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POS RELEASE NOTES VERSION 11.2

Date: June 12, 2007	Subtopic(s): 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 that the latest version of the Paperless Office System (POS), Version 11.2, is scheduled to migrate to production on June 18, 2007. Descriptions of the changes can be found in POS Release Notes Version 11.2 (Attachment A) and POS Release Notes Version 11.2 Appendices (Attachments B-F), as well as on the FIAweb at:</p> <p>http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective June 18, 2007</i></p> <p>Attachments:</p> <table data-bbox="477 1249 1399 1465"><tr><td>Attachment A</td><td>POS Release Notes Version 11.2</td></tr><tr><td>Attachment B</td><td>POS Release Notes Version 11.2 Appendix A</td></tr><tr><td>Attachment C</td><td>POS Release Notes Version 11.2 Appendix B</td></tr><tr><td>Attachment D</td><td>POS Release Notes Version 11.2 Appendix C</td></tr><tr><td>Attachment E</td><td>POS Release Notes Version 11.2 Appendix D</td></tr><tr><td>Attachment F</td><td>POS Release Notes Version 11.2 Appendix E</td></tr></table>	Attachment A	POS Release Notes Version 11.2	Attachment B	POS Release Notes Version 11.2 Appendix A	Attachment C	POS Release Notes Version 11.2 Appendix B	Attachment D	POS Release Notes Version 11.2 Appendix C	Attachment E	POS Release Notes Version 11.2 Appendix D	Attachment F	POS Release Notes Version 11.2 Appendix E
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HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 2 at the prompt followed by 765 or
send an e-mail to *FIA Call Center*

POS Release Notes

Version 11.2, June 18, 2007

These Release Notes contain descriptions of changes in POS Release 11.2, scheduled for June 18, 2007. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Jose Breton**. 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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POS Release Notes

Version 11.2, June 18, 2007

1. Changes to match WMS 2007.2

The following changes will be made to match changes in WMS version 2007.2

Employment Code Changes

The following changes will be made in the Employment Code field:

- Employment code 73 (OVESID Participant) will no longer be available for selection.
- A new employment code will be added: 40 (Needed in Home Part Time to Care for an Incapacitated/Disabled Family Member Non-exempt).

PA Opening Code A32

PA opening code A32 (PA Approval First Month Prorated) is available for use at HASA centers when the PA case status is changed to SI (single issue) and the MA Suffix must be activated. This code will also be available for the Riverview (037) Job Center.

PA Opening Code Y19

A new PA opening code will be added to the POS TAD:

- Y19, Case accepted for emergencies other than shelter or utility arrears.

This opening code will be available when the case category is EAA, EAF or E-SN.

PA Opening Code Y39

PA opening Y39 (Case accepted for emergency shelter/utility arrears [No repayment agreement]) will only be available when the case category is EAA, EAF or E-SN. This code was previously available for the FA, SNNC, SNFP and SNCA categories.

WMS Budget Number Requirement

The POS TAD business rules will not require a WMS budget number with PA opening codes Y19, Y39 or Y41 when the PA suffix is changed from applying (AP) to single issue (SI) status and the FS suffix is remaining in applying (AP) or not applying (NA) status.

Grant Issuance Code Edits

In the **Application Interview**, **Non-Food Emergency Interview/Special Grant** and **Change Case Data** activities, new PA grant issuance code edits will be added to match new edits in WMS:

- If PA opening code Y19 is used to change the PA suffix to SI (single issue), the only valid PA grant issuance codes will be: 14, 15, 16, 18, 19, 21, 22, 31, 38, 39, 42, 45, 46, 47, 48, 49, 60, 61, 62 and 81.
- If PA opening code Y38 is used to change the PA suffix to SI (single issue), the only valid PA grant issuance codes will be: 10, 31, 40, 41, 50 and 59.
- If PA opening code Y39 is used to change the PA suffix to SI (single issue), the only valid PA grant issuance codes will be: 10, 30, 31, 40, 41, 50, 59 and 62.
- If PA opening code Y41 is used to change the PA suffix to SI (single issue), the only valid PA grant issuance codes will be: 10, 18, 19, 22, 25, 30, 31, 38, 39, 40, 41, 42, 44, 49, 50, 59, 60, 61, 81 and 99.

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These grant issuance code edits may be used with the following Pick-Up Codes (PUC): PUC 1 (Special Roll), PUC 2 (EBT SNCA 45-Day Elig), PUC 6 (E-Check, issued via the E-Check authorization print process) or PUC 9 (EBT Emergency Special Grant).

If the Worker selects an invalid grant issuance code, the following error message will appear when the Worker attempts to complete the activity: "Grant Issuance Code is invalid for the Opening Code. Please remove the Issuance Code or change the Opening Code"

Removal of Grant Issuance Code A8

PA Grant Issuance Code A8 (Supplement HSP Rent [Recoupable]) will be removed from the Grant Data Entry window.

2. Food Stamp Separate Determination through POS, Phase I

The **Eligibility Determination** window and the **Application Interview** activity flow will be updated to allow Workers to complete the current 2-day action to deny PA and accept FS by creating a separate NPA FS case in one day using POS. POS will automatically handle the PA denial transaction one day after the FS acceptance transaction is processed by WMS.

For full details, please see **Appendix A (FS Separate Determination through POS, Phase I)** at the end of this document.

3. Mass Caseloading, Phase I

New functionality in POS will allow an authorized user to change the caseload designation for multiple cases at the same time. The **Mass Caseloading** tool will retrieve applying, single issue and active PA cases from the WMS Extract file, which includes caseload information as of the previous night. The cases will be shown by caseload and the authorized user will be able to move cases from its existing caseload to a new caseload. After the changes are made, POS will schedule a WMS transaction to update the caseload indicator for the cases in WMS.

For full details, please see **Appendix B (Mass Caseloading)** at the end of this document.

4. Changes to Rent, Mortgage or Shelter Expense window

The Response to Question window for the question "Do You (or Anyone Who Lives with You) Have a Rent Mortgage or Other Shelter Expense?" will be updated to improve the accuracy of the data collected in the window and add new enhancements for changes to the shelter type and the settings for landlord and rent restriction information.

For full details, please see **Appendix C (Rent, Mortgage or Shelter Expense Window Updates)** at the end of this document.

5. Updates to LDSS-4013 Data Entry window

The LDSS-4013 data entry window in POS will be updated to match changes in the LDSS-4013A NYC and LDSS-4013B NYC forms and to improve the accuracy and completeness of entries on the form.

For full details, please see **Appendix D (Updates to LDSS-4013 Data Entry window)** at the end of this document.

POS Release Notes

Version 11.2, June 18, 2007

6. Changes to Adults in Household and Children in Household windows

New Instructions

Instructions will be added to the **Adults in Household** and **Children in Household** window:

“To remove a person, highlight the First Name and hit the ‘Delete’ button on the keyboard, then highlight the Last Name and hit the ‘Delete’ button on the keyboard. All other entries for the individual will be removed by the system.”

New question in Adults in Household window

A new question will be added to the **Adults in Household** window:

- Receiving SSI?

The Worker must answer this new question for each adult in the case.

New application edit for the spouse of the casehead

If an adult is the spouse of the casehead, is not receiving SSI (Supplemental Security Income) and the Worker has not checked the **PA** checkbox in the **Applying For** section, the following error message will appear:

“You have indicated that the spouse of the case head is not applying for PA and is not receiving SSI. The spouse must apply for PA if he/she is living in the household and is not in receipt of SSI. Please change your answer.”

New edit for the parent of an applying child

If a child on the case has a relationship of son (natural, adopted or step) or daughter (natural, adopted or step) to a payee on the case who is not applying for PA and is not in receipt of SSI, POS will display the following error message when the Worker clicks “Next” on the **Children in Household** window:

“Parents who are not in receipt of SSI must apply for public assistance if their child/children are applying. You will be returned to the Adults in the Household window to change the “Payee” to “Casehead” and check the PA applying checkbox” OR if the payee is in receipt of SSI select ‘Yes’ to the question.”

Revised messages in Adults in Household and Children in Household window

When the Worker clicks “Next” on the **Adults in Household** window, the following revised message will appear: “Are you sure you have added all adults living in the household even if they are not applying?”

When the Worker clicks “Next” on the **Children in Household** window, the following revised message will appear: “Are you sure you have added all children living in the household even if they are not applying?”

POS Release Notes

Version 11.2, June 18, 2007

Revised Adults in Household window

Version 11.1 - Paperless Office System - [Adults in Household] 9:56:01 AM Monday, April 23, 2007

File Edit Tools Window Help

Adults

To remove a person, highlight the First Name and hit the 'Delete' button on the keyboard, then highlight the Last Name and hit the 'delete' button again. All other entries for the individual will be removed by the system.

Last Name: Plast First Name: Plast Middle Name: Relationship: Casehead Sex: M

Individual is a:

- Spouse of Casehead/Payee
- Casehead
- Payee
- None of the above

Applying For:

- PA
- MA
- FS
- None

Suffix: 1 D.O.B: 01/01/1962

Required for Applying Adults ONLY:

SSN: - - Birth Certificate No: []

County of Birth: Bronx Other Name(s): Yes No

Marital Status: Single/Never Married Receiving SSI?: Yes No

Multi Ethnic Fields:

- Hispanic/Latino: Yes No
- Asian: Yes No
- Native Hawaiian/Other Pacific Islander: Yes No
- Native American or Alaska Native: Yes No
- Black or African American: Yes No
- White: Yes No

List Parents' Names Even If Not On Birth Certificate:

Mother's - Maiden Name: [] First Name: [] Middle Name: []

Father's - Last Name: [] First Name: [] Middle Name: []

Next Previous

Revised Children in Household window

Version 11.1 - Paperless Office System - [Children in Household] 10:06:48 AM Monday, April 23, 2007

File Edit Tools Window Help

Children

To remove a person, highlight the First Name and hit the 'Delete' button on the keyboard, then highlight the Last Name and hit the 'delete' button again. All other entries for the individual will be removed by the system.

Last Name: [] First Name: [] Middle Name: [] Relationship to First Casehead/Payee: [] Sex: []

Applying For:

- PA
- MA
- FS
- None

Affiliated Suffix: [] D.O.B: 00/00/0000

Required for Applying Children ONLY:

SSN: - - Other Name(s): Yes No

Marital Status: Single/Never Married Birth Certificate No: []

County of Birth: []

Multi Ethnic Fields:

- Hispanic/Latino: Yes No
- Asian: Yes No
- Native Hawaiian/Other Pacific Islander: Yes No
- Native American or Alaska Native: Yes No
- Black or African American: Yes No
- White: Yes No

List Parents' Names Even If Not On Birth Certificate:

Mother's - Maiden Name: [] First Name: [] Middle Name: []

Father's - Last Name: [] First Name: [] Middle Name: []

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POS Release Notes

Version 11.2, June 18, 2007

7. Saving Form LDSS-3938 and Updates to Form Preview window

The revised Previewing Form DSS3938 window will be displayed in the **Application Interview** after the **Expedited Processing** window. The preview of the POS form will be replaced with a data window that will include the data used to complete the form. The LDSS-3938 (Expedited Food Stamp Service Worksheet) will be saved to the POS Document Browser when the Worker clicks “Next” on this window in the **Application Interview**. At the time it is saved, the form will only include the screening results on page 1.

The revised Previewing Form DSS3938 window will also appear in the **Approve IN/EFS** activity. The LDSS-3938 will include all relevant information, including screening results on page 1 and expedited benefit eligibility on page 2.

Revised Previewing Form DSS3938 window

8. Automated calculation of income in the current month for applicants

POS will now automatically calculate the total income in the month of application for each household member, based on the information entered in the **Employment Information**, **Current Income** and **Past Maintenance** windows. The information will be entered by POS in the response window for the question “Has Anyone Who Is Applying for Food Stamps Had Income from Any Sources (Such As Employment, SSA, SSI, UIB, Or Contribution) This Month?” If no income is found on the case, POS will set the income amount for the month of application to zero and the answer for this question to “No”.

9. FS Benefit Issuance Look-Up in Expedited Processing and EFS windows

In the **Expedited Processing** window in the **Application Interview** and **IN/EFS Issuance** activities, POS will now retrieve FS benefit issuance information from the **WMS Extract** file, improving the speed of the retrieval.

