget from an existing Archived or Authorized budget. Attempts to save a new budget from the Archived or Authorized budget will result in the error message:

“F1745 RECALCULATED AFP BUDGET CANNOT BE STORED” or
“F1781 RECALCULATED ARC BUDGET CANNOT BE STORED.”

Effective September 18, 2006