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POLICY BULLETIN #07-136-SYS

FS POS RELEASE NOTES VERSION 1.3

Date: November 1, 2007	Subtopic(s): Food Stamp Paperless Office System (FS POS)								
<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 Non-Cash Assistance Food Stamp (NCA FS) Office staff that the latest version of the Food Stamp Paperless Office System (FS POS), Version 1.3, migrated to production on October 22, 2007. Descriptions of the changes can be found in FS POS Release Notes Version 1.3 (Attachment A) and FS POS Release Notes Version 1.3 Appendices A, B and C (Attachments B, C and D), as well as on the FIAweb at:</p> <p>http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective Immediately</i></p> <p>Attachments:</p> <table><tr><td>Attachment A</td><td>FS POS Release Notes Version 1.3</td></tr><tr><td>Attachment B</td><td>FS POS Release Notes Version 1.3 Appendix A</td></tr><tr><td>Attachment C</td><td>FS POS Release Notes Version 1.3 Appendix B</td></tr><tr><td>Attachment D</td><td>FS POS Release Notes Version 1.3 Appendix C</td></tr></table>	Attachment A	FS POS Release Notes Version 1.3	Attachment B	FS POS Release Notes Version 1.3 Appendix A	Attachment C	FS POS Release Notes Version 1.3 Appendix B	Attachment D	FS POS Release Notes Version 1.3 Appendix C
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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*

FS POS Release Notes

Version 1.3, October 22, 2007

These Release Notes contain descriptions of changes in FS POS Release 1.3, scheduled for October 22, 2007. 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://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Changes to match WMS 2007.3

The following changes will be made to match changes in WMS version 2007.3

Updates to CIN Re-Use Window

The following changes will be made in the POS CIN Re-Use window:

- If there is at least one CIN with a score of 102 or higher, the Worker may not use the spawned CIN and must select a CIN from the clearance.
- If there is at least one CIN with a score of 102 or higher, the spawned CIN will not appear in the clearance.
- CINs with a score below 80 will no longer appear in the window.

Removed Single Issuance Grant Codes

The following single issuance codes will be removed from the **FS Single Issuance Benefit Data Entry** window:

- Code 30 - Replace Undelivered Benefits
- Code 34 - Replace Coupons
- Code 43 - Replace Destroyed Benefits
- Code 47 - Replace Expired/Mutilated/Cancelled Benefits

2. Changes to Expedited Food Stamp Benefit Workflow

In accordance with recent clearances received from the United States Department of Agriculture (USDA) and the New York State Office of Temporary Disability and Assistance (NYS OTDA), the POS Expedited Food Stamp benefit determination workflow will be updated in the **EFS Issuance** activity:

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- Verification of expenses will be added to the Document Completeness tab in the **EFS Eligibility Determination** window.
- Case acceptances will be completed through the **EFS Issuance** activity when appropriate.
- Updates will be made to change the **Case Acceptance** window into an **EFS Summary** window and record differences between the screening completed during the intake at reception and the determination made during the interview.

Presetting the FS Suffix and FS grant code for applicants eligible for EFS

For an applicant eligible for an EFS grant that provides all documents to verify identity and FS eligibility, POS will preset the FS case to active (AC) status in the **Program Status** tab of the **EFS Eligibility Determination** window. For these cases, POS will also preset the FS single issuance grant code to 53 (Expedited Food Stamps – Fully Verified) in the **Grants Data Entry** window.

For applicants eligible for EFS grant that provide verification of casehead identity, but do not provide full verification of eligibility, POS will preset the FS suffix status to single issue (SI) in the **Program Status** tab of the **EFS Eligibility Determination** window. For these cases, POS will also preset the FS single issuance grant code to 55 (Expedited Food Stamps – Not Verified) in the **Grants Data Entry** window.

Please see the exceptions under the “Previous receipt of EFS benefits with pended verification and subsequently failed to comply” and “Identity has not been verified” sections for details.

Previous receipt of EFS benefits with pended verification and subsequently failed to comply

If the household previously received FS benefits under the EFS criteria with pended verification and subsequently failed to comply, expedited benefits cannot be issued until s/he submits all outstanding documentation.

Identity has not been verified

If the applicant is financially eligible for FS benefits under the EFS criteria, expedited benefits cannot be issued until verification of casehead identity provided. Identity can be verified via AFIS.

Applicants who return with documentation

If the EFS-eligible applicant returns with the missing documentation within seven (7) days after the FS file date, the Worker should return to the **EFS Issuance** activity through the **Action** tab to process the EFS grant.

If the applicant returns the document to the CSIC (Model Centers) or FS Reception (non-Model Centers) area, a “Document Forwarded” alert will appear in the Worker’s queue after the CSIC or Reception staff complete the **Document Intake** activity for the case.

Eligibility Factors Considered for Full Verification

The eligibility factors that are considered for full verification are:

- Identity, Citizenship/Alien Status, Residence/Household Composition, Social Security Number, Income, Resources and Expenses

The following types of expenses will be considered for full verification determination:

- Rent/Mortgage/Shelter Expense, Utility Expense, Fuel or Air Conditioning Expense, Medical Bills/Expenses, Child Care/Dependent Expenses and Pays Child Support

The **Document Completeness** tab will be updated to track this information and to allow the Worker to record collateral contact made, if any.

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Example: Rent/Mortgage/Shelter Expense

Changes to Case Acceptance window

The **Case Acceptance** window will be renamed **EFS Summary** and several changes will be made in the window to capture differences in the expedited determination made during the application intake and interview. The instructions on the window will be updated:

“The EFS Summary window shows the expedited processing determination made at the time of the intake and the expedited processing determination made during the EFS Issuance.

If the determinations are different, you must select the reason for the difference.”

The current question (Will this case be accepted today?) will be removed from the window.

The following fields will be added:

1. **EFS Eligibility Determination**
2. **Does the case qualify for fully verified FS benefits?**
3. **Expedited Processing Determination in Intake** – This field will display the expedited processing determination made during the pre-screening completed in the FS Reception Intake.
4. **CBO Case** – This field will indicate whether the case was submitted electronically through a community-based organization (CBO).
5. **Expedited Processing Determination in EFS Issuance** – This field will display the expedited processing determination made in the EFS Issuance activity.
6. **Does the determination made at the time of the interview differ from the determination made during the intake?** – This field will indicate whether the expedited determination made during the intake differs from the final expedited determination.
7. **Reason for difference** – This drop-down menu will be enabled when the answer for the question “Does the determination made at the time of the interview differ from the determination made during the intake?” is “Yes”. There are two choices:
 - (a) Applicant had change in circumstance
 - (b) Agency error at Intake

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The EFS Issuance activity will no longer be suspended when the FS case will be accepted (AC) on the same day. Instead, POS will allow the Worker to process the acceptance in the **EFS Issuance** activity and will automatically complete the **FS Application Interview** that is pending in the Worker's queue.

EFS Summary window

The screenshot shows the 'FS POS 1.3' application window. The title bar indicates the time is 6:01:54 PM on Monday, October 15, 2007. The menu bar includes 'File', 'Edit', 'Tools', 'Window', and 'Help'. The toolbar contains various icons for file operations and editing. The main content area is titled 'EFS Summary window' and contains the following elements:

- Instructions:** A text box stating: "The EFS Summary window shows the expedited processing determination made at the time of the intake and the expedited processing determination made during the EFS Issuance. If the determinations are different, you must select the reason for the difference."
- EFS Eligibility Determination:** A text input field containing 'ELIGIBLE'.
- Does the case qualify for fully verified FS benefits?:** A text input field containing 'Yes'.
- Expedited processing determination at Intake:** A text input field containing 'No'.
- Expedited processing determination in EFS Issuance:** A text input field containing 'Eligible'.
- Does the determination made at the time of the interview differ from the determination made during the intake?:** A text input field containing 'Yes'.
- Reason for difference:** A dropdown menu with two options: 'Agency error at intake' (selected) and 'Applicant had change in circumstance'.
- Navigation:** Two buttons labeled 'Next' and 'Previous' at the bottom.

3. Changes to Food Stamp Recertification Interview Log

The **Food Stamp Recertification Interview Log** to add additional functionality for 2 HRA pilot programs and re-arrange several columns.

For full details, please see **Appendix A (Food Stamp Recertification Interview Log)** at the end of this document.

4. Changes to Food Stamp Application Interview Log

The **Food Stamp Application Interview Log** will be updated to allow Supervisors to assign an eligibility action to the Worker for clients who failed to keep the application interview appointment.

For full details, please see **Appendix B (Food Stamp Application Log)** at the end of this document.

5. New Activity: Failed to Keep FS Application Interview

A new activity will be added in POS to allow Workers to complete an eligibility action to the Worker for clients who failed to keep the application interview appointment.

For full details, please see **Appendix C (New Failed to Keep FS Application Interview Activity)** at the end of this document.

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6. Changes to Alien Determination Windows

Changes will be made in the POS alien determination windows to help ensure that the alien document window is completed and to add new help text and sample images for several alien types.

New business rule for Alien Document Window

A new business rule will require the selection of a document in the Alien Document window.

Alien Document List window

Documents	Document Requested	Available for indexing
DRR Certification Letter	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DRR Letter for Children	<input type="checkbox"/>	<input type="checkbox"/>
I-94 coded T1, T2, T3, T4, T5 adm. under INA Sec 212(d)(5) fr at least 1yr	<input checked="" type="checkbox"/>	<input type="checkbox"/>

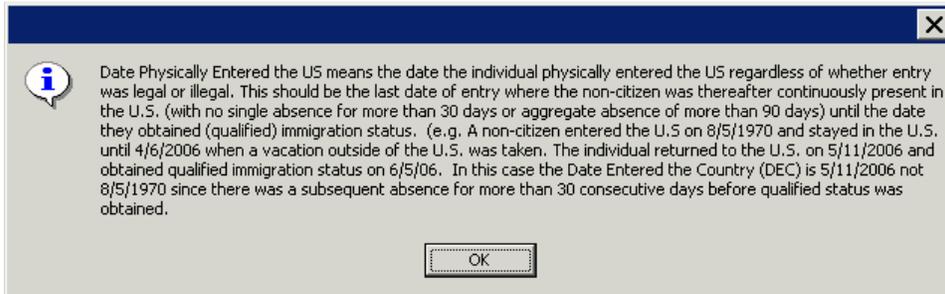
Updates to Help Text in Alien Determination Windows

Additional help text will be added to the POS alien determination windows. The new help text is identified by red links with the word “(help?)”

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Example: Help Text for "Date the Individual Physically Entered the US"



New Example Images of Alien Documentation

Sample images of certain alien documentation will be added to the POS alien determination windows to assist Workers completing these windows. These images can be retrieved by clicking on the "Link to Image" next to the document. The sample image will appear in a pop-up window.

Example of Link to Image

7. Changes to Case Member Information Window

The Case Member Information window in the **FS Application Interview** and **FS Recert Interview** activities will be updated to display appointment information and mark the appointment as kept once this window is completed.

The following fields will be added in the FS Application Interview activity:

- Appointment Date
- Appointment Time
- Telephone Interview, Contact Telephone Number and Extension

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The following fields will be added in the FS Recert Interview activity:

- Appointment Date
- Appointment Time
- Telephone Interview?
- LDSS-4826 Received?
- Contact Telephone Number and Extension (for telephone interviews only)
- IVRS (for center F43 and F53 only)

When the Eligibility Specialist clicks the Next button on this window, the appointment will be marked as "Kept".

Case Member Information Window

The 'Case Member Information' window lists the individuals who are currently on the case. Please ask the applicant/recipient whether anyone who lives with them is not listed in the 'Case Member Information' section. **1**

Case Member Information **2**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	FS	AFIS
1	1	TA00570R	Comelate Johnny	Casehead	12/15/1968	121-50-1968	1	M	<input checked="" type="checkbox"/>	AC

Appointment Date: **3** Appointment Time: **4**

Is there anyone who lives with you who is not listed above? Yes No **5**

Is this a telephone interview? No **6**

Contact Telephone Number: **7** Extension: **8**

LDSS-4826 Received? No **9**

IVRS? No **10**

Next Action

Please click the "Next" button. POS will display the next window in the FS Recert Interview activity. **11**

12 **13**

8. Updates to Food Stamp Reception Intake

Using Form W-119

Form **W-119** (Request for Contact on a Food Stamp Application) instead of the **W-129PP** (Food Stamp Eligibility Interview Appointment Notice) will be printed for applications submitted by mail or fax and for applicants who drop off an application in person, but cannot stay for an expedited processing determination.

For additional details about this form, please see Policy Bulletin 07-21-OPE (Revisions to Form W-119).

New Message for Intakes Completed 6 or 7 days after the FS file date

If the FS Reception Intake is completed 6 or 7 days after the FS file date, POS will select the Same Day Interview checkbox in the Interview Scheduler window. The following warning will appear for these cases:

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“The applicant’s file date is 6 days or 7 days in the past. You must schedule a Same Day interview for the applicant in order to ensure compliance with the expedited processing rules. If the applicant does not want to proceed with expedited processing and has requested to return at a later date, you may uncheck the “Same Day Interview” checkbox and schedule an appointment on a later date.”

9. New Alerts for Managers in Calendars

New alerts in the default calendar will remind managers to update the CBO calendar when the default application interview calendar in the **Configuration Console** for FS Reception is updated.

10. New E-Forms, Revised E-Forms and Changes to POS Forms

Printed POS forms are saved in the POS Printed Forms area, which is available in POS interview and approval activities and in the Review Case activity.

Printed E-Forms are saved in the FileNET image repository. The forms are available for viewing and re-printing through the POS Document Browser. E-Forms are not available through the **Tools > Printed Forms** menu.

New E-Forms for FS Centers

The following forms have been added to citywide E-Forms. They will be saved in the FileNET image repository upon printing and will be available in the POS Document Browser:

- M-40K, Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits
- W-147Q, Primary Tenant's Statement Regarding Occupancy of Secondary Tenant

Updated E-Forms for FS Centers

The following E-Forms will be revised:

- EBT-23, Notice of Special Public Assistance and/or Food Stamp Benefit
- M-3mm, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance)
- W-113K, Documentation Requirements and/or Assessment Follow-Up

Existing E-Forms for FS Centers

The following forms are available as citywide E-Forms. They are saved in the FileNET image repository upon printing and are available for re-printing in the POS Document Browser:

- EBT-23, Notice of Special Public Assistance and/or Food Stamp Benefit
- LDSS-4753, Food Stamps - Request for Contact/Missed Interview
- M-3mm, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Assistance)
- LDSS-3151, Food Stamp Change Report Form
- LDSS-3938, Food Stamp Application Expedited Processing Summary Sheet
- M-3g, Notice to Report to Center
- W-113K, Documentation Requirements and/or Assessment Follow-Up
- W-119, Request for Contact on a Mailed or Faxed Application
- W-119D, Eligibility Factors and Suggested Documentation Guide
- W-147, Letter to Landlord
- W-186C, Fair Hearing Compliance Statement
- W-186D, Fair Hearing Compliance Request
- W-515X, Systematic Alien Verification for Entitlements (SAVE) Referral
- W-607A, Request for ID Card/Temporary MA Authorization/Update Existing CBIC
- W-680, Request for Birth or Death Verification from Agencies Outside New York City
- W-680FF, Language Questionnaire
- W-700D, FIA School/Training Enrollment Letter

FS POS Release Notes

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Removed POS Form

The following form is obsolete and will be removed from POS:

- W-515D, Document Verification Request

Updated Data Entry Window

The following data entry window will be updated to allow longer comments:

- W-186D, Fair Hearing Compliance Request

FS POS Release Notes: Appendix A

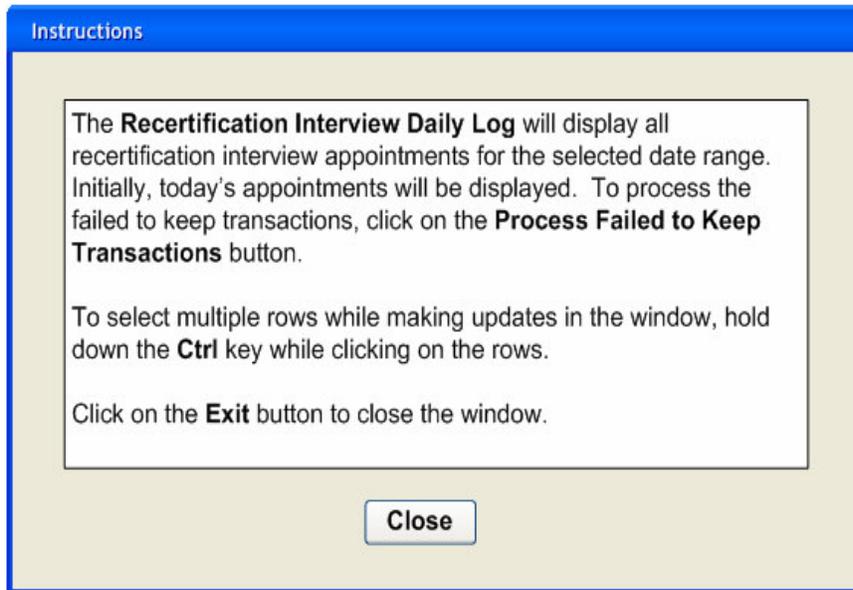
Version 1.3, October 22, 2007

Overview

The **Recertification Interview Log** allows Food Stamp (FS) Centers to view their past, current and future Recertification Interview appointments, to assign and reschedule their Recertification Interviews.

Instructions

When the Worker clicks OK on the Instructions window for the **Recertification Interview Log** window is displayed.



When the Worker clicks on the **Close** button, the **Recertification Interview Log** appears.

Summary of Changes to Recertification Interview Log

The Food Stamp Recertification Interview Log to add additional functionality for two HRA pilot programs and re-arrange several columns.

Telephone Recertification Pilot

Two FS centers (East End F02 and Fordham F44) will be running a pilot where the client will be given the choice of processing their recertification over the telephone. Those participants deemed eligible for telephone interviews will be sent a notice advising them of this process. They will be asked to mail in the LDSS-4826 recertification form. The center will contact the client once the LDSS-4826 is received to conduct the interview.

IVRS Pilot

Two FS centers (LIC F43 and Queens F53) are in a pilot where some clients are given the choice of going the recertification over the phone through an interactive voice response system (IVRS). Clients who are included in the mail process may qualify to recertify through IVRS if they have no changes. The center has to do special processing for these cases.

FS POS Release Notes: Appendix A

Version 1.3, October 22, 2007

Revised Recertification Log

File Retrieve Print

Recertification Interview Log

View Current and Past Appointments
 View Future Appointments

Date Range <input type="radio"/> Today <input type="radio"/> Yesterday <input type="radio"/> Past 7 Days <input checked="" type="radio"/> Date Range From: 08/07/07 To: 10/04/07		Future Appointments <input type="radio"/> Select Date Friday, October 05 <input type="radio"/> Date Range From: To:		Appointment Type <input type="checkbox"/> Telephone Interview <input type="checkbox"/> In-Center Interview		Appointment Status Filter <input type="checkbox"/> Kept Appointment <input type="checkbox"/> Failed to Keep Appointment <input type="checkbox"/> None	
--	--	--	--	---	--	---	--

	Case No	Case Name	Spoken Lang	Appt Date	Appt Time	LDSS-4826 Received	Tel Intv	Contact Nun
▶	00003602681D	MERCADO HAY		09/07/2007	02:00 PM	Yes	No	

Totals:
 Total Kept Appointments: 0 Total Failed To Keep Appointments: 0 Total Re-scheduled Appointments: 0 Total: 1

Addition of Date Range in Future Appointments Filter

In the Future Appointments section, there will be a new date range filter allowing the user to view appointments for a selected future date range.

New Appointment Type Filter

There will be a new Appointment Type filter, with two options:

- Telephone Interview
- In-Center Interview

New Buttons

Two new buttons will be added:

- LDSS-4826 Received
- Contact

New columns

The following new columns will be added:

- LDSS-4826 Received
- Telephone Interview
- Contact Number
- Number of Contacts
- IVRS (Interactive Voice Response System)

FS POS Release Notes: Appendix A

Version 1.3, October 22, 2007

Change to order of columns

The order of the columns will be changed:

1. Case Number
2. Case Name
3. Spoken Language
4. Appt Date
5. Appt Time
6. LDSS-4826 Received
7. Telephone Interview
8. Contact Number
9. Assigned To
10. Number of Contacts
11. Interview Started On
12. Appt Status
13. Case Status
14. IVRS
15. Previous Appt

Existing Buttons in the Window

The following buttons also appear in the window:

1. Assign – See the *Assign procedure and Refer window* section below for additional details.
2. Reschedule- Displays the Recertification Interview Scheduler window for updating with new appointment
3. Kept Appointment- Will indicate that the appointment was kept
4. Failed to Keep Appointment- Will indicate that the participant did not keep the appointment
5. Process Failed to Keep Appointments- will display Fail to Keep Recertification Interview Log
6. Exit

Assign procedure and Refer window

If the title of the person who clicks on the **Assign** button is 'FS Clerk' or 'FS Eligibility Specialist', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor

If the title of the person who clicks on the **Assign** button is 'FS Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display only individuals with the following titles in the **Refer Action** window:

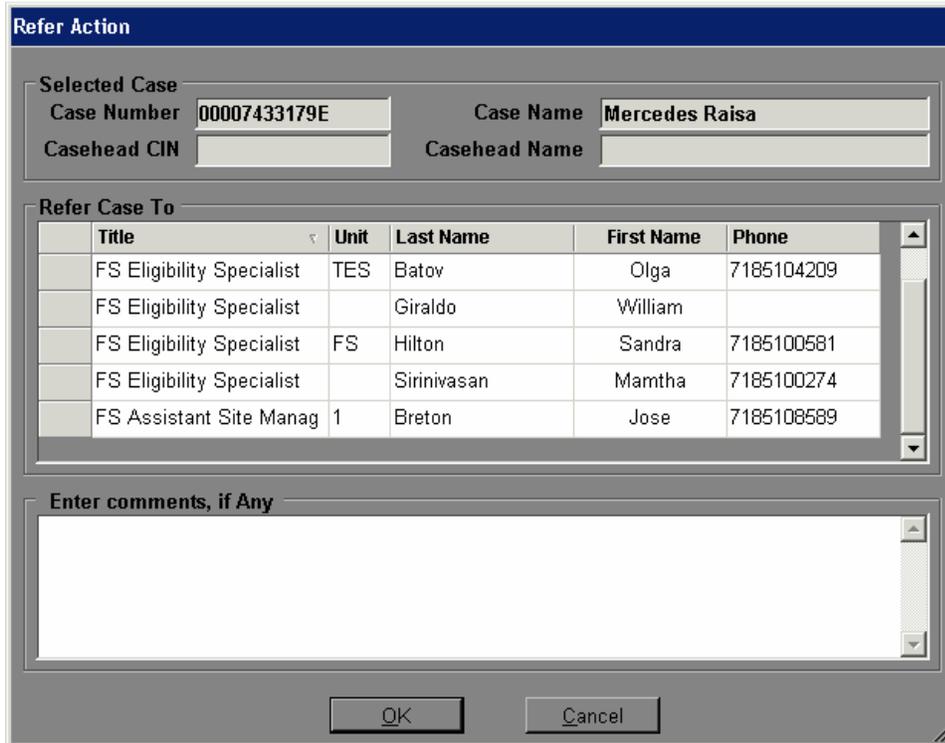
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist

When the case is assigned to a FS Eligibility Specialist and the OK button is clicked in the Refer Action window, the caseload (unit worker value) will be updated in POS.

FS POS Release Notes: Appendix A

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Refer Action window



The screenshot shows a 'Refer Action' dialog box. At the top, it has a title bar 'Refer Action'. Below that, there are four input fields: 'Selected Case Case Number' with value '00007433179E', 'Case Name' with value 'Mercedes Raisa', 'Casehead CIN' (empty), and 'Casehead Name' (empty). Below these is a section titled 'Refer Case To' containing a table with columns: Title, Unit, Last Name, First Name, and Phone. The table lists five rows of staff information. At the bottom of the dialog is a text area labeled 'Enter comments, if Any' and two buttons: 'OK' and 'Cancel'.

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

Read-Only Totals

The data in the following totals is read-only:

1. Total Kept Appointments
2. Total failed to Keep Appointments
3. Total Re-Scheduled Appointments
4. Total

FS POS Release Notes: Appendix A

Version 1.3, October 22, 2007

Contact Attempted Window

The new Contact Attempted window will appear when the Contact button is clicked at the bottom of the FS Recertification Log. This window allows the worker to record the number of attempted contacts with the client scheduled for a telephone interview. Each recorded contact and comment will be saved in the POS case activity history.

