



FAMILY INDEPENDENCE ADMINISTRATION

Seth W. Diamond, Executive Deputy Commissioner



James K. Whelan, Deputy Commissioner
Policy, Procedures and Training

Lisa C. Fitzpatrick, Assistant Deputy Commissioner
Office of Procedures

POLICY BULLETIN #06-167-SYS

POS RELEASE NOTES VERSION 10.3.1

| Date: December 21, 2006 | Subtopic(s): Paperless Office System (POS) |
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| <p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p> | <p>This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS), Version 10.3.1, migrated to production on December 18, 2006. Descriptions of the changes can be found in Attachment A: POS Release Notes Version 10.3.1, and on the FIAweb at:</p> <p>http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective Immediately</i></p> <p>Attachment:</p> <p>Attachment A POS Release Notes Version 10.3.1</p> |

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 2 at the prompt followed by 765 or
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Distribution: X

POS Release Notes

Version 10.3.1, December 18, 2006

These Release Notes contain descriptions of changes in POS Release 10.3.1, scheduled for December 18, 2006. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact Patrick Casey. These and prior Release Notes may also be found on the HRA Intranet at http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Revised Motor Vehicle window

The “Has Title or Registration to a Motor Vehicle(s) or Other Vehicle(s)?” Response to Question window in the Resources window has been updated. It now determines the liquid resource amount for both the Public Assistance and Food Stamp Programs. Motor Vehicle is an automobile, camper or motorcycle.

Figure 1 Revised Motor Vehicle Response to Question window

The following is an explanation of all the fields in the revised Motor Vehicle Response to Question window which will be referred to as the “Vehicle Owners” window in this release notes.

- “Instructions” The instructions field at the top of the window displays instructions for completing the window. The current instructions are, “Enter the information for the year, make, model, VIN #, lease information and value information for each vehicle. Then, click on the “Additional Information” checkbox.
- “Who” This field is for whom owns the car that the worker is entering/has entered information about. This is a drop down menu of everyone on the case over the age of 16 who is in an Individual PA Status or Individual FS Status of AP, SI, AC or SN plus a “delete row” option.

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Selecting someone in this field adds an additional row with the "Vehicle #" field incremented by one. The worker may scroll between rows by clicking on the arrows at the right bottom of the window.



- "Vehicle #" This field is system filled and numbers the row of vehicles in the order they are entered by the worker.
- "Year" The year the motor vehicle was manufactured. This is a manual entry field.
- "Make" the manufacturer of the motor vehicle. This is a manual entry field.
- "Model" the manufacturer's model designation. This is a manual optional entry field.
- "VIN" the Vehicle Identification Number of the motor vehicle. This is a manual optional entry field.
- "Lease?" with Yes/No radio buttons. This is a must complete field. If "Yes" is selected, the "Kelley Blue Book Value" field is grayed out. If the "No" is selected, the "Kelley Blue Book Value" field is enabled and is a required entry field and is a manual entry field.
 - "Kelley Blue Book Value" Enter the Kelley Blue Book value. This is a must fill field. You may get the Kelley Blue Book value by clicking on the "www.KBB.com" link next to the Kelley Blue Book field. If the Kelley Blue Book value is unavailable at the time the worker is completing this window, estimate the value and when the Kelley Blue Book value is available update this field.
- "Paid Off" with Yes/No radio buttons. This is a must complete field. If "Yes" is selected the "Monthly Payment" and "Number of Payments" fields are grayed out. If "No" is selected the "Monthly Payment" and "Number of Payments" fields are enabled, are required entry fields and are manual entry fields.
- "Additional Information" This brings up the Additional Information Drill Down. This must be selected after entries are completed for each vehicles owned by case members so that the countable Resource amount can be calculated.

Figure 2 Motor Vehicle Equity Value Drill Down

Drill Down Window

Instructions

Please complete this window so POS can calculate the Motor Vehicle Liquid and Countable Resource Amount.

| | | | |
|-------------------|--------------------------------|--------------|--------------------------------|
| Vehicle # | <input type="text" value="1"/> | Used By | <input type="text"/> |
| Used For | <input type="text"/> | | |
| Fair Market Value | <input type="text" value="0"/> | Equity Value | <input type="text" value="0"/> |

How will the motor vehicle loan(s) or lease(s) be paid?

