



# FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #07-151-SYS

### POS RELEASE NOTES VERSION 11.3.1 AND FS POS RELEASE NOTES VERSION 1.3.1

<b>Date:</b> December 13, 2007	<b>Subtopic(s):</b> POS and 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 Job Center staff and Non-Cash Assistance Food Stamp (NCA FS) Office staff that the latest versions of the Paperless Office System (POS) and the Food Stamp Paperless Office System (FS POS), respectively, are scheduled to migrate to production on December 17, 2007.</p> <p>Descriptions of the POS release changes for Job Center staff can be found in POS Release Notes Version 11.3.1 (<b>Attachment A</b>) and POS Release Notes Version 11.3.1 Appendix A (<b>Attachment B</b>). Descriptions of the FS POS release changes for NCA FS Office staff can be found in FS POS Release Notes Version 1.3.1 (<b>Attachment C</b>) and FS POS Release Notes Version 1.3.1 Appendix A (<b>Attachment D</b>). These release notes can also be found on the FIAweb at:</p> <p><a href="http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79">http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79</a></p> <p><i>Effective December 17, 2007</i></p> <p><b>Attachments:</b></p> <p><b>Attachment A</b>    POS Release Notes Version 11.3.1  <b>Attachment B</b>    POS Release Notes Version 11.3.1 Appendix A  <b>Attachment C</b>    FS POS Release Notes Version 1.3.1  <b>Attachment D</b>    FS POS Release Notes Version 1.3.1 Appendix A</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*

# POS Release Notes

Version 11.3.1, December 17, 2007

These Release Notes contain descriptions of changes in POS Release 11.3.1, scheduled for December 17, 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](http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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## 1. POS, OCSE and NYCWAY Non-Custodial Parent Integration, Phase I

The interface to capture the non-custodial parent information in the POS Application Interview will be updated to enable a data exchange between POS and the Office of Child Support Enforcement (OCSE) databases.

### OCSE Connection

POS will make a call to the OCSE database and will receive information available in the OCSE database for the non-custodial parent. The Worker will then verify the information received from OCSE with the applicant. Based on this data exchange, OCSE will send a recommendation to POS to indicate if a referral is required.

For cases where a referral is required, POS will allow the Worker to schedule the appointment, will record the appointment in NYCWAY and will generate the appointment notice for the client.

### Removed Question

The question “Anyone applying under 21 whose parent(s) is (are) unknown?” will be removed from to the **Absent LRR** window in the **Application Interview**.

### Non-Custodial Parent Interface Changes

The Worker records the parental information for each child under 21 in the Children in the Household window within the Application Intake activity or within the Individual Detail window in the Application Interview activity. For households with individuals under 21 years of age whose parent(s) is not in the household or whose parents are in a non-legal union, the Show button for the question “Anyone applying under 21 whose parents(s) is (are) absent?” will be enabled.

If there are no similarly-named individuals, the **Non-Custodial Parents Summary** window will appear. If two or more individuals with similar names appear on the case, the **Name Match** window will appear.

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## Name Match window

This window allows the Worker to indicate which individual is the non-custodial parent or to indicate that the individuals are different non-custodial parents. When the Worker clicks the **Next** button, the **Non-Custodial Parents Summary** window will appear.

### Name Match window

**Name Match**

**Instructions**

Names that appear in the window appear to be the same individual, however, the spelling of the names are different. Please select the name with correct spelling by highlighting that row or if those are different non-custodial parents, please select "Different non-custodial parents" row.

Select correct name of the non-custodial parent or indicate if those are different non-custodial parents

John Smith

John Smitty

Different non-custodial parents

Next Cancel

## Non-Custodial Parents Summary window

The Non-Custodial Parent window allows the Worker to enter additional information for the non-custodial parent(s) for applying individuals under the age of 21. POS will indicate the children for whom the individual is non-custodial parent.

The Worker must enter the last name, first name, deprivation factor, date of death (if applicable), whether the child(ren) were born in wedlock and whether the client is claiming good cause for not providing absent parent information. To enter the information for other custodial parents, the Worker must click on the down arrow in the scroll bar.

Once the required information is entered for all non-custodial parents on the case, the Worker must click on the **Next** button.

### Non-Custodial Parents Summary window

**Non-Custodial Parents Summary Window**

**Instructions**

Below is the list of Non-Custodial Parents for all applying individuals who under the age of 21.

Non-Custodial Parent John Smith Relationship to the Casehead Non-Legal Union

Last Name First Name Deprivation Factor [/Help?](#) Abandonment/Desertion

Children In Wedlock  Yes  No Date of Death

Garot Ginny Good Cause Claim [/Help?](#)  Yes  No

Garot Child

Next Cancel Scroll Between Rows

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## OCSE Query

POS will submit the data entered by the Worker to OCSE. OCSE will return all data available within its database, if any, for the non-custodial parent to POS, along with a referral recommendation. This data will be displayed in the **Non-Custodial Parent Information** window.

If no data is found on the OCSE database, the Worker must enter the non-custodial parent information in the window.

## Non-Custodial Parent Information window

The Non-Custodial Parent Information window will display all information received from OCSE for the non-custodial parent. The Worker must verify the information with the client and indicate whether the client confirms the non-custodial parent name and demographical information or has any new information about the non-custodial parent.

For cases where the recommendation is to make an OCSE referral, the **OCSE Referral** window will appear.

If the applicant answers "Yes" for the question "Does applicant have any new information about non-custodial parent", the Non-Custodial Parent fields will be enabled and the Worker will make the necessary updates.

### Non-Custodial Parent Information window

Non-Custodial Parent Information Window

**Instruction**

Information displayed below was received from OCSE database. Please confirm the name of the non-custodial parent with the applicant and question applicant if he/she has any new information about non-custodial parent. If no data displayed in the window you must fill out information in all enabled fields.

<b>Non-Custodial Parent Name</b> John Smith	<b>Children</b> Garot Ginny Garot Child	<b>Paternity Established?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Non-Custodial Parent Demographics</b>		
<b>Non-Custodial Parent SSN</b> NA	<b>Non-Custodial Parent DOB</b>	
<b>Non-Custodial Parent Address</b>		
<b>Street</b> NA	<b>City</b> NA	<b>State</b> NA <b>Zip</b> NA
<b>Phone</b> 0	<b>Cell</b>	
<b>Non-Custodial Parent Employer</b>		
<b>Employer Name</b> NA	<b>Employer Street Address</b> NA	
<b>Employer City</b> NA	<b>Employer State</b> NA	<b>Employer Zip</b> NA
<b>Child Support Information</b>		
<b>Status of Child Support Order</b> Order Doesn't Exist	<b>Year to Date Child Support Payment</b> 0	
<b>Last Child Support Payment Date</b>	<b>Last Child Support Payment Amount</b> 0	
<b>OSCE Referral Recommendation</b> Make a Referral	<b>Does applicant have any new information about non-custodial parent?</b> <input type="radio"/> Yes <input type="radio"/> No	
<b>Does applicant confirm non-custodial parent identity?</b> <input type="radio"/> Yes <input type="radio"/> No		

# POS Release Notes

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## OCSE Referral window

The OCSE Referral window will allow the Worker to schedule an OCSE appointment for the case via NYCWAY.

The Worker must click on the **Make a New Appointment** button to request available appointment dates. POS will send action code 940A to NYCWAY and will receive the available appointment dates in return in **Schedule the Appointment window**.

Two fields named **Take Primary Appointment** and **Choose Alternative Appointment** will be displayed. The Worker must select the appointment date and click on the **Schedule the Appointment** button. POS will then schedule the appointment in NYCWAY and will print the OCSE appointment notice.

