



# OFFICE OF POLICY, PROCEDURES, AND TRAINING

## POLICY BULLETIN #24-09-SYS

### CA POS RELEASE NOTES

<b>Date:</b> February 26, 2024	<b>Subtopic(s):</b> POS
	<p><b>Purpose:</b></p> <p>This policy bulletin is to inform Benefits Access Center staff that the latest version of the Paperless Office System (POS) migrated into production on February 19, 2024. Descriptions of the changes can be found in Cash Assistance Paperless Office System (CA POS) Release Notes Version 28.1 (<b>Attachment A</b>).</p> <p>These release notes can also be found on the HRA Intranet at:</p> <p><a href="http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx">http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</a></p> <p><i>Effective Immediately</i></p> <p><b>Attachment:</b></p> <p><b>Attachment A</b>      CA POS Release Notes Version 28.1</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 Fax* or fax to: (917) 639-0298

# CA POS Release Notes

CA POS Version 28.1 February 19, 2024

These Release Notes contain descriptions of changes and fixes in the Cash Assistance (CA) Paperless Office System (POS) release for February 19, 2024. These and prior Release Notes can also be found on the Human Resources Administration (HRA) Intranet at

<http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

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# CA POS Release Notes

CA POS Version 28.1 February 19, 2024

## 1. Overview of Changes

The following changes and fixes were made in this release:

- The enhancement involves the inclusion of Sex Field Option "X" to the existing Sex field of Classic Paperless Office System (CPOS).
  - Implementation of New Synchronization Rule for Sex Field in POS and Welfare Management System (WMS) Integration.
  - The transmission of the inclusion of the "Sex" field option "X" to the Centralized Web Indexing (CWI) system.

## 2. Inclusion of Sex Field Option "X"

This release introduces a new inclusion of Sex Field Option "X". This is an additional selection to the existing options of "M-Male," "F-Female," and "U-Unborn" in CA Intake/Interview/Modification screens and related activities. Additionally, this enhancement applies to SNAP CPOS, CA intake/Interview/Modification screens, and their associated activities.

The inclusion of this improvement is crucial to a priority project initiated by a Commissioner and aligns with State legislation and requests from oversight agencies specifically the Office of Temporary and Disability Assistance (OTDA) and State Department of Health (SDOH). The release is strategically scheduled to be combined with the February 2024 migration involving comprehensive modifications to all POS and EDITS system components.

In the POS Site Determination window, the Sex drop down now includes a new Sex field option "X" value.

The screenshot shows the 'Version 28.1 - Paperless Office System - [Site Determination]' window. The 'Sex' dropdown menu is open, showing options 'M', 'F', and 'X'. The 'X' option is highlighted in yellow. The form includes fields for Residential Address, Casehead information, and various checkboxes for programs and language preferences.

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In the Adult screen, a new field Sex "X" value was added to the sex drop down shown below.

Version 28.1 - Paperless Office System - [Adults In Household]

File Edit Tools Window Help

Adults

Last Name First Name Middle Name Relationship Casehead Sex F M X No

Individual is a:  
 Spouse of Casehead/Payee  
 Casehead  
 Payee  
 None of the above

Applying For  
 CA  
 MA  
 SNAP  
 None

Suffix 1 D.O.B 01/01/1990

Required for Applying Adults ONLY  
SSN County of Birth Birth Certificate No

Marital Status Other Name(s) Yes No

What is your Primary Language Spoken? Receiving SSI Yes No

Multi Ethnic Fields  
Hispanic/Latino Asian Native Hawaiian/Other Pacific Islander  
Yes No Unknown Yes No Unknown Yes No Unknown

Native American or Alaska Native Black or African American White  
Yes No Unknown Yes No Unknown Yes No Unknown

List Parents' Names Even If Not On Birth Certificate  
1st Parent - Last Name: First Name: Middle Name:  
2nd Parent - Last Name: First Name: Middle Name:

Next Previous

Next Refer for Intake Referral

In the children in Household screen, a new field Sex "X" value was added to the sex drop down shown below.