POS Release Notes

Version 11.2, June 18, 2007

10. Shortened flow for applicants who are ineligible for Expedited Food Stamps

If an applicant is ineligible for expedited FS and the case will not receive an immediate needs grant, the flow of the **IN/EFS Issuance** and **Approve IN/EFS** activities will be shortened.

In the **IN/EFS Issuance** activity, the following windows will no longer appear when the applicant will not receive an immediate grant and is ineligible for Expedited Food Stamps or cannot receive FS benefits under the expedited process:

- Document Matching
- CIN Re-Use
- Budget
- TAD
- CBIC Payee
- Grant Data Entry
- Non Food Emergency Details

In the **Approve IN/EFS** activity, the following windows will no longer appear when the applicant will not receive an immediate grant and is ineligible for Expedited Food Stamps or cannot receive FS benefits under the expedited process:

- Activity Checklist
- Document Matching
- CIN Re-Use
- Budget
- TAD
- CBIC Payee
- Grant Data Entry
- Non Food Emergency Details

In the **IN/EFS Eligibility** window, the message asking the Worker to calculate a FS Only scratchpad budget to determine the coupon for applicants with income will no longer appear for applicants who are financially ineligible for expedited FS processing.

The **Xmit** button in the **Approval Elements** window will be disabled, since there is no transaction to send to WMS.

POS Release Notes

Version 11.2, June 18, 2007

11. Updates to Filters in Individual Queue in Activities Management

The following changes will be made in the **Activity Type Filter** section in the **Individual Queue**:

- The **Begin Recert Prep** checkbox will be removed.
- A new **Reop** checkbox will be added:
 - Selecting the **Reop** checkbox and clicking on the **Filter** button will retrieve **Re-Open a Case** activities.
- A new **Other** checkbox will be added:
 - Selecting the **Other** checkbox and clicking on the **Filter** button will retrieve **Application Modification, Case Member Addition, Case Transfer** and **Settle in Conference** activities.

The following changes will be made in the **Activity Approve Filter** section in the **Individual Queue**:

- A new **Approve Change** checkbox will be added.
 - Selecting the **Approve Change** checkbox will retrieve **Approve Recertification** activities.

The name of the **Individual Queue** varies in accordance with the title of the staff person's title in the POS enrollment table.

Revised Activities Management window

Version 11.1 - Paperless Office System - [Activities Management] 3:18:39 PM Friday, May 18, 2007

File Edit Tools Window Help

Unit Filter: Worker CMU Uncovered [Dropdown]

Activity Type Filter

Application Interview Recert Prep
 IN & EFS Recert Interview
 Change Case Data Error Corrections
 Reop Other

Activity Approve Filter

Approve Appl Inter Approve Recert
 Approve IN & EFS Approve Error Corr
 Approve Change Approve Other
 Approve Reop

Activity Status Filter

Suspended Removed since
 Not Scheduled Completed since
 Not Started

Activity Alert Filter

Coming Due Filter
 Overdue Clear

Activity	Due Date	Alert	Case Name	Case No	Sur	Receive
Total: 0 Case						

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

POS Release Notes

Version 11.2, June 18, 2007

12. Updates to POS Budget Windows and Navigation

Changes to Existing Budgets window

The instructions on the **Existing Budgets** window will be changed to:

- “Click on the ‘New Budget’ button to calculate a new budget.”

The “New Budget” button will be moved to the left side of the window and will be the first button displayed. The “New Budget” button will allow the Worker to calculate a new budget based on the latest POS interview data.

The “OK” button will be removed and will be replaced with two new buttons:

- View Selected Budget
- View Budget Result

The “View Selected Budget” button will be enabled when a budget is selected from the list. Clicking on this button will display the **POS Budget Household** window for the selected budget, in **read-only** mode.

The “View Budget Result” button will be enabled when a budget is selected from the list. Clicking on this button will display the **POS Budget Results** window for the selected budget, in **read-only** mode.

Revised Existing Budgets window

Click on the 'New Budget' button to calculate a new budget.

Case No.	POS Suf	PDS Bdat No	Author-izable	Authorized Budget?	WMS Bdat No	Type	Save Date	Effective Dates	Description
000074356471	1	2	Y	N		PA & FS	2/8/2007 13:58:27	02A07	
	1	1	Y	N		PA & FS	1/8/2007 09:58:33	01A07	

Buttons: **New Budget**, **View Selected Budget**, **View Budget Result**, **Next**, **Previous**

POS Release Notes

Version 11.2, June 18, 2007

Changes to POS Budget Individual window

Several updates will be made in the POS Individual Budget window to ease navigation in the window and improve usability.

A new button named **Existing Budgets** will be added to the window to allow the Worker to exit the budget from the **POS Budget Individual** window.

The **Calculate Budget/View Result** button will be renamed **Calculate Budget**. Clicking on this button will run the POS budget business rules. If the case passes the business rules, a success message will appear. The budget will be posted to WMS when the Worker clicks **OK** on the success message: "Success – The Income portion of the budget has passed all applicable Business Rules known to POS at this time." The message "Your budget has passed the Business Rules. Do you want to send it up to WMS?" will no longer appear.

When the budget is in **read-only** mode, the **Calculate Button** will not be displayed. Instead, a new button named **View Result** will be displayed.

The **End Date** fields have been removed from the **Deductions and Medical Bills** section to match changes in WMS version 2007.2.

Revised POS Budget Individual window

Version 11.1 - Paperless Office System - [Individual Income / Needs] 4:32:33 PM Friday, May 18, 2007

File Edit Tools Window Help

Case No & Suffix: 000074356471 | Line No.: 1 | Bdgt No.: 1 | Client Name: Newt | Version: | Hours Worked: | Tax FICA30 & 1/3: | Pregnancy Due Date: | Emplmt Training?: | Spec: | Rel: |

Employability Status: ACTIVE | PA Status: ACTIVE | FS Status: ACTIVE | Date of Birth: 10/19/1962 | Involvement: | CIN: TB22007A

Income	Line	Source	Frequency	Gross	Program	Usage	Inc. Exemption:	PA	FS
	1								
	1								
	1								

Deductions and Medical Bills	Line	Type	Amount
	1		
	1		

Daycare Needs	Line	Type	Amount	Date of Birth	Disabled?
	1			00/00/0000	
	1			00/00/0000	
	1			00/00/0000	
	1			00/00/0000	

Special Needs	Line	Type	Amount
	1		
	1		

Calculate Budget Household Needs Existing Budgets

POS Release Notes

Version 11.2, June 18, 2007

Revised POS Budget Individual window in read-only mode

Version 11.1 - Paperless Office System - [Individual Income / Needs] 4:37:12 PM Friday, May 18, 2007

File Edit Tools Window Help

Case No & Suffix: 000074356471 | Line No.: 1 | Bdgt No.: 3 | Client Name: Newt | Version

Hours Tax FICA30 & Pregnancy Emplmt: 1/3 | Due Date Training?

Employability Status: ACTIVE | PA Status: ACTIVE | FS Status: | Date of Birth: 10/19/1962 | Involvement: | CIN: TB22007A

Line	Source	Frequency	Gross	Program	Usage	Inc. Exemption:	PA	FS
1								
1								
1								

Deductions and Medical Bills

Line	Type	Amount
1		
1		

Daycare Needs

Line	Type	Amount	Date of Birth	Disabled?
1			00/00/0000	
1			00/00/0000	
1			00/00/0000	
1			00/00/0000	

Special Needs

Line	Type	Amount
1		
1		

View Result Household Needs Existing Budgets

Changes to POS Budget Results window

The "Household Needs" button will be removed from the POS Budget Results window.

Revised POS Budgets Results window

Version 11.1 - Paperless Office System - [Budget Results] 4:34:31 PM Friday, May 18, 2007

File Edit Tools Window Help

Center ID: 040 | Worker: 89B226 | Type: PA & FS | Case No: 000074356471 | Suffix No.: 1 | Bdgt No.: 3 | Client Name: VERSION NEWT | Total # of People in PA Household: 4 | FR: | WMS Budget No:

Monthly Food Stamp Budget Results

Suffix in HH	No Eligibility	Catg.	Adjusted Income	Shelter Amount	Net FS Income	Coupon Amount	Recoup	Adjusted Coupon	FS Rtg
1	3								

Semi-Monthly Public Assistance Budget Results

Suffix in HH	No	Allowances:					Net PA Income	PA Grant	Recoup	Adjusted Grant
		Basic	Shelter	Energy	Fuel	Other				
1	4									

Effective Dates: 06A07

Existing Budgets

POS Release Notes

Version 11.2, June 18, 2007

Posting SI Budgets

The following updates will be made in the posting of single issue (SI) budgets from POS to WMS:

- When the PA suffix is updated from applying to single issue status and a budget is calculated, POS currently posts a status of AP to the WMS budget. POS will now post a status of SI for the PA suffix.
- When the FS suffix is updated from applying to single issue, POS currently posts a status of AP to the WMS budget. POS will now post a status of SI for the FS suffix.
- When the individual status for PA or FS is updated from applying to single issue, POS currently posts a status of AC to the WMS budget. POS will now post a status of AP for the PA or FS individual.

Beginning with WMS version 2007.2:

- A single issue (SI) budget will no longer be required to change the PA suffix from AP to SI status when the FS suffix remains in AP status (no EFS issued).
- A single issue (SI) budget will no longer be required to change the PA suffix from AP to SI status for a PA-only one shot deal (EAA, EAF, E-SNA) case.

13. Updates to Withdrawals in POS

A new shortcut in the window menu will allow the Worker to process a PA application withdrawal for an applicant who does not want to stay for the full interview. This new shortcut will be enabled in the **Application Interview** and will take the Worker directly to the **Disposition/Withdrawal** window. If the applicant is not withdrawing, the Worker will be unable to use this shortcut and must complete the full interview question set.

For applicants who are withdrawing their application, POS will also provide a shorter flow with the following windows after the Worker clicks the **Next** button on the **Disposition/Withdrawal** window:

- LDSS-2921 Signatures
- CIN Re-Use
- Case Number Re-Use
- TAD
- Print Forms
- Approval Elements

A new edit will also be added to help ensure that the proper updates are made in the **Disposition/Withdrawal** window in the **Application Interview** activity when PA denial code Y50 or Y94 is used to record the application withdrawal.

The Supervisor will be required to print the M-3mm (Notice of Withdrawal) when PA denial code Y50 or Y94 or FS denial code Y94 is used to record the application withdrawal. The Supervisor will be able to print the form using the **Print Forms** window.

POS Release Notes

Version 11.2, June 18, 2007

14. Posting Alien Employability Action Codes to NYCWAY

POS will post the appropriate action code(s) to NYCWAY to indicate whether applying or active noncitizens have received work authorization from USCIS (US Citizenship and Immigration Services) and should be scheduled for employment activities. The action code will be based on the answers to the following questions in the **Additional Information** window in the **Alien Type Determination** section and will be posted when the Worker answers these questions in the **Application Interview**, **Change Case Data** or **Recertification Interview** activity:

- Does Individual Have Employment Authorization Documents I-688B or I-766?
- Does Individual Have Social Security Card Authorizing Employment?

POS will post Action Code **99NW** to NYCWAY to indicate that noncitizen does not have work authorization if:

- The answer for the question “Does Individual Have Employment Authorization Documents I-688B or I-766?” is “No”
- The answer for the question “Does Individual Have Employment Authorization Documents I-688B or I-766?” is “Yes” and the answer for the question “Does Individual Have Social Security Card Authorizing Employment?” is “No”.

POS will post Action Code **99EA** to NYCWAY to indicate that the noncitizen has work authorization if:

- The answer for the question “Does Individual Have Employment Authorization Documents I-688B or I-766?” is “Yes” and the answer for the question “Does Individual Have Social Security Card Authorizing Employment?” is “Yes”.

The action will be posted when the Worker suspends or completes the activity.

15. Changes to Automated Alien Re-Evaluation Triggers

When certain milestones are reached, POS automatically sets up alien individuals for re-evaluation of their eligibility in the alien determination windows.

New re-evaluation triggers will be added for the following type of immigrant:

- Qualified immigrants who are denied for FS and have 5 years in a qualified status.
- Immigrants with an alien type of N, T or O who have obtained a qualified immigrant status.
- Immigrants who previously did not have an Employment Authorization Document or a Social Security Card Authorizing Employment.
- Immigrants who were previously denied a Social Security based on their immigration status (SSN Validation Code of “3” or “4”) and who now obtained a Social Security Card.
- Legally responsible caseheads or payees who have a FS status of “not applying” (NA).