The OCSE Referral window will also allow the Worker to reschedule or cancel an appointment and will display the outcome of the OCSE appointment. To reschedule the existing appointment, the Worker must click on the **Reschedule Existing Appointment** button. To cancel the existing appointment, the Worker must click on the **Cancel Existing Appointment** button. If the existing appointment is canceled, the Worker must schedule a new appointment.

The results of the OCSE appointment are currently retrieved via an OpenTI call when the Worker returns to the **Application Interview** activity and there are results available in NYCWAY. This data will be displayed in the **Results of OCSE Appt, Did Not Cooperate Detail** and **Follow Up Action** field in the OCSE Referral window.

### *OCSE Referral window without a scheduled appointment*

The screenshot shows the OCSE Referral window interface. At the top, there is a blue header bar with the text "OCSE Referral". Below this is a white box with a title "Instructions" containing the following text: "An OCSE Appointment is necessary for this case. Please click the 'Make a New Appointment' button to request available appointment dates. If the appointment is already scheduled and you need to change the date of the appointment, click on the 'Reschedule the Existing Appointment' button. You can cancel the existing appointment by clicking on the 'Cancel the Existing Appointment' button, but remember that you will have to schedule a new appointment for this case." Below the instructions box, there are three input fields: "Casename" with the value "Victor", "Latest OCSE Appointment Date" with an empty date field, and "Office ID" with an empty text field. Below these fields are three buttons: "Make a New Appointment", "Reschedule Existing Appointment", and "Cancel Existing Appointment". Below the buttons, there are two more input fields: "Result of OCSE Appt" and "Did Not Cooperate Detail", both with empty text boxes. Below these are two more input fields: "Follow Up Action" with a dropdown arrow, and another empty text box. At the bottom of the window are two buttons: "OK" and "Cancel".

# POS Release Notes

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*Schedule the Appointment window*

**Schedule the Appointment** [X]

**Instructions**

If the date displayed in the 'Primary Appointment' field is acceptable, click on the 'Take Primary Appointment' radio button to select it. If the date displayed in the 'Primary Appointment' field is not acceptable, click on the 'Choose an Alternate Appointment' radio button and select one of the dates displayed in 'Alternate Appointments' field. After selecting a date click on the 'Schedule the Appointment' button to schedule that an appointment in NYCWAY.

**Primary Appointment**

Take Primary Appointment

Thursday	12/13/07	08:00AM
----------	----------	---------

**Alternate Appointments**

Choose an Alternate Appointment

Thursday	12/13/07	09:00 M
Thursday	12/13/07	10:00 M
Friday	12/14/07	08:00 M
Friday	12/14/07	09:00 M
Friday	12/14/07	10:00 M
Monday	12/17/07	08:00 M
Monday	12/17/07	09:00 M

**Schedule the Appointment**      **Cancel**

*OCSE Referral window with a scheduled appointment*

**OCSE Referral**

**Instructions**

An OCSE Appointment is necessary for this case. Please click the 'Make a New Appointment' button to request available appointment dates. If the appointment is already scheduled and you need to change the date of the appointment, click on the 'Reschedule the Existing Appointment' button. You can cancel the existing appointment by clicking on the 'Cancel the Existing Appointment' button, but remember that you will have to schedule a new appointment for this case.

**Casename**      **Latest OCSE Appointment Date**      **Office ID**

Victor      12/13/07 08:00 M      003

**Make a New Appointment**      **Reschedule Existing Appointment**      **Cancel Existing Appointment**

**Result of OCSE Appt**      **Did Not Cooperate Detail**

Follow Up Action

**OK**      **Cancel**

# POS Release Notes

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## 2. Recertification Appointment Scheduling Changes and Travel Accommodations

To fully integrate recent changes made in form W-908T (Recertification Appointment Notice) through Policy Bulletin # 07-96-OPE and add new travel accommodation functionality, the **Calendar** window in the **Schedule Recertification Appointment** activity will be updated. The following recertification types will be available for scheduling:

- In-Office
- Home Visit (FIA and HASA)
- Mail (RTSC and HASA only)
- Video (RTSC only)

The W-908T will now be used for all CA/FS recertification appointments scheduled through POS, with the exception of Out of County cases. The form will be generated and mailed by MIS on the next business day following the completion of the scheduling activity. As a result, the W-908SS and RED-10 notices will be removed from the activity.

If the case has a mailing or residential address outside of New York City, it will be marked as an **Out of County** case and no scheduling will be permitted. For these cases, the Worker must complete a paper W-908T and must mail the form along with a Recertification packet to FIA Central Office, who will attempt to schedule a courtesy interview with the appropriate district office.

### Travel Accommodations and Flexible Appointment Hours

When the Calendar window opens, POS will make an OpenTI call to retrieve action codes from NYCWAY to determine whether the client qualifies for a travel accommodation or flexible appointment hours. The following action codes will be retrieved:

- 16TE (WeCARE Temporary Employment Call-In Exemption)
- 16TT (WeCARE Para-Transit Services Needed)
- 16TH (WeCARE Flexible Appointment Hours)

If NYCWAY action code 16TE or 16TT is found for the casehead, the case will be scheduled for a home visit. If NYCWAY action code 16TH is found, NYCWAY will provide day and time ranges for which the client is not available for the recertification appointment.

Day Not Available	Start Time Not Available	End Time Not Available
Monday	8:30 AM	5:00 PM
Thursday	8:30 AM	10:59 AM

# POS Release Notes

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## RTSC Cases

If the case is an RTSC case, POS will read the mail indicator from the WIN32X (PA Recertification Report) to determine whether the case should be scheduled for a mail recertification or in-office recertification interview. The Worker can override the system's determination. For in-office or video appointments, the Worker must select the date and time of the appointment. The appointment must be at least 10 days in the future.

## HASA Cases

If the case is a HASA case, the Worker must select whether the case should be scheduled for mail, home visit or in-office interview. For home visit and in-office appointments, the Worker must select the date and time of the appointment. The appointment must be at least 10 days in the future.

## Home Visits

For all other cases, POS will determine whether the casehead is homebound using POS and NYCWAY data. If the casehead is homebound, the question "Does this case require a home visit for face-to-face (FFR)?" will be prefilled with an answer of "Yes". The Worker must then select the date and time of the appointment. The appointment must be at least 10 days in the future.

If the casehead is not homebound, the Worker must indicate whether s/he is an R.E.D. (Returning Eligibility Determination [BEV]) Worker and whether the case requires a home visit for FFR.

If the case requires a home visit for FFR, the Worker must indicate whether an FFR home visit appointment was arranged by phone and the date of the phone conversation, if applicable. The Worker must then select the date and time of the appointment. The appointment must be at least 10 days in the future.

## In-Office Interviews

If the recertification appointment will take place at the Center, the Worker must select the date and time of the appointment. The appointment must be at least 10 days in the future.

If there is more than one adult on the case, POS will determine whether the other adult(s) are required to attend the interview using POS and NYCWAY data. If the other adults are required to attend the interview, their names will appear on the W-908T notice.

## New Appointment Date Edit

A new edit in the Calendar window will prevent the Worker from scheduling an appointment more than 60 days in the future.



# POS Release Notes

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## Calendar window

Version 11.3 - Paperless Office System 12:54:11 PM Monday, October 15, 2007

File Edit Tools Window Help

Case Number 00007421939F Case Name PERKINS SAM CIN TB54379A Suffix 1

Is this an Out of County Case?  Yes  No

Is this an RTSC Case?  Yes  No

Is this an HASA Case?  Yes  No

RTSC Type  RTSC In-Office  RTSC Mail  RTSC Video

HASA Type  HASA In-Office  HASA Mail  HASA Home Visit

Are you an R.E.D. worker?  Yes  No

Does this case require a home visit for face-to-face (FFR)?  Yes  No

Was a FFR home visit appointment arranged by phone?  Yes  No

Date of Phone Conversation

CALENDAR Personnel ID: 712B86 Date: 10/25/2007

Go to date: 00/00/0000 Go Go to today: Today

< Year < Month < Day Day > Month > Year >

October 2007

Sun	Mon	Tue	Wed	Thr	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Case Name Case No Suffix Type Tickler Time

Done Previous Clear Appt Time

Schedule Date: 10/25/2007 Schedule Time: 00:00 AM

### Accessing Reports, RFI and Risk Data

The reports, RFI and risk data previously available through the Recertification Preparation are available for review in the **Recertification Interview** via the Tools menu in POS:

- The CED Worksheet and WINR0032 reports are available under the **Reports** option.
- WMS pending data is available under the **WMS Inquiry** option.
- The current budget is available under the **Current Active Budget** option.
- Vital records and building clearance data are available under the **Clearances** option.
- The Wage, UIB, SSA, Bank and New Hire RFI reports are available under the **RFI Data** option.
- NYCWAY employment data is newly available under the **Activity Inquiry in NYCWAY** option.

# POS Release Notes

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## 3. Printing the Document Receipt (Form EXP-76R) in Document Intake Activity

Currently, the Document Receipt (EXP-76R) is printed when documents are scanned and indexed on the same day using the **Document Intake** activity. The form is printed when the **Done** button is clicked.

A new button will be added in the **Forward Document** (formerly named "Process Mail") window in the **Document Intake** activity that will allow the Worker to print the Document Receipt (EXP-76R) for the client. Once this button is clicked, POS will print the form and the **Done** button will be enabled.

If the documents are scanned and indexed on the same day, POS will prefill form EXP-76R. If the documents are not scanned and indexed on the same day, POS will print a blank EXP-76R, which the Worker must complete, scan and index.

The addition of the button will also allow the Worker to re-print the form if the initial printing fails.

### Forward Document window

File Edit Tools Window Help

Case Number: 00007421939F Case Name: PERKINS SAM Suffix: 1 Responsible: Shepard I

Notify That Documents Are Available:

Job Title	Worker's First Name	Worker's Last Name	Worker's IDs	Caseload	Phone Number
Supervisor	Jose	Breton	712B86	POSDD	718-510-8589
Supervisor	Michele	Shepard	143C39	POSDP	
Supervisor			907A94		
Office Manager			907A40	00042	
Supervisor			907A92		
Supervisor			907A81		
Supervisor			907A97		
Supervisor			481A66	AMSPS	

Scanned and Indexed Documents

Case Number	Document Description	Client	Scan Date
00007421939F	(Form W-515X) Systematic Alien Verification for	Sam Perkins	09/11/07 06:14:35 pm
00007421939F	(Form LDSS-3938) FS Application Expedited	Sam Perkins	07/23/07 11:42:46 am
00007421939F	(W-607A) Request Identification card/temporary	Sam Perkins	06/19/07 04:36:40 pm
00007421939F	(Form W-451) Police Report	Sam Perkins	05/23/07 04:26:52 pm
00007421939F	(Form DSS-4753) Food Stamps-request for	Sam Perkins	05/23/07 09:41:19 am

Show Image Print Receipt Done

# POS Release Notes

Version 11.3.1, December 17, 2007

## 4. New Utility Liaison Referral Outcome Windows

A new activity was added to POS in release 11.3 to allow Utility Liaisons to review grant requests for fuel arrears, utility arrears, heat-related property repair or replacement and heat-related equipment repair or replacement.

When this activity is completed, the **Utility Liaison** assigns a Non-Food Emergency Interview/Special Grant (applicants only) or Change Case Data (participants only) activity to the Worker via the **Refer Case** window.

Three new windows will be added to the **Non-Food Emergency/Special Grant** and **Change Case Data** activities to allow the Worker to view the final decision from HEAP and the recommendation entered by the Utility Liaison for the following request types:

- Property Repair Related to Heat
- Utilities
- Fuel

### Utility Liaison Recommendation Window – Property Repair

This window will include the following read-only fields:

- Response from HEAP section
  - Final Decision (Approved or Denied)
  - Date
  - Denial Reason
- Utility Liaison Recommendation
  - Payment Recommended (Yes or No)
  - Denial Reason
  - Payment Amount
  - Recommendation (Repair or Replace)
  - Two Party Check to Vendor Via Mail
  - Contractor Name
  - Contractor Address
  - Contractor Phone

### Utility Liaison Recommendation Window – Utilities

This window will include the following read-only fields:

- Response from HEAP section
  - Final Decision (Approved or Denied)
  - Date
  - Denial Reason
- Utility Liaison Recommendation
  - Payment Recommended (Yes or No)
  - Denial Reason
  - Payment Amount
  - Payment Period From (date)
  - Payment Period To (date)
  - Abeyance Amount
  - Abeyance Period From (date)
  - Abeyance Period To (date)
  - Actions Required (Utility Guarantee, Restriction, Other)

# POS Release Notes

Version 11.3.1, December 17, 2007

## Utility Liaison Recommendation Window – Fuel

This window will include the following read-only fields:

- Response from HEAP section
  - Final Decision (Approved or Denied)
  - Date
  - Denial Reason
  
- Utility Liaison Recommendation
  - Payment Recommended (Yes or No)
  - Denial Reason
  - Payment Amount
  - Payment Period From (date)
  - Payment Period To (date)
  - New Vendor (checkbox)
  - Account #
  - Company Name
  - Company Address
  - Company City
  - Company State
  - Company Phone
  - Abeyance Amount
  - Abeyance Period From (date)
  - Abeyance Period To (date)
  - Actions Required (Utility Guarantee, Restriction, Other)
  - Fuel on the Budget
  - Message

The **Fuel** window will also indicate whether there is a fuel indicator on the current active budget for the case in the field “**Fuel on the Budget**”.

*Example of Utility Liaison Referral Outcome: Fuel*

**Utility Liaison Referral Outcome - Fuel**

Response From HEAP:  
 Final Decision:  Approved  Denied      Date: 12/7/2007  
 Denial Reason: Client Denied HEAP-other reasons

Utility Liaison Recommendation:  
 Payment Recommended:  Yes  No      Denial Reason: Office of Central Processing will issue the grant  
 Payment Amount: \$      Payment Period From:      To:       New Vendor  
 Account #:      Company Name: Con Edison  
 Company Address:      Company City:      Company State:      Company Phone:  
 Abeyance Amount: \$      Abeyance Period From:      To:  
 Action Required:  Utility Guarantee     Restriction     Other

