



# FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #09-78-SYS (This Policy Bulletin Replaces PB #09-73-SYS)

### FS POS RELEASE NOTES VERSION 3.2

<p><b>Date:</b> June 29, 2009</p>	<p><b>Subtopic(s):</b> FS POS</p>
<p> This procedure can now be accessed on the FIAweb.</p>	<p><b>Revisions to Original Policy Bulletin:</b></p> <p>This policy bulletin is being revised to replace <b>Attachments B and C</b> with the revised versions issued by POS.</p> <p><b>Purpose:</b></p> <p>The purpose of this policy bulletin is to inform Non Cash Assistance Food Stamp (NCA FS) Center staff that changes were made to the Food Stamp Paperless Office System (FS POS) Release 3.2. Descriptions of the changes can be found in FS POS Release Notes Version 3.2 (<b>Attachments A, B and C</b>).</p> <p>Version 3.2 and prior Release Notes can be found on the HRA Intranet at:</p> <p><a href="http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79">http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</a></p> <p><i>Effective Immediately</i></p> <p><b>Attachments:</b></p> <p><b>Attachment A</b> FS POS Release Notes Version 3.2  <b>Attachment B</b> FS POS Release Notes: Appendix A  <b>Attachment C</b> FS POS Release Notes: Appendix B</p>

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

# FS POS Release Notes

Version 3.2 June 22, 2009

These Release Notes contain descriptions of changes in FS POS Release 3.2, scheduled for June 22, 2009. 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](http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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# FS POS Release Notes

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## 1. Changes to EFS Activities with Ineligible Budgets

The EFS Issuance and EC – EFS Issuance activities have been updated to allow the Worker to indicate that an applicant is ineligible for expedited Food Stamp benefits when the WMS budget returns a result of ineligible. A new window named **WMS Budget Selection for EFS Determination** will be added to accommodate these changes.

### WMS Budget Selection for EFS Determination Window

The WMS Budget Selection for EFS Determination window will allow the Worker to select the budget that will be used in the **EFS determination**.

The window will include the following fields:

- WMS Budget for EFS Determination
- FS Budget Result
- Coupon Amount
- Outcome and Next Action

*New window: WMS Budget Selection for EFS Determination*

The **WMS Budget for EFS Determination** list will include the saved FS budgets. The **FS Budget Result** field will indicate whether the selected budget has a result of eligible or ineligible. If the result is eligible, the amount from the saved WMS budget will be displayed in the **Coupon Amount** field. The **Outcome and Next Action** field will indicate the next step that should be taken by the Worker.

### Revised Activity Flow for Cases with Ineligible Food Stamp Budget Result

If the case is initially marked as eligible for FS benefits under the expedited service criteria, but the WMS budget returns a result of ineligible, POS will:

- Reset the **EFS Eligibility Determination** to ineligible;
- Reset the FS case status to AP (applying);
- Reset the FS individual status will be reset to AP (applying) for all individuals applying for FS.

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## 2. Application Modification Changes

The **Application Modification** activity has been updated to allow the Worker to save time and increase accuracy of changes to application cases by implementing shortened flows:

- A new window named **Changes to Application Case** has been added to the beginning of the activity to ask the Worker to select the change that they want to make to the case.
- New communication with WMS will retrieve information on individuals who were previously on a case with the casehead and will be displayed in a new window named **Add individual(s) to case** in order to save data entry time. This window will allow the Worker to copy the name, sex, Social Security Number and date of birth information from WMS to POS for the individuals found on prior WMS cases.

File Edit Tools Window Help

Please select the change(s) that you would like to make to this application case and click the Next button to continue.  
If necessary, you will be able to make additional changes once the change selected below is made.

Select one of the following options:

- Address Change
- Add individual(s) to the case
- Remove individual(s) from the case
- Change household member information
- Other change(s)

Next Previous

### Address Change

When the Worker selects **Address Change** in the **Changes to Application Case** window, the following windows will appear after the **Changes to Application Case** window:

- Address
- Case Login

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## **Add individual(s) to the case**

When the Worker selects **Add individual(s) to the case** in the **Changes to Application Case** window, the following windows will appear after the **Changes to Application Case** window:

- Add individual(s) to the case
- Adults
- Children
- Food Stamp Household Composition
- Case Login

## **Remove individual(s) to the case**

When the Worker selects **Remove individual(s) to the case** in the **Changes to Application Case** window, the following windows will appear after the **Changes to Application Case** window:

- Remove individual(s) to the case
- Adults
- Children
- Food Stamp Household Composition
- Case Login

## **Change Household Member Information**

When the Worker selects **Change household member information** in the **Changes to Application Case** window, the following windows will appear after the **Changes to Application Case** window:

- Adults
- Children
- Food Stamp Household Composition
- Case Login

## **Other Changes**

When the Worker selects **Other change(s)** in the **Changes to Application Case** window, the following windows will appear after the **Changes to Application Case** window:

- Address
- Adults
- Children
- Food Stamp Household Composition
- Case Login

# FS POS Release Notes

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## New window: Add individual(s) to case

A new window named **Add individual(s) to case** will allow the Worker to add individuals to the case and will appear in the Application Intake activity after the Address window and in the Application Modification when the Worker selects **Add individual(s) to the case** in the **Changes to Application** window.

The window will have new instructions: "This window lists all individuals currently in the household and individuals found on prior WMS cases. To add an individual to the household, please click on the "Select" checkbox."

The individuals who are currently on the POS case will be listed in a new section named "Individuals currently in the household". This section will include the following information for each individual:

- Name
- SSN
- DOB
- Sex
- Relationship
- Individual Status PA/MA/FS

The individuals found on prior WMS cases will be listed in a new section named "Individuals currently in the household". This section will include the following information for each individual:

- Name, SSN, DOB, Sex, Select checkbox

To add individuals to the household, the Worker will need click on the "Select" checkboxes and click on the **Next** button.

This window lists all the individual currently in the household and individuals found on prior WMS case. To add an individual to the household, please click on the "Select" checkbox.