Contact Attempted

Case Number: 00003602681D
Case Name: MERCADO HAYDY
Casehead Name:
Contact Number: Extension:
Requested call time:

Contact Attempt 1
Did you successfully contact the client? Yes No
Date that the contact was attempted? 09/27/2007
Time that the contact was attempted? 7:45 am

Contact Attempt 2
Did you successfully contact the client? Yes No
Date that the contact was attempted? 10/03/2007
Time that the contact was attempted? 9:00 am

Contact Attempt 3
Did you successfully contact the client? Yes No
Date that the contact was attempted? 10/04/2007
Time that the contact was attempted:

Contact Attempt 4
Did you successfully contact the client? Yes No
Date that the contact was attempted? 10/04/2007
Time that the contact was attempted:

Comments:

Interview Type: Telephone In-Center
New Contact Number: Yes No
Contact Number: Extension:

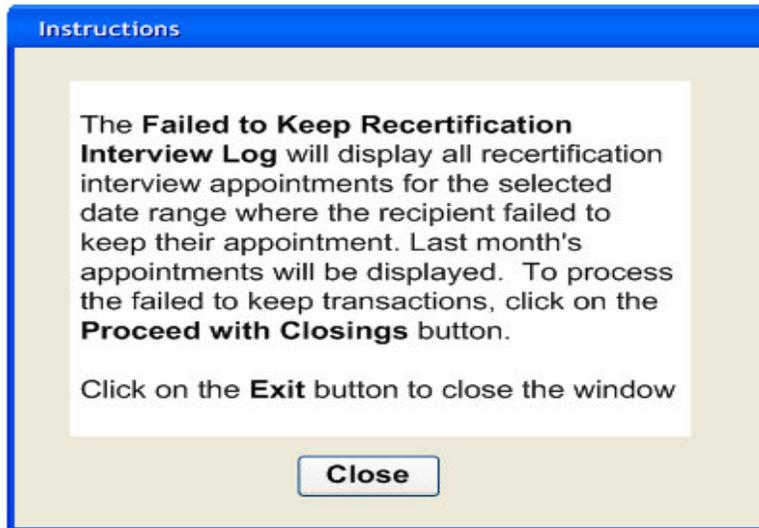
OK Cancel

FS POS Release Notes: Appendix A

Version 1.3, October 22, 2007

Failed to Keep Recertification Interview Log

When the Worker clicks OK on the Instructions window for the **Failed to Keep Recertification Interview Log** window will display.



Failed to Keep Recertification Interview Log

FS POS Version 1.2

File Retrieve Print

Failed To Keep Recertification Interview Log

Date Range

Prior Month

Specify Range

From: To:

Case No	Case Name	Appt Date	Appt Time	Appt Status	Telephone Interview	Assign To

Totals:

Total Failed To Keep Appointments

FS POS Release Notes: Appendix A

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Columns in Failed to Keep Recertification Interview Log

The list of the prior month's appointments where the client failed to keep will be displayed in this window beginning on the 16th day of the month.

The following columns appear in this log:

1. Case Number
2. Case Name
3. Appointment Date
4. Appointment Time
5. Appointment Status
6. Assigned to
7. Case Status
8. Total Failed to Keep Appointments- Read Only

Buttons in Log

9. Post Closings to WMS-Presently Disabled

10. Assign- Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
11. Reschedule-Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
12. Kept Appointment- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
13. Hold Closing- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
14. Exit

FS POS Release Notes: Appendix B

Version 1.3, October 22, 2007

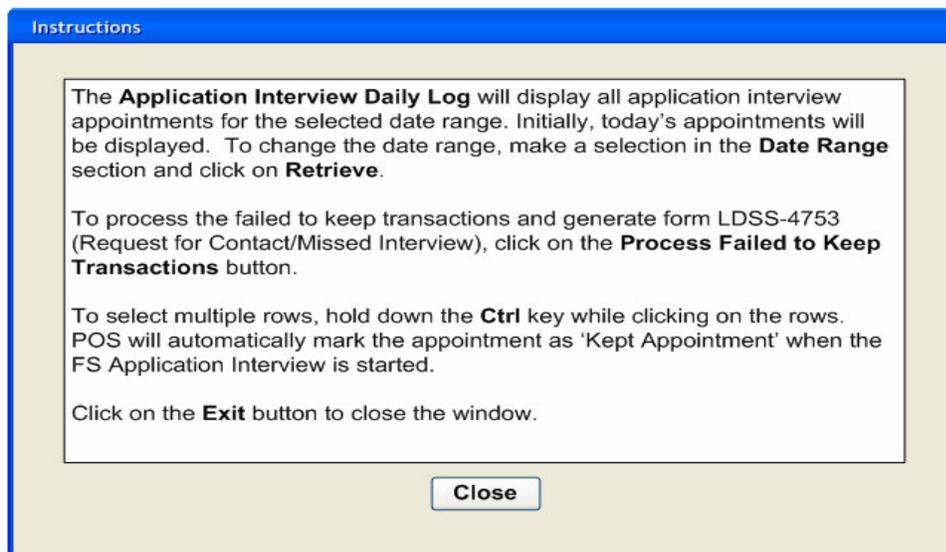
Overview

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and will allow for the processing of failed to keep transactions by designated staff.

Instructions

When the Worker clicks OK on the Instructions window for the **Application Interview Log** window will be displayed.