Fuel on the Budget

# POS Release Notes

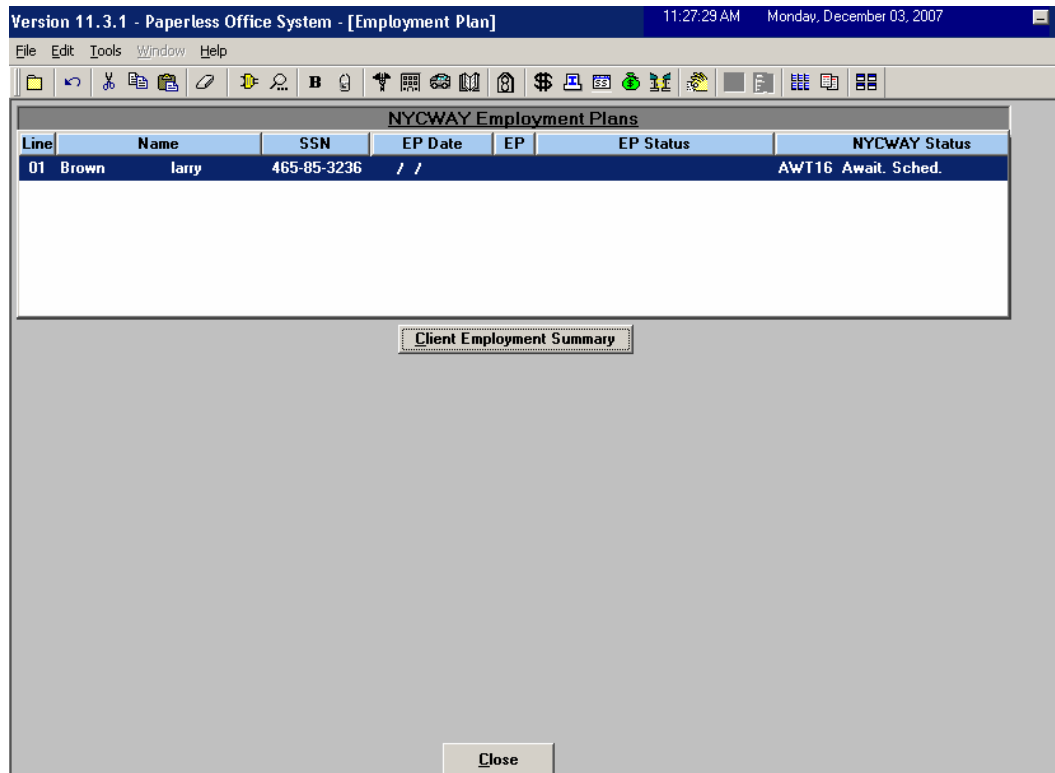
Version 11.3.1, December 17, 2007

## 5. NYCWAY Activity Inquiry

A new inquiry window in POS will allow Workers and Supervisors to view NYCWAY activity for the case. This window will appear after the Print Forms window in the Application Interview activity or when the Worker clicks on the new **NYCWAY Activity Inquiry** option in the POS Tools menu. POS will make an OpenTI call to the NYCWAY inquiry area to retrieve the latest Employment Plan, assignment and FIA-3A information for each adult on the case.

To view detailed information, the Worker selects the individual and clicks on the **Client Employment Summary** button. The **Client Employment Summary from NYCWAY** window will appear.

### *NYCWAY Activity Inquiry*



# POS Release Notes

Version 11.3.1, December 17, 2007

*Client Employment Summary from NYCWAY window*

**Client Employment Summary from NYCWAY**

Case: 00007390901C    Category: SNCA

Line: 01    Name: Brown    Larry    DOB: 1957/11/11    Sex: M    SSN: 465-85-3236

RL: 01    ES: 20    PStat: AWT16    Ln: AC

Status: **Await. Sched.**  
New Active Individual

Next FFR: 1998/05/09

Assessment:

FIA 3A:	Nbr	Job/Description	Employer	Hours	Start	Wage	Paid
					//		

Income: Change Date    Amount  
//    //

Fair Hearing: FH Number    Request Date    Sched. Date    Disposition    Issue    Outcome    MDR  
//    //    //

Appointment:			Assignment:		
Desc	Fad Date	Time	Act Code	Description	Start Date

OK

## 6. Change to Budget in POS Separate Food Stamp Determination

The Worker will no longer need to change the PA suffix status on the **POS Budget** window when completing the Food Stamp Separate Determination workflow in POS.

The instructions for POS Food Stamp Separate Determination have been updated accordingly in **Appendix A (FS Separate Determination Phase I)** at the end of this document.

## 7. New TAD Business Rules

### New Business Rule for Failed to Keep Application Interview Rejection Codes

A new TAD business rule will display an error message if the Worker uses rejection codes E10, F10 or N10 for a case where the interview question set has been started. These rejection codes should only be used for applicants who fail to keep the initial interview.

#### Error Message

“PA Rejection codes E10, F10 or N10 cannot be used if Application Interview is started.”

### New Business Rule for Cases with Prior Adverse BEV Outcomes

When a case with a prior adverse outcome from BEV is re-opened or re-apply, the case must be referred to the BEV. A TAD business rule will warn the workers about the BEV Referral Requirement:

#### Error Message

“This client had a negative outcome from a previous Bureau of Eligibility Verification (BEV) referral. The client must be referred to BEV before processing the case.”

## 8. New Single Issuance Code Edits

Edits were added in WMS to the PA single issuance (SI) opening codes used to open one-shot deal cases and to issue immediate needs grants. These edits have been integrated into POS. If the Worker uses a single issuance code that is invalid for the opening code, the following error message will appear when the Worker attempts to complete the activity:

“The Grant Issuance Code is invalid for the Opening Code. Please remove the Issuance Code or change the Opening Code.”

For additional details, please Policy Bulletin # 07-95-SYS (Public Assistance [PA] Single Issue Opening Codes and Associated PA Special Grant Issuance Codes).

## 9. Flagging Cases where Noncitizens Have Lost SSI Benefits

Certain individuals will lose their SSI benefits some time in the next few years because of their alien status. If these individuals apply for CA, they will be exempt from employment because they are permanently disabled. MIS has received a file containing the list of individuals who meet the “Noncitizen who have lost SSI” criteria for this exemption.

### Posting Action Code to NYCWAY

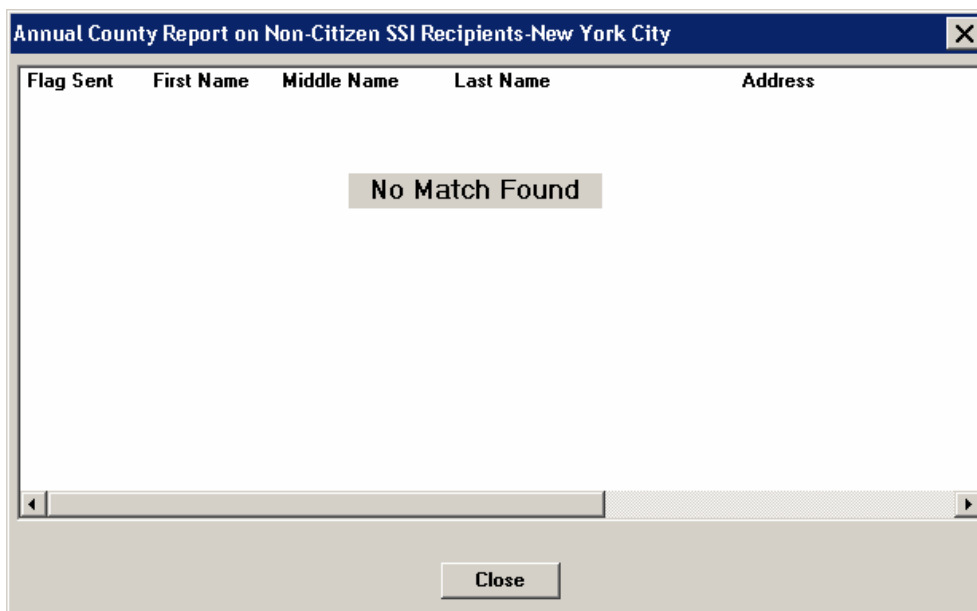
When the Worker processes an Application Interview, Recertification Interview or Change Case Data activity for a case with an individual who meets the “Noncitizen who have lost SSI” criteria, Action Code **350E** (SSI Ineligible Non-Medical Reason) will be posted to NYCWAY to exempt the individual from the Employment Plan requirement and to code the individual as permanently disabled.

The action code will be posted when the Worker suspends or completes the Application Interview, Recertification Interview or Change Case Data activity.

