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POLICY BULLETIN #08-134-SYS

CASH ASSISTANCE (CA) POS RELEASE NOTES VERSION 12.3

Date: October 21, 2008	Subtopic(s): Paperless Office System (POS)
🖥 This procedure can now be accessed on the FIAweb.	The purpose of this policy bulletin is to inform Job Center staff that the latest version of the Cash Assistance (CA) Paperless Office System (POS) migrated to production on October 20, 2008. Descriptions of the changes can be found in CA POS Release Notes Version 12.3 (**Attachment A**), or from the following link: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79 *Effective Immediately* **Attachment:**
🖥 Please use Print on Demand to obtain copies of forms.	**Attachment A** CA POS Release Notes Version 12.3

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center*

Distribution: X

POS Release Notes
Version 12.3, October 20, 2008

These Release Notes contain descriptions of changes in CA POS Release 12.3, scheduled for October 20, 2008. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes may also be found on the HRA Intranet at http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Changes to Match WMS 2008.3

The updates listed below will be made to match changes in the New York State Welfare Management System (WMS) version 2008.3.

<u>Updated Screens in Inquiry Browser in POS</u>

The following inquiry screens will be updated with the new field labeled "**FSINTW" (Food Stamp Interview):**

- **NQCS01 (Case Composition-Suffix/Individual Summary)**
- **NQCS02 (Case Composition- Suffix Summary)**
- **NQCS3A (Current Case Composition-Historical Suffix Information)**
- **NQCS3B (Case Composition-Individual Summary)**
- **NQCP01 (Pending Case Level Data)**

Please refer to **PB# 08-121-SYS** for policy details.

<u>New Employability Codes 54 and 58</u>

To meet the reporting requirements within the Temporary Assistance to Needy Families Final Rule, two new employability codes have been created:

- **54 (Parent in Receipt of SSDI/Exempt); and**
- **58 (Non-Parent Needed in the Home Full-Time to Care for an Incapacitated/disabled Household Member/Exempt)**

In addition, employability codes, 38 and 40 will be redefined as follows:

- **38 (Parent Needed in-Home full-time to care for an Incapacitated/Disabled Household Member/ Exempt)**
- **40 (Parent or Non-Parent Needed in the Home Part-time to Care for an Incapacitated/ Disabled Household Member/Non-exempt)**

<u>New Fleeing Felon Codes</u>

The **F35** (Fleeing Felon/Parole Violator [HH=1]) closing code will be replaced by the following new codes:

- **G44 (Probation Violator)**
- **G45 (Parole Violator)**
- **W35 (Fleeing Felon)**

All three codes will be valid **for case level closings/denials and line level closing/rejections for CA or FS.**

<u>CA Single Issuance over $999.99</u>

WMS will now allow and accept the entry of **issuances greater than $999.99** but **no greater than $5000.00** on each line of the single issue transaction for specific special grant codes.

<u>Procedure</u>

POS will include all new codes as outlined. For additional details, please see the Policy Directive for WMS version 2008.3 under separate cover.

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2. Food Stamp Standard Utility Allowance (SUA) and Budget Updates

The United States Department of Agriculture (USDA) has released its cost-of-living adjustments for the Food Stamp (FS) program, which became effective on October 1, 2008. This section of the release notes will explain the updates made in the Paperless Office System (POS) in accordance with the USDA updates.

<u>Standard Utility Allowance (SUA) Updates</u>

There has been an expansion of Home Energy Assistance Program (HEAP) eligible Shelter Type codes. FS households with Shelter Type codes, **02, 11, 15, 16, 24, 27, 28, 29, 30, 31, 32, 38, 40, 42, 43** and **44** that were previously ineligible for a HEAP grant will become HEAP eligible and will be issued a $1 HEAP grant if they incur a shelter expense. The issuance of a HEAP grant to these households will qualify the household for a combined heat/utility/phone SUA.

Current amounts for combined heat/utility/phone Standard Utility Allowance (SUA) ($577), combined utility/phone ($256), phone ($33) and the homeless shelter deduction ($143) will remain the same.

The EFS determination that occurs within the Application Interview, EC Application Interview, IN/EFS Issuance and IN/EC-EFS Issuance are updated to reflect the new SUA rules effective 10/A/08.

<u>Budget Updates</u>

The POS budget windows in all CA interview and change activities have been updated to reflect the revised SUA rules.

Additionally, the previous cap on dependant care deductions have been eliminated, therefore the entire household dependent care expenses are to be budgeted. The POS budget window was updated to reflect the elimination of the dependent care deduction cap.

<u>Grant Amount Updates</u>

In the POS Expedited Food Stamp (EFS) activity, the Grant Data Entry window was updated to reflect the revised FS coupon amounts, effective October 2008.

<u>Procedure</u>

Please refer to **PD# 08-36-ELI** (October 2008 Changes in Food Stamp Standards and Schedules of Food Stamp Issuance) for details.

3. Updates to Application Intake

The following updates will be made in the Application Intake activity to allow the Worker to identify applicants that cannot stay for a same day interview and applications received via the mail or fax.
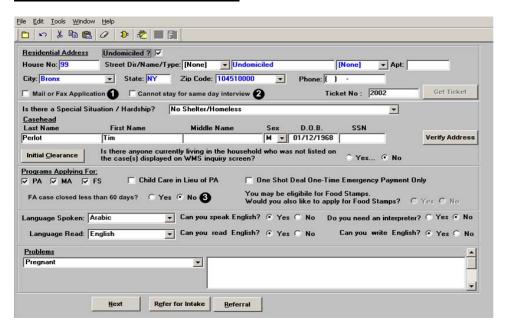
Site Determination window updates

The **Site Determination** window in the **Application Intake** activity will be updated to add two new checkboxes and update one question:

- Mail or Fax Application (new checkbox)
- Cannot stay for same day interview (new checkbox)
- The question "FA case closed less than 30 days?" will be updated to say "**FA case closed less than 60 days?**"

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Revised Site Determination window

Activity Flow Update

POS will now automatically start the **Application Interview** when the Worker clicks on the "Done" button in the **Case Login** window for same day CA interviews.

If the Worker selects the "Mail or Fax Application" checkbox or the "Cannot stay for same day interview" checkbox in the Site Determination window, POS will place an Application Interview in the Worker's queue at the end of the Application Intake, but will not start the Application Interview. The Worker can indicate the scheduled date for the interview, if available, by selecting the Application Interview in the queue and clicking on the **Schedule** button.

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4. Addition of Finger Imaging Referral – AFIS window to Application Interview

The Application Interview will be updated to add the **Finger Imaging Referral** window. The window will follow the **Activity Checklist** window, which appears after the interview section is completed.

Reminder on Form Printing

The W-519 (Finger Imaging Referral) form is completed and printed for all adults who are present at the interview.

If an adult is not present at the time of the interview and is not exempt from finger imaging, the Worker must indicate that he or she is not present on the **Finger Imaging Referral – AFIS** window. For these adults, POS will pre-fill the return appointment section on the **W-113K** (Documentation Requirements and/or Assessment Follow-up Form) to indicate that the adult must return in person to be finger imaged.
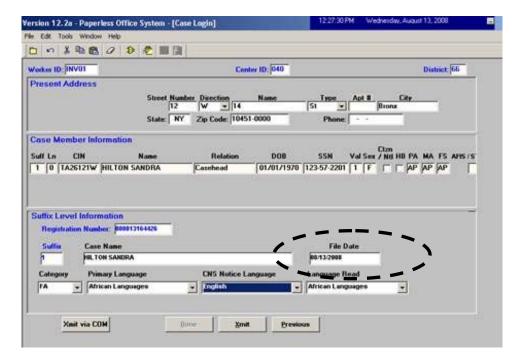
Reminder on Exemption Criteria

For adults who meet the exemption criteria (such as "payee only" applicants, homebound applicants, Congregate Care Facility residents and EAA applicants), the Worker must mark the individual as "exempt" in the Finger Imaging – AFIS window. For the full list of exemption criteria, please review the W-519 form.

5. New Case Login Window Business Rule

For applicants who are entitled to re-use their prior FS file date, POS will protect the file date field in the **Application Intake** activity.

POS will also protect the file date field in the **Application Modification** activity to help ensure that the date in POS matches the latest information from WMS.

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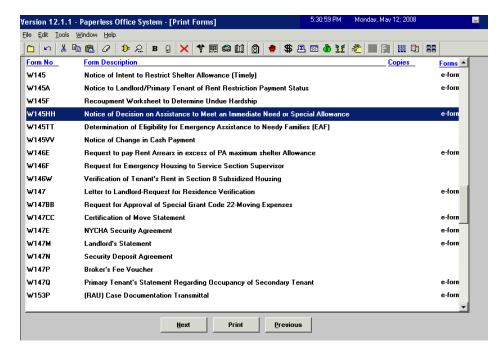
6. New Print Edits for Form W-145HH

A new edit in the **Application Interview** and **IN/EFS Issuance** activities will help ensure that the Worker completes the data entry window for the W-145HH form (Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance) when the Worker selects **No Food** in the **Problems** section of the **Site Determination** window in the **Application Intake**.

Problems section in the Site Determination Window

A new edit in the **Approve Eligibility Decision** and **Approve IN/EFS Issuance** activities will help ensure that the Supervisor prints the form for "no food" cases. Supervisors can print the W-145HH form via the Print Forms window.

Print Forms Window

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7. Fix to Application Pre-Population in POS for CA Cases

A flaw in the application pre-population implemented in the CA POS 12.2.1 release has been corrected and will now be available in the CA POS 12.3 release. This fix will help ensure the re-use of data for all cases meeting the file date re-use criteria.

Reminder: Pre-population criteria

Effective September 8, 2008, the data re-use was available for applicants who are returning for Food Stamps and are entitled to keep their prior FS file date.

For cases meeting the pre-population criteria, POS will:

- Pre-populate the individual details and documentation.
- Pre-populate the absent parent, resource, potential income, medical, other expenses and training information with the prior POS application data. The Worker will be able to edit the application information, if necessary.

The following windows are not pre-populated for PA cases:

1. CIN Re-Use
2. Case Number Re-Use
3. Alien Determination
4. Form Data Entry
5. Notice Data Entry
6. Budget
7. TAD
8. LDSS-2921 Signature Capture – New signatures are required for the CA application
9. LDSS-4013 – The eligibility notice must be processed through the Client Notice System or through the POS LDSS-4013 data entry window.

Prior POS forms and form data entry windows are available via the Review Case activity and the Printed Forms menu or within the current activity if the prior case number is re-used.
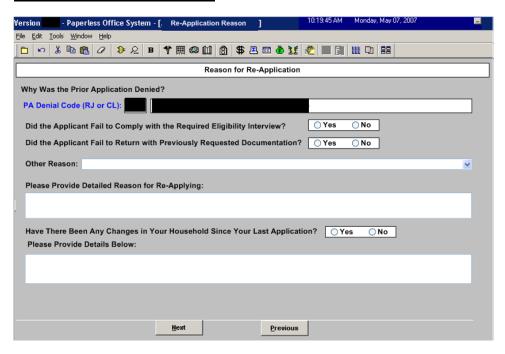
Re-Application Reason and Confirmation windows

Two windows were added to help capture the reason for the re-application and to allow the Worker to confirm whether the prior data is still valid in the income and shelter windows.

The **Re-Application Reason** window appears after the **Additional Suffix Information** window when the **Re-Use Data** is selected in the **Application Intake** activity.

This window displays the denial reason for the original application and will allow the Worker to record the reason for the re-application and whether there have been any changes in the household since the last application.

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Re-Application Reason Window

Fields in the Re-Application Reason Window:

1. Reason for Reapplication
2. Why was the Prior Application Denied?
3. PA Denial Code (RJ or CL)
4. PA Denial Code Reason
5. Did the Applicant Fail to Comply with the Required Eligibility Interview?
6. Did the Applicant Fail to Return with Previously Requested Documentation?
7. Reasons
8. Please Provide Detailed Reason for Re-Applying:
9. Have There Been Any Changes in Your Household Since Your Last Application?
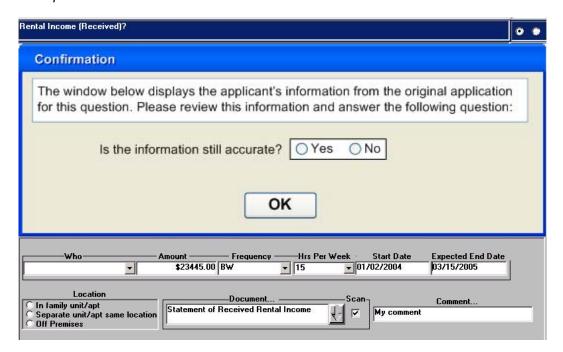10. Please Provide Details Below:

Confirmation pop-up window

POS asks the worker to verify the accuracy of the prior employment, income and shelter information in a new interface and allows the re-use of the application data, if it is accurate. The Worker can edit the application information, if necessary.

If there is data available and the Worker answers 'Yes' for this question, POS displays the **Confirmation** window and displays the old data in a read-only window below the **Confirmation** window.

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Example of Income Window with Prior Data

8. New Food Stamp Separate Determination Queue for CA Pilot Centers

A new **Food Stamp Separate Determination** queue will appear at the pilot CA centers that have access to the FS separate determination functionality. This functionality allows the pilot centers to make a decision on Non-Cash Assistance (NCA) Food Stamp (FS) cases created in applying (AP) or single issue (SI) status through the automated WMS FS Separate Determination process.

The following pilot sites will have this new queue:

- Dekalb Job Center #64
- Bushwick Model Center # 66
- Linden Model Center # 67

The new queue can be accessed by clicking on the **Worker** menu. It will be labeled **FS SEPDT** and will also include the CA center number.

9. Loading of Food Stamp Separate Determination Activities at CA Pilot Centers

POS will receive daily files from New York State that will include the cases listed on the WINRO827 report (Daily FS Pending Separate Determination) and will receive weekly files that will include the cases listed on the WINRO828 report (Weekly FS Pending Separate Determination).

The new files will allow POS to automate the assignment and selection of the cases that need a separate determination action, also allow tracking of the activity usage and will improve the efficiency of the pilot center's operations.

For cases appearing on the daily WINRO827 files, POS will load a **FS Sep Det – Elig Decision** activity in the new **FS SEPDT** queue.

POS will use the weekly WINRO828 files to determine the cases for which the FS separate determination has been completed and to automatically remove completed cases from the **FS SEPDT** queue.

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10. E-Forms

The following forms will be converted to E-Forms:

- **M-327e** (Sixty-Month Time Limit Checklist)
- **W-145VV** (Notice of Change in Cash Payment)
- **W-147N** (Security Deposit Agreement)
- **W-163** (Assignment of Security Deposit)
- **W-163D** (Acknowledgement Of Assignment of Security Deposit)
- **Non-Citizen Referral for a Social Security Number Application**(Noncitizens eligible for FA, SNFP, FS and federally-funded MA)
- **Non-Citizen Referral for a Social Security Number Application**(Noncitizens eligible for SNA [SNCA and SNNC] and state-funded MA only)

11. Reminder: AFIS Requirement for EFS Determination

In order to process EFS benefits, the applicant must, at a minimum, verify his/her identity. If identity has been verified and other eligibility factors, including AFIS, are outstanding, EFS benefits can be issued, but the status of the FS case must be Single Issue (SI).

Based on the document completeness, POS determines the status of the FS suffix as follows:

- If all eligibility factors, except AFIS, have been established the FS suffix will be SI;
- If any other eligibility factor is missing, the FS suffix will be SI;
- If all eligibility factors, including AFIS, have been established the FS suffix will be AC.