Individuals currently in the Household						
Name	SSN	DOB	Sex	Relationship	Ind Status PA/MA/PS	

Individuals from prior cases				
Name	SSN	DOB	Sex	Select
				<input type="checkbox"/>

# FS POS Release Notes

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## New window: Remove individual(s) from case

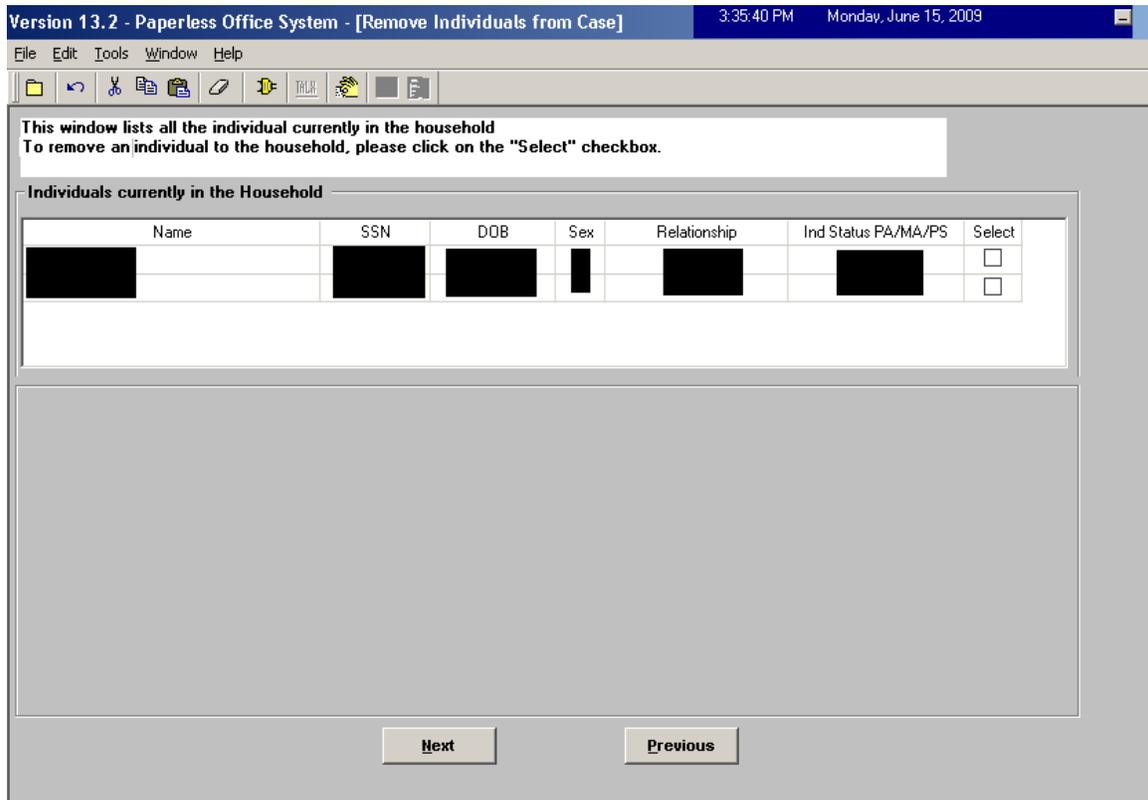
A new window named **Remove individual(s) from case** will allow the Worker to remove individuals from the case in the Application Modification.

The window will have instructions: "This window lists all individuals currently in the household and individuals found on prior WMS cases. To remove an individual from the household, please click on the "Select" checkbox."

This window will include the following information for each individual:

- Name
- SSN
- DOB
- Sex
- Relationship
- Individual Status PA/MA/FS
- Select checkbox

To remove individuals from the household, the Worker will need click on the "Select" checkboxes and click on the **Next** button.



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## 3. Change to POS Response to Question Windows

In order to allow Workers to differentiate between two individuals with the same name, the “Who” selection windows in the POS interview response windows will now include the line number and date of birth for the listed individuals.

Who	English One	Never	Start	End
1	English One			01/01/1967
2	English Two			01/28/1969
3	English Three			01/19/2007
4	English Four			07/19/2008
	ROW??? DELETE			00/00/0000

## 4. Changes to Income from Sponsor Window

The response window for the question “Is anyone in your household an immigrant who was sponsored for admission into the US” has been updated.

A new question “Is the sponsor making contributions” will be added to the window. If the Worker clicks “Yes” for this question, the following new fields will be enabled:

- Amount
- Frequency
- Start Date
- Expected End Date
- Program

Who	Income Type	Amount -Frequency	Start Date	Expected End Date
		Bv	00/00/0000	00/00/0000
Description		Program Indicator	Hrs. Worked	
Income from Trust				
<input type="radio"/> In Receipt <input type="radio"/> Not Yet Received		Expected Distribution Date: 00/00/0000		
Training Allotment				
Full Amount of Allotment or Reimbursement (monthly)		Amount to be budgeted as income		

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## 5. Case Transfer Activity

A new activity has been added to allow staff to transfer active Food Stamp cases to another office. This activity will be available to Eligibility Specialists and Supervisors. POS will prevent the transfer of cases that have an upcoming recertification interview.

This new activity is available in the Action menu and will include the following windows:

- Household Screen: This window will allow the Worker to view the details for the current case.
- Center Information: This window will allow the Worker to indicate the reason for the case transfer, the new center and the new caseload for the case.
- Approval Elements: This window will allow the Worker to send the case to the supervisor for approval.

### Center Information window

The Center Information window will allow the Worker to indicate the reason for the case transfer, the new center and the new caseload for the case. The Worker will be able to select Food Stamp home centers in the New Center list.

POS Case Transfer - Center Information

File, etc.

Case Number: [REDACTED] Suffix: [REDACTED] Center: [REDACTED] Unit Worker: [REDACTED] Case Name: [REDACTED]

Reason for Case Transfer: [REDACTED]

New Center: [REDACTED]

Caseload: [REDACTED] 00000

Next Previous Cancel Suspend

*List of Reasons for Case Transfer:*

- Out of Territory
- Transfer to Special Site
- Transfer for Administrative Reasons

# FS POS Release Notes

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## 6. Transmission Business Rule

A new business rule will prevent Supervisors from accidentally completing activities with TAD changes that require transmission to WMS. If the Supervisor attempts to complete the activity and there are changes on the TAD window, the following error message will appear:

"Transmission is required in this activity. Please click on the Xmit button to transmit the TAD to WMS or click Suspend to return the case to the queue."