Version 28.1 - Paperless Office System - [Children In Household]

File Edit Tools Window Help

Children

Last Name First Name Middle Name Relationship to First Casehead/Payee Unborn Sex U M F U X

Applying For  
 CA  
 MA  
 SNAP  
 None

Affiliated Suffix D.O.B 00/00/0000

Required for Applying Children ONLY  
SSN County of Birth Birth Certificate

Marital Status Single/Never Married Other Name(s) Yes No

What is your Primary Language Spoken?

Multi Ethnic Fields  
Hispanic/Latino Asian Native Hawaiian/Other Pacific Islander  
Yes No Unknown Yes No Unknown Yes No Unknown

Native American or Alaska Native Black or African American White  
Yes No Unknown Yes No Unknown Yes No Unknown

List Parents' Names Even If Not On Birth Certificate  
1st Parent - Last Name: First Name: Middle Name:  
2nd Parent - Last Name: First Name: Middle Name:

Next Previous

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## 2.1 WMS Transmission Rule Update for new Sex Field Option "X"

The new policy allows clients to choose "X" as their sex designation, starting from the February 2024 release of the POS UI. However, the WMS system is not compatible with this "X" value, so for individuals with a sex value of "X," POS will transmit the value of "F" which WMS will accept. This Release has been made to adjust the transmission logic, ensuring that when the POS value is "X," the system transmits the value "F" to WMS. In the synchronization process, if WMS already has a value of "F" and the POS value was initially "X," the POS value will not be replaced. If the WMS sex value is anything other than "X," the existing synchronization rule remains unchanged.

The included screenshots show how a case proceeds from the "applied" stage to the "accepted" stage, displaying how the "sex value" field is changed to "WMS" while the case is being processed.

The screenshot below shows the POS Case login screen with the sex value "X" for two individuals.

The screenshot shows the 'Version 28.1 - Paperless Office System - [Case Login]' window. It includes a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main form area contains the following sections:

- Worker ID:** [Blank] **Center ID:** CA4 **District:** 66
- Present Address:**
  - Street Number: [Blank] Direction: [None] Name: [Blank] Type: St Apt #: [Blank] City: Bronx
  - State: NY Zip Code: 104740000 Phone: - -
- Case Member Information:**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Ctzn/	Ntl	HB	CA	MA	SNAP	AFIS/ST
1	1	[Blank]	Casehead	[Blank]	[Blank]	[Blank]	F		<input type="checkbox"/>	<input type="checkbox"/>	AP	AP	AP	
1	2	[Blank]	Legal Spouse	[Blank]	[Blank]	[Blank]	X		<input type="checkbox"/>	<input type="checkbox"/>	AP	AP	AP	
1	3	[Blank]	Natural Sister	[Blank]	[Blank]	[Blank]	X		<input type="checkbox"/>	<input type="checkbox"/>	AP	AP	AP	
- Suffix Level Information:**
  - Registration Number: [Blank] Unit Worker: [Blank] Update Unit Worker
  - Suffix: 1 Case Name: [Blank] File Date: 02/09/2024
  - Category: SNCA Primary Language: English CNS Notice Language: English Language Read: English

At the bottom, there are navigation buttons: Return to Interview, Print Referral Form, Next, Xmit, and Previous.

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The screenshot below displays the POS Sex of "X" value for two individuals entered into WMS as Sex value "F".

```

NQCS01 (Z) Case Composition - Suffix/Individual Summary 02/09/24
Case # Ctr U/W MRS FS Rent 931.00 RVI TI Pg 1 of 01
[redacted] 040 CASIJ PA Rent 286.00 APP SRC RCRT SRC AVS RCT
Address City Zip Phone No.
[redacted] BRONX 104740000 ( ) - -
Case Name Case Name
[redacted] SF-NET SF-NET
SUF 01 FS SUF 01 Case SNCA Lang SP E | SUF FS SUF Case Lang SP
Pg Stat Type Lang Read E | Pg Stat Type Lang Read
PA AC PA TB Ind PA TB Ind
MA AC Parent TB Date MA Parent TB Date
FS AC Ind 2 / / | FS Ind / /
NEXT RECERT 12/09/24 FSINTW
LAST PA RCT 02/09/24 LAST MA RCT / / Next PA 02/20/24 Next ATP 03/05/24 M S
Suffix Individual Data Status CAS A
Sