

FS POS Release Notes

Version 3.3.1 January 11, 2010

These Release Notes contain descriptions of changes in FS POS Release 3.3.1, scheduled for January 11, 2010. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes may also be found on the HRA Intranet at http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79

Table of Contents

1.	FOOD STAMP (FS) TIME SAVERS FOR ENTRY OF UNEARNED INCOME AND RESOURCES.....	2
2.	FS CHANGE CASE DATA UPDATE	2
3.	MOVE OF DEFERRED APPLICATION CASES TO MPU QUEUES FOR F15 AND F61.....	3
4.	NEW FS TAD BUSINESS RULES	3
5.	DUE DATES FOR FS RECERTIFICATION ACTIVITIES IN QUEUES	3
6.	FS RECERTIFICATION LOG UPDATE	3
7.	SAVED APPLICATION FORM (LDSS-4826) FOR TELEPHONE INTERVIEWS.....	4
8.	PRINTED FORMS IN FS RECEPTION INTAKE AND FS LOGS.....	4
9.	ADDITIONAL FORMS AVAILABLE IN PRINT FORMS WINDOW	4
10.	PRINTING OF W-119D ELIGIBILITY FACTORS AND SUGGESTED DOCUMENTATION GUIDE.....	4
11.	UPDATE TO DOCUMENTATION REQUESTED ON W-113K FOR EARNED INCOME.....	4
12.	UPDATE TO POTENTIAL IVRS INDICATOR IN CASE MEMBER WINDOW IN FS RECERT	4
13.	REVISED MESSAGES FOR VITAL RECORDS COLLATERAL CALL	5
14.	ADDITIONAL INFORMATION WINDOW UPDATE IN ALIEN TYPE DETERMINATION SCRIPT	5
15.	CHANGES TO HEAT EXPENSE WINDOW	6
16.	INDIVIDUAL FOOD STAMP STATUS REASON TRANSMISSION RULE.....	7
17.	SELECT EFFECTIVE DATE FOR BUDGET WINDOW	7
18.	SPECIAL ASSESSMENT REFERRAL	7
19.	REMINDER: APPENDICES	7

FS POS Release Notes

Version 3.3.1 January 11, 2010

1. Food Stamp (FS) Time Savers for Entry of Unearned Income and Resources

In order to streamline the Food Stamp (FS) interviews and change activities, the presentation of unearned income and resource questions in the Food Stamp Paperless Office System (FS POS) will be updated. The new presentation of these questions will reduce the time it takes for an interviewer to record the applicant or participant's responses.

Updated Unearned Income Windows

The question set for unearned income will be streamlined in a similar manner to the presentation of the Income section in the LDSS-4826 (Food Stamp Benefits Application/Recertification) to reduce the time required to record the applicant's or participant's responses. If no one in the household receives unearned income, the number of the times that the Worker will need to click "No" will be reduced from seventeen (17) to six (6).

Resources Window

The detailed resource questions will be eliminated for categorically eligible applicants and participants. For these households, only the total resource amount will be recorded for the determination of eligibility for expedited service and WMS budgeting, and eighteen (18) questions will be removed from the question set.

Appendix A

For additional details, please see **Appendix A (FS Time Savers)** and refer to Policy Bulletin 09-129-SYS (Food Stamps [FS] Time Savers).

2. FS Change Case Data Update

The **Individual Status Change** window in the **FS Change Case Data** activity will be updated to allow the Eligibility Specialist to:

- activate or close individuals in sanctioned (SN) status;
- reject individuals in applying (AP) status;
- close individuals in single issue (SI) or (AC) active status.

Current Status and Available New Status

Current Status	Available New Statuses
AP	SI, AC, RJ, SN
SI	AC, CL, SN
AC	SI, CL, SN
RJ	SI, AC
CL	SI, AC
SN	SI, AC, CL

FS POS Release Notes

Version 3.3.1 January 11, 2010

3. Move of Deferred Application Cases to MPU Queues for F15 and F61

Deferred application cases from F15 (SSI Food Stamp Office) and F61 (Residential Treatment Food Stamp Center) will be moved to the MPU queues when the Supervisor completes the **Approve EFS Issuance** activity:

- The deferred application cases that receive Food Stamps (FS) under the expedited criteria from the following centers will move to the **MPU Home Center SI Queue**.
- The deferred application cases that do not receive FS under the expedited criteria from the following centers will move to the **MPU Home Center AP Queue**.