Legally Responsible Relative
 Non-Legally Responsible Relative
 Other

The fields in this window are:

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- "Instructions" The instructions field at the top of the window displays instructions for completing the window. The current instructions are, "Please complete this window so POS can calculate the Motor Vehicle Liquid and Countable Resource Amount."
- "Vehicle #" Carried over from the "Vehicle Owners" window for each motor vehicle.
- "Used by" is drop down menu of everyone on the case.
- "Used for" is a drop down menu of uses the motor vehicle may be put to that affect what percentage of the value is countable as a resource. For details about this refer to the **Food Stamp Source Book, Section 16, Pages 368-370** and **PD 04-12-ELI** Public Assistance Resource Policy and **W-204X** FS Resource Limits/Exemptions Desk Guide. The options in the menu are:
 1. Primarily (> 50% of the time) used for income producing purposes.
 2. Used to produce income greater than or equal to Fair Market Value.
 3. Necessary for long distance travel essential to FS h/h member's employment.
 4. Necessary for long distance travel essential to excluded FS h/h member's employment.
 5. Necessary to transport disabled FS h/h member.
 6. Used for child < 18 years old who drives to school or training program.
 7. Used for child < 18 years old who drives to work.
 8. Used for child < 18 years old who drives to look for work.
 9. Used as household's home
 10. Used to carry household's primary source of fuel/water
 11. Operating on Indian Reservations as unlicensed vehicle\
 12. Sale value < 1500
 13. Other (seek, retain or travel to employment).
 14. None of the above purposes
- "Fair Market Value" This amount is retrieved from the "Kelley Blue Book Value" in the "Vehicle Owners" window.
- "Equity Value" This is calculated by the system using the formula: (Fair Market Value) minus (Monthly Payment [from "Vehicle Owners" window]) times (Number of Payments [from "Vehicle Owners" window])
- "How will the motor vehicle loan or lease be paid?" This radio button group is enabled if the worker selects "Yes" for the Lease question or "No" for the "Paid Off" question in the "Vehicle Owners" window and is required when enabled. The worker has a choice of three radio buttons for this question. They are:
 - "Legally Responsible Relative"
 - "Non-Legally Responsible Relative"
 - "Other" Select this option if the payments come from earnings/income.
- The system checks the validity of the entries and displays an error message for any invalid entries it finds when the worker exits the window. It then calculates the PA Motor Vehicle Liquid Resource and FS Motor Vehicle Liquid Resource. The calculations, in the order they are evaluated, are :
 - **Public Assistance**
 - If there are no Motor Vehicles owned by the household the PA Motor Vehicle Liquid Resource is = \$0.00.
 - If one Motor Vehicle is owned by the household and the fair market value is less than or equal to \$4650 then the PA Motor Vehicle Liquid Resources is = \$0.00
 - A. If one Motor Vehicle is owned by the household and the Fair Market Value is between \$4650 and \$9300 the PA Motor Vehicle Liquid Resource is = \$0.00 if one of the following are selected from the "used for" question drop down menu:
 1. Primarily (> 50% of the time) used for income producing purposes.
 2. Used to produce income greater than or equal to Fair Market Value.

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3. Necessary for long distance travel essential to FS h/h member's employment.
 4. Necessary for long distance travel essential to excluded FS h/h member's employment.
 6. Used for child < 18 years old who drives to work.
 13. Other (seek, retain or travel to employment).
- If more than one vehicle is owned by the household each Motor Vehicle is evaluated in turn as follows:
 - The vehicle with the highest equity value is evaluated.
 - Motor Vehicles with less than the highest equity value have a PA Motor Vehicle Liquid Resource value = Equity Value of that Motor Vehicle
- **Food Stamps:**
- If there is only one vehicle registered to each of the adult household members, the FS Motor Vehicle Liquid Resource is = \$0.00.
 - A there is a vehicle for someone 17 or younger, the FS Motor Vehicle Liquid Resource is = \$0.00 if the reason selected from the "Used for" drop down menu is one of:
 6. Used for child < 18 years old who drives to school or training program.
 7. Used for child < 18 years old who drives to work.
 8. Used for child < 18 years old who drives to look for work.
 - If an individual on the case has more than one motor vehicle, the FS Motor Vehicle Liquid Resource is equal to "Equity Value" if the reason selected from the "Used for" drop down menu is
 14. None of the above purposes