POS Release Notes

Version 11.2, June 18, 2007

16. New PRUCOL MA Edit

The alien type PRUCOL MA should only be used for immigrants applying for Medicaid Only. POS will prevent Workers from selecting PRUCOL MA in the **Alien Type Determination** for PA clients. If the Worker attempts to select "Yes" in the PRUCOL MA window, the following error message will appear:

"This alien type is only applicable for immigrants eligible for Medicaid only. If this individual is PRUCOL immigrant, return to the Alien Type Determination Script - PRUCOL (PA) window and select 'Yes' in that window."

POS will change the answer in the PRUCOL MA window to "No" and will return the Worker to the PRUCOL PA window when s/he clicks "OK" on the message box.

17. Messages and Action Codes to NYCWAY in Disposition/Withdrawal window

New messages will appear when the Worker clicks "Next" on the **Disposition/Withdrawal** window in the **Application Interview**.

Case is not exempt

When the case is not exempt from employment, the following message will appear: "This case is not exempt for Employment. An Employment Plan is required. POS will initiate an Employment Plan once the Interview is completed"

HASA Case

When the case is a HASA case, the following message will appear: "This case is a HASA case. An Employment Plan is not required." POS will then post Action Code **905B** to NYCWAY. POS will not launch the Employment Plan.

Payee Case

When the case is a payee case, the following message will appear: "This case is a Payee case. An Employment Plan is not required." POS will not launch the Employment Plan.

Homebound Casehead

When the casehead is homebound, the following message will appear: "This case is a Homebound Casehead case. An Employment Plan is not required." POS will not launch the Employment Plan. POS sends the individual homebound data to NYCWAY for individuals who submitted documentation to support a homebound status when the POS activity is suspended or completed.

One Shot Deal

If the case is a One Shot Deal case (EAA, EAF or E-SN), the following message will appear: "This case is a One Shot Deal case. An Employment Plan is not required." POS will then post Action Code **005N** to NYCWAY. POS will not launch the Employment Plan.

CILOPA

When the case is applying for Child Care in Lieu of PA (CILOPA), the following message will appear: "This case is a Child Care in Lieu of PA case. A Special Employment Plan is required. POS will initiate an Employment Plan once the Interview is completed." POS will then post Action Code **918L** to NYCWAY.

POS Release Notes

Version 11.2, June 18, 2007

Withdrawal

When the applicant is withdrawing their application, the following message will appear: "Client is withdrawing from the Application for Ongoing Assistance, an Employment Plan is not required." POS will not launch the Employment Plan.

Withdrawal of One Shot Deal Application, Continue Application for Ongoing PA

If the applicant withdraws their One Shot Deal application, but continues with an application for ongoing PA, the following message will appear: "Client is withdrawing from the 'One Shot deal' and continuing with an Application for Ongoing Assistance. An Employment Plan is required. POS will initiate an Employment Plan once the Interview is completed."

Withdrawal of CILOPA Application, Continue Application for Ongoing PA

If the applicant withdraws their CILOPA application, but continues with an application for ongoing PA, the following message will appear: "Client is withdrawing from the 'CILOPA' and continuing with an Application for Ongoing Assistance. An adequate Employment Plan is required. POS will initiate an Employment Plan once the Interview is completed." POS will then post Action Code 918D to NYCWAY.

Withdrawal of One Shot Deal Application, Will Not Continue Application for Ongoing PA

If the applicant withdraws their One Shot Deal application, but continues with an application for ongoing PA, the following message will appear: "Client is withdrawing from the 'One Shot deal' and does not wish to continue with an Application for Ongoing Assistance. No Employment Plan is required."

Withdrawal of CILOPA Application, Will Not Continue Application for Ongoing PA

If the applicant withdraws their CILOPA application, but continues with an application for ongoing PA, the following message will appear: "Client is withdrawing from the 'CILOPA' and does not wish to continue with an Application for Ongoing Assistance. No Employment Plan is required."

18. Changes to POS Enrollment table

Change to column order

The order of the POS enrollment window columns will be updated to display the **Title** and **Group** columns together. The columns in the window will now appear in the following order:

- Pers ID, Center, Task, Supervisor, First Name, Last Name, MI, Title, Phone, Floor, Group, Worker

Change to Group list when a title of Auditor is selected

When the title of **Auditor** is selected, the list of available groups will be retrieved from a central POS table maintained by the POS Help Desk, ensuring that a proper group is selected for the auditor.

New option in Personnel Tasks window

A new option will be added in the Personnel Tasks window:

- Mass Caseloading

Only staff with this designation will be able to use this new activity.

POS Release Notes

Version 11.2, June 18, 2007

Revised Enrollment window

Enrollment Window: Active Workers.

File Edit Popup Status

Pers ID	Center	Task	Supervisor	First Name	Last Name	MI	Title	Phone	Floor	Group	Worker
ORR330	F23							()			
ANG903	F23							()			
FPOS01	F23		FPOS01	Olga	Batov		65	(718) 510 0392	17th	FS	FPOS1
712886	F23		712886	Jose	Breton		64	(718) 510 8589	16	1	00900
FPOS03	F23		FPOS03	Larry	Brown		65	(718) 510 0371	17th	DEV	FPOS3
907A06	F23		907A06	Sheree	Clement		7	()	16	DEV	POSDC
68C685	F23		68C685	Sandra	Hilton		7	(718) 510 0581	16	FS	SHPOS
ROW634	F23		FPOS01	Trial	Name		63	(718) 220 2222	2	FS	000TN
JJOG430	F23		JJOG430	Augustine	Ojogwu		21	(718) 510 8375	17th	DEV	DEV
FPOS05	F23		FPOS05	Augustine	Ojogwu		65	(718) 510 8375	17th	FS	FPOS5
68C771	F23		907A12	Sandeep	Pawar		7	()		DEV	POSD1
FPOS04	F23		FPOS04	Madhu	Rangaiah		65	(718) 510 0564	17th	FS	FPOS4
FPOS07	F23		FPOS07	Margarita	Romano		65	(718) 510 8233		FS	FPOS7
FPOS02	F23		FPOS02	Mamtha	Sirinivasan		62	(718) 510 0274	17th	FS	FPOS2
FPOS06	F23		FPOS06	Lynn	Wilson		65	(718) 510 0376	17th	FS	FPOS6

19. Changes to Property Equipment and Household Item Repair window

Two new fields will be added to the Response to Question window for 'Property Equipment and Household Item Repair' to track whether the repair is heat related and the type of heating equipment:

- Is this is a Heat Related Repair?
- Type of Heating Equipment

The question "Is this is a Heat Related Repair?" will help determine whether the grant request should be forwarded to the Utility Liaison for review. The field "Type of Heating Equipment" will be enabled when the Worker clicks "Yes" for the question "Is this is a Heat Related Repair?"

Response to Question

Type of Repair Property Equipment Household Item

Is a this a Heat Related Repair? Yes No

Type of Heating Equipment

Reason Essential to Health Welfare Needed to Maintain Income

Detail

Client Owned Yes No

Repair Covered in Lease Yes No

Landlord Contact Result

Estimates Rcv'd Yes No

Service Ref Made Yes No

Service Recom. Ready Yes... No

Contractor name Address Phone

Licensed Yes No

License No

Document... Scan

Comment...

OK Cancel

POS Release Notes

Version 11.2, June 18, 2007

20. Default Undomiciled Residential and Mailing Addresses

Changes to WMS Address Check window in Application Intake and Application Modification

Two new questions will be added in the **WMS Address Check** window in the **Application Intake** and **Application Modification** activities.

New question: Is the applicant undomiciled?

If the Worker clicks No for the question “Is the applicant undomiciled?” POS will continue to require an entry by the Worker in the residential address fields. If the Worker clicks “Yes” for the question, POS will:

- Preset the residential address fields to the default undomiciled address
 - House Number: 99
 - Street Name: Undomiciled
 - City: City of Job Center
 - State: NY
 - Zip Code: Zip Code of Job Center

New question: Does the applicant have a mailing address?

If the Worker clicks “Yes” for the question “Does the applicant have a mailing address?” POS will require an entry by the Worker in the mailing address fields. If the Worker clicks “No” for the question, POS will preset the mailing address to the default GPO mailing address for the borough of the Job Center.

Revised WMS Address Check window

The screenshot shows the 'WMS Address Check' window. At the top, it displays the time '2:10:52 PM' and the date 'Tuesday, April 03, 2007'. The window has a menu bar with 'File', 'Edit', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains several sections:

- Residential Address:** Includes a question 'Is the applicant undomiciled?' with radio buttons for 'Yes' (selected) and 'No'. Below this are fields for House No. (800), Street Dir/Name/Type (JOHN), Junction, Apt., City (BROOKLYN), State (NY), and Zip Code (11206 0000).
- Mailing Address:** Includes a question 'Does the applicant have a mailing address?' with radio buttons for 'Yes' and 'No'. Below this are fields for Care Of, Alternate Phone, Contact Person, House No., Street Dir/Name/Type, Apt., City, State, and Zip Code (00000 0000).
- Authorized Representative:** Includes fields for Name, Alternate Phone, Contact Person, House No., Street Dir/Name/Type, Apt., City, State, Zip Code (00000 0000), and Phone Number.

Below the form fields, there is a button labeled 'WMS Address Check' and a link that says 'Highlight All Cases Listed Below Whose Household Members Currently Live With The Applicant'. Underneath is a table with the following data:

Case Number	Suffix	Case Name	Apt No	Center	MA Resp	Case Type	PA Status	MA Status	FS Status	Closing Date	Mail Addr Ind
010001736H	01	FONDA JANE		F23		FS	NA	NA	AP		N

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

POS Release Notes

Version 11.2, June 18, 2007

Changes to Address Information window in Application Interview, Change Case Data and Recertification Interview

Two new questions will be added in the **Address Information** window in the **Application Interview**, **Change Case Data** and **Recertification Interview** activities.

New question: Is the applicant/participant undomiciled?

If the Worker clicks No for the question “Is the applicant/participant undomiciled?” POS will continue to require an entry by the Worker in the residential address fields. If the Worker clicks “Yes” for the question, POS will:

- Preset the residential address fields to the default undomiciled address
 - House Number: 99
 - Street Name: Undomiciled
 - City: City of Job Center
 - State: NY
 - Zip Code: Zip Code of Job Center

New question: Does the applicant/participant have a mailing address?

This new question will be enabled when the Worker clicks Yes for the question “Is the applicant/participant undomiciled?” If the Worker clicks “Yes” for the question “Does the applicant have a mailing address?” POS will require an entry by the Worker in the mailing address fields. If the Worker clicks “No” for the question, POS will preset the mailing address to the default GPO mailing address for the borough of the Job Center.

For more details, please see Policy Bulletin [# 03-13-ELI](#) (Mailing Address for Homeless Applicants/Participants).

Revised Address Information window

POS Release Notes

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21. Changes to POS TAD Window Behavior

Updates to PA, MA and FS Suffix Status Fields

If the PA suffix is in applying (AP) status and the case is not applying for MA and FS, the MA suffix status, MA suffix status reason, FS suffix status and FS suffix status reason fields will be disabled.

The following changes will be made to the suffix status reason fields in the POS TAD window to help prevent mistaken entries:

- If the PA suffix status is not changed, the PA suffix status reason field will be disabled.
- If the MA suffix status is not changed, the MA suffix status reason field will be disabled.
- If the FS suffix status is not changed, the FS suffix status reason field will be disabled.

New MA Opening Codes

The following MA opening codes will be added to the POS TAD:

- 087, Eligible for MA for 45 days based on pregnancy
- 088, Disabled child/children receiving medical/nursing care at home
- 094, Medical need - no recent change in financial circumstances (for MA only)
- 095, Administrative (MA only)
- 753, Combined PA/MA App under review - 30 days
- 839, MA Approval on PA case

Removal of Invalid MA Opening Codes

The following invalid MA opening codes will no longer be displayed when the MA suffix status is AC (active): 114, 400, A30, A32, A36, Y42, Y43, Y46, Y47 and Y65.

22. Response window for Felon, Parole/Probation Violation and Fraud Conviction

A new **Response to Question** window will appear when the Worker clicks "Yes" for any for the following questions:

- Have you or any member of your household been convicted of making a fraudulent statement or representation of residence in order to receive Temporary (Cash) Assistance in two or more states?
- Are you or any member of your household fleeing prosecution, confinement or conviction for a felony?
- Are you or any member of your household violating probation or parole?