This new rule will run in the Approve EFS Issuance, Approve EC – EFS Issuance, Approve FS Application Interview, Approve EC – FS Application Interview, Approve FS Recertification Interview and Approve EC – FS Recertification Interview activities.

## 7. Updates to FS Recertification Interview Log

The **FS Recertification Interview Log** has been updated to add two new filters and a new column.

### IVRS Filter

A new filter will be added to allow the Worker to filter for cases that may be eligible to complete their recertification via the Interactive Voice Response System (IVRS).

Appointment Type

- Telephone Interview
- In-Center Interview
- IVRS
- No Change
- Original Appointment date
- LDSS-4826 Received

### No Change Filter

A new filter will be added to allow the Worker to filter for cases that were marked as “no change recertifications” in the FS Recertification Interview activity.

Appointment Type

- Telephone Interview
- In-Center Interview
- IVRS
- No Change
- Original Appointment date
- LDSS-4826 Received

### New columns: No Change and Closing Requested

Two new columns have been added: The “No Change” column will be updated if a case is marked as a “no change recertification” and the “Closing Requested” column will be updated if the recipient requested a case closing in the FS Recertification Interview activity.

For additional details, please see **Appendix A**.

# FS POS Release Notes

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## 8. Shortened Flow for IVRS, F15 and F61 “No Change” Recertifications

A shortened activity flow has been implemented in the **FS Recertification Interview** activity for the following types of cases:

- Cases that completed the recertification via the Interactive Voice Response System (IVRS) and have no changes;
- Cases from Center F15 (SSI) that have no changes;
- Cases from Center F61 (Residential Treatment Center) that have no changes.

When the case meets one of the criteria listed above, the following windows will appear in the activity:

- Household Information
- Case Member Information
- Budget
- TAD
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements

Updates will be made in the **Case Member Information** window to accommodate this new flow.

# FS POS Release Notes

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## 9. Updates to Case Member Information window in FS Recertification Interview

The Case Member Information window in the FS Recertification Interview activity has been updated to:

- Allow the Worker to change the recertification interview type indicator when necessary;
- Allow the Worker to indicate that the case is a “no change” recertification interview; and
- Allow the Worker to indicate the date that the LDSS-4826 was received;
- Allow the Worker to indicate that the recipient failed to keep the interview.

If the Worker indicates that the recertification interview type has changed, the **FS Recertification Interview Log** will be updated.

If the Worker indicates that the recipient failed to keep the interview, the FS recertification interview will be removed from the Worker’s queue and the appointment status will be updated to “Failed to Keep” for the case in the **FS Recertification Interview Log**.

### Revised Case Member Information window in FS Recertification Interview

FS POS 3.2 - [Case Member Information] 4:09:16 PM Monday, June 15, 2009

File Edit Tools Window Help

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

**Case Member Information**

Suff	Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	FS	AFIS / ST
1	1	TA18157V	Sthree E F	Casehead	01/01/1977	518-51-8848	1	M	<input checked="" type="checkbox"/>	AP	<input type="checkbox"/>

**Household Composition**

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

**Interview Disposition**

Appointment Date: 6/15/2009 Appointment Time: 9:30 AM

Failed to Keep?  Yes  No

Telephone Interview?  Yes  No Telephone Number: \_\_\_\_\_ Extension: \_\_\_\_\_

LDSS-4826 Received?  Yes  No Date Received: \_\_\_\_\_

IVRS?  Yes  No

No Change Recert?  Yes  No Closing Requested?  Yes  No

**Next Action**

Next Previous

# FS POS Release Notes

Version 3.2 June 22, 2009

## 10. Updates to Case Member Information window in FS Application Interview

The Case Member Information window in the FS Application Interview activity has been updated to:

- Allow the Worker to change the application interview type indicator when necessary;
- Allow the Worker to indicate that the recipient failed to keep the interview.
- Remove the unnecessary "LDSS-4826 Received" and "IVRS" indicators.

If the Worker indicates that the application interview type has changed, the **FS Application Interview Log** will be updated.

If the Worker indicates that the applicant failed to keep the interview, the FS application interview will be removed from the Worker's queue and the appointment status will be updated to "Failed to Keep" for the case in the **FS Application Interview Log**.

### Revised Case Member Information window in FS Application Interview

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

**Case Member Information**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val Sex	Citizen / National	FS AFIS / ST
							<input checked="" type="checkbox"/>	AP <input type="checkbox"/>

**Household Composition**

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

**Interview Disposition**

Appointment Date: 6/6/2009 Appointment Time: 9:15 AM

Failed to Keep?  Yes  No

Telephone Interview?  Yes  No Telephone Number: \_\_\_\_\_ Extension: \_\_\_\_\_

**Next Action**

Next Previous

# FS POS Release Notes

Version 3.2 June 22, 2009

## 11. WMS 2009.2 Updates

POS has been updated to match the following change in the WMS software version 2009.2 Release:

- Increase of Same Day Expedited Food Stamp Issuance Maximum to \$1999.99

These changes will be effective June 22, 2009. For additional information, please refer to the WMS 2009.2 system release policy directive.

## 12. Change to Address Windows

The **City** field in the Address windows in POS will be updated to include all possible city values in the borough of Queens.

## 13. E-Forms

The following E-Forms have been **updated**:

- W-515X, System Alien Verification of Entitlements (SAVE) Referral;
- W-680FF, Language Questionnaire

## 14. Reminder: Assigning and Starting CBO Cases

CBO cases scheduled for a FS application interview should be assigned to the Worker by a supervisor, so the FS Application Interview is moved from the "Applications CBO" queue and appears in the Worker's queue.

FS POS checks for the successful application registration when the FS Application Interview is started from the POS queue.

If the case was successfully registered at the time of submission by the CBO, POS retrieves the case number from WMS and updates all of the case data with the WMS registry number. If the case was not successfully registered at the time of submission, POS submits an application registration to WMS and updates all of the case data with the WMS registry number.

The Worker should not be looking for the WMS case number prior to starting the FS Application Interview activity. Starting the case with the WMS case number will result in the loss of the CBO entered data.