4. New FS TAD Business Rules

The FS TAD will be updated with new business rules for the effective date fields to help ensure that appropriate dates are entered:

- When the Eligibility Specialist enters a new value in the **From** suffix date field for a case in applying (AP) status, a new business rule will verify that the date is less than 30 days in the future.
- When the Eligibility Specialist enters a new value in the **To** suffix date field for a case in active (AC), single issue (SI) or closed (CL) status, a new business rule will verify that the date is less than 91 days after the 1st day of the current month.
- When the Eligibility Specialist enters a new value in the **Individual Effective Date** field for a case in applying (AP) status, a new business rule will verify that the date is less than 30 days in the future.
- When the Eligibility Specialist enters a new value in the **Individual Effective Date** field for a case in active (AC), single issue (SI) or closed (CL) status, a new business rule will verify that the date is less than 91 days after the 1st day of the current month.

5. Due Dates for FS Recertification Activities in Queues

The due date column in the FS POS queue for the FS recertification activities will be updated. The due date for the following activities will be set to the end date of the authorization/certification period:

- FS Recertification Interview
- Error Correction (EC) - FS Recertification Interview
- Approve FS Recertification
- Approve EC - FS Recertification

6. FS Recertification Log Update

The Food Stamp Recertification Log will be updated with a new column and filter:

- The current homebound indicator will be displayed and a new filter will be added to allow the center to view a list of homebound cases.

The Food Stamp Recertification Log will be updated with new rescheduling edits:

- Appointment rescheduling will be disabled after the 15th day of the final month of the certification period.
- New edits will prevent rescheduling on Sunday, holidays and non-business hours.

FS POS Release Notes

Version 3.3.1 January 11, 2010

7. Saved Application Form (LDSS-4826) for Telephone Interviews

In order to allow additional review of application data through the forms saved in the HRA One Viewer, the **Food Stamp Application/Recertification Form** (LDSS-4826) will be saved in the **FS Application Interview** for telephone interview cases where:

- The Eligibility Specialist captures the electronic signature using the **Food Stamp Applicant Signature Form** (W-120) or the **Food Stamp Benefits Application Attestation Signature Form** (W-129B) in the **FS Reception Intake** activity or
- The Eligibility Specialist indicated that the paper Food Stamp Application/Recertification Form (LDSS-4826) was signed.

8. Printed Forms in FS Reception Intake and FS Logs

Forms printed in the **FS Reception Intake**, **FS Application Log** and **FS Recertification Log** windows will be available through the **Printed Forms** menu in the **Review Case** activity. The forms in these windows include:

- LDSS-3938, Food Stamp Application Expedited Processing Summary Sheet;
- W-119, Request for Contact on a Food Stamp Application;
- W-120, Food Stamp Applicant Signature Form;
- W-129A, Food Stamp Eligibility Interview Telephone Appointment Notice;
- W-129B, Food Stamp Benefits Application Attestation Signature Form;
- W-129PP, Food Stamp Eligibility Interview Appointment Notice;
- W-129RR, Notice of Food Stamp Recertification Appointment;
- W-680FF, Language Questionnaire.

9. Additional Forms Available in Print Forms Window

The following forms will be available in the **Print Forms** window for FS cases:

- LDSS-2474, SSI Referral
- W-700D, FIA School/Training Enrollment Letter

10. Printing of W-119D Eligibility Factors and Suggested Documentation Guide

The Eligibility Factors and Suggested Documentation Guide (W-119D) will automatically print when the Documentation Requirements and/or Assessment Follow-up Form (W-113K) is printed.

11. Update to Documentation Requested on W-113K for Earned Income

When the Eligibility Specialist indicates that documentation is needed on the **Is Employed** response window, the Documentation Requirements and/or Assessment Follow-up Form (W-113K) is prefilled with a request for **“Earned Income from Employer”**.

Effective January 11, 2010, the W-113K will also be prefilled with a request for **“Documentation of the last 4 weeks of pay is required”** if the Eligibility Specialist requests that documentation is needed on the **Is Employed** response window.

12. Update to Potential IVRS Indicator in Case Member Window in FS Recert

The Potential **IVRS** indicator in the **Case Member Information** window in the **FS Recertification Interview** is set through a monthly file exchange process between Food Stamp POS and the Interactive Voice Response System (IVRS). The **Potential IVRS** field will be preset and protected by the file exchange to prevent the Worker from mistakenly removing this indicator.

FS POS Release Notes

Version 3.3.1 January 11, 2010

13. Revised Messages for Vital Records Collateral Call

The messages in the Vital Records Collateral window will be updated to provide Workers with clearer instructions. For additional details, please review **Appendix B: Vital Records Collateral Call**.

14. Additional Information Window Update in Alien Type Determination Script

Individuals with an alien/citizenship indicator value of "T" (Parolees for less than 1 year) no longer require a date to be entered in the date entered country (DEC) field on the TAD. As a result, the edits for the **Date Physically Entered the US** field in the **Additional Information** window in the **Alien Type Determination Script** will be updated accordingly.

For additional information about this policy changes, please review **Policy Bulletin # 09-105-SYS** (Noncitizen-Related Systems and Processing Changes).