The sum of the Motor Vehicle Liquid Resource values for each Motor Vehicle for both the PA and FS values is placed in the Response to Question window for the "Total Amount of PA Household (Available and Countable) Cash Resources (such as cash on hand, checking and savings accounts and certificates of deposit)" question in the Resources window. The PA Motor Vehicle Liquid Resource sum is placed in the field for "MOTOR VEHICLE" (Countable PA Resource Amount) and the FS Motor Vehicle Liquid Resource sum is placed in the field for "MOTOR VEHICLE" (Countable FS Resource Amount).

| Response to Question | |
|---|--------|
| CASH ON HAND | \$0.00 |
| CHECKING ACCOUNT | \$0.00 |
| CREDIT UNION | \$0.00 |
| SAVING ACCOUNT | \$0.00 |
| MOTOR VEHICLE (Countable FS Resource Amount) | \$0.00 |
| MOTOR VEHICLE (Countable PA Resource Amount) | \$0.00 |
| TOTAL AVAILABLE AND COUNTABLE RESOURCES | |
| Comment... | |
| <input type="text"/> | |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> | |

Please refer to the **Food Stamp Source Book, Section 16, Pages 368-370** and **PD 04-12-ELI** Public Assistance Resource Policy and **PB 03-61-OPE** PA and FS Resource Limits/Exemptions Desk Guide for information about motor vehicles as a resource.

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2. Do You Have A Rent, Mortgage Or Other Shelter Expenses? changes

The Response to Question window for the “Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses?” question in the Shelter window has been updated.

- The fields have been rearranged
- There are two new fields,
 - “Actual Amount to be restricted.” Which is filled in by the new “Actual Rent Drill Down”. The amount in this field is entered into the PA Shelter field in the Household Screen of the Budget window
 - “Is the Restriction Information the Same As The Landlord Information?” with Yes/No radio buttons.
- The Drill Down window that opens when “APT pvt house...” is selected in the Shelter Type drop down menu has been updated.

Figure 3 Shelter Response to Question window

- “Actual Amount to be restricted” (New Field) filled in with the amount from the “Actual Rent Drill Down” except when the Shelter Type is Jiggets. When the shelter type is Jiggets the amount in the “Actual Amount Charged for Rent/Mortgage” field is placed in this field.
- Is the Restriction Information the Same as the Landlord Information? with Yes/No Radio buttons. Affects enabling of the Landlord address information below it.
 - The “Name” field is enabled at all times for manual entry.
 - House Number, Street Dir, Street Name, Street Type, City, State and Zip are enabled for manual entry if “No” is selected, if “Yes” is selected they are completed by the system by copying the Landlord information from the left side of the this window
- The amount in the “Actual amount charged for Rent/Mortgage” field is placed in the “Amount” field in the Household screen of the Budget window and the amount in the “Actual Amount to be restricted” field is placed in the “PA Shelter” field in the Household screen of the Budget window.

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Figure 4 Apartment/Pvt House Drill Down

The fields in the revised "APT pvt house..." window are as follows:

- "Apartment/PVT House" select the type of shelter. All other fields in this drill down are disabled until a selection is made from the drop down menu. If "Own Home" is selected then the fields in the drill down are enabled. If any other shelter type is selected than all the fields remain disabled except the "Document" field. "Mortgage Payment Amount" (New Field) enter the amount of the each mortgage payment
 - "Frequency" (New Field) select from the drill down menu how often the payments are.
- "Are Property Taxes and/or Insurance Included in Your Mortgage Payment?" (New Field) Select the "Yes" or "No" radio button as appropriate. If "Yes" is selected the section with fields for entry of property tax and Home and Fire Insurances is disabled, if "No" is selected that box is enabled.
- "Property Tax Amount" (New Field) enter the amount of the property tax payment
 - "Frequency" (New Field) select from the drill down menu how often the payments are
- "Home Insurance Amount" (New Field) enter the amount of the home insurance payment
 - "Frequency" (New Field) select from the drill down menu how often the payments are made
- "Fire Insurance Amount" (New Field) enter the amount of the
 - "Frequency" (New Field) select from the drill down menu how often the payments are made
- "Calculate" (New Field) sums all the payments made from the entries made in the drill down. The value in the "Total Monthly Payment" field is placed in the PA Shelter field of the POS Budget Household needs window.
- "Document" select from the pop-up menu all documents that apply.
- (NOTE: Fields for frequency of payment are converted to monthly amounts when the calculations are done if a frequency other than monthly is selected.)