For additional details, please refer to **Appendix B**.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Overview

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

**The Recertification Interview Log and Failed to Keep Recertification Log windows has been updated with the following new functionality and features:**

- New IVRS filter
- New No Change filter
- New No Change column

### IVRS Filter

A new filter has been added to allow the Worker to filter for cases that may be eligible to complete their recertification via the Interactive Voice Response System (IVRS).



### No Change Filter

A new filter has been added to allow the Worker to filter for cases that were marked as “no change recertifications” in the FS Recertification Interview activity.



### No Change Column

A new column will indicate whether the case was marked as a “no change recertification” in the FS Recertification Interview activity.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Past Changes

### Enhanced Search Criteria

The FS sites will be able to find the cases by entering the case number. This will allow the Worker to find the case that may have been scheduled for a past or future date without running the log for a long date range.

### Retrieve by Original Appointment Date

The FS sites will be able to view cases by the original appointment date. This will allow the site to replicate the reconciliation view that is currently done using the WINRO076 report.

### Filtered View and Printing

The FS sites will be able to select the columns that they wish to view or print.  
The FS sites will be able to view all of the data for 1 case row on the same printed page.

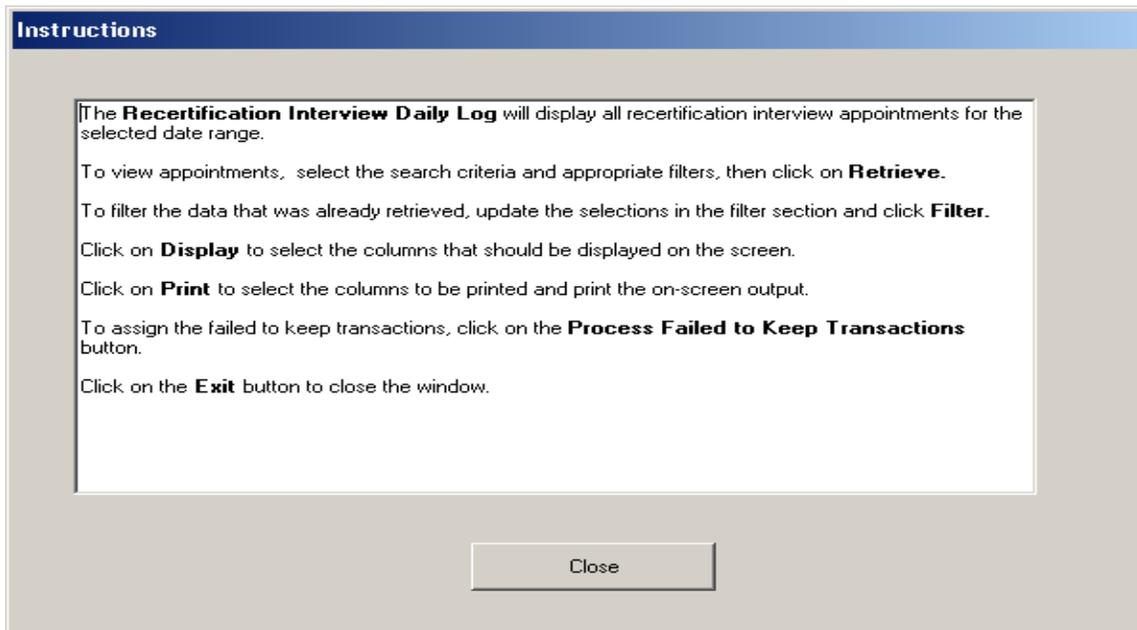
### CNS Notice Number Required Window

This window has been removed and a clearance has been issued that all failed to keep recertification closing should be processed using **Y10**.

## Instructions

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

### New Instructions



The Instruction window will display new instructions for the NCA FS Centers. When the Worker clicks on the **Close** button, the **Recertification Interview Log** appears.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Updated Recertification Log

FS POS Version 3.2

File Retrieve Print Filter Display Summary 1 Recertification Interview Log [ Center Number: F40 ] 2

Search by 3

Appointment Date 3a Select Date 3b Specify Range

Case Number 4

Last Name of Casehead or Payee 5

Appointment Type

6d Telephone Interview 6e In-Center Interview 6g IVRS 6h No Change 6 Original appointment date 6f LDSS-4826 Received

Appointment Status Filter

7 Kept Appointment 8 Failed to Keep Appointment 9 None

10	11	11a	11b	12	13	13a	13b	13c	14	15	16	17	18	18a	19	6i	6a
Case Number	Case Name	Spoken Lang	Interpreter	Appt Date	Appt Time	LDSS-4826 Received	Telephone Interview	Contact Number	Assigned To	Number of Contacts	Interview Started On	Appt Status	Case Status	IVRS	Previous Appt	No Change	Orig Appt
0000538905A	Lorne Anne	English	Yes	7/31/2007	10:00 AM	Yes	Yes	(212) 555-1200	A. Turner	1	7/31/2007	Kept Appt	Active	No	6/22/07	No	6/25/07 11:15 AM
00007422506B	Steel Dan	Spanish	Yes	7/31/2007	10:00 AM	Yes	Yes	(212) 555-1201	B. Jones	2	7/31/2007	Kept Appt	Active	No		No	
00007421970C	Chatmen Steve	Russian	Yes	7/31/2007	11:00 AM	Yes	Yes	(212) 555-1202	C. Allen	1	7/31/2007	Kept Appt	Active	No		No	
00007424834D	Mort Ralph	Arabic	Yes	7/31/2007	1:00 PM	Yes	Yes	(212) 555-1203	D. Roberts	2	7/31/2007	Kept Appt	Active	No		No	
00007446480E	Deep Zan	Haitian	No	7/31/2007	2:00 PM	No	Yes	(212) 555-1204	E. Spool	0			Active	No		No	
070611121115	Sands Raul	English	Yes	7/31/2007	3:00 PM	Yes	No		F. Wells	0			Active	Yes		Yes	

Assign 23 LDSS-4826 Received 23a Contact 23b Reschedule 24 Kept Appointment 25 Failed to Keep Appointment 26 Process Failed to Keep Transactions 27 Exit 28