In this window, the Worker must indicate the household member who is a fleeing felon, is parole/probation violator or has been convicted of fraud. The Worker must also select the type of felony, the date of conviction (if applicable), the date of parole/probation (if applicable), the reason that the person is considered a parole or probation violator (if applicable), whether a referral was made to BFI and the BFI recommendation, if any.

POS Release Notes

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New Response window

If the Worker selects “None of the above” in the “Reason that person is considered a parole or probation violator” drop-down menu, a message will appear indicating that the individual is not considered a parole or probation violator. POS will close the response window and change the answer for the question to “No”.

23. Tracking Review Case and In-Center Referral activities

POS will now record Review Case and In-Center Referral activities in the case activity history.

24. Removal of FAP field from POS TAD

The FAP (Food Assistance Program) field on the POS TAD is no longer used. It will be removed from the POS TAD.

25. Bug Fix: Date Entered Country (DEC) field in Re-Open a Case

A bug in the posting of the Date Entered Country (DEC) on the TAD window in the **Re-Open a Case** activity has been fixed.

26. Change in Absent Child window

The Worker will be able to enter two absent children for the same parent in the response window for the question “Does Anyone Applying Have a Child under 18 Living Someplace Else?” in the **Absent LRR** window.

27. Removal of Income Amount Edit in Employment and Self-Employment windows

The Worker will be able to enter an amount of up to \$9,999.99 in the **Amount** field for the response windows for the questions “Is Employed?” and “Is Self-Employed?”

POS Release Notes

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28. Bug Fixes for MA Transmission for Sanctioned Lines and Back Dated Lines

POS will transmit the individual MA data to WMS for individuals who are sanctioned for PA, but activated for MA. Previously, POS did not transmit this information for individuals sanctioned for PA and the lines were not activated for MA.

When the MA individual effective date is back dated for some lines on a case and is not back dated for other lines, POS will transmit the individual MA data to WMS for all individuals, including the non-back dated lines. Previously, POS did not transmit this information for non-back dated lines and these lines were not activated for MA.

29. Changes to SSN Validation Field in Individual Detail window

The Worker will be able to update the SSN validation code in the **Individual Detail** window when the SSN validation code retrieved from WMS is A, B, C, D, E, X or if the individual is not an unborn line and has no SSN.

30. Update to POS Referrals window

The **Referrals** window will be update to remove referrals that are completed in NYCWAY:

- SACAP
- Do You Have Childcare/Homecare Services in Place?
- Employment

The **BEV** referral option will be removed for HASA cases.

31. Retrieval of OCSE Compliance Data from NYCWAY

POS will retrieve real-time OCSE compliance information from NYCWAY via an Open TI call when the **Application Interview, Change Case Data** or **Recertification Interview**. Previously, this information was obtained from a nightly file.

32. Financial Planner References

All references to **Financial Planner** in the Login Queue of the **Activities Management** window have been updated. The new labels will say **JOS/Worker**.

33. New E-Forms

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

- LDSS-3151, Food Stamp Change Report Form
- LDSS-3938, Food Stamp Application Expedited Processing Summary Sheet
- M-3g, Notice to Report to Center
- M-687m, Safety Net Assistance (SNA) Application Supplement
- M-858c, Notice of Intent to Restrict Home Energy Allowance for Family Assistance Cases
- M-858x, Notice of Intent to Recoup Utility Grant (Timely)
- W-113K, Documentation Requirements and/or Assessment Follow-Up
- 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-451, NYPD - Job Center Report/Referral
- W-582A, Family Care Assessment

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- W-648D, Income Contribution Worksheet for Families in Temporary Housing
- W-680, Request for Birth or Death Verification from Agencies Outside New York City
- W-700D, FIA School/Training Enrollment Letter
- W-700E, School Attendance Verification Letter

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.

34. Forms

New POS Forms

The following forms will be added to POS to support Policy Directive 07-12-ELI (Social Security Numbers for Noncitizens):

- Referral to Social Security Administration for SNA Noncitizens
- Referral to Social Security Administration for FA/FS Noncitizens
- EXP-83H, Declaration of Application for SSN

The following form will be added to POS to support the Policy Directive on Time Limit processing:

- LDSS-4529, Agreement to Repay Safety Net Assistance Overpayments Still Owed After Case is Closed

Updated POS Forms

The following POS forms will be updated:

- LDSS-4013A NYC, Action Taken on Your Application: Part A: Public Assistance, Food Stamp Benefits and Medical Assistance Coverage (NYC)
- LDSS-4013B NYC, Action Taken on Your Application: Part B: Public Assistance, Food Stamp Benefits and Medical Assistance Coverage (NYC)
- LDSS-3152 NYC, Action Taken on Your Food Stamp Case (NYC)
- LDSS-4530, Assignment of Wages, Salary, Commissions or Other Compensation for Services
- M-858m, Utility Arrears / Emergency Heating

Removed POS Form

The W-163A form (Agreement to Repay Safety Net Assistance Still Owed After Case is Closed) will be removed. It will be replaced by the LDSS-4529 form.

New and Updated Form Data Entry windows

Data entry windows will be added to the **Form Data Entry** window for the following forms:

- EXP-83H, Declaration of Application for Social Security Number
- W-582A, Family Care Assessment
- W-700D, FIA School/Training Enrollment Letter
- W-700E, School Verification Letter

A new checkbox (Appointment Scheduled) will be added to the W-186C form data entry window to match updates to the form.

POS Release Notes

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New W-147 Landlord Language Pop-Up

When the Worker prints the W-147 form (Letter to Landlord), a pop-up window will ask for the language of the landlord. Two languages are available: English and Spanish.

For additional information on E-Forms, POS forms, previewing forms and capturing signatures, please see **Appendix E (POS Forms)** at the end of this document.

POS Release Notes: Appendix A

Version 11.2, June 18, 2007

Food Stamp Separate Determination through POS, Phase I

In Phase I of Food Stamp Separate Determination through POS, the **Eligibility Determination** window and the **Application Interview** activity flow will be updated to allow Workers to complete the current 2-day action to deny Public Assistance (PA) and accept Food Stamps (FS) by creating a separate NPA FS case in one day using POS. This functionality will be available for cases where the decision for PA and FS is being made at the same time.

Eligibility Determination window

The **Eligibility Determination** window will only appear for cases for which the PA suffix is in applying (AP) or single issue (SI) status and for which 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 MA AP FS AP PA APPLYING MA APPLYING FS ACTIVE Delink MA from PA?

Individual Level Name Payee Payee DOB 01/01/1982

Current Status PA AP MA AP FS AP PA APPLYING MA APPLYING FS **8** ACTIVE Deny No

Comments

Next Previous

7 new fields will be added to the **Eligibility Determination** window:

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

POS Release Notes: Appendix A

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In the window, the Worker will indicate the final PA and FS decisions. For cases that will be denied for PA and accepted for FS, the Worker will enter the PA denial reason and the FS acceptance reason.

If the PA status will be denied and the Worker selects a reason that does not require FS Separate Determination, POS will display 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) will be 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) will be preset to 'Active' for each individual on the case and the fields will be 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) will only be enabled when **Final PA Determination** (Field 1) has a value of 'Deny'.

The **FS Status** field (Field 6) will be 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 will process and authorize the budget for the Food Stamp acceptance and will submit the case to the Supervisor. The Supervisor will process the acceptance of the FS case. POS will then automatically handle the PA denial transaction one day after the FS acceptance transaction is processed by WMS.

FS acceptance for PA case is applying status

If the PA suffix is in applying status and the case will be accepted for Food Stamps, a FS-only budget must be calculated in WMS for the case. POS will display the following message (with Yes and No buttons) when the Worker clicks "Next" on the **Eligibility Determination** window:

"The case scenario requires a FS Only budget- Option 3 on the WMS budget screen and POS cannot calculate a FS Only budget. You need to calculate a FS Only budget manually in WMS using the PA case number then enter the budget number on the Budget Number Window in POS. Do you want to go to WMS now to calculate a budget?"

When the Worker clicks "Yes", POS will launch WMS to allow the Worker to calculate the FS-Only budget. Upon saving the budget, the Worker must return to POS. The **Budget Number** window will appear. The Worker must enter (type) the WMS budget number in the **New Value** field.

Following the **Budget Number** 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.

POS Release Notes: Appendix A

Version 11.2, June 18, 2007

Budget Number window

Version 11.2 - Paperless Office System - [Tad Suffix Elements Window] 12:58:17 PM Monday, June 11, 2007

File Edit Tools Window Help

Instruction
Please review and update the following critical TAD data elements for the suffix. Items with orange background are required.

Suffix	Category	Suffix PA Status	Suffix MA Status	Suffix FS Status
1	from SNCA to SNCA	from AP to RJ	from AP to RJ	from AP to AC

WMS Budget No.

FS acceptance for PA case in single issuance status

Following the **Eligibility Determination** window, the Worker will process and authorize the PA/FS budget using the **Existing Budgets** window. The latest interview data will pre-fill the new 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.

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 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.

POS Release Notes: Appendix A

Version 11.2, June 18, 2007

2nd Day Action by POS for PA 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 PA denial transaction to WMS one day after the FS acceptance transaction is processed by WMS.

An Error Correction activity will be scheduled for the Worker if the first day transaction errored out in WMS. In that case, the second day transaction will not be posted automatically by POS. The worker will have to complete a TAD action through the Change Case Data activity to deny the PA suffix with a FS Separate Determination code and close the FS suffix with an appropriate code.

POS Release Notes: Appendix B

Version 11.2, June 18, 2007

Mass Caseloading, Phase I

New functionality in POS will allow authorized users to change the caseload designation for multiple cases at the same time. The **Mass Caseloading** tool will retrieve applying, single issue and active PA cases from the WMS Extract file, which includes caseload information as of the previous night. The cases will be shown by caseload and the authorized user will be able to move cases from their existing caseload to a new caseload. After the changes are made, POS will schedule a WMS transaction for each case to update the caseload indicator in WMS overnight.

Access

To access the **Mass Caseloading** tool in a Job Center, the FIA staff person must be marked as a **Mass Caseloading User** in the **Personnel Tasks** window in POS Enrollment and be enrolled in one of the following titles:

- Director
- Administrative Assistant
- Office Manager
- Supervisor
- Assistant Office Manager
- Error Correction Supervisor
- AJOSI
- AJOSII
- Admin JOSI
- Admin JOSII

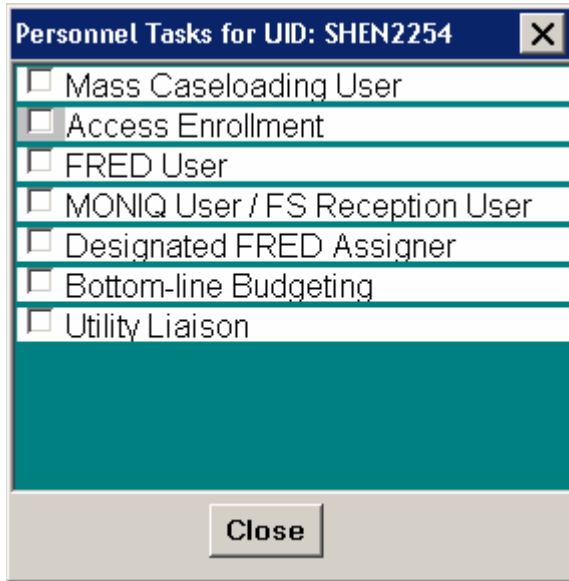
To access the **Mass Caseloading** tool in a HASA Center, the HASA staff person must be marked as a **Mass Caseloading User** in the **Personnel Tasks** window in POS Enrollment and be enrolled in one of the following titles:

- Director
- Administrative Assistant
- Office Manager
- Supervisor
- Assistant Office Manager
- Error Correction Supervisor
- AJOSI
- AJOSII
- Admin JOSI
- Admin JOSII
- HASA FH&C Director
- HASA FH&C Supervisor

POS Release Notes: Appendix B

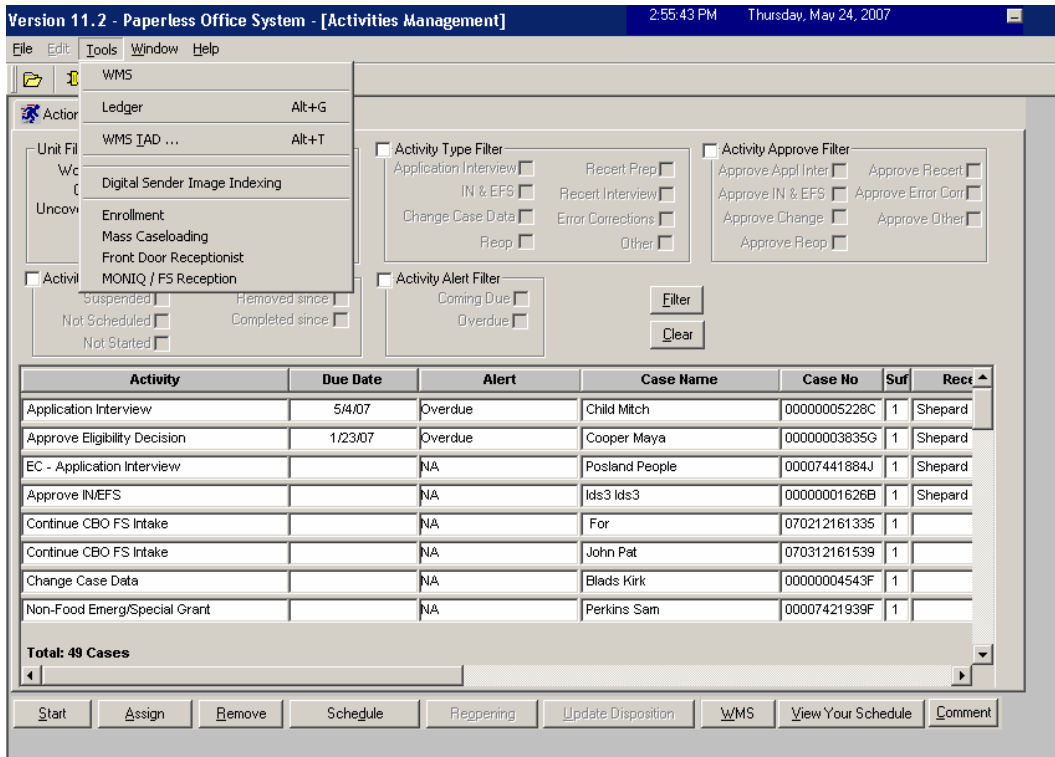
Version 11.2, June 18, 2007

Personnel Tasks window



The **Mass Caseloading** tool will be available through an option in the **Tools** menu on the **Activities Management** window.

Activities Management window

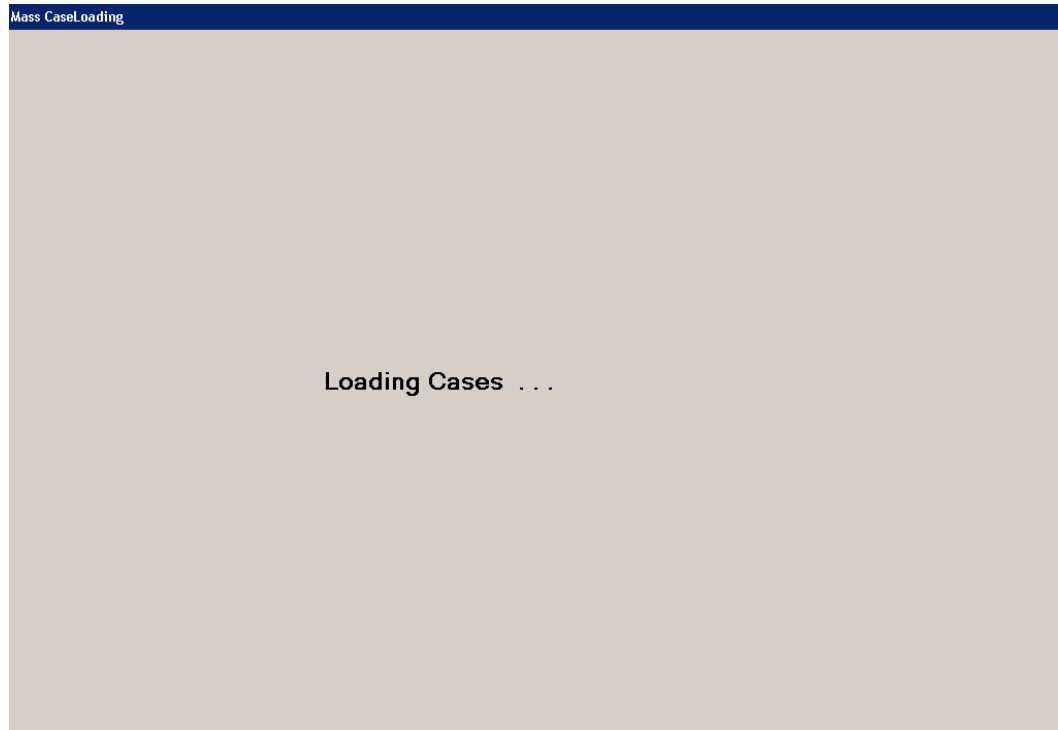


POS Release Notes: Appendix B

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Loading of Cases

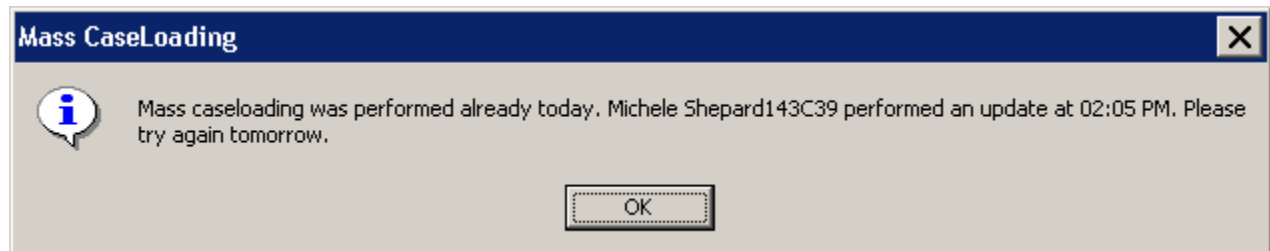
When the Mass Caseloading tool is accessed, the cases will be retrieved from the WMS Extract file. The time that it takes to load the cases will vary according to the size of the center. A window will appear with the following message:



The staff person can continue work in other section of POS by clicking on the bottom tool bar:



In Phase I, the Mass Caseloading tool will be accessible once per day at each center. If the tool was previously accessed, an error message will appear informing the staff person to try again tomorrow. In Phase II, which will be done in a future POS release, the center staff will be able to use this tool multiple times on the same day.



POS Release Notes: Appendix B

Version 11.2, June 18, 2007

Change Caseload window

The main window in the **Mass Caseloading** tool is the **Change Caseload** window. This window will allow the Worker to view all POS caseloads for the center on the left-hand side of the window. The right-hand side of the window will list the cases for the selected caseload.

Updating the caseload

To update the caseload, the staff person must click on the case row in the **Cases in Selected Caseloads** section by clicking on the arrow to the left of the case number. Then, s/he must select the new caseload in the **Select new caseload** drop-down menu and click on the **Update** button. To select multiple rows, s/he must hold down the **Ctrl** key on the keyboard while clicking on each case row.

Once all required changes are made, the staff person must click on the **Transmit to WMS** button.

Adding a new caseload

To add a new caseload, the Worker must type the five character caseload in the **Add new caseload** text box and click on the **Add** button.

Change Caseload window

Mass Caseloading [Change Caseload]

This window will allow you to change the caseload for POS cases. The left-hand side of the window lists the current valid POS caseloads for the center. The right-hand side of the window lists the cases for the selected caseload. The changes will be transmitted to WMS from the **Confirmation** window.

Updating the caseload
To move a case from one caseload to another, click on the case row. To select multiple rows, hold down the Ctrl button on the keyboard while clicking. Then, select the new caseload and click on the **Update** button.
To save the changes made and transmit them to WMS, click on the **Transmit to WMS** button.

Caseloads			
Caseload	Worker	WMS ID	Total Cases
0203			1
000			1
0000			2
00000		907A65	59
00010	Testfour, M	000A04	86
00011	Elkordy, S	139G39	205
00012	Testfive, M	119E10	178
00013	Tessix, M	139D27	155
00014			179
00015			194
00021			7
00022			9
.....			-

Cases in Selected Caseload		
Case Number	Case Name	Language Spoken
00003588268H	Colon Daisy	English

Select new caseload: 000

Adding a new caseload
To add a new caseload, type the new five character caseload below and click on the **Add** button.

Add new caseload:

Save changes or exit the window
To save the changes, click on the **Transmit to WMS** button below. To undo all changes made, click on the **Cancel Changes** button. To exit this window, click on the **Exit** button.

Window edits

The following edits will be in effect in the window:

- FIA staff will only be able to move cases out of and into reserved caseloads if the center is authorized to handle the caseload.
- FIA staff will not be able to move cases into a HASA caseload.
- HASA staff will only be able to move cases from one HASA caseload to another.

POS Release Notes: Appendix B

Version 11.2, June 18, 2007

When the staff person clicks on the **Transmit to WMS** button on the **Change Caseload** window, POS will check whether there is a pending Recertification activity (preparation or interview) for the case or whether the **Next Recert Date** is in the current or next month. If any such cases are found, the **Upcoming Recertification** window will appear. If no cases due for recertification are found, the **Confirmation** window will appear.

Upcoming Recertification window

The **Upcoming Recertification** window will list cases with pending or upcoming recertifications. To remove these cases from the list of caseload changes, the Worker must select the case row and click on the **Remove Cases from List** button. Clicking on this button will cancel the change to the selected case's caseload.

To proceed, the staff person must click the **Continue** button.

Mass CaseLoading [Upcoming Recertification]

The 1 case(s) listed below have a pending **Recertification** activity or are due for **Recertification** within the current or next month. Click the **Continue** button to continue with the changes. To remove cases from the list, highlight them and click the **Remove Cases from List** button.

Cases with pending Recertification						
Case Number	Case Name	Language Spoken	New Caseload	Worker	WMS ID	Next Recert Date
▶ 00003588268H	Colon Daisy	English	00013	Tessix, M	139D27	5/16/2007

Continue Remove Cases from List Cancel

POS Release Notes: Appendix B

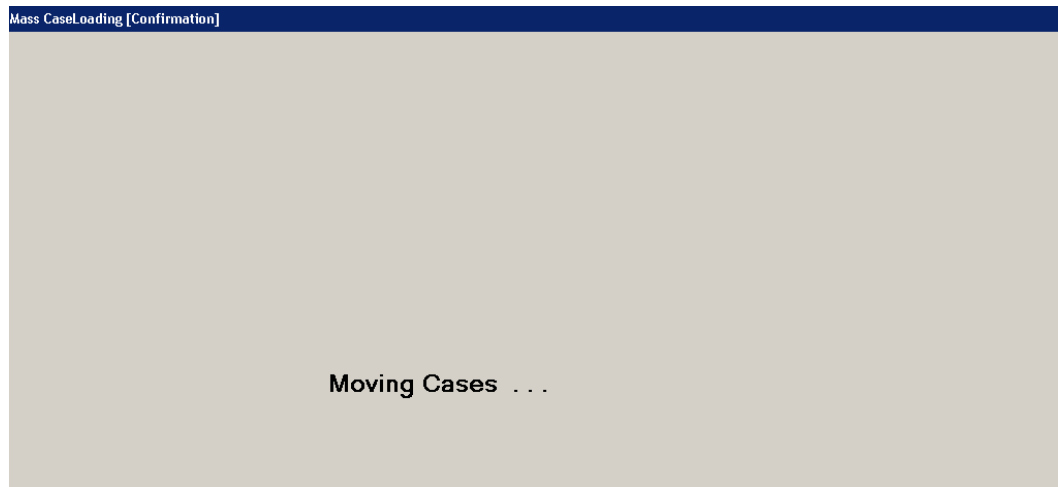
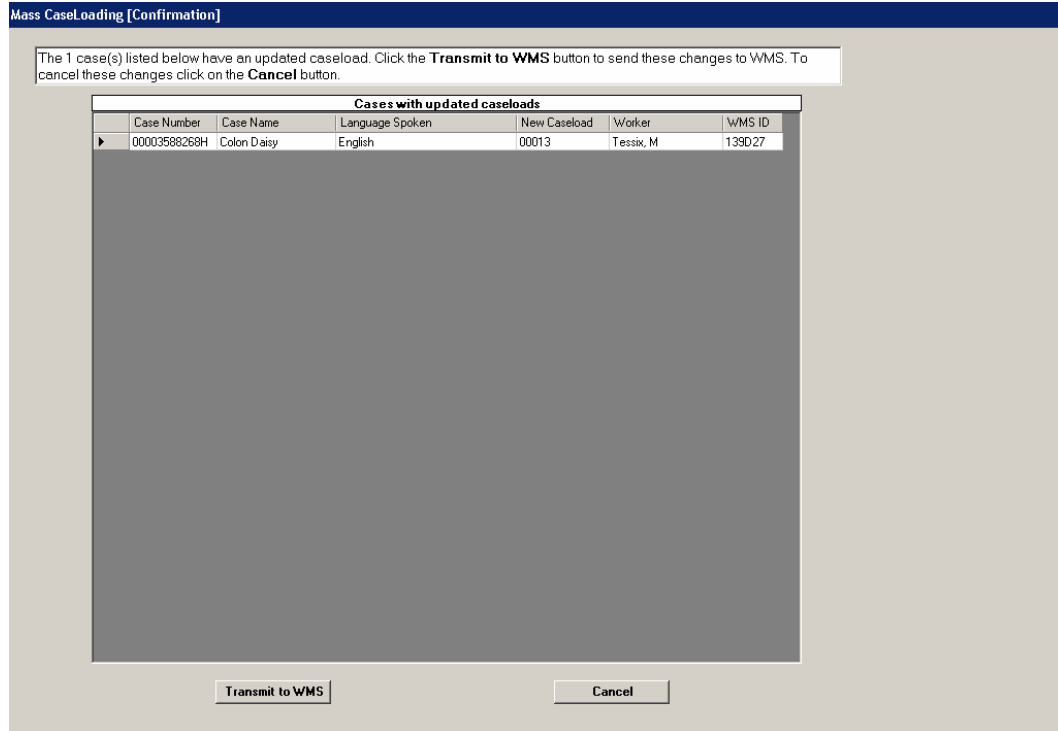
Version 11.2, June 18, 2007

Confirmation window

The **Confirmation** window will list the cases with an updated caseload. To send the changes to WMS, the person must click on the **Transmit to WMS** button.

Please note that all pending case actions will be moved from the queue of the previous worker into the queue of the new selected Worker.

POS will schedule transactions to update the caseload in WMS for each case. These transactions will be automatically posted by POS and will be processed overnight.



POS Release Notes: Appendix C

Version 11.2, June 18, 2007

Changes to Rent, Mortgage or Shelter Expense window

The Response to Question window for the question "Do You (or Anyone Who Lives with You) Have a Rent Mortgage or Other Shelter Expense?" on the **Shelter (Housing) Expenses** window will be updated to improve the accuracy of the data collected in the window and add new enhancements.

Shelter (Housing) Expenses window

Version 11.2 - Paperless Office System - [SHELTER (HOUSING) EXPENSES] 6:22:33 PM Thursday, May 24, 2007

File Edit Tools Window Help

	Yes	No
Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses?	<input checked="" type="radio"/>	<input type="radio"/>
Do You (Or Anyone Who Lives With You) Have A Heat Bill Separate From Your Rent Or Shelter Expense?	<input type="radio"/>	<input checked="" type="radio"/>
Do You (Or Anyone Who Lives With You) Have An Electricity And/Or Gas Bill Separate From Your Rent Or Mortgage?	<input type="radio"/>	<input checked="" type="radio"/>
Do You (Or Anyone Who Lives With You) Have Air Conditioning Bill Separate From Your Rent Or Mortgage?	<input type="radio"/>	<input checked="" type="radio"/>
Do You (Or Anyone Who Lives With You) Have Other Utilities (Water, ETC.) Bill Separate From Your Rent Or Mortgage?	<input type="radio"/>	<input checked="" type="radio"/>
Does Any Person, Group Or Organization Outside The Household Pay Any Of The Household Expenses?	<input type="radio"/>	<input checked="" type="radio"/>
Does Any Person Living In The Household Who Is Not Applying, Pay Any Of Your Household Expenses?		
Are There Rent Arrears?	<input type="radio"/>	<input checked="" type="radio"/>
Do You (Or Anyone Who Lives With You) Have Utility/Telephone Installation Fees Separate From Your Rent Or Mortgage?	<input type="radio"/>	<input checked="" type="radio"/>
Did The Household Receive A HEAP Payment For The Current (HEAP) Program Year or are They Anticipating Receiving a HEAP Payment?	<input type="radio"/>	<input checked="" type="radio"/>

Spanish Next Previous

POS Release Notes: Appendix C

Version 11.2, June 18, 2007

Changes to Shelter Type drop-down menu

When the Worker clicks “Yes” for the question “Do You (or Anyone Who Lives with You) Have a Rent Mortgage or Other Shelter Expense?” a Response to Question window is displayed. The first field in the question is the **Shelter Type** drop-down menu.

When the window is opened for the first time in the **Application Interview** or **Recertification Interview** activity, the **Shelter Type** field will be enabled. The Worker must select the shelter type for the household from the list shown in the drop-down menu.

Rent/Shelter Expense window: No prior answer

Response to Question					
Shelter Information		Actual amount charged for Rent/Mortgage	Frequency	Verified	
Shelter Type	Shelter Code		M	<input type="radio"/> Yes <input type="radio"/> No	
		Rent Charged To Secondary Tenant		Frequency	
		.00			
Landlord Information			Restriction Information		
Landlord Type	SSN/Tax Number		Has The Household Requested A Rent Restriction Exemption? <input type="radio"/> Yes <input type="radio"/> No		
			Rent Restriction Type		
Name	Phone		PA Shelter Amount		
House/PO Box Number	Apt/Suite Number		Is the restriction information the Same As The Landlord Information? <input type="radio"/> Yes <input checked="" type="radio"/> No		
			Name		
Street Dir	Street Name	Street Type	House Number or PO Box		
			Apt/Suite		
City	State	Zip	Street Dir		
	New York		Street Name		
			Street Type		
			City		
			State		
			New York		
			Zip		
			Routing Number		
Excess Rent			Comment...		
Monthly Excess Rent	\$0.00				
Document...			Scan		
OK			Cancel		

POS Release Notes: Appendix C

Version 11.2, June 18, 2007

For cases where the question was previously answered, the **Shelter Type** field will be disabled. A warning message will appear:

Rent/Shelter Expense window: Shelter Type was previously selected

Response to Question

Shelter Information		Actual amount charged for Rent/Mortgage		Frequency		Verified	
Shelter Type Apt pvt house...	Shelter Code []	Change Shelter type? <input type="radio"/> Yes <input checked="" type="radio"/> No	\$400.00	M	[]	<input checked="" type="radio"/> Yes <input type="radio"/> No	[]
View or Update Details		Click on this button to view or update the details for the current shelter type.		Rent Charged To Seconadary Tenant .00		Frequency []	

Information:

The Shelter Type was previously selected for this case. To view or update the details for the existing shelter type, click on the 'View or Update Details' button.

To change the shelter type, select 'Yes' for the question 'Change shelter type?'

Changing the shelter type will delete the existing shelter information, including the rent amount, the landlord information and the rent restriction.

OK

Information	Household Requested A	<input type="radio"/> Yes <input checked="" type="radio"/> No
tion Exemption?	tion Type	Direct Involuntary (PA level)
amount		215.00
tion information the	Landlord Information?	<input checked="" type="radio"/> Yes <input type="radio"/> No
er or PO	22	Apt/Suite []
Street Name	House	Street Type Str
State	New York	Zip 11255
ber	[]	[]
Comment...		

OK Cancel

POS Release Notes: Appendix C

Version 11.2, June 18, 2007

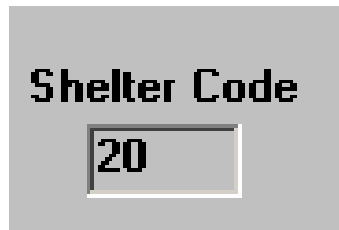
New button: View or Update Details



A new **View or Update Details** button will appear allowing the Worker to access the drill-down window to view or update the details for the current shelter type when one of the following shelter types was selected in the **Shelter Type** field:

- Congregate Care
- Apartment / Private House
- Drug/Alcohol Rehab Housing
- Section 8 Subsidized Housing
- Domestic Violence Shelter
- Public Housing
- Undomiciled
- Temporary Housing

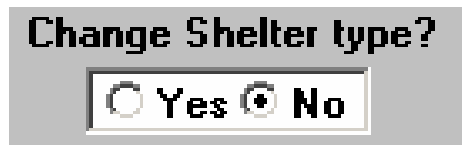
New field: Shelter Code



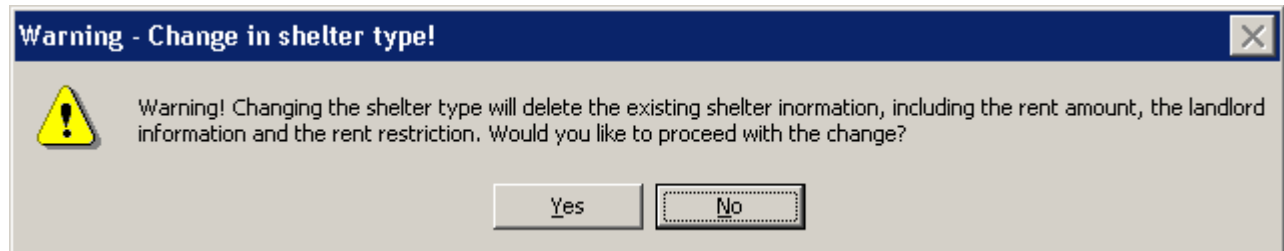
A new **Shelter Code** field will be added to show the shelter code that will be carried over to the WMS budget for the case.

When landlord information or rent restriction information is not required for the selected shelter code, POS will disable those sections in the Response to Question window.

New question: Change Shelter Type?



A new question will appear to the right of the field: "Change Shelter Type?" If the Worker clicks "Yes" for this question, a warning message will appear.



POS Release Notes: Appendix C

Version 11.2, June 18, 2007

If the Worker clicks "Yes" on the warning message, all existing shelter/housing information will be removed and the Worker will need to record the updated information for the household.

New field in Landlord Information section: Apt/Suite Number

A new field has been added to allow the Worker to enter the apartment number or suite number for the landlord.

Landlord Information		
Landlord Type	SSN/Tax Number	
Landlord		
Name	Phone	
Landlord Man	212-555-5555	
House/PO Box Number	Apt/Suite Number	
22		
Street Dir	Street Name	Street Type
	House	Str
City	State	Zip
New York	New York	11255

New field in Rent Restriction section: Apt/Suite Number

A new field has been added to allow the Worker to enter the apartment number or suite number for the rent restriction.

Restriction Information		
Has The Household Requested A Rent Restriction Exemption?		
<input type="radio"/> Yes <input checked="" type="radio"/> No		
Rent Restriction Type	Two party Involuntary (PA level)	
PA Shelter Amount	500.00	
Is the restriction information the Same As The Landlord Information?		
<input checked="" type="radio"/> Yes <input type="radio"/> No		
Name	Pat Kindly	
House Number or PO Box	199	Apt/Suite 22
Street Dir	Street Name	Street Type
West	152nd	Str
City	State	Zip
New York	New York	10036

POS Release Notes: Appendix C

Version 11.2, June 18, 2007

New question for HASA cases in Apartment/Private House Drill Down window

A new question will appear only for HASA cases in the **Apartment/Private House Drill Down** window:
“Was the case approved for enhanced rent?”

If the HASA Worker clicks “Yes” for this question, POS will prefill the **Proration Indicator** field with an “A” (Enhanced Shelter Calculation) on the **POS Budget Household** window when a new budget is calculated.

The screenshot shows a software window titled "Drill Down Window" with a blue header bar. Inside the window, there is a sub-section titled "Apartment/Pvt House" with a dashed border. This section contains six radio button options: "Unfurnished Apt/Rm" (selected), "Own Home", "Rented Pvt Home", "Jiggetts", "Furnished Apt", and "Emerg. Rental Supplement". Below these options are input fields for "Mortgage Payment Amount" (set to ".00") and "Frequency" (a dropdown menu). A question "Are Property Taxes and/or Insurance Included in Your Mortgage Payment?" is followed by "Yes" and "No" radio buttons. A separate box contains three rows of input fields: "Property Tax Amount" (.00), "Home Insurance Amount" (.00), and "Fire Insurance Amount" (.00), each with its own "Frequency" dropdown. Below this box is a "Calculate" button and a "Total Monthly Payment (Mortgage, Taxes and Insurance)" field showing ".00". At the bottom of the window, there is a question "Was the case approved for enhanced rent?" with "Yes" and "No" radio buttons. The window has "OK" and "Cancel" buttons at the bottom.

POS Release Notes: Appendix C

Version 11.2, June 18, 2007

New question in Public Housing Drill Down window

A new question will be added to the **Public Housing Drill Down** window: “Does the household pay an additional cost for use of a washer and/or dryer in their home or apartment?”

The answer to this question will be used to determine the Standard Utility Allowance (SUA) level for the case, when needed.

The screenshot shows a window titled "Drill Down Window" with a blue header bar. The main area contains a form with several fields and a new question. At the top, there are four input fields: "Public Housing Utilities" with radio buttons for "Utilities Included" and "Utilities Not Included", "Num of Bedroom" (text input), "Project Number" (text input with "enter 3 digits" below it), and "Account Number" (text input with "enter 6 digits/letters" below it). Below these fields is a new question: "Does the household pay an additional cost for use of a washer and /or dryer in their home or apartment?" with radio buttons for "Yes" and "No". Underneath the question is a "Document..." label above a text input field, and a "Scan" label above a checkbox. At the bottom of the window are "OK" and "Cancel" buttons.

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

Updates to LDSS-4013 Data Entry window

The LDSS-4013 data entry will be updated to match changes to the LDSS-4013A NYC and LDSS-4013B NYC forms.

Instructions

Instructions will appear at the top of the Response to Question window:

Instructions

- When a CNS notice cannot be sent, you must complete a LDSS-4013 A/B.
- If the case is denied using "Other" on the TAD, a reason for case denial must be entered.
- If the case is being accepted and some individual/s are being denied, enter the name in the denial section if not already entered by the system and enter a denial reason.
- If the PA case is being denied and the case has received an expedited food stamp issuance, no entry should be made in the denial section except in situations where information received such as RFI or employer's letter, etc. has shown the applicant to be ineligible.
- If more than 3 individuals are being denied as well as the case or if more than four individuals are being denied, a paper form must be used for the additional names.

A new checkbox has been added: OVERRIDE SYSTEM ENTRIES. This checkbox allows the Worker to override the entries made by the system in the data entry window.

New fields – Public Assistance section

Name and **Reason** fields have been added to the DENIED under Public Assistance in the data entry window. When an individual is denied for a program, POS will prefill the name and reason for the denial. If all individuals on the case are denied for the program for the same reason, POS will prefill the first **Name** field with the word "ALL" and will prefill the denial reason in the first **Reason** field.

Printing Additional LDSS-4013A when the PA case is accepted and more than 4 individuals are denied for PA

The revised form can display the individual information for a maximum of 4 individuals in the PA Denied section. If the PA case is accepted, but more than 4 individuals are denied for PA, POS will only prefill the **Name** and **Reason** for the first 4 denied individuals.

A second blank page with header information will be printed. The Worker will have to manually enter information for the additional denied individuals and scan the second page into the case.

Printing Additional LDSS-4013A when the PA denial reason is "Other" and more than 3 individuals are denied for PA

When all individuals on the case are denied for PA, but there are multiple reasons for the individual denials, reason code "Other" is used at the suffix level. POS will prefill the first **Name** field with the word "ALL". The Worker will need to enter the suffix level denial reason(s). POS will also prefill the **Name** and **Reason** fields for the first 3 individuals who are denied.

A second blank page with header information will be printed. The Worker will have to manually enter information for the additional denied individuals and scan the second page into the case.

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

New fields – Food Stamps section

Name and **Reason** fields have been added to the DENIED under Food Stamps in the data entry window. When an individual is denied for a program, POS will prefill the name and reason for the denial. If all individuals on the case are denied for the program for the same reason, POS will prefill the first **Name** field with the word “ALL” and will prefill the denial reason in the first **Reason** field.

The “**Other**” section will be prefilled with the correct text when expedited food stamps have been issued and the FS case is closed.

Printing Additional Form LDSS-4013B when the case is accepted and more than 4 individuals are denied

The revised form can display the individual information for a maximum of 4 individuals in the FS Denied section. If the FS case is accepted, but more than 4 individuals are denied for FS, POS will only prefill the **Name** and **Reason** for the first 4 denied individuals.

A second blank page with header information will be printed. The Worker will have to manually enter information for the additional denied individuals and scan the second page into the case.

Printing Additional Form LDSS-4013B when the FS denial reason is “Other” and more than 3 individuals are denied

When all individuals on the case are denied for FS, but there are multiple reasons for the individual denials, reason code “Other” is used at the suffix level. POS will prefill the first **Name** field with the word “ALL”. The Worker will need to enter the suffix level denial reason(s). POS will also prefill the **Name** and **Reason** fields for the first 3 individuals who are denied.

A second blank page with header information will be printed. The Worker will have to manually enter information for the additional denied individuals and scan the second page into the case.

New edits

The following edits will be added to the window:

- A new edit will warn the Worker that the entries in the data entry window will not be saved if s/he clicks the Cancel button on the Response to Question window.
- If an individual's name is listed in the denial section, an entry will be required in the denial reason field.

Regulations sections

The **Regulations** sections will be prefilled by POS based on selected status reason(s). However, when the selected status reason is “Other”, POS will not prefill the regulations sections. The Worker must type or select the proper regulation(s) in the combo box.

Change to Form Suppression

The LDSS-4013 will no longer be suppressed when FS denial code Y99 and M-3E indicator 1 or 2 are used on the POS TAD.

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

OCSE Sanction Information

POS will continue to prefill the OCSE sanction information on the LDSS-4013A when appropriate.

School Lunch Program Section

POS will continue to prefill the School Lunch information on the LDSS-4013B when appropriate.

Revised LDSS-4013 Data Entry window - Instructions

Response to Question

Instructions

- ◆ When a CNS notice cannot be sent, you must complete a LDSS-4013 A/B
- ◆ If the case is being denied using 'Dther' on the TAD, a reason for case denial must be entered.
- ◆ If the case is being accepted and some individual/s are being denied, enter the name in the denial section if not already entered by the system and enter a denial reason.
- ◆ If the PA case is being denied and the case has received expedited food stamp issuance, no entry should be made in the denial section for food stamp except in situations where information received such as RFI or employer's letter etc. has shown the applicant to be ineligible.
- ◆ If more than 3 individuals are being denied as well as the case or if more than four individuals are being denied, a paper form must be used for the additional names.

PUBLIC ASSISTANCE **OVERRIDE SYSTEM ENTRIES**

ACCEPTED for the period from to

For name(s)

You will get\$ which will cover the period from to

This amount will be available to you on After this you will get\$

The above grant is based on a reduced because:

failed without good cause to cooperate with the Office of Child Support Enforcement (OCSE) on by [18NYCRR 352.3(d)]

To lift this sanction, call

failed to comply with the following drug/alcohol treatment requirement(s) [18NYCRR 351.2(j)]

screening assesment rehabilitation

or, has not provided consent or revoked consent to disclose treatment information to the agency.

RECOUPMENT at the rate of percent (%) is being taken against your Public Assistance. The reason for this recoupment is:

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

Revised LDSS-4013 Data Entry window – Public Assistance DENIED section

Response to Question

DENIED for the following individuals:

Name	<input type="text"/>	Reason(s):	<input type="text"/>
Name	<input type="text"/>	Reason(s):	<input type="text"/>
Name:	<input type="text"/>	Reason(s):	<input type="text"/>
Name]	<input type="text"/>	Reason(s):	<input type="text"/>

The above decision(s) is based on 18 NYCRR

MEDICAL ASSISTANCE

 ACCEPTED - for Medical Assistance effective for (name(s))

ACCEPTED - for Medical Assistance with SPENDDOWN, effective for (name(s))

Your total monthly income is \$. Your total monthly deductions are \$.
 the difference between these figures is your monthly net income for Medical Assistance. This is \$.
 The allowable income standard for a family household your size is \$. The difference between your net income standard (\$) is monthly excess income (18 NYCRR 360-4-8).

DENIED - Medical Assistance effective for names because

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

Revised LDSS-4013 Data Entry window – Food Stamps DENIED section

Response to Question

DENIED for Food Stamp Benefits for the following individuals:

Name:	Reason(s):
Name:	Reason(s):
Name:	Reason(s):
Name:	Reason(s):

You did not give us the proof we need to see if you can get Food Stamp Benefits. If you give us this proof we listed above by you will not have to reapply. After that date, you will have to reapply.

OTHER because

OVERPAYMENT INFORMATION (check all that apply)

- We are establishing a Food Stamp Benefits overpayment because you or your household got more in Food Stamp Benefits than you should have. See the Demand Letter (and also, if your case is closing, the Repayment Agreement) for more information on this overpayment. This decision is based on 18 NYCRR 387.19.
- You currently have a Food Stamp Benefits overpayment. If your case is closing, see the Demand Letter and Repayment Agreement for more information on the amount you owe and how you will repay this overpayment.
- The benefit in Section 3 above reflects a % reduction (recoupment) of \$ in your benefits in order to repay your overpayment. This decision is based on 18 NYCRR 387.19.
- The benefit in Section 4 above reflects a % reduction (recoupment) of \$ in your benefits in order to repay your overpayment. This decision is based on 18 NYCRR 387.19.

The above decision(s) based on 18 NYCRR

National School Lunch/Breakfast Program: The children listed below are approved to receive free lunch and/or breakfast if he or she is

New warning when Cancel is clicked

Any data you entered will not be saved if you click the cancel button.
✕

If you want to save your change, please click 'Yes' to this message and click the 'OK' button in the main window. If you want to exit the window without saving your change(s), click 'No'

POS Release Notes: Appendix D

Version 11.2, June 18, 2007

New LDSS-4013 Completion Edit

A new edit will help prevent the printing of incomplete eligibility notices. If CNS will not produce the eligibility notice, the LDSS-4013 notice must be printed from POS.

If the Worker has not opened the LDSS-4013 data entry window in the **Application Interview** activity, the following error message will appear when the Worker attempts to complete the activity: "You must open the LDSS 4013 Data Entry window before closing the case."

The Worker will be unable to complete the activity until the data entry window is opened and completed. Once the window is opened, windows edits will ensure the completion of required fields.

The form will continue to be available for supervisory review in the **Approve Eligibility Decision** activity. It will be printed by POS once the Supervisor approves it. The supervisor must check the form approval box in order to process the transaction to WMS.

POS Release Notes: Appendix E

Version 11.2, June 18, 2007

POS Forms and 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.

This document contains reminders on the steps to capture a signature for a POS form and the steps to capture a signature for an E-Form.

New E-Forms for PA 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:

- LDSS-3151, Food Stamp Change Report Form
- LDSS-3938, Food Stamp Application Expedited Processing Summary Sheet
- M-3g, Notice to Report to Center
- M-687m, Safety Net Assistance (SNA) Application Supplement
- M-858c, Notice of Intent to Restrict Home Energy Allowance for Family Assistance Cases
- M-858x, Notice of Intent to Recoup Utility Grant (Timely)
- W-113K, Documentation Requirements and/or Assessment Follow-Up
- 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-451, NYPD - Job Center Report/Referral
- W-582A, Family Care Assessment
- W-648D, Income Contribution Worksheet for Families in Temporary Housing
- W-680, Request for Birth or Death Verification from Agencies Outside New York City
- W-700D, FIA School/Training Enrollment Letter
- W-700E, School Attendance Verification Letter

Existing E-Forms for PA 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-2921, Statewide Common Application
- LDSS-4753, Food Stamps - Request for Contact/Missed Interview
- M-3mm, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Assistance)
- W-102, Notice To Participant Of New Worker
- W-119, Request for Contact on a Mailed or Faxed Application
- W-145, Notice Of Intent To Restrict Shelter Allowance (Timely)
- W-515X, Systematic Alien Verification for Entitlements (SAVE) Referral
- W-607A, Request for ID Card/Temporary MA Authorization/Update Existing CBIC
- W-680FF, Language Questionnaire

POS Release Notes: Appendix E

Version 11.2, June 18, 2007

Updated POS Forms

New POS Forms

The following forms will be added to POS:

- Noncitizen Referral to SSA for a Social Security Number Application (for noncitizens eligible for FA and/or FS)
- Noncitizen Referral to SSA for a Social Security Number Application (for noncitizens eligible for SNA only)
- EXP-83H, Declaration of Application for SSN
- LDSS-4529, Agreement to Repay Safety Net Assistance Overpayments Still Owed After Case is Closed

Updated POS Forms

The following POS forms will be updated:

- LDSS-4013A NYC, Action Taken on Your Application: Part A: Public Assistance, Food Stamp Benefits and Medical Assistance Coverage (NYC)
- LDSS-4013B NYC, Action Taken on Your Application: Part B: Public Assistance, Food Stamp Benefits and Medical Assistance Coverage (NYC)
- LDSS-3152 NYC, Action Taken on Your Food Stamp Case (NYC)
- LDSS-4530, Assignment of Wages, Salary, Commissions or Other Compensation for Services
- M-858m, Utility Arrears / Emergency Heating

Removed POS Form

The W-163A form (Agreement to Repay Safety Net Assistance Still Owed After Case is Closed) will be removed. It will be replaced by the LDSS-4529 form.

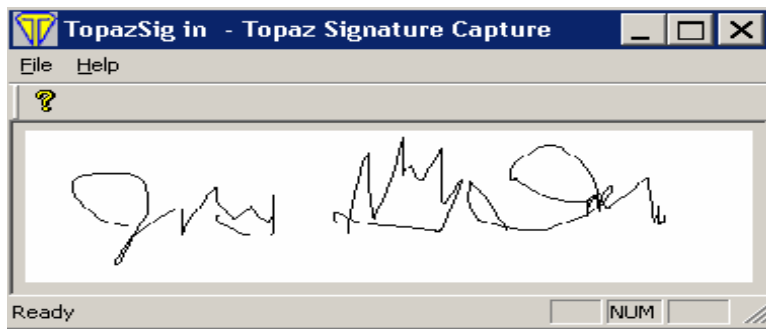
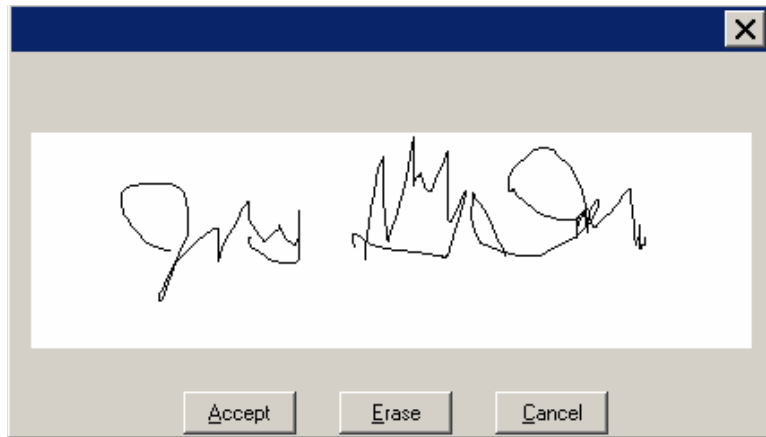
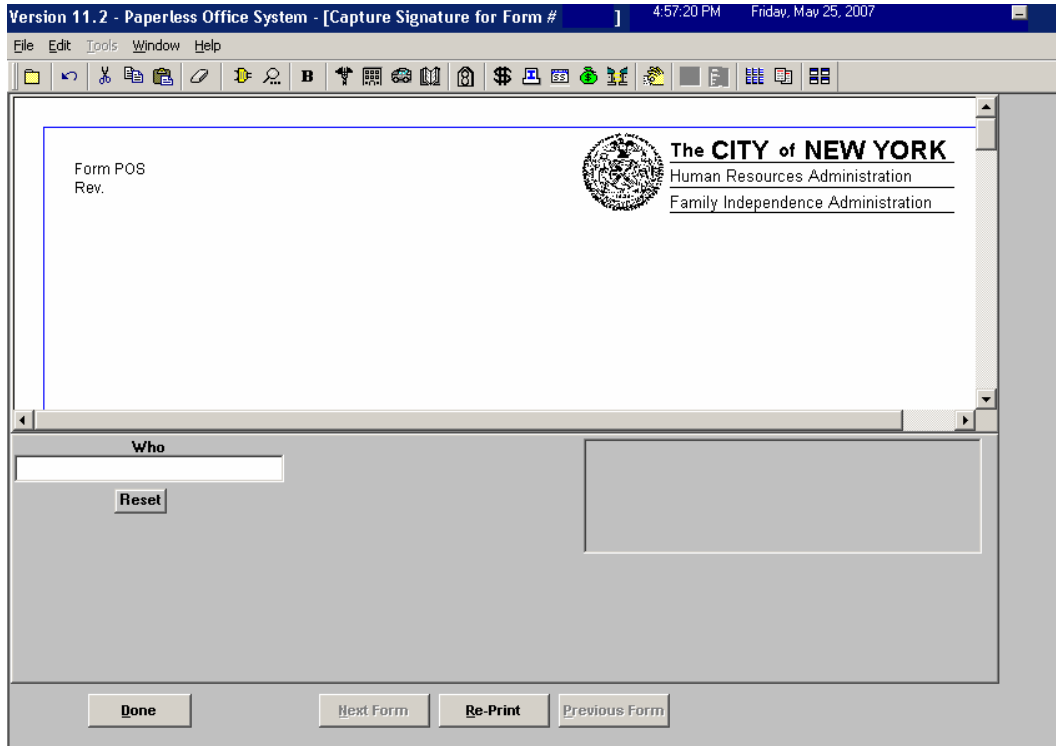
Reminder: Signature Capture for POS Forms through the Print Forms window

To capture signatures in POS, the Worker must follow these steps:

1. Select the form on the Print Forms window.
2. Click on the Print button.
3. Pick up the form from the printer.
4. Place the page with the signature space on the Topaz signature pad.
5. Click on the signature box on the POS signature capture window.
6. Ask the applicant/participant to sign using the electronic pen.
7. View the signature in the pop-up window.
8. Click Accept to save the signature
9. Close the Topaz window by clicking on the "X" in the upper right hand corner.
10. Click the **Next Form** button (if enabled) to capture the next signature or the **Done** button to close the signature capture window.

POS Release Notes: Appendix E

Version 11.2, June 18, 2007



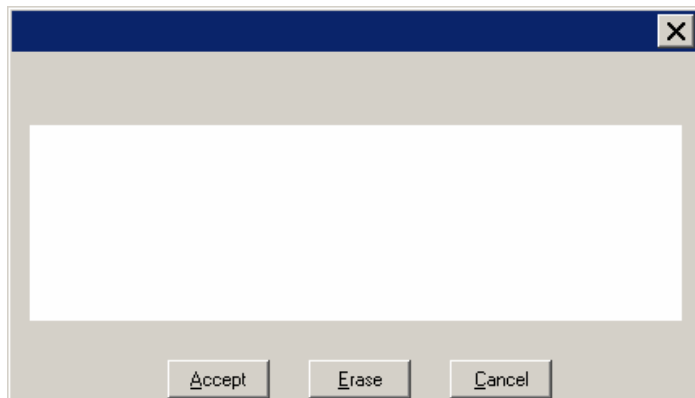
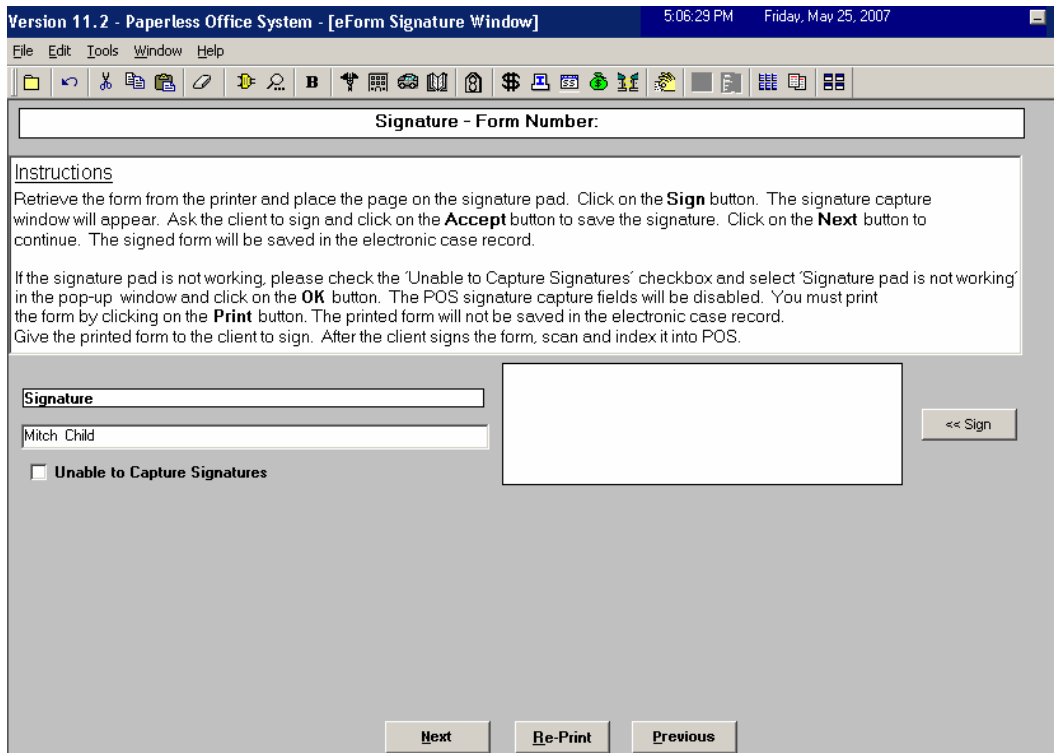
POS Release Notes: Appendix E

Version 11.2, June 18, 2007

Reminder: Signature Capture for E-Forms through the Print Forms window

To capture signatures in POS for an E-Form, the Worker must follow these steps:

1. Select the form on the Print Forms window.
2. Click on the Print button.
3. Pick up the form from the printer.
4. Place the page with the signature space on the Topaz signature pad.
5. Click on the signature box on the POS signature capture window.
6. Ask the applicant/participant to sign using the electronic pen.
7. View the signature in the pop-up window.
8. Click Accept to save the signature
9. Click the **Next** button.



Note: The signatures are not visible on the E-Form signature window once the Worker clicks the Next button. To view the signed form, go to the POS Document Browser.

POS Release Notes: Appendix E

Version 11.2, June 18, 2007

New and Updated Form Data Entry windows

EXP-83H (Declaration of Application for Social Security Number)

A data entry window will be added for the EXP-83H form.

W-700D (FIA School/Training Enrollment Letter)

A data entry window will be added for the W-700D form.

Response to Question

FIA School/Training Enrollment Letter (Form W-700D)

Who?

How much do you spend on carfare each day you attend class? \$

Do you need anything special in order to participate in your program? Yes No

If "Yes", explain special need, e.g., uniform:

Amount of special need: \$ Frequency:

I agree that any engagement expense overpayment be recovered from my public assistance grant.

I request that any engagement expense overpayment be recovered from my next or future carfare and/or

OK Cancel

W-700E (School Verification Letter)

A data entry window will be added for the W-700E form.

Response to Question

School Verification Letter (Form W-700E)

Participant Name

Child/Student's Name

NAH Liaison

OK Cancel

POS Release Notes: Appendix E

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W-582A (Family Care Assessment)

A data entry window will be added for the W-582A form.

Response to Question

Family Care Assessment (Form W-582A)

Who? [dropdown] has declared that s/he is not able to participate in an employment program activity at this time because of the need to care for a disabled/sick household member.

Patient Name [dropdown]

OK Cancel

W-186C (Fair Hearing Compliance Statement)

A new checkbox (Appointment Scheduled) will be added to the W-186C form data entry window to match updates to the form.

Response to Question

Public Assistance, Food Stamp and/or Medical Assistance

We have been unable to determine if you are eligible for the benefits that were the subject of your Fair Hearing. We mailed you a letter on [00/00/0000], asking you to bring the following to the Job Center/Brighton NPA FS Office by [00/00/0000] (date)

Appointment Scheduled

Based on the decision of your Fair Hearing, we are required to review/reevaluate your medical claim. Therefore, we made an appointment for you with our medical vendor. You will receive a notice in the mail concerning this appointment.

OK Cancel

New Landlord Language Pop-Up Window for Form W-147

When the Worker prints the W-147 form (Letter to Landlord), a pop-up window will ask for the language of the landlord. Two languages are available: English and Spanish.