### New Inquiry Window

A new window containing the Noncitizen SSI Collateral Data will be available to the Worker via the POS Tools menu for these individuals.

*Non-Citizen SSI Collateral Data window*



# POS Release Notes

Version 11.3.1, December 17, 2007

## 10. New Back-Up Grant Checkbox on Grants Data Entry window

A new **Back-Up Grant** checkbox on the Grants Data Entry window will allow the Worker to indicate that the grant is a “back-up” grant. This checkbox will be enabled when CA grant code 02 (Regular Allowance for Recurring Needs), CA grant code 09 (Supplement of Rent Only) or FS grant code 14 (Food Stamp Benefit – Full Month) is selected.

The screenshot shows the 'Grants Data Entry' window in the 'Version 11.3 - Paperless Office System'. The window title is 'Version 11.3 - Paperless Office System - [PA Single Issuance Benefit]'. The date is Wednesday, September 26, 2007, and the time is 1:01:55 PM. The menu bar includes File, Edit, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The main form area is divided into several sections:

- Case Information:** Case Name: VERSION NEWT, Case Number: 000074356471, Suffix: 1, Date Form Prepared: 09/26/2007, IS Center: 040, Category: SNCA.
- Benefit Type:** Radio buttons for PA (selected) and FS.
- Pick-Up Codes:** A dropdown menu showing 'PUC 2 - Pended Until 45th Day of SNFP/SNCA/SNNC Eligible'.
- Issuance Category:** A dropdown menu showing 'Regular Allowances'.
- Issuance Code:** A dropdown menu showing 'Code 02 - Regular Allowance for Recurring Needs'. A checkbox labeled 'Back-Up Grant' is located to the right of this dropdown.
- Amount:** A text box containing '\$50.00'.
- From:** A text box containing '01/01/2007'.
- To:** A text box containing '01/15/2007'.
- Routing Location:** A text box.
- Replaces Check Number:** A text box.
- Restricted Indicator:** A dropdown menu showing 'Unrestricted'.
- Authorization Number:** A text box.
- Total Amount:** A text box containing '\$50.00'.

At the bottom of the window, there are 'Next' and 'Previous' buttons.

## 11. New Synchronization Message

When the TAD is synchronized in an approval activity because changes were made to the case outside of POS after the case was submitted by the Worker, the following warning message will appear for the Supervisor:

“The TAD has been synchronized because a change has been made in WMS since the Worker completed the activity. Please send this case back to the Worker if the TAD changes must be transmitted to WMS. Failing to update the TAD may result in WMS errors.”

The Supervisor must access the **Approval Elements** window, record a case comment to indicate that a new TAD is required and click on the **Refer to Worker** button to send the case back to the Worker.

The Worker must return to the **POS TAD** window and redo the action.

## 12. Changes to Undomiciled Shelter Expense window

Two fields will be removed from the **Undomiciled Shelter Expense** window and a new warning will be displayed when the recorded shelter expense exceeds the home income deduction.

The **End Date** and **The Expense Continue** fields will be removed.

If the Worker selects **Yes** for the field **Shelter Expense Incurred** and an amount larger than the monthly homeless income deduction of \$143, a warning message will appear: “This amount is over the monthly homeless income deduction.”



# POS Release Notes

Version 11.3.1, December 17, 2007

## 13. Changes to Display of Budget window in Application Interview

WMS no longer requires a budget number for cases with a category of EAA (Emergency Assistance for Adults) or EAF (Emergency Assistance for Families). As a result, the POS budget window will no longer appear in the Application Interview when the case category is EAA or EAF.

## 14. Disabled Amount Field in Special Needs section of POS Budget

The **Amount** field in the Special Needs section in the POS Budget Individual Income/Needs window will be disabled.

Line	Source	Frequency	Gross	Program	Usage	Inc. Exemption	PA	FS
1	Salary, Wages	Monthly	\$541.63	PA & FS				

Line	Type	Amount	Date of Bath	Disabled?
1	Restaurant Allowance - Dinner		00/00/0000	
1	Home Delivered Meals		00/00/0000	

## 15. New E-Forms and Removed POS Forms

The following forms have been added to city wide E-Forms:

- LDSS-3152, Action Taken on Your Food Stamp Case
- LDSS-4013A, Action Taken on Your Application: PA, MA and FS, Part A
- LDSS-4013B, Action Taken on Your Application: PA, MA and FS, Part B

These forms will be saved to the FileNET image repository upon printing and will be available in the POS Document Browser. E-Forms are not available through the **Tools > Printed Forms** menu.

### Removed POS Forms

The following forms will be removed from POS:

- LDSS-4280, Right to Claim Good Cause
- LDSS-4281, Attestation to Lack of Information
- M-181X, Notification of "Good Cause" Claim

# POS Release Notes: Appendix A

Version 11.3.1, December 17, 2007

## Food Stamp Separate Determination through POS, Phase I

### Overview

In Phase I of Food Stamp Separate Determination through POS, the **Eligibility Determination** window and the **Application Interview** activity flow were updated to allow Workers to complete the current paper 2-day action to deny Cash Assistance (CA) and accept Food Stamps (FS) in one day using POS. When this process is used, the Non-Cash Assistance (NCA) FS case created through the automated Food Stamp Separate Determination process in WMS will be in active (AC) status.

This functionality is available for cases where the decision for CA and FS is being made at the same time.

The Day 1 action to accept the FS suffix is processed by the Worker and transmitted to WMS by the Supervisor, while the Day 2 action to deny the CA suffix is posted by POS once the FS acceptance is processed by WMS.

### Eligibility Determination window

The **Eligibility Determination** window only appears for cases for which the CA suffix is in applying (AP) or single issue (SI) status and for which the FS suffix is in AP or SI status.

### Revised Eligibility Determination window

Version 11.2 - Paperless Office System - [Eligibility Determination] 12:34:43 PM Monday, June 11, 2007

File Edit Tools Window Help

Decision Documents Referrals Others

Completeness Overall **COMPLETE** Documents **COMPLETE** Referral **COMPLETE** Other Factors **COMPLETE**

Final PA Determination  Accept  Deny **1** Final FS Determination  Accept  Deny **2**

Are All Individuals Being Activated for FS  Yes  No **3**

Pa Denial Status **4** REJECTED-Complia PA Status Reason **5** Failure to Complete Eligibility Process (MA Sep Determin

Fs Status **6** Active FS Status Reason **7** Y45 - Other

Case/Suffix Level Case Name PAYEE PAYEE Deny No

Current Status PA 1 Category SNCA New Status

PA AP PA APPLYING

MA AP MA APPLYING Delink MA from PA?

FS AP FS ACTIVE

Individual Level Name Payee Payee DOB 01/01/1982

Current Status

PA AP PA APPLYING

MA AP MA APPLYING Deny No

FS AP FS **8** ACTIVE

Comments

Next Previous

# POS Release Notes: Appendix A

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7 new fields were added to the **Eligibility Determination** window to handle the FS separate determination process:

1. Final PA Determination
2. Final FS Determination
3. Are all individuals being activated for FS?
4. PA Denial Status
5. PA Status Reason
6. FS Status
7. FS Status Reason

In the window, the Worker indicates the final CA and FS decisions. For cases that will be denied for CA and accepted for FS, the Worker enters the CA denial reason and the FS acceptance reason.

If the CA suffix is denied and the Worker selects a reason that does not require FS Separate Determination, POS displays an error message asking the Worker to select a different code or to change the FS determination to 'Deny'.

## Enabling or disabling the new fields on the Eligibility Determination window

When **Final PA Determination** (Field 1) has a value of 'Deny', **Final FS Determination** (Field 2) is enabled.