Additional Information window

Alien Type Determination Script -- Additional Information for [REDACTED]

1. Initial Summary	Name [REDACTED] Type Parolee for Less than One Year
2. North American Indian Born in Can.	SSN [REDACTED] Date of Birth [REDACTED]
3. Hmong or Highland Laotian	Date of Status (DOS) from WMS Link to the Entry Date Procedure
4. Victims of Trafficking and Violence	Date Entered Country (DEC) from WMS
5. Cuban/Haitian Entrants	Instructions Please Read This Before Entering the Dates listed below !
6. Refugees or Amerasian Immigrants	For immigrants who were determined to be Battered Aliens (B) enter the Date of Application, when determination for alien status 'B' was made, in the 'Date of Application when alien status 'B' was Determined'. For Legal Permanent Residents (K) who have their Legal Permanent status for less than 5 years, you must investigate if they had other qualified status prior to becoming an LPR. If prior status can be verified, you must enter the date when original status was obtained. Legal Permanent Residents (K), Parolees for at
7. Asylee	Alien Number [REDACTED]
8. Deportation or Removal Withheld	Does the Individual Have Employment Authorization Document I-688B or I-766? <input type="radio"/> Yes <input checked="" type="radio"/> No
9. Conditional Entrant	Does the Individual Have Social Security Card Authorizing Employment (card doesn't say 'Not Valid for Employment')? <input type="radio"/> Yes <input checked="" type="radio"/> No
10. Legal Permanent Resident	Dates
11. Parolee for at Least One Year	Date of Entry (Alien Type R or F) 00/00/0000
12. Battered (Abused) Spouse and/or I	Date Status Granted (Alien Type A, H, L, Z, K, T or G) [REDACTED]
13. Parolee for Less than One Year	Date of Application when alien status 'B' was Determined 00/00/0000
14. PRUCOL (PA)	Date Deportation/Removal Withheld (Alien Type J only) 00/00/0000
15. PRUCOL (MA)	Certification (Initial Eligibility) Date (Alien Type D only) 00/00/0000
16. Undocumented immigrant or non-im	Did the Individual Have Other Qualified Status Prior to Becoming an LPR? <input type="radio"/> Yes <input checked="" type="radio"/> No
17. Additional Information for Mdsaonn	Prior Status [REDACTED] Do you have documents to verify prior status? <input type="radio"/> Yes <input checked="" type="radio"/> No
	Documented Date of Prior Status 00/00/0000
	Date the Individual Physically Entered the US (help?) 00/00/0000
	Does the individual have documents to verify U.S. residence prior to 8/22/96? <input type="radio"/> Yes <input checked="" type="radio"/> No
	Was this individual out of US since that date for 30 consecutive days (help?) or a total of more than 90 days? <input type="radio"/> Yes <input checked="" type="radio"/> No

FS POS Release Notes

Version 3.3.1 January 11, 2010

15. Changes to Heat Expense Window

The heat expense window will be updated to add a new menu option, a new field, change field labels, remove a checkbox and add validations to the window.

Heat Expense Window

Company Name options

A new menu option of “Other” will be added in the **Company Name** field.

Other Company Name Field

A new field named **Other Company Name** will be added within the response window for the question “Do you or anyone who lives with you have a heat bill separate from your rent or shelter expense?” The new field will be enabled when “Other” is selected in the **Company Name** field.

If the Worker selects “Other” in the **Company Name** field, but fails to enter the other company name, the following error message will appear: “Please enter the Other Company Name”

Addition of Company Address Fields and Edits

New fields will be added to allow the Eligibility Specialist to enter the company name and address. This information is not required for Food Stamp cases, but assists the applicant/recipient in getting a higher HEAP grant.

New validations for account number

The **Account Number** field will have new validations when the selected company name is **Con Edison** or **Keyspan** and an account number is entered:

- When Con Edison is selected, at least 14 characters must be entered in the account number field.
- When Keyspan is selected, at least 10 characters must be entered in the account number field.

FS POS Release Notes

Version 3.3.1 January 11, 2010

16. Individual Food Stamp Status Reason Transmission Rule

The transmission rule for the individual Food Stamp (FS) status reason "LZ" (Override code to reopen sanctioned individual) will be updated to ensure that it is always submitted when the user selects it in the FS TAD window.

17. Select Effective Date for Budget Window

The **Select Effective Date for Budget** window will be updated to prefill the beginning effective date field with the next budget cycle based on the current date and the "toe digit" for the case.

The Worker will still be able to enter a different beginning effective date.



18. Special Assessment Referral

Food Stamp Center staff can make a Special Assessment referral via the **Referrals** window in the **FS Recert Interview** activity.

Appendix C

For additional details, please see Appendix C (Special Assessment Referral).