Instructions window



FS POS Release Notes: Appendix B

Version 1.3, October 22, 2007

FS POS Version 1.2
[03:35:30 PM Tuesday, June 26 2007]

File **1** Retrieve

Print

Application Interview Log **2**

View Current and Past Appointments

View Future Appointments **3**

Date-Range

Today **4**

Yesterday

Past 7 Days

Specify Range

From: To: **5**

Future Appointments

Select Date **6a**

6

Specify Range

From: To: **6b**

Application Type Filter

In-Center **7**

CBO **8**

Telephone **9**

Exclude dummy case numbers **10**

Appointment Status Filter

Kept Appointment **11**

Failed to Keep Appointment **12**

None **13**

Intake Date 14	Case Number 15	Case Name 16	Appt Date 17	Appt Time 18	Appt Status 19	CBO 20	Tel Intv 21	Contact Number 22	Assigned To 23	Spoken Lang 24	Interview Started On 25	Case Status 26	Previous Appt 27
6/25/07	00000538905A	Lorrie Anne	6/26/07	10:00 AM	Kept Appt	Yes	No		A. Turner	English	6/26/07	Active	6/25/07 11:15 AM
6/25/07	00007422506B	Steel Dan	6/26/07	10:30 AM	Failed to Keep	No	No		B. Jones	Spanish		Applying	
6/25/07	00007421970C	Chatmen Steve	6/26/07	11:30 AM	Kept Appt	No	No		C. Allen	Russian	6/26/07	Active	
6/25/07	00007424834D	Mort Ralph	6/26/07	1:00 PM	Failed to Keep	Yes	Yes	(718) 555-1212 Ext 224	D. Roberts	Arabic		Applying	
6/23/07	00007446480E	Deep Zan	6/26/07	2:45 PM	Kept Appt	No	No		E. Sprool	Haitian	6/26/07	Applying	
6/25/07	070611121115	Sands Raul	6/26/07	3:30 PM		Yes	No		F. Wells	English		Applying	

Totals:

Total Kept Appointments **28**

Total Failed To Keep Appointments **29**

Total Re-scheduled Appointments **30**

Assign **31**

Reschedule **32**

Kept Appointment **33**

Failed to Keep Appointment **34**

Process Failed to Keep Transactions **35**

Exit **36**

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Definitions

Tool Bar

1. This tool bar allows you to save, exit, retrieve data or print.

Title

2. Application Interview Log

Date Filters

3. View Current and Past Appointments, View Future Appointments
4. Date Range
5. Specify Range
6. Mini-Calendar – Date cannot be more than 14 days in the future
- 6a. Select date (new)
- 6b. From To Date (new)

Application Type Filter

7. In-Center
8. POS CBOs'
9. Telephone Interview
10. Exclude Dummy Case Numbers

Appointment Status Filter

11. Kept Appointment
12. Failed to Keep Appointment
13. None

Application Log Columns- All Column Headers are Sortable

14. Intake Date
15. Case Number
16. Case Name
17. Appointment Date
18. Appointment Time
19. Appointment Status
20. POS CBOs'
21. Telephone Interview
22. Contact Number
23. Assigned to
24. Spoken Language
25. Interview Started On
26. Case Status
27. Previous Appointment

Read-Only Totals

28. Total Kept Appointments
29. Total Failed to Keep Appointments
30. Total Re-Scheduled Appointments

Buttons

31. Assign- See *Assign procedure and Refer Action window* below
32. Reschedule – Displays Application Interviewer Scheduler Window
33. Kept Appointment – Click on button to indicate applicant kept appointment
34. Failed to Keep Appointments – Click on this button to indicate that the applicant did not keep appointment
35. Process Failed to Keep Transactions – Click on button to process Failed to Keep rejections
36. Exit

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Assign procedure and Refer window

If the title of the person who clicks on the **Assign** button is 'FS Clerk' or 'FS Eligibility Specialist', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor

If the title of the person who clicks on the **Assign** button is 'FS Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist

When the case is assigned to a FS Eligibility Specialist and the OK button is clicked in the Refer Action window, the caseload (unit worker value) will be updated in POS.

Refer Action window

Selected Case

Case Number: 00007433179E Case Name: Mercedes Raisa

Casehead CIN: Casehead Name:

Refer Case To

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

Enter comments, if Any

OK Cancel

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Failed to Keep Application Interview Log

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and will allow for the processing of failed to keep transactions by designated staff.

The instructions popup window will appear each time the window is opened.



New Button

The **Assign Rejection** button will be utilized by FS Supervisors, FS Assistant Managers and FS Site Managers. Once clicked supervisors and managers can assign the case to a worker to proceed with the rejection process for cases that failed to keep the initial interview.

Refer Action window

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

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FS POS Version 1.2
[10:35:30 AM Tuesday, June 27, 2007]

File
1 Retrieve
Print

Failed to Keep Application Interview Log **2**

Date-Range

Yesterday **3**

Past 14 Days

Specify Range

From To **4**

Intake Date 5	Case Number 6	Case Name 7	Appt Date 8	Appt Time 9	Appt Status 10	CBO 11	Tel Intv 12	Assigned To 13	Case Status 14
6/25/07	00000000001A	Lort Jake	6/26/07	10:00 AM	Failed to Keep	Yes	No	A. Turner	Applying
6/25/07	00000000002B	Mort Dan	6/26/07	10:30 AM	Failed to Keep	No	No	B. Jones	Applying
6/25/07	00000000003C	Chisold Steve	6/26/07	11:30 AM	Failed to Keep	No	No	C. Allen	Applying
6/25/07	00000000004D	Blake John	6/26/07	1:00 PM	Failed to Keep	Yes	No	D. Roberts	Applying
6/23/07	00000000005E	Tan Lihn	6/26/07	2:45 PM	Failed to Keep	No	No	E. Spool	Applying
6/25/07	00000000006F	Porty Lon	6/26/07	3:30 PM	Failed to Keep	Yes	No	F. Wells	Applying

Totals:

Total Failed To Keep Appointments **15**

Assign Rejection **16**
Assign Interview **17**
Reschedule **18**
Kept Appointment **19**
Hold Rejection **20**
Exit **21**

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Additional buttons

The following buttons will also allow Supervisors and Managers the ability to assign a case for further processing:

Assign Interview

Reschedule

Kept Appointment

Hold Rejection

Use of these buttons will remove the case from the Failed to Keep Log and place the case back on the Application Interview Log awaiting further action.

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New Activity: Failed to Keep FS Application Interview

A new activity named **FTK FS Application Interview** (Failed to Keep Food Stamp Application Interview) will be added in POS to allow Workers to complete an eligibility action to the Worker for clients who failed to keep the application interview appointment.

The Supervisor will assign the case to the Worker using the **Failed to Keep Application Interview Log** in **FS Reception**. The Supervisor must select the case, click on the **Assign Rejection** button and select the Worker in the Refer window that appears. The FTK FS Application Interview will appear in the selected Worker's queue. Pending FS Application Interview activities will be automatically completed by POS.

Assign Rejection button in Failed to Keep Application Interview Log



Starting the activity in the queue

The Worker must select the **FTK FS Application Interview** activity in their queue and click on the **Start** button. POS will retrieve the latest TAD from WMS to verify that the case is applying (AP) status for FS. If the case is not in AP status, an error message will appear and the activity will be removed from the queue.

Edit: 7 days after file date

The failed to keep (FTK) action cannot be completed until 7 calendars have passed after the file date. If the action is started less than 7 days after the file date, an error message will appear and the activity will be suspended in the queue.

Queue in Activities Management window

FS POS 1.3 - [Activities Management] 2:35:33 PM Wednesday, September 26, 2007

File Edit Tools Window Help

FS Assistant Site Manager Queue

Unit Filter: Worker CMU Uncovered FS Application Interview FS Recertification Interview

Activity Type Filter: FS Application Interview EFS Issuance FS Recert Interview FS Change Case Data Error Corrections Other

Activity Approve Filter: Approve FS Application Interview Approve EFS Issuance Approve FS Recertification Approve FS Change Case Data Approve Error Corrections Approve Other

Activity Status Filter: Suspended Not Scheduled Not Started

Activity Alert Filter: Coming Due Overdue

Filter Clear

Activity	Due Date	Alert	Case Name	Case No	Sur	Rec
FTK FS Application Interview		NA	Kelly Miller	00010002678A	1	
FS Recert Interview		NA	Manuela Johnson	00007433180C	1	
FS Recert Interview		NA	Comelate Johnny	00007443178E	1	
FS Reception Intake		NA	Syed W Azmat	070815162803	1	
FS Reception Intake		NA	Tuesday Azmat	070911162847	1	
FS Reception Intake		NA	Li Chen	070829162829	1	
FS Reception Intake		NA	Waqas Azmat	070910162842	1	
FS Reception Intake		NA	Test Azmat	070911162846	1	

Total: 17 Cases

Start Assign Remove Schedule Reopening Update Disposition WMS View Your Schedule Comment

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Activity flow

The following windows appear in the activity:

- Household Screen
- Address Information
- Individual Detail
- CIN Re-Use
- Case Number Re-Use
- TAD
- Form Data Entry
- Close

Household Screen

FS POS 1.3 - [Household Screen] 2:40:44 PM Wednesday, September 26, 2007

File Edit Tools Window Help

No messages from WMS via OLTP

Control Information

District : 66 Center : Melrose FS Center Worker : Case Number : 00010002678A

Present Address

Street Number	Direction	Name	Type	Apt #	City
99	[None]	Undomiciled			Bronx

State: NY Zip Code: 00001-0451 Phone: - -

Suffix Information Active Applying

FS Suffix FS Status AP FS # AC 0

Suff Case Name

1	Kelly Miller
---	--------------

Case Member Information

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	FS	AFIS
1	1	RX237885	Miller Kelly B	Casehead	12/12/1970	-	-	F	<input type="checkbox"/>	AP

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Address Information window

FS POS 1.3 - [Address Information] 2:40:55 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Present Address

St No/Dir/Name: 99 [None] Undomiciled Type Apt # City
 State: NY Zip Code: 00001 0451 Phone: - -

Mailing Address

Care of Name: Miller K c/o GPO Type Apt # City
 St No/Dir/Name: 558 [None] Grand Concourse Type Apt # City
 State: NY Zip Code: 10451 0000 Phone: - -

Authorized Representative

St No/Dir/Name: [None] Type Apt # City
 State: Zip Code: 00000 0000 Phone: - -

Other Phone

Contact Person: Phone: - -

Next Previous

Individual Detail window

FS POS 1.3 - [Individual Detail] 2:41:01 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Case No: 00010002678A

Suf Ln CIN First Name Middle Last Name Document Externally Scan Verified

1 1 RX237885 Kelly B Miller Identity

SSN Valid Sex Relation

Date SSN Card Applied For Marital Status

00/00/0000

Ethnic/Race Affiliation

Hispanic/Latino Yes No

Native American/Alaska Native Yes No

Asian Yes No

Black or African American Yes No

Native Hawaiian/Pacific Islander Yes No

White Yes No

DOB Mother's: First Name Middle Maiden Name

12/12/1970

Father's: First Name Middle Last Name

Relationship

Residency

US Citizen/National Yes No Immigrant Type Immigrant No Date of Entry

00/00/0000

Qualified Immigrant Type and Description

Student ID

Status PA NA MA NA FS AP Other Names

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CIN Re-Use window

FS POS 1.3 - [CIN Re-use] 2:41:08 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Registry # Application Date Unit/Worker Case # Case Name Suffix Case Type Request New Clearance

Ln	Suf	First Name	MI	Last Name	Sex	SSN	DOB	AFIS Ex Ind	CIN	CNTR	Case/Reg #

Ln Suf	Name	Sex	SSN	DOB	Afis	CIN	CNTR	Case/Reg #	Case Type	Case Stat	Oth co	Re Ind Stat	PAMAFS Name up	PAMAFS Score

The selected CIN match is indicated by the arrow.

Do you wish to use a new CIN because there is no appropriate Cin match in the clearance ? Yes No

Next Previous

Case Number Re-Use window

FS POS 1.3 - [Case Number Re-Use] 2:41:11 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Case Number: Case Suffix:

Line	Seq No	First Name	MI	Last Name	Sex	SSN	DOB	CIN

POSSIBLE MATCHES

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TAD window

FS POS 1.3 - [ELIGIBILITY] 2:48:25 PM Wednesday, September 26, 2007

File Edit Tools Window Help

WMS Data POS Data

Food Stamp Tad Window

Case Number	Suf	Center	Unit Worker	Rule Status	Proj.No	Acct.No	Reuse case No
000100026616	T	Melrose FS Center	FSPOS				

Case Suffix	M3E Ind	WMS Bdgt#	Notice Bdgt#	Notice #
T				

Case Name	Language	Language Read	Notice Language	LFLN	Homebound Ind
FTK TEST	English	English	English	Yes	<input type="radio"/> Yes <input type="radio"/> No

Category	Prg	Status	Status Reason	From Date	To Date
FS	FS	APPLYING		08/19/2007	00/00/0000

Individual Name	Line#	CIN	Prg	Status	Deny ?	Status Reason	Date
Test Ftk	1	TA17031T	FS	APPLYING			08/19/2007

Next Previous Ignore Errors Show Individual Data Run Rules

Worker Entry in TAD

The Eligibility Specialist must change the status to "**Rejected**" and select status reason **N10** (Failed to Keep Initial Interview). The ES must then click on the Show Individual Data button and enter the required data element. Once the required entries are made, the ES will click on the **Return to Case Level Data** button.