When **Final FS Determination** (Field 2) has a value of 'Accept', the Worker must answer the question "**Are all individuals being activated for FS?**" (Field 3)

If the answer for this question is 'Yes', the **Individual FS Status** (Field 8) is preset to 'Active' for each individual on the case and the fields are protected and disabled. If the answer is 'No', the Worker must select the proper individual status for each individual (Active, Rejected or Closed).

**PA Denial Status** (Field 4) and **PA Status Reason** (Field 5) are only enabled when **Final PA Determination** (Field 1) has a value of 'Deny'.

The **FS Status** field (Field 6) is pre-filled with a value of 'Active' when **Final PA Determination** (Field 1) has a value of 'Deny' and **Final FS Determination** (Field 2) has a value of 'Accept'. When the FS Status field is enabled, the Worker must select the FS opening code in the **FS Status Reason** (Field 7) drop-down menu.

## FS acceptance

Following the **Eligibility Determination** window, the Worker calculates a CA/FS budget for the Food Stamp acceptance action, authorizes the budget on the POS TAD and submits the case to the Supervisor. The Supervisor will process the acceptance of the FS case. POS will then automatically handle the CA denial transaction one day after the FS acceptance transaction is processed by WMS.

## Budget

At the time of the FS decision, the Worker should return to the income, resource, shelter/housing expense and other expense windows to ensure that the interview data has the latest information provided by the applicant.

## TAD

After the **Existing Budgets** window, the **POS TAD** window will appear. The Worker must make all required updates at the suffix and individual levels on the TAD and run the business rules. For individuals who will be denied, the individual FS denial reason must be entered on the POS TAD.

After the **POS TAD** window, the **Grants Data Entry** window appears to allow the Worker to complete a benefit authorization form if the case requires any CA or FS grant.

# POS Release Notes: Appendix A

Version 11.3.1, December 17, 2007

After the **Print Forms** window, the Worker will complete the activity and submit it to the Supervisor for review and approval.

## **Supervisory Approval of FS Acceptance**

The Supervisor will review and process the FS acceptance action. On the Approval Elements window, the Supervisor will click on the **Xmit** button to send the case action to WMS.

## **2<sup>nd</sup> Day Action by POS for CA Denial**

POS will check the status of the FS acceptance transaction in WMS one day after the Supervisor transmits from the **Approve Eligibility Decision** activity. If the FS acceptance transaction was successfully processed by WMS, POS will transmit the CA denial transaction to WMS one day after the FS acceptance transaction is processed by WMS.

## **Error Correction – FS Acceptance**

An Error Correction activity will be scheduled for the Worker if the first day transaction errored out in WMS. The **EC – Application Interview** must be completed to process the FS acceptance for the case.

POS will check the status of the FS acceptance transaction in WMS one day after the Supervisor transmits from the **Approve Eligibility Decision** activity. If the FS acceptance transaction was successfully processed by WMS, POS will transmit the CA denial transaction to WMS one day after the FS acceptance transaction is processed by WMS.

## **Error Correction – CA Denial with FS Separate Determination Code After FS Acceptance**

An Error Correction activity will be scheduled for the Worker if the first day transaction for the FS acceptance was successfully processed by WMS, but the second day transaction for the CA denial errored out in WMS.

POS will schedule an Error Correction activity named **EC - Day 2 FS Sep Det** in the Worker's queue. The Worker will complete a TAD action to deny the CA suffix with a FS Separate Determination code and close the FS suffix with an appropriate code.

# FS POS Release Notes

Version 1.3.1, December 17, 2007

These Release Notes contain descriptions of changes in FS POS Release 1.3.1, scheduled for December 17, 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](http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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## 1. Case Re-Opening in FS Change Case Data

FS POS will be updated to allow Eligibility Specialists to process a non-recertification related case re-opening through the **FS Change Case Data** activity.

A new checkbox named “Re-Open the FS Case (Closing is not related to recertification)” will be added in the **Changes to FS Case** window. When this checkbox is selected, the re-opening flow will be implemented.

### *Changes to FS Case window*

The screenshot shows a web-based application window titled "FS Change Case Data". The window has a menu bar (File, Edit, Tools, Window, Help) and a toolbar with various icons. Below the toolbar is an "Instructions" box with the following text: "This activity will allow you to indicate what changes must be made to the active case. First, select the source of the changes. Then, select the changes that are needed on the case by clicking on the appropriate checkbox(es) below. You may click on as many changes as necessary. Then, click the Next button. The windows needed to make the changes will appear according to the selected checkbox(es)." Below the instructions is a form with a dropdown menu for "Source of Change(s)" set to "In Person". The form contains several sections of checkboxes: "Household Composition" (Add a Person to the Case, Remove a Person from the Case), "Changes" (Address, Telephone Number and/or Authorized Representative, Landlord Information, Rent, Mortgage, Shelter or Utility Expenses, Demographics, Citizenship or Alien Status, Income, Resources, Close the Case, Re-Open the Case (Closing is not related to recertification)), and "Benefits and Forms" (Issue Skipped Assistance or Other FS Benefits, Prepare Forms). At the bottom of the form are "Next" and "Previous" buttons.

# FS POS Release Notes

Version 1.3.1, December 17, 2007

POS will display the new **Re-Open the FS Case** window when the ES clicks the Next button in the **Changes to FS Case** window. This window will allow the ES to update the case status, select the status reason and record the contact date.

## *Re-Open the FS Case window*

File Edit Tools Window Help

Instructions

This FS case is currently closed in WMS. To re-open the case, please select the new case status, the status reason, enter the contact date and click the Next button to continue.

Current WMS Status	New POS Status	Status Reason	Contact Date
CL	ACTIVE	PA Approval - Same Benefit each Month	12/07/2007

Next Previous

Following the **Re-Open the FS Case** window, the **Individual Status Change** window will appear. This window will allow the Eligibility Specialist to indicate which individuals should be re-activated on the case. When this window is completed, the Eligibility Specialist clicks the Next button to continue the activity.

## *Individual Status Change window*

File Edit Tools Window Help

Instructions

Select the line(s) that must be re-opened or accepted, select the new POS TAD status(es), the new POS TAD status reason(s) and enter the new effective date(s).

Select	Name	Current POS TAD Status	New POS TAD Status	New POS TAD Status Reason	Effective Date
<input type="checkbox"/>	Patrick Joseph	ACTIVE			00/00/0000

Next Previous

# FS POS Release Notes

Version 1.3.1, December 17, 2007

## 2. Caseload Entry

The Eligibility Specialist will be able to change the caseload for the case in the **FS Reception Intake** and **Application Modification** activities.

### FS Reception Intake

The Worker will be able to change the caseload for the case in the new Unit Worker field on the Intake Completion window in the FS Reception Intake activity.

#### Intake Completion window

**Intake Completion**

The intake process is complete. The disposition for this applicant is shown below. Please confirm by clicking the 'Register the Case' button.

The intake activity will be finished. The application will be registered and a copy of the LDSS-3938 will be copied in the image repository.

Unit Worker:

Application Registration Status:

Application Registration Number:

Temporary CIN:

If the appointment is a Same Day Interview, you must issue a Food Stamp Application Interview ticket from MONIQ.

If the application was submitted in person, the applicant stayed for the Expedited Determination and the appointment is not a Same Day Interview, Form W-129PP (Food Stamp Eligibility Interview Notice) will be printed.

If the application was submitted by mail or fax, Form W-119 (Request for contact on a Food Stamp Application) will be printed. If the application was submitted in person, but the applicant could not stay for the Expedited Determination, Form W-119 will be printed.

### Application Modification

The Worker will be able to change the caseload for the case in the new Unit Worker field on the Case Login window in the Application Modification activity.