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Actual Rent Drill Down

The Actual Rent Drill Down only opens if the restriction type is either, "Direct Voluntary (Actual Rent)" or "Two-Party Voluntary (Actual Rent)" and the shelter type is not "Jiggets". The Actual Rent Drill Down recalculates the values everytime it's opened except in the Review Case activity. If the rent frequency is other than monthly the figures for "PA Shelter Allowance for Household", "Energy Grant" and "Available Food and Other" are adjusted to the frequency of the rent. The worker enters in the "Amount to be taken from F&O" field how much the applicant/participant wants to take from "Food & Other" to use to pay the rent. The amount entered will be added to the "PA Shelter Allowance for Household" amount and the total will appear in the "Total PA Rent on Budget" field. The "Total PA Rent on Budget" amount is placed in the "Actual Amount to be restricted" field in the Response to Question window.

Figure 5 Actual Rent Drill Down Window

Actual Rent Drill Down Window

This window displays the PA Shelter Allowance, Energy Grant and Available F&O for the Household. Applicants/Participants with Excess Rent may choose to pay it from the Food & Other portion of their Public Assistance (PA) grant. Additionally, secondary tenants with Excess Rent may also choose to pay it from the Energy Grant portion of their PA grant. The Energy Grant for primary tenants may be restricted and cannot be used to pay excess rent.

To properly budget the amount that will be used to pay excess rent from the F&O for primary tenants or from the F&O and Energy Grant for secondary tenants, the sum of the PA shelter allowance and the amount to be taken from the F&O (or F&O and Energy Grant for secondary tenants) must be input in the 'PA Shelter Amount' field on the Budget Household/Suffix Financial Needs window (NSBL02).

Please enter the amount that the household wishes to use to pay the Excess Rent in the 'Amount to be taken from F&O' field. The system will use this amount to calculate the total PA rent budget for the budget. This total will be displayed in the "Total PA Rent on Budget" field and will be carried over to the "PA Shelter Amount" field on the Budget Household/Suffix Financial Needs window (NSBL02).

| | |
|--|-------------------------------------|
| PA Shelter Allowance for Household | <input type="text" value="283.00"/> |
| Energy Grant (Restricted for Primary Tenants) | <input type="text" value="39.50"/> |
| Available Food and Other (F&O) | <input type="text" value="179.00"/> |
| Amount to be taken from F&O | <input type="text" value="0"/> |
| Total PA Rent on Budget | <input type="text" value="283.00"/> |

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3. Interface updates

Disable Screen Picklist in Recertification Interview and add Print Forms window

The Print Forms window has been added to the Recertification Interview Activity after the Citizenship Recertification Signatures window and before the Budget window. The Print Forms window has also been added to the Screen Picklist.

The disabling of the Screen Picklist in the Recertification Interview activity has been done to help prevent empty recertification question sets. The Screen Picklist is disabled until the Print Forms window is displayed in the Recertification Interview activity. The following error message will appear if the worker attempts to use the Screen Picklist window before reaching the Print Forms window:

"SORRY: You must use the 'Next' button and respond to all the questions before you can use the 'Screen Picklist'.
The Screen Picklist will be enabled when you reach the 'Print Forms' window."

Add Recoupment window to Non-Food Emergency Interview

The Recoupment window has been added to the Non-Food Emergency Interview activity after the Grants Data Entry window.

Label changes in interview windows

Cosmetic changes have been made to several interview screens.