### Definitions

1. File, Retrieve, Print, Filter, Display, Summary
2. Recertification Log

### New Search by Date Filters

3. Appointment date
  - a. Select Date
  - b. Specify Range
4. Case Number
5. Last name of case head or payee

### New Appointment Type Filter

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

6. Original Appointment date
  - 6d. Telephone Interview
  - 6e. In-Center Interview
  - 6f. LDSS-4826 Received
  - 6g. IVRS
  - 6h. No Change
7. Kept Appointment
8. Failed to Keep Appointment
9. None
10. Case Number
11. Case Name
  - a. Spoken Language
  - b. Interpreter
12. Appt Date
13. Appt Time
  - a. LDSS-4826 Received
  - b. Telephone Interview
  - c. Contact Number
14. Assigned To
15. Number of Contacts
16. Interview Started On
17. Appt Status

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

- 18. Case Status
- 18a IVRS
- 19. Previous Appt
- 6i. No Change
- 23 Assign
- 23a LDSS-4826 Received
- 23b Contact
- 24 Reschedule
- 25 Kept Appointment
- 26 Failed to Keep Appointment
- 27 Process Failed to keep Transactions
- 28 Exit

## Existing Buttons in the Window

The following buttons also appear in the window:

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

### Assign procedure and Refer window

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

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

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

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

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

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Refer Action window

**Refer Action**

Selected Case  
 Case Number: 00007433179E      Case Name: Mercedes Raisa  
 Casehead CIN:      Casehead Name:

Refer Case To

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

Enter comments, if Any

OK      Cancel

## Log Summary window

**Log Summary**

Totals :

Total Kept Appointments :

Total Failed To Keep Appointments :

Total Appointments without Status :

Total Appointments :

Total Re-scheduled Appointments :

OK

A new window (**Log Summary**) will summarize the kept, failed and re-scheduled appointments from the Application log.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## LDSS-4826 Received Window

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

### *LDSS-4826 Received window*

The screenshot shows a standard Windows-style dialog box titled "LDSS-4826 Received". It features a blue title bar with minimize, maximize, and close buttons. The main area is light gray and contains the following fields and controls:

- Case Number:** Text box containing "00010000372C".
- Case Name:** Text box containing "JOE BROWN".
- Casehead Name:** Text box containing "Joe Brown".
- Date that the LDSS-4826 was received?:** A date picker showing "Monday, December 10, 2007".
- Interview Type:** Two radio buttons: "Telephone" (selected) and "In-Center".
- Contact Number:** Text box containing "212-488-8888".
- Extension:** Text box (empty).
- Did the applicant request a new call time?:** Two radio buttons: "Yes" and "No" (selected).
- Date:** A date picker showing "Monday, December 10, 2007".
- Time:** A time picker showing "06:45 pm".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

## Contact Attempted Window

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

If there are two unsuccessful contacts recorded and no successful contact has been made, the appointment status will be automatically updated to "Failed to keep".

# FS POS Release Notes: Appendix A

## Version 3.2, June 22, 2009

### Contact Attempted window: Successful Contact

**Contact Attempted**

Case Number: 00007440715G  
Case Name: JULIA RIVERIO  
Casehead Name: Julia Riverio  
Contact Number: 718-555-1212 Extension:  
Requested call time:

**Contact Attempt 1**  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 11/01/2007  
Time that the contact was attempted? 10:00 am

**Contact Attempt 2**  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 11/05/2007  
Time that the contact was attempted? 09:00 am

**Contact Attempt 3**  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 11/05/2007  
Time that the contact was attempted?

**Contact Attempt 4**  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 11/05/2007  
Time that the contact was attempted?

Comments:

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

OK Cancel

### Definitions of Contact Attempted Window

1. Case Number
2. Case Name
3. Case head Name
4. Contact Number
5. Extension
6. Request call time

### Contact Attempted 1

7. Did you successfully contact the client?
8. Date that the contact was attempted?
9. Time that the contact was attempted?

### Contact Attempted 2

10. Did you successfully contact the client?
11. Date that the contact was attempted?
12. Time that the contact was attempted?

### Contact Attempted 3

13. Did you successfully contact the client?
14. Date that the contact was attempted?
15. Time that the contact was attempted?

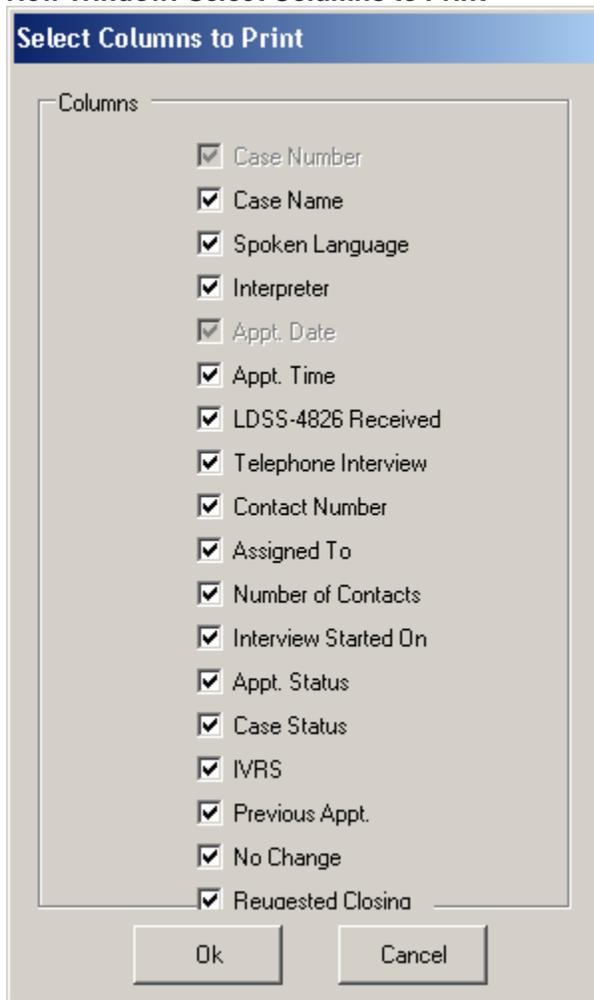
### Contact Attempted 4

16. Did you successfully contact the client?
17. Date that the contact was attempted?
18. Time that the contact was attempted?
19. Comments
20. Interview Type
21. New Contact Number
22. Contact Number
23. Extension
24. OK
25. Cancel

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## New Window: Select Columns to Print



A new window will allow the worker to decide which columns should be printed. This window will appear when the Worker clicks the Print option in the menu at the top of the log.

The Case Number and Appt Date checkboxes have been pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks OK, the print job will be sent to the printer. If the worker clicks cancel, POS will return to the Log.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## *New Window: Select Columns to Display*



A new window will allow the Worker to decide which columns should be displayed. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected and protected.

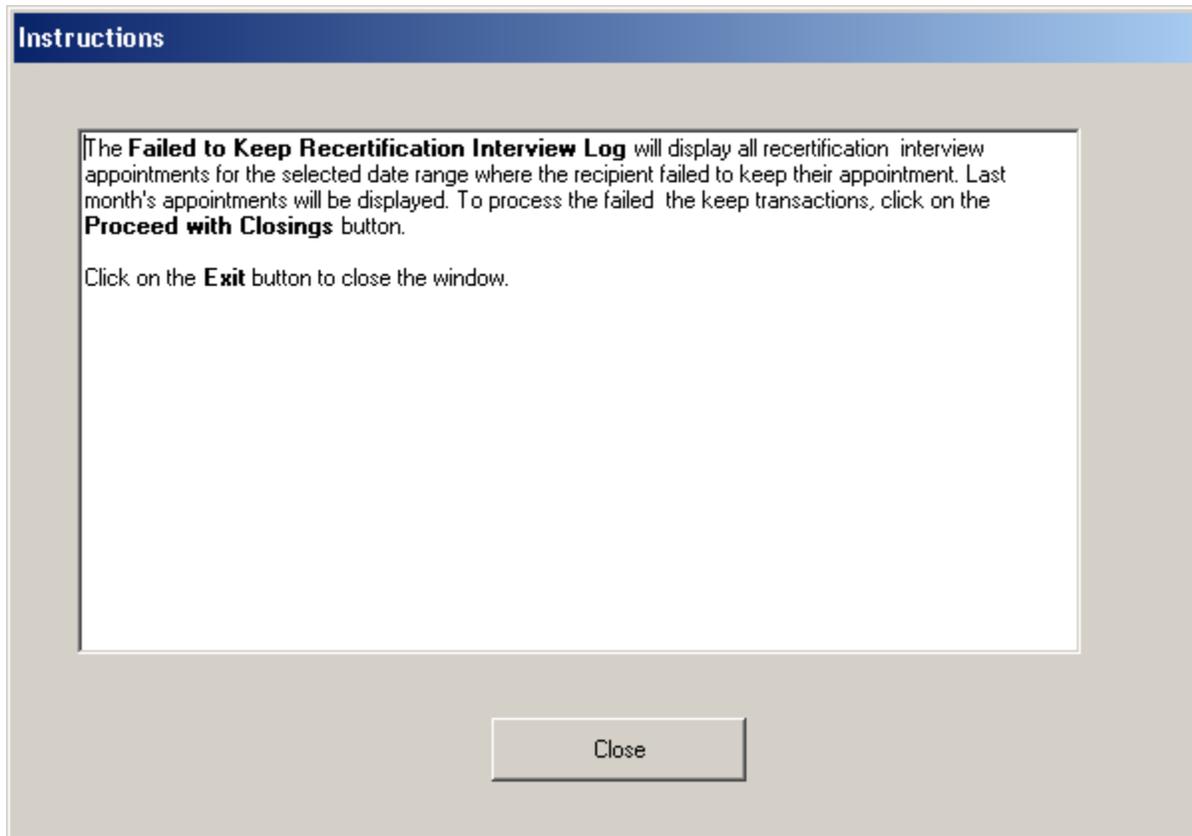
When the Worker clicks OK, POS will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Failed to Keep Recertification Interview Log

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



# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## Updated Failed to Keep Recertification Interview Log

FS POS Version 2.2.1

File Retrieve Print Display **1** Failed to Keep Recertification Interview Log [ Center Number: F40 ] **2**

Search by

Prior month **3**  Case Number **4a**

Specify Range **4**  Case Name **4b**

From: 00/00/00 **4** To: 00/00/00

<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>11a</b>
Case Number	Case Name	Appt Date	Appt Time	Appt Status	Assigned To	Case Status	Orig Appt
00000000001A	Lort Jake	5/26/07	10:00 AM	Failed to Keep	A. Turner	Active	6/25/07 11:15 AM
00000000002B	Mort Dan	5/26/07	10:30 AM	Failed to Keep	B. Jones	Active	
00000000003C	Chisold Steve	5/26/07	11:30 AM	Failed to Keep	C. Allen	Active	
00000000004D	Blake John	5/26/07	1:00 PM	Failed to Keep	D. Roberts	Active	
00000000005E	Tan Lihn	5/26/07	2:45 PM	Failed to Keep	E. Spool	Active	
00000000006F	Porty Lon	5/26/07	3:30 PM	Failed to Keep	F. Wells	Active	

Totals:

Total Failed To Keep Appointments: X X **12**

Post Closings to WMS **13** Assign **14** Reschedule **15** Kept Appointment **16** Hold Closing **17** Exit **18**

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

### The following columns appear in the Fail to Keep Recertification Log:

1. File, Retrieve, Print and Display
2. Failed to Keep Recertification Log
  - i. Search by Feature
3. Prior Month
4. Specify Range
  - a. Case Number
  - b. Case Name
5. Case Number
6. Case Name
7. Appointment Date
8. Appointment Time
9. Appointment Status
10. Assigned to
11. Case Status
  - a. Originating Appointment
12. Total Failed to Keep Appointments- Read Only

### Buttons in Log

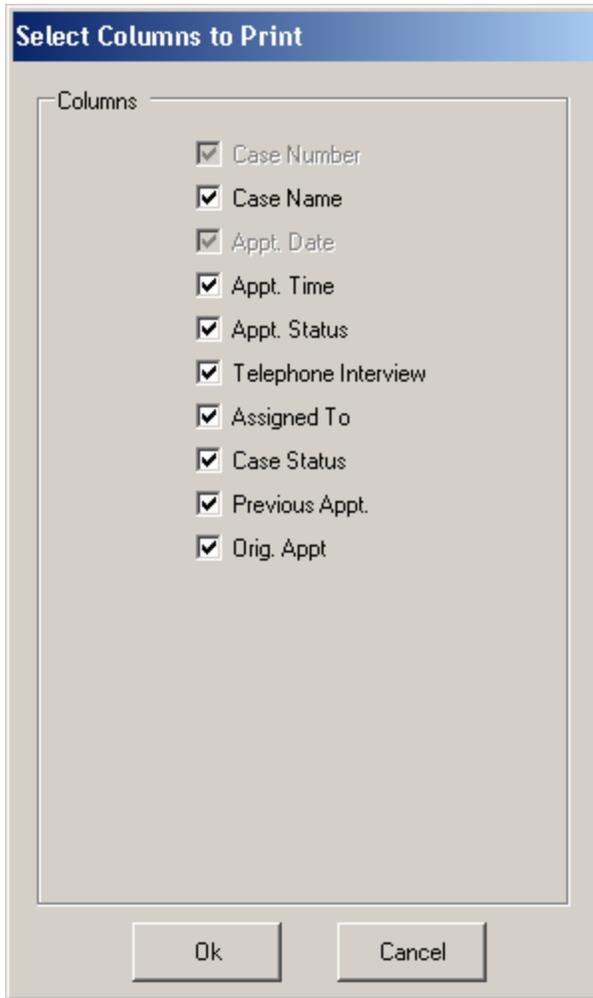
13. Post Closings to WMS-All closing will be processed Y10
14. Assign- Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
15. Reschedule-Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
16. Kept Appointment- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

17. Hold Closing- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
18. Exit

## ***New Window: Select Columns to Print***



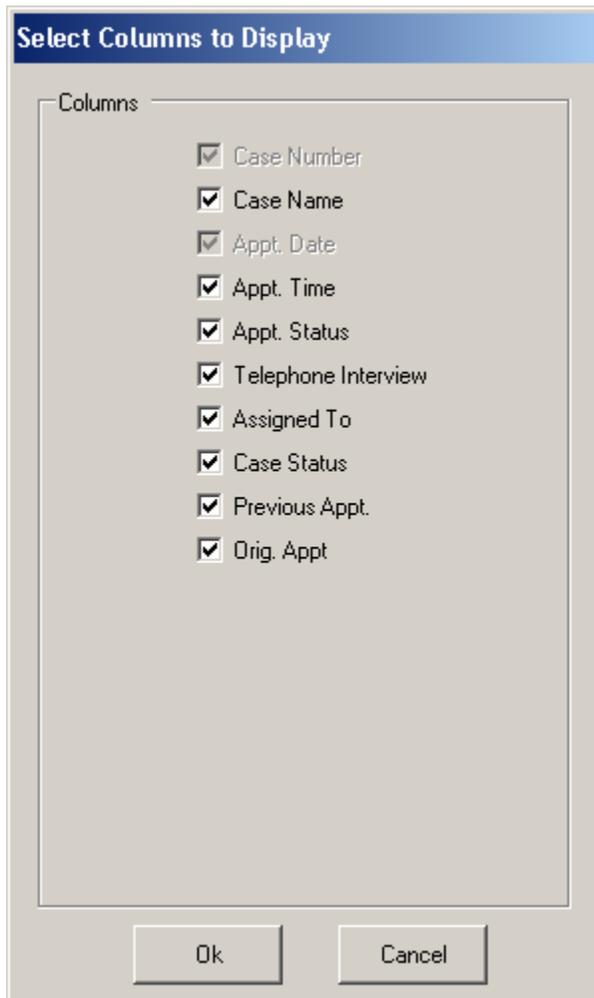
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks **OK**, the print job will be sent to the printer. If the Worker clicks cancel, POS will return to the Log.

# FS POS Release Notes: Appendix A

Version 3.2, June 22, 2009

## *New Window: Select Column to Display*



The new window will allow the Worker to decide which columns should be displayed from the **Failed to Keep Recertification Log**. This window will appear when the Worker clicks the **Display** option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected.

When the Worker clicks **OK**, the log will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.

# FS POS Release Notes: Appendix B

Version 3.2, June 22, 2009

## Assigning and Starting a CBO Case

### Overview

This quick guide provides instructions on starting a CBO case that is scheduled for a food stamp application interview.

### Supervisor Assigns Case to Worker

The Supervisor accesses the **Application Interview Log**, selects the CBO case and assigns it to a Worker. The Supervisor must inform the Worker that the case has been assigned to them.

FS POS Version 2.3.1  
File Retrieve Print Filter Display Summary

Application Interview Log [ Center Number: F53 ]

Search By

Appointment Date  Case Number

Selected Date

03/05/2009

Date Range

From:  To:

Last Name of Casehead or Payee

Application Type Filter

Working Families

In-Center

CBO

Telephone

Exclude dummy case numbers

Original Appointment Date

Appointment Status Filter

Kept Appointment

Failed to Keep Appointment

None

Intake Date	Case No	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number
03/04/2009	090304468760	Testing Case	03/05/2009	09:00 AM		Yes	Yes	212-628-7501

Assign Reschedule Contact Kept Appointment Failed to Keep Appointment Process Failed to Keep Transaction Exit

Referral Window

Selected Case

Case Number: 090304468760 Case Name: Testing Case

Casehead CIN: CIN00001 Casehead Name: Testing Case

Center: F43

Refer Case To

Title	Unit	Last Name	First Name	Phone
FS Supervisor	RCT	Breton	Jose	7185108589
FS Assistant Site Manag	DEV	Pawar	Sandeep	7185108598
FS Supervisor	FS	Rangaiah	Madhu	7185100564
FS Assistant Site Manag	MPU	Supervisor	907B01	
FS Assistant Site Manag	MPU	Syed	907A89	

Enter comments, if Any

OK Cancel

# FS POS Release Notes: Appendix B

Version 3.2, June 22, 2009

If the case is scheduled for an In-Center Interview, the Worker calls the applicant from the waiting area. If the center is a Model Center, the Worker also updates the MONIQ Ticket. Once the Worker returns to their area, he or she goes into the queue to find the assigned FS Application Interview.

If the case is scheduled for a telephone interview, the Worker accesses the **Application Interview Log** to record the attempted telephone contact, as shown below.