File Edit Tools Window Help

**Present Address**

Street Number	Direction	Name	Type	Apt #	City
900	SOUT	ALLEY	Alley		BRONX

State:  Zip Code:  Phone:

**Case Member Information**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val Sex	Citzn / Nat	HB	PA	MA	FS	AFIS	
1	T	TA45325T	Sepa Sepa	Casehead	11/11/1850	115-11-5111	1	M	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NA	NA	AP

**Suffix Level Information**

Registration Number:  Unit Worker:

Suffix	Case Name	File Date
1	SEPA SEPA	10/23/2007

Category	Primary Language	CNS Notice Language	Language Read
FS	English	English	English

# FS POS Release Notes

Version 1.3.1, December 17, 2007

## 3. Failed to Keep Recertification Interview Log

The Failed to Keep Recertification Log will be updated to allow Supervisors to process closings for cases that failed to keep the recertification appointment.

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

## 4. Printing the Document Receipt (Form EXP-76R) in Document Intake Activity

Currently, the Document Receipt (EXP-76R) is printed when documents are scanned and indexed on the same day using the **Document Intake** activity. The form is printed when the **Done** button is clicked.

A new button will be added in the **Forward Document** (formerly named "Process Mail") window in the **Document Intake** activity that will allow the Worker to print the Document Receipt (EXP-76R) for the client. Once this button is clicked, POS will print the form and the **Done** button will be enabled.

If the documents are scanned and indexed on the same day, POS will prefill form EXP-76R. If the documents are not scanned and indexed on the same day, POS will print a blank EXP-76R, which the Worker must complete, scan and index.

The addition of the button will also allow the Worker to re-print the form if the initial printing fails.

*Forward Document window*

File Edit Tools Window Help

Case Number: 00007421939F Case Name: PERKINS SAM Suffix: 1 Responsible: Shepard M

Notify That Documents Are Available:

Job Title	Worker's First Name	Worker's Last Name	Worker's IDs	Caseload	Phone Number
Supervisor	Jose	Breton	712B86	POSDD	718-510-8589
Supervisor	Michele	Shepard	143C39	POSDP	
Supervisor			907A94		
Office Manager			907A40	00042	
Supervisor			907A92		
Supervisor			907A81		
Supervisor			907A97		
Supervisor			481A66	AMSPS	

Scanned and Indexed Documents

Case Number	Document Description	Client	Scan Date
00007421939F	(Form W-515X) Systematic Alien Verification for	Sam Perkins	09/11/07 06:14:35 pm
00007421939F	(Form LDSS-3938) FS Application Expedited	Sam Perkins	07/23/07 11:42:46 am
00007421939F	(W-607A) Request Identification card/temporary	Sam Perkins	06/19/07 04:36:40 pm
00007421939F	(Form W-451) Police Report	Sam Perkins	05/23/07 04:26:52 pm
00007421939F	(Form DSS-4753) Food Stamps-request for	Sam Perkins	05/23/07 09:41:19 am

Show Image Print Receipt Done



# FS POS Release Notes

Version 1.3.1, December 17, 2007

## 5. New TAD Business Rules

### **CNS Notice Number Requirement**

A new TAD business rule will display an error message if the Eligibility Specialist selects an opening code beginning with "A" or "Q" in the FS TAD for an applying case, fails to enter a CNS notice number and the M3E Indicator is not A or T:

#### *Error Message*

"CNS Notice Number is required."

### **CNS Notice Number Entry Validation**

A new TAD business rule will display an error message if the Eligibility Specialist enters a CNS notice number that does not begin with the letter "N" and the number zero (0).

#### *Error Message*

"The first two characters of Notice # must be 'N' and the number '0' (zero)."

### **Rejection Code N10 in Failed to Keep FS Application Interview**

A new TAD business rule will display an error message if the Eligibility Specialist does not use rejection code N10 in the **Failed to Keep FS Application Interview** activity:

#### *Error Message*

"Rejection code N10 is required for cases that failed to keep the initial eligibility interview."

## 6. New E-Forms and Revised E-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 form has been added to citywide E-Forms. It will be saved in the FileNET image repository upon printing and will be available in the POS Document Browser:

- LDSS-3152, Action Taken on Your FS Case

### **Updated E-Forms for FS Centers**

The following E-Forms will be revised:

- W-129RR, Notice of Recertification Interview

### **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
- M-40K, Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits
- W-113K, Documentation Requirements and/or Assessment Follow-Up

# **FS POS Release Notes**

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- 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-147Q, Primary Tenant's Statement Regarding Occupancy of Secondary Tenant
- 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: Appendix A

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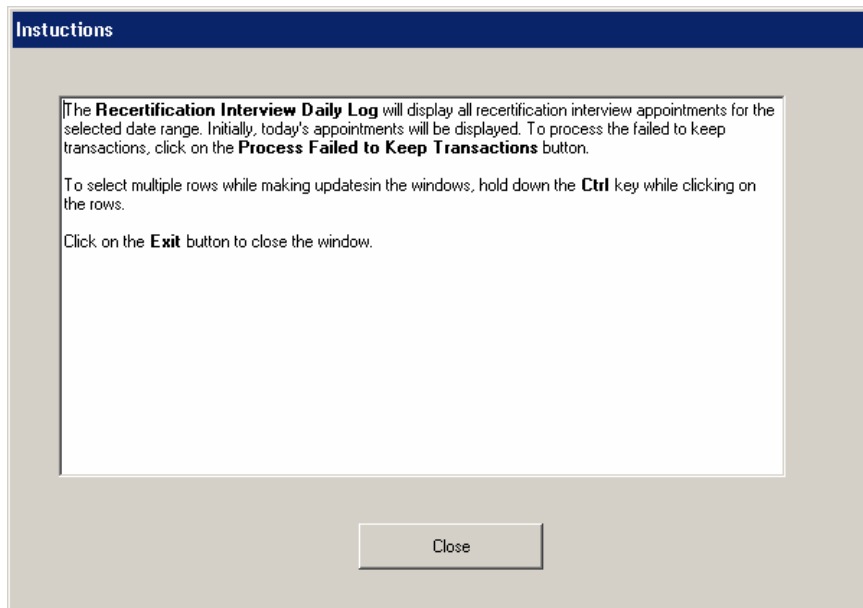
## Overview

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.

### *Instructions*



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

## Summary of Changes to Recertification Interview Log

The Supervisors will be able to post closing transactions for clients who failed to keep the interview using the **Failed to Keep Recertification Interview Log**.

## Telephone Recertification Pilot

A new pilot gives clients the choice of processing their recertification over the telephone. Those participants deemed eligible for telephone interviews receive a notice advising them of this process. They are asked to mail in the LDSS-4826 recertification form. The center contacts 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 completing the recertification over the telephone 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 completes special processing for these cases. For additional details, please see PB 06-34-ELI (The Interactive Voice Response System [IVRS]).

# FS POS Release Notes: Appendix A

Version 1.3.1, December 17, 2007

## Recertification Interview Log

File Retrieve Print

### Recertification Interview Log

View Current and Past Appointments
  View Future Appointments

Case No	Case Name	Spoken Lang	Appt Date	Appt Time	LDSS-4826 Received	Tel Intv	Contact Num
00010002496H	PATRICK JOSEPH	Polish	12/10/2007	10:00 AM	No	No	
00010002497F	PIERRE ROLANDA		12/10/2007	10:00 AM	No	No	

**Totals:**  
 Total Kept Appointments: 
 Total Failed To Keep Appointments: 
 Total Re-scheduled Appointments: 
 Total:

### View Current and Past Appointments

In the Current and Past Appointments Date Range Filter, the Worker can select the date range of appointments that will be retrieved. The default value is "Today." The Worker may select one of the following options:

- Today
- Yesterday
- Past 7 Days
- Date Range

The Worker may view appointments up to 60 days in the past.

### Future Appointments Filter

In the Future Appointments Filter, the Worker can select the date range of appointments that will be retrieved. The default value is the next business day. The Worker may select one of the following options:

- Date
- Date Range

The Worker may view appointments up to 60 days in the future.

# FS POS Release Notes: Appendix A

Version 1.3.1, December 17, 2007

## Appointment Type Filter

There is an Appointment Type filter, with two options:

- Telephone Interview
- In-Center Interview

## Appointment Status Filter

There is an Appointment Status filter, with three options:

- Kept Appointment
- Failed to Keep Appointment
- None

## Column Order

The columns in the Log appear in the following order:

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

The following buttons appear in the window:

1. Assign – See the *Assign procedure and Refer window* section below for additional details.
2. LDSS-4826 Received- Opens new LDSS-4826 Received window
3. Contact – Opens new Contact Attempted window
4. Reschedule – Displays the Recertification Interview Scheduler window for updating with new appointment
5. Kept Appointment – Will indicate that the appointment was kept
6. Failed to Keep Appointment – Will indicate that the participant did not keep the appointment
7. Process Failed to Keep Appointments- will display Fail to Keep Recertification Interview Log
8. Exit

## 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 1.3.1, December 17, 2007

## 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

# FS POS Release Notes: Appendix A

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## LDSS-4826 Received Window

The new LDSS-4826 Received window will appear when the LDSS-4826 Received button is clicked at the bottom of the FS Recertification Log window. This window allows the worker to indicate that the signed and completed recertification form (LDSS-4826) has been received, the specific interview type, record the date of receipt and any new contact information for the person.

*LDSS-4826 Received window*

The screenshot shows a Windows-style dialog box titled "LDSS-4826 Received". It contains the following fields and controls:

- Case Number:
- Case Name:
- Casehead Name:
- Date that the LDSS-4826 was received?:
- Interview Type:  Telephone  In-Center
- Contact Number:  Extension:
- Did the applicant request a new call time?:  Yes  No
- Date:  Time:

At the bottom of the dialog are two buttons: "OK" and "Cancel".

# FS POS Release Notes: Appendix A

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## 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 window: Successful Contact*

The screenshot shows a window titled "Contact Attempted" with the following fields and sections:

- Case Information:**
  - Case Number: 00007440715G
  - Case Name: JULIA RIVERIO
  - Casehead Name: Julia Riverio
  - Contact Number: 718-555-1212 | Extension:
  - Requested call time:
- Contact Attempt 1:**
  - Did you successfully contact the client?  Yes  No
  - Date that the contact was attempted? 11/01/2007
  - Time that the contact was attempted? 10:00 am
- Contact Attempt 2:**
  - Did you successfully contact the client?  Yes  No
  - Date that the contact was attempted? 11/05/2007
  - Time that the contact was attempted? 09:00 am
- Contact Attempt 3:**
  - Did you successfully contact the client?  Yes  No
  - Date that the contact was attempted? 11/05/2007
  - Time that the contact was attempted:
- Contact Attempt 4:**
  - Did you successfully contact the client?  Yes  No
  - Date that the contact was attempted? 11/05/2007
  - Time that the contact was attempted:
- Comments:** (Empty text area)
- Interview Type:**  Telephone  In-Center
- New Contact Number:**  Yes  No
- Contact Number:** | **Extension:**
- Buttons:** OK, Cancel

If the Worker is unable to make contact after 4 attempts, he or she must notify their Supervisor. The Supervisor will mark the appointment status as "Failed to keep".

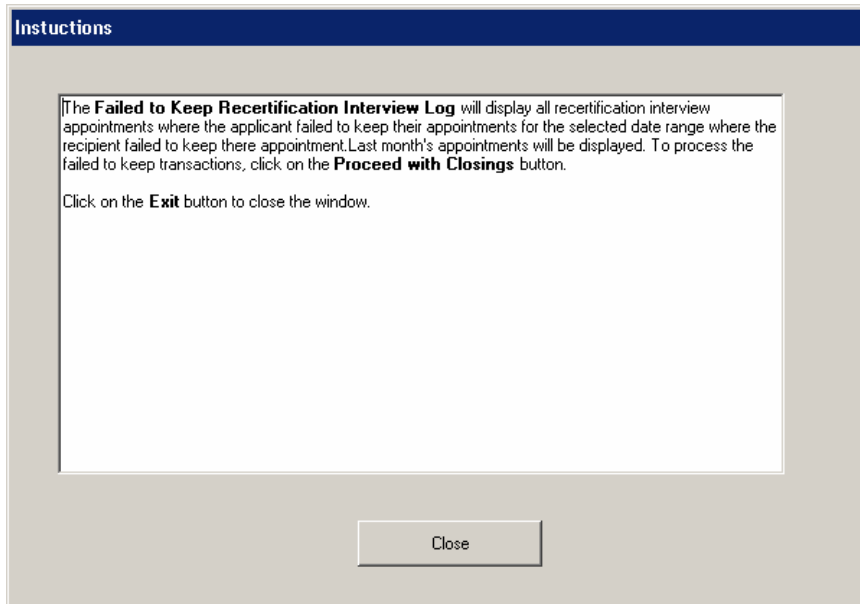


# FS POS Release Notes: Appendix A

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## Failed to Keep Recertification Interview Log

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



## Failed to Keep Recertification Interview Log

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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## Date Range Filter

The list of the prior month's appointments where the client failed to keep will be displayed in this window beginning on the 16<sup>th</sup> day of the month. The Date Range filter contains two options:

- Prior Month
- Specify Range

## Columns in Failed to Keep Recertification Interview Log

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

1. Post Closings to WMS – Click on this button to post the case closing to WMS
2. Assign – Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
3. Reschedule – Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
4. Kept Appointment – Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
5. Hold Closing – Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
6. Exit

When the Post Closings to WMS button is clicked, a warning message will appear with Yes and No buttons: "These cases will be closed for failing to keep the interview. Would you like to continue?"

- If the Worker clicks No, the closing transaction will not be sent to WMS.
- If the Worker clicks Yes and the client did not submit a signed LDSS-4826, a transaction with closing code Y10 will be posted to WMS for the case.
- If the Worker clicks Yes and the client submitted a signed LDSS-4826, the **CNS Notice Number Required** window will appear to allow the Worker to enter the CNS notice number for the case. When the Worker enters the CNS notice number and clicks the OK button, a transaction with closing code N10 will be posted to WMS for the case.

# FS POS Release Notes: Appendix A

Version 1.3.1, December 17, 2007

## New window: CNS Notice Number Required window

If the client submitted a signed LDSS-4826, but failed to keep the recertification appointment, the case must be closed using recertification-related closing code N10 (Failed to Keep/Complete Appointment). This closing code requires the creation of a notice number in the Client Notice System (CNS) Subsystem in WMS under transaction type 08.

*CNS Notice Number Required window*

**CNS Notice Number Required**

This case closing requires a CNS notice number. Please access the Client Notice Number Subsystem in WMS and generate a notice number for the case using Transaction Type 08 (Recert Closing) and FS Closing Code N10. The appointment date must also be entered in CNS.

Once the notice is generated, please enter the CNS Notice Number in this window in the "CNS Notice Number" field.

Case Number: 00001234567A

Appointment Date: 11/01/2007

CNS Notice Number: N0

OK Cancel

Field Descriptions:

1. Instructions
2. Case Number Field (read-only)
3. Appointment Date (read-only)
4. CNS Notice Number – Entry of CNS Notice Number is required in this field.