19. Reminder: Appendices

- Appendix A, FS Time Savers
- Appendix B, Vital Records Collateral Call
- Appendix C, Special Assessment Referral.

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Overview

In order to streamline the food stamp application interview, the Food Stamp Division has requested changes to the presentation of unearned income and resource questions in the Food Stamp Paperless Office System.

The new presentation of these questions will reduce the time it takes for an interviewer to record the applicant or participant's responses.

Affected Activities

These changes will affect the following activities:

- FS Application Interview
- EC – FS Application Interview
- FS Recert Interview
- EC – FS Recert
- FS Change Case Data
- EC – FS Change Case Data
- FS Sep Det – Elig Decision
- EC – FS Sep Det – Elig Decision
- CBO FS Intake

Current Income Windows

The **Current Income** window currently appears when the Worker clicks the “Next” button in the **Employment Information** window.

Employment Information Window

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:		Yes	No
Is Employed?	<input type="radio"/>	<input type="radio"/>	
Is Self-Employed?	<input type="radio"/>	<input type="radio"/>	
Is Unemployed?	<input type="radio"/>	<input type="radio"/>	
Participating In A Strike?	<input type="radio"/>	<input type="radio"/>	
Is Anyone in the Household a Migrant or Seasonal Farm Worker?	<input type="radio"/>	<input type="radio"/>	

Spanish Next Previous

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Current Income Window – prior to revisions

FS POS 3.3 - [Current Income] 2:20:07 PM Thursday, November 12, 2009

File Edit Tools Window Help

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU RECEIVES :

	Yes	No
Unemployment Insurance Benefits?	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Supplemental Security Income (SSI) Benefits?	<input type="radio"/>	<input type="radio"/>
Social Security Disability Benefits?	<input type="radio"/>	<input type="radio"/>
Foster Care Payments (Received)?	<input type="radio"/>	<input type="radio"/>
Social Security Dependent Benefits?	<input type="radio"/>	<input type="radio"/>
Social Security Survivor's Benefits?	<input type="radio"/>	<input type="radio"/>
Social Security Retirement Benefits?	<input type="radio"/>	<input type="radio"/>
Retirement Benefits (Pensions)?	<input type="radio"/>	<input type="radio"/>
Worker's Compensation?	<input type="radio"/>	<input type="radio"/>
NYS Disability Benefits?	<input type="radio"/>	<input type="radio"/>
Veteran's Pensions or Benefits?	<input type="radio"/>	<input type="radio"/>
Education Grants Or Loans?	<input type="radio"/>	<input type="radio"/>
Boarders/Lodgers Income (Received)?	<input type="radio"/>	<input type="radio"/>
Contributions/Gifts (Received - NOT Excess Rent, Tuition or Household Expenses)?	<input type="radio"/>	<input type="radio"/>

Spanish Next Previous

FS POS 3.3 - [Current Income] 2:20:28 PM Thursday, November 12, 2009

File Edit Tools Window Help

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU RECEIVES :

	Yes	No
Foster Care Payments (Received)?	<input type="radio"/>	<input type="radio"/>
Social Security Dependent Benefits?	<input type="radio"/>	<input type="radio"/>
Social Security Survivor's Benefits?	<input type="radio"/>	<input type="radio"/>
Social Security Retirement Benefits?	<input type="radio"/>	<input type="radio"/>
Retirement Benefits (Pensions)?	<input type="radio"/>	<input type="radio"/>
Worker's Compensation?	<input type="radio"/>	<input type="radio"/>
NYS Disability Benefits?	<input type="radio"/>	<input type="radio"/>
Veteran's Pensions or Benefits?	<input type="radio"/>	<input type="radio"/>
Education Grants Or Loans?	<input type="radio"/>	<input type="radio"/>
Boarders/Lodgers Income (Received)?	<input type="radio"/>	<input type="radio"/>
Contributions/Gifts (Received - NOT Excess Rent, Tuition or Household Expenses)?	<input type="radio"/>	<input type="radio"/>
Child Support Payments (Received)?	<input type="radio"/>	<input type="radio"/>
Alimony/Support (Received)?	<input type="radio"/>	<input type="radio"/>
Has Other Income? If Yes, Please Specify.	<input checked="" type="radio"/>	<input type="radio"/>

Spanish Next Previous

For each question that appears in the **Current Income** window, the Worker must click “Yes” or “No” based on the applicant or participant’s response. If the answer for the question is “Yes”, a response window appears, allowing the Worker to enter additional information.

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Updated Unearned Income Windows

This question set will be streamlined in a similar manner to the presentation of the Income section in the LDSS-4826 (Food Stamp Benefits Application/Recertification) to reduce the time required to record the applicant's or participant's responses. If no one in the household receives unearned income, the number of the times that the Worker will need to click "No" will be reduced from seventeen (17) to six (6).

The Worker will ask the applicant or participant whether anyone in the household receives SSI, social security disability benefits, social security dependent benefits, social security retirement benefits, social security survivor's benefits, retirement benefits (pensions) or veteran's pensions, benefits or aid and attendance. If no one in the household receives these types of income, the Worker will only need to click "No" once.

The Worker will then ask the applicant or participant whether anyone in the household receives foster care payments, NYS disability benefits, worker's compensation, boarder/lodger income, alimony/support or education grants or loans. If no one in the household receives these types of income, the Worker will only need to click "No" once.

If no one in the household receives the types of incomes listed, the revised **Current Income** will appear.

Unearned Income Window

File Edit Tools Window Help

Unearned Income

Does anyone in the household receive? Yes No

- Supplemental Security Income (SSI) Benefits?
- Social Security Disability Benefits?
- Social Security Dependent Benefits?
- Social Security Retirement Benefits?
- Social Security Survivor's Benefits?
- Retirement Benefits (Pensions)?
- Veteran's Pensions/Benefits/Aid And Attendance?

Does anyone in the household receive? Yes No

- Foster Care Payments (Received)?
- NYS Disability Benefits?
- Worker's Compensation?
- Boarders/Lodgers Income (Received)?
- Alimony/Support (Received)?
- Education Grants Or Loans?

Spanish Next Previous

If anyone in the household receives these types of income, the Worker will click "Yes" and an "Unearned" window will appear. In this window, the Worker will indicate the type of income(s) received. When the

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Worker clicks on a checkbox, the detailed response window will appear to allow the Worker to record the details of the income.

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Unearned Income Types – Check all unearned income that apply – first window

File Edit Tools Window Help

Unearned Income Types

Check all Unearned Income that apply
(A separate Window will appear for each income type selected.)

- Supplemental Security Income (SSI) Benefits?
- Social Security Disability Benefits?
- Social Security Dependent Benefits?
- Social Security Retirement Benefits?
- Social Security Survivor's Benefits?
- Retirement Benefits (Pensions)?
- Veteran's Pensions/Benefits/Aid And Attendance?

Spanish OK

Unearned Income Types – Check all unearned income that apply – second window

File Edit Tools Window Help

Unearned Income Types

Check all Unearned Income that apply
(A separate Window will appear for each income type selected.)

- Foster Care Payments (Received)?
- NYS Disability Benefits?
- Boarders/Lodgers Income (Received)?
- Alimony/Support (Received)?
- Education Grants Or Loans?

Spanish OK

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Sample of a response window – Social Security Dependent Benefits

The screenshot shows a software interface with a menu bar (File, Edit, Tools, Window, Help) and a window titled "Unearned Income Types". The main area contains the instruction "Check all Unearned Income that apply (A separate Window will appear for each income type selected.)" and three checkboxes: "Supplemental Security Income (SSI) Benefits?", "Social Security Disability Benefits?", and "Social Security Dependent Benefits?". The third checkbox is checked, and a "View / Edit" button is visible to its right.

Overlaid on this is a "Response to Question" dialog box. It has a blue title bar and contains the following fields: "Who" (a dropdown menu), "Amount" (a text input), "Frequency" (a dropdown menu with "M" selected), "Start Date" (a date input with "00/00/0000"), and "Expected End Date" (a date input with "00/00/0000"). Below these are "Document..." (a text input), a "Scan" checkbox, and "Comment..." (a text input). At the bottom of the dialog are "OK" and "Cancel" buttons.

Once the answers in the response window are recorded and the Worker clicks on the OK button, the Worker will return to the **Unearned Income Types** window and a **View/Edit** button will appear to allow the Worker to return to the response window if necessary.

Sample View/Edit button enabled

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

File Edit Tools Window Help

Unearned Income Types

Check all Unearned Income that apply
(A separate Window will appear for each income type selected.)

Supplemental Security Income (SSI) Benefits?

Social Security Disability Benefits?

Social Security Dependent Benefits? View / Edit

Social Security Retirement Benefits?

Social Security Survivor's Benefits?

Retirement Benefits (Pensions)?

Veteran's Pensions/Benefits/Aid And Attendance?

Spanish OK

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Current Income Window – after revisions

Following the **Unearned Income** window(s), the shorter **Current Income** window will allow the Worker to indicate whether anyone in the household receives unemployment insurance benefits (UIB), contribution or gifts, child support payments or other types of income.

Revised Current Income window

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU RECEIVES :		Yes	No
Unemployment Insurance Benefits?	<input checked="" type="radio"/>	<input type="radio"/>	
Contributions/Gifts [Received - NOT Excess Rent, Tuition or Household Expenses]?	<input type="radio"/>	<input type="radio"/>	
Child Support Payments [Received]?	<input type="radio"/>	<input type="radio"/>	
Has Other Income? Such as Training Allotment, Income from a Trust, Spina Bifida etc..	<input type="radio"/>	<input type="radio"/>	

Spanish Next Previous

Medical Window

Following the **Current Income** window, the **Medical** window will appear. This window will not change.

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU WHO IS APPLYING:		Yes	No
Has Daily Activity Limited because of an Illness/Temporary Disability or is Blind, Sick or Disabled ?	<input checked="" type="radio"/>	<input type="radio"/>	
Has Any Type of Health/Hospital/Accident Insurance or Receives Assistance in Paying Medical Expenses?	<input type="radio"/>	<input type="radio"/>	
Is Pregnant?	<input type="radio"/>	<input type="radio"/>	
Has Any Medical Bills Or Medically Related Expenses?	<input type="radio"/>	<input type="radio"/>	

Spanish Next Previous

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Resources Window

The detailed resource questions will be eliminated for categorically eligible applicants and participants. For these households, only the total resource amount will be recorded for the determination of eligibility for expedited service and WMS budgeting, and eighteen (18) questions will be removed from the question set.

To distinguish the categorically eligible rules please refer to **Policy Bulletin #09-27-ELI Food Stamp Categorically Eligibility**.

Revised Resources Window for Categorically Eligible Household

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU WHO IS APPLYING:	
Total Amount of Available and Countable Resources	Yes No

Spanish Next Previous

For households that are not categorically eligible, the full resource question set will appear.

Attachment B

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix A: FS Time Savers

Resources Window with Full Question Set – for households that are not categorically eligible

File Edit Tools Window Help

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU WHO IS APPLYING:		Yes	No
Is Anyone In Your Household An Immigrant Who Was Sponsored For Admission Into The US?	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Does The Step Parent Of Any Children Who Live With You Have Any Resources Or Receive Income Of Any Kind?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does Anyone Applying Have a Child Under 18 Living Some Place Else?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Title Or Registration To A Motor Vehicle(s) Or Other Vehicle(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Saving Bonds?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Own Home Or Cooperative Or Condominium Apartment?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Cash On Hand?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Checking Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Saving Account(s) Or C.D. (Cert. Of Deposit)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Credit Union Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Stocks, Bonds, Certificates Or Mutual Funds?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has An IRA, KEOGH, 401-K, Or Deferred Compensation Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has a burial fund?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Burial Space?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Spanish Next Previous

File Edit Tools Window Help

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU WHO IS APPLYING:		Yes	No
Has Own Home Or Cooperative Or Condominium Apartment?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Cash On Hand?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Checking Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Saving Account(s) Or C.D. (Cert. Of Deposit)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Credit Union Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Stocks, Bonds, Certificates Or Mutual Funds?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has An IRA, KEOGH, 401-K, Or Deferred Compensation Account(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has a burial fund?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has A Burial Space?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Real Estate Including Income-Producing And Non-Income-Producing Property?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has An Annuity?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expects To Receive A Trust Fund, Lawsuit Settlement, Inheritance Or Income From Any Other Sources?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has Resources Other Than Those Listed Above?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Amount of Available and Countable Resources	<input type="text"/>	<input type="text"/>	<input type="text"/>

Spanish Next Previous

Attachment C

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix B: Vital Records Collateral Call

Updated Vital Records Collateral Call

POS will resume the Birth Verification process with NYC Vital Records for applicants/participants. POS will validate the Birth Certificate based on the Department of Health and Mental Health (DOHMH) records.

DOHMH will be hosting a web service which will return a system validation. The validation process should consist of two parts:

- Birth Authentication
- Death report check.

The death verification is based on the Death Report results from DOHMH. It represents the info about the demographics entered showing the individual as deceased. The data is passed to POS for possible follow up action by the worker. The System will process this validation as well as the Birth Records search.

Only POS workers who are allowed in the application interview and recertification activities can process the call to Vital Records for Birth Authentication:

- Entering the Birth Certification number in the Individual Details window (if available) will narrow the search and make it possible to receive a single exact match.
- Based on the results they obtained from DOHMH, the worker may have to continue to process the verification.
- The Vital records messages will determine if the worker must follow-up with any additional action.

The screenshot shows a software window titled "Version 13.2.1 - Paperless Office System" with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main content area is divided into several sections:

- Data from System:** A table with columns: First Name, Last Name, DOB, Sex, Birth Cert No, County of Birth. It contains two rows: "Test111 Verification 05/23/1976 F Brooklyn" and "Test Verification 12/12/1975 M New York".
- Instructions:** Text stating: "Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action".
- Returned Results:** A table with columns: Return, SSN, First Name, Last Name, Sex, DOB, Mothers Maiden Name, Birth Cert No, Deceased, Verification Date. It contains one row: "NO Match Found 038-59-5000 Test111 Verification F 05/23/1976 [blank] [blank] [blank] 08/10/2009".
- Messages:** Text stating: "Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted."
- Close:** A button at the bottom center.

- The individuals born in a New York City borough will appear at the top of the window, with the data submitted to DOMMH.
- The User must click on the name to view the result of the collateral call:

Attachment C

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix B: Vital Records Collateral Call

Data from System					
First Name	Last Name	DOB	Sex	Birth Cert No	County of Birth
Test111	Verification	05/23/1976	F		Brooklyn
Test	Verification	12/12/1975	M		New York

- The results will be displayed for each selected individual:

Instructions

Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action

Returned Results

Return	SSN	First Name	Last Name	Sex	DOB	Mothers Maiden Name	Birth Cert No	Deceased	Verification Date
NO Match Found	038-59-5000	Test111	Verification	F	05/23/1976				08/10/2009

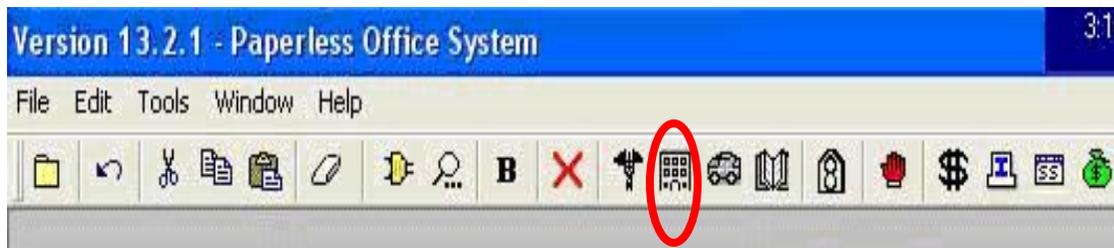
Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

The worker may need to add or change existing demographic information on the individual detail window based on the verification results.

They may also need to modify the birth certificate number if it has been entered incorrectly on this window and **click re-run BV process**.

Vital Records Collateral Call

The Vital Records result can also be seen by clicking on the Vital Records Icon in the toolbar.



Attachment C

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix B: Vital Records Collateral Call

Revised Messages for Vital Records		
Long Description	Short Description	Messages
The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov	Cannot Authenticate	The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov
You are missing some required entries. Please return to the Individual Details window and fill in all data including parents' names.	Return to Individual Details	You are missing some required fields. Please return to the Individual Details window and fill in all data including parents' names.
You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.	Exceeded no. of attempts	You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.
Multiple Match found based on spelling of first and last names, DOB, gender.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data based on spelling of first and last names, DOB, gender.
Multiple Match found based on spelling of first and last names, DOB, gender. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data based on spelling of first and last names, DOB, gender. Individuals have been verified as Deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data based on spelling of first and last names, DOB, gender and mother's maiden name.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data based on spelling of first and last names, DOB, gender and mother's maiden name. Individuals have been verified as Deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and Birth Certificate number.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data based on spelling of first and last names, DOB, gender and Birth Certificate number.

Attachment C

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix B: Vital Records Collateral Call

Revised Messages for Vital Records		
Long Description	Short Description	Messages
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender).	Single Match	Birth Verification has been received from Vital Records. Match based on exact spelling of first name, last name, date of birth, and gender. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using five-factor matching (with exact spelling of first name, last name, date of birth, gender, and with mother's maiden name normalized)	Single Match	Birth Verification has been received from Vital Records. Match based on exact spelling of first name, last name, date of birth, gender, and with mother's maiden name. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender) after failing using the five-factor matching (with exact spelling of first name, last name, date of birth, gender).	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found with provided birth certificate number, first name, last name, gender and date of birth.	Single Match	Birth Verification has been received from Vital Records. Match based on birth certificate number, first name, last name, gender and date of birth. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on Birth Certificate number, first and last names, DOB and gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual based on Birth Certificate number, first and last names, DOB and gender. If Birth Certificate number entered has been verified, case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual based on spelling of first and last names, DOB, gender. Documentation for citizenship, identity and age should be collected if not already submitted.

Attachment C

FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix B: Vital Records Collateral Call

Revised Messages for Vital Records		
Long Description	Short Description	Messages
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found based on spelling of first and last names, DOB, gender for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

Attachment D

FS POS Release Notes

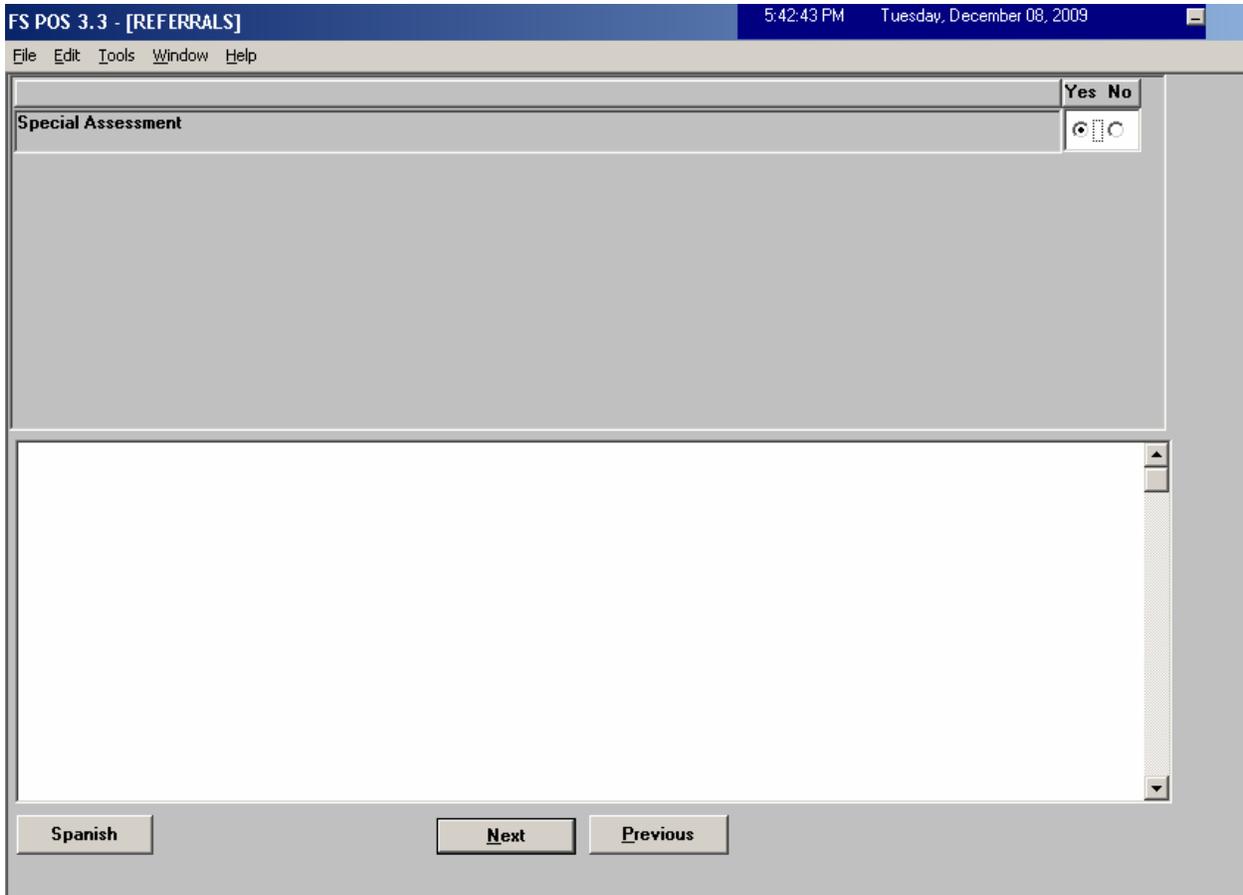
Version 3.3.1 January 11, 2010

Appendix C: Special Assessment Referral

Food Stamp Center staff can make a Special Assessment referral via the **Referrals** window in the **FS Recert Interview** activity. The **Referrals** window appears after the **Other Information** window in the interview.

Instructions

To open the referral window, the Eligibility Specialist (ES) must click **Yes** for **Special Assessment**. The response to question window appears.



FS POS Release Notes

Version 3.3.1 January 11, 2010

Appendix C: Special Assessment Referral

Response to Question window

The ES must select the name of the household member who needs a special assessment. The ES will then indicate whether the recipient is willing to accept the referral.

If the recipient is willing to accept the referral, the ES will click **Make a Referral** button to send the action code **191N** (Special Assessment) to NYCWAY. NYCWAY will then return the appointment date range.

If the interview is by telephone, the recipient will receive the appointment information verbally. If the interview is in-person, the **W-103D** (Special Assessment Notice) will be printed.

Upon returning to the window at a later date, the ES will be able to view special assessment referral results, if they were entered into NYCWAY by the special assessment unit.

Response to Question

Instructions

Select the name of the household member who needs a Special Assessment from the "Who" list. Indicate if the client is willing to accept the referral. Remember acceptance of the referral is always voluntary. Click the "Make a Referral" button to make the special Assessment appointment.

Screening

Who

Is Applicant/Participant Willing to Accept the Referral? Yes No

Referral Information

Appointment Date Range - Time

Result of Special Assessment Referral

Document... Scan Comment...