- The following drop down list boxes will be displayed alphabetically sorted.

| Window | List box |
|--|---|
| Additional Suffix Level Data | Preferred Language for Speaking Preferred Language for Reading |
| Site Determination | Primary Language |
| Case Login | Primary Language Language Read |
| Adults in Household Screen | Marital Status |
| Children in Household Screen | Marital Status |
| Individual Detail | Relation Marital Status |
| Has Other Income? If Yes, Please Specify | Income Type |
| Is Employed? | Type of Work State |
| Is Unemployed | Type of Work State |

- The Marital Status field on the Children in Household screen will default to "Single/Never Married".
- In the Is Employed, Is Self-Employed, and Is Unemployed response to question windows in the Employment Information screen the label "Off Book" has been changed to "Taxes Not Withheld?" and the label "Hours" has been changed to "Hours Per Frequency"

Disable Clearance icon and menu option The "WMS Internal Clearance" icon and the "WMS Downstate Clearance" Menu options have been temporarily disabled in all POS activities.

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Changes to the approval window for the question: "Do You (Or Anyone Who Lives with You) Pay Rent, Mortgage or Other Shelter Expense?" The "Do You (Or Anyone Who Lives with You) Pay Rent, Mortgage or Other Shelter Expense?" question had been updated with new fields and changes to the labels for some fields in POS 10.3, the corresponding changes have been made in the approval window for this question.

Change Domestic Violence Title in Referrals Window

Several changes have been to the Domestic Violence question in the Referrals Window.

- In the Referrals window, "Screening and Consultation" has been renamed to "Special Assessment"
- The following changes have been made to the Response to Question window for the "Special Assessment" question:
 - The "Referred for Consultation?" question has been changed to "Referred for Special Assessment?"
 - In the "Referrals Results" section of the window the "Consultation Date" has been changed to "Assessment Date" and "Temp. Exempt from Requirement" has been changed to "Temporarily Exempt from Requirement?"
 - The Learnfare Button has been removed from the "Temporarily Exempt from Requirement?" part of the "Referral Results" section.

Figure 6 Revised Special Assessment Response to Question window

The screenshot shows a software dialog box titled "Response to Question". It is divided into two main panels. The left panel, titled "Screening", contains a "Who" dropdown menu with "Dow Jones" selected. Below it are four sets of radio buttons: "Screening Form Completed?" (Yes/No), "Referred for Special Assessment?" (Yes/No), "Referral Accepted?" (Yes/No), and "Form Disposition?" (Refused to return form/Refused to complete form). The right panel, titled "Referral Results", contains an "Assessment Date" field with "00/00/0000". Below it is a "Temporarily Exempt from Requirement" section with two columns of checkboxes: "Child Support", "Employment", "Drug / Alcohol Treatment", "Time Limits" on the left; and "Alien Deeming", "Residency", "Minor Parent", "Other" on the right. At the bottom of the right panel are a "Document..." field and a "Scan" checkbox. At the bottom of the entire dialog box are a "Comment..." text area, a "Worker" dropdown menu, and "OK" and "Cancel" buttons.

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4. Rules updates

Form M-858m Business Rule

A business rule has been added to the Application Interview, Change Case Data, Recertification Interview, and Non-Food Emergency/Special Grant activities and Error Correction for those activities to ensure printing of the M-858m when the client comes in requesting an emergency payment for a heat related utility. If the worker attempts to complete the activity without printing the M-858m after indicating that there are heat related arrears the completion will be stopped and the following error message will display.

“You have indicated that there are “heat” related arrears. You must print the M-858m form and forward it to the Utility Liaison OR you must scan and index the completed paper M-858m form.”

Retrieving Alien DV Appointment Outcome from NYCWAY

POS receives a file overnight from NYCWAY that now includes information about Domestic Violence Alien Appointments and results of those appointments. POS will use that information in the Evidence of Battery or Abuse Window.

5. Forms

The following forms will be revised to match changes in the paper forms:

- **LDSS-3152 NYC** Action Taken On Your Food Stamps Benefits Case (NYC)

6. E-Forms

The following forms have been added to city wide E-Forms and will be available in both the POS browser and HRA viewer:

- **W-145** Notice Of Intent To Restrict Shelter Allowance (Timely)
- **M-3mm** Notification of Application Withdrawal (Cash Assistance, Food Stamps and Assistance)
- **EBT-23** Notice of Special Public Assistance and/or Food Stamp Benefit
- **W-102** Notice To Participant Of New Worker
- **W-680FF** Language Questionnaire