Then, the ES will click on the **WMS Plug** in the tool bar and access the Client Notice System (CNS) to generate the notice for the case. The notice number from CNS must be entered in the **Notice Number** field on the FS TAD. Once the required entries are made, click on the **Next** button to run the business rules. After the case has passed the business rules, click the **Yes** button to continue.

WMS Plug in Tool Bar



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Form Data Entry window

	Yes	No
Request for Identification Card/Temporary Medicaid Authorization (Form W607A)	<input type="radio"/>	<input type="radio"/>
Financial Institution Inquiry (Form W532F)	<input type="radio"/>	<input type="radio"/>
Request for Birth or Death Verification from Agencies Outside New York City (Form W680)	<input type="radio"/>	<input type="radio"/>
Documentation Requirements (Form W-113K)	<input type="radio"/>	<input type="radio"/>
Social Security Administration - Consent for Release of Information (Form W515R)	<input type="radio"/>	<input type="radio"/>
Request for Marriage or Divorce Verification from Agencies outside New York City (Form W681)	<input type="radio"/>	<input type="radio"/>
Request For Contact/ Missed Interview (LDSS-4753 Food Stamp)	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Request for Contact on a Food Stamp Application (Form W-119)	<input type="radio"/>	<input type="radio"/>
Systematic Alien Verification for Entitlement (SAVE) Referral (Form W-515X)	<input type="radio"/>	<input type="radio"/>
FIA School/Training Enrollment Letter (Form W-700D)	<input type="radio"/>	<input type="radio"/>
Notice of Food Stamp Recertification Appointment (Form W-129RR)	<input type="radio"/>	<input type="radio"/>
School Verification Letter (Form W-700E)	<input type="radio"/>	<input type="radio"/>
Family Care Assessment (Form W-582A)	<input type="radio"/>	<input type="radio"/>
Declaration of Application for a Social Security Number (Form EXP-83H)	<input type="radio"/>	<input type="radio"/>

Buttons: Spanish, Next, Previous

An edit in the Form Data Entry will remind the Worker to complete the LDSS-4753 form data entry window.

Close window

Close

Closing Window : **Household Screen**

Current Activity : **FS Application Interview**

Buttons: Complete Activity, Suspend Activity, Cancel

When the Worker clicks on Complete Activity, an approval activity will be sent to the Supervisor.

FS POS Release Notes: Appendix C

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Approval Flow

The following windows appear in the activity:

- Household Screen
- Address Information
- Individual Detail
- CIN Re-Use
- Case Number Re-Use
- TAD
- Print Forms
- Approval Elements

Print Forms

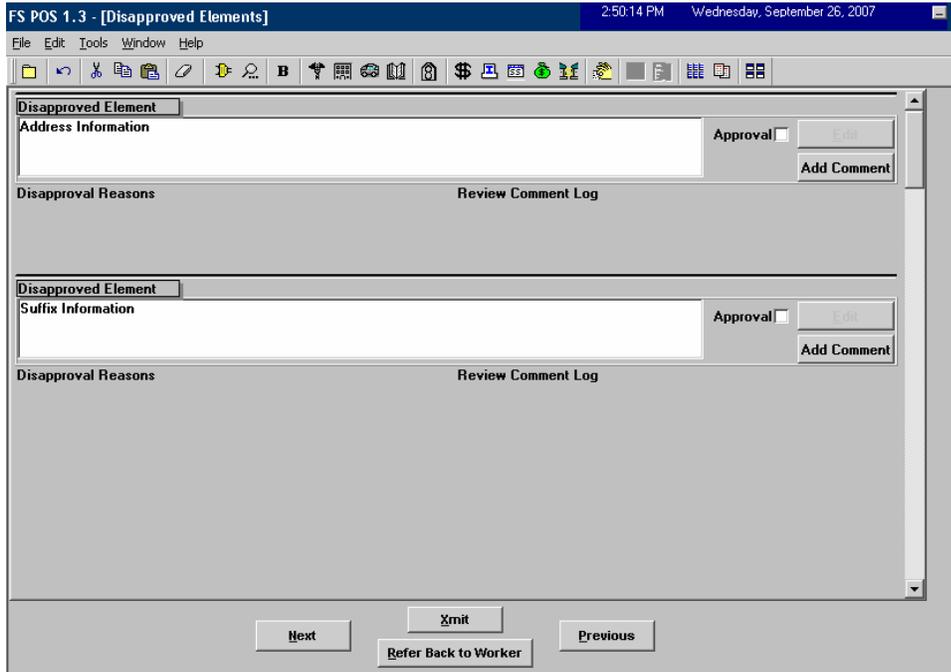
Form No	Form Description	Copies	Forms
DSS3151	Food Stamp Change Report Form		e-form
DSS3152	Action Taken on Your Food Stamp Case		
DSS3574	Food Stamps Single Issuance		
DSS3938	Food Stamp Application Expedited Processing Summary Sheet		e-form
DSS4753	Food Stamps - Request for Contact/Missed Interview		e-form
EBT_23	Notice of Special Benefit		e-form
EXP76R	Documentation Receipt		
M3G	Notice to Report to Center		e-form
M3MM	Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance)		e-form
M40K	Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits		e-form
M42G	Referral for a Medicaid Eligibility Determination		e-form
SS5	Social Security Card Application		
W102	Notification to Participant of New Worker		e-form
W113K	Documentation Requirements		e-form
W119	Request for Contact on Mailed or Faxed Application		e-form
W119D	Eligibility Factors and Suggested Documentation Guide		
W129RR	Notice of Food Stamp Recertification Appointment		e-form
W133D	Social Security Number Verification		

In the **Print Forms** window, a message will remind the Supervisor to print the **LDSS-4753** (Request for Contact/Missed Interview) and **M-40K** (Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits)

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Approval Elements



Following the Print Forms window, the Supervisor must click on the **Xmit** button in the **Approval Elements** window to submit the failed to keep transaction to WMS.