## Telephone Contact for CBO Telephone Interviews

When contacting an applicant scheduled for a telephone interview, the Worker accesses the **Application Interview Log**, selects the case and clicks on the **Contact** button. In the **Contact** window, the Worker records the contact attempt and clicks **OK**. If the applicant is successfully contacted, the Worker exits the Log, exits FS Reception/MONIQ and goes to their POS queue.

FS POS Version 2.3.1  
File Retrieve Print Filter Display Summary

Application Interview Log [ Center Number: F53 ]

Search By:

Appointment Date     Case Number

Selected Date: 03/05/2009

Date Range: From: To:

Last Name of Casehead or Payee

Application Type Filter:

Working Families  
 In-Center  
 CBO  
 Telephone  
 Exclude dummy case numbers  
 Original Appointment Date

Appointment Status Filter:

Kept Appointment  
 Failed to Keep Appointment  
 None

	Intake Date	Case No	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number
▶	03/04/2009	090304468760	Testing Case	03/05/2009	09:00 AM		Yes	Yes	212-628-7501

Assign    Reschedule    Contact    Kept Appointment    Failed to Keep Appointment    Process Failed to Keep Transaction    Exit

Contact Attempted

Case Number: 090304468760  
Case Name: Testing Case  
Casehead Name: Case Testing  
Contact Number: 212-628-7501    Extension:  
Requested call time:

Contact Attempt 1  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 03/04/2009  
Time that the contact was attempted?

Contact Attempt 2  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 03/04/2009  
Time that the contact was attempted?

Contact Attempt 3  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 03/04/2009  
Time that the contact was attempted?

Contact Attempt 4  
Did you successfully contact the client?  Yes  No  
Date that the contact was attempted? 03/04/2009  
Time that the contact was attempted?

Comments:

Interview Type:  Telephone     In-Center

New Contact Number:  Yes     No

Contact Number:    Extension:

OK    Cancel

# FS POS Release Notes: Appendix B

Version 3.2, June 22, 2009

## Starting the FS Application Interview activity

The Worker accesses their queue and filters for **FS Application Interview** activities. If the Worker cannot see the case in their queue, they should refresh their queue:

The screenshot shows the 'Activities Management' window in FS POS 3.1. The window title is 'FS POS 3.1 - [Activities Management]' and the system clock shows '5:16:14 PM Wednesday, March 04, 2009'. The interface includes a menu bar (File, Edit, Tools, Window, Help) and a toolbar with icons for Home, Refresh, Print, and Help. Below the toolbar are several filter sections:

- Unit Filter:** Worker (selected), CMU, Uncovered. Center dropdown.
- Activity Type Filter:** FS Application Interview (checked), EFS Issuance, FS Recert Interview, FS Change Case Data, Error Corrections, Other.
- Activity Approve Filter:** Approve FS Application Interview, Approve EFS Issuance, Approve FS Recertification, Approve FS Change Case Data, Approve Error Corrections, Approve Other.
- Activity Status Filter:** Suspended, Not Scheduled, Not Started, Removed, Completed.
- Activity Alert Filter:** Coming Due, Overdue.

Buttons for 'Filter' and 'Clear' are present. Below the filters is a table with the following data:

Activity	Due Date	Alert	Case Name	Case No	Suf	Receive
FS Application Interview	3/15/09	Due	[Redacted]	090213165134	1	
FS Application Interview	3/15/09		[Redacted]	00010004848H	1	
FS Application Interview	4/1/09		[Redacted]	00010004915E	1	
FS Application Interview	3/14/09		[Redacted]	00010004830F	1	

At the bottom of the window, there is a 'Total: 4 Cases' label and a row of buttons: Start, Assign, Remove, Schedule, Reopening, Update Disposition, WMS, View Your Schedule, Comment.



# FS POS Release Notes: Appendix B

Version 3.2, June 22, 2009

## Application Case Number

Once the case is found, the Worker must select it and click on the **Start** button. POS will check whether the case has been registered in WMS. If the case has been registered, POS will update the data entered by the CBO so it is available under the WMS case number. If the case has not been registered, POS will send the application registration to WMS and will update the data entered by the CBO so it is available under the WMS case number. The Worker then goes on to complete the **FS Application Interview** and the EFS issuance determinations.

FS POS 3.1 - [Activities Management] 5:17:54 PM Wednesday, March 04, 2009

File Edit Tools Window Help

Action F43 FS Supervisor Queue

Unit Filter: Worker (Center), CMU, Uncovered

Activity Type Filter:
 

- FS Application Interview
- EFS Issuance
- FS Recert Interview
- FS Change Case Data
- Error Corrections
- Other

Activity Approve Filter:
 

- Approve FS Application Interview
- Approve EFS Issuance
- Approve FS Recertification
- Approve FS Change Case Data
- Approve Error Corrections
- Approve Other

Activity Status Filter:
 

- Suspended
- Not Scheduled
- Not Started
- Removed
- Completed

Activity Alert Filter:
 

- Coming Due
- Overdue

Activity	Due Date	Alert	Case Name	Case No	Suf	Receive
FS Application Interview	3/15/09	Due	Syed Waqas	090213165134	1	
FS Application Interview	4/1/09		Queens Fs	00010004915E	1	
FS Application Interview	3/15/09		Auth Nyc	00010004848H	1	
FS Application Interview	3/14/09		Spec Design	00010004830F	1	
FS Application Interview	4/3/09		Testing Case	090304468760	1	BRET2781

Total: 5 Cases

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

FS POS 3.1 - [Activities Management] 5:27:18 PM Wednesday, March 04, 2009

File Edit Tools Window Help

Action F43 FS Supervisor Queue

Unit Filter: Worker (Center), CMU, Uncovered

Activity Status Filter:
 

- Suspended
- Not Scheduled
- Not Started

Activity Alert Filter:
 

- Coming Due
- Overdue

Please wait ...

Beginning TAD Synchronization process ...

Activity	Case No	Suf	Receive
FS Application Interview	090213165134	1	
FS Application Interview	00010004915E	1	
FS Application Interview	00010004848H	1	
FS Application Interview	00010004830F	1	
FS Application Interview	00010004928H	1	BRET2781

Total: 5 Cases

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

## Important Note:

The Worker should not be looking for the WMS case number prior to starting the FS Application Interview activity. Starting the case with the WMS case number will result in the loss of the data entered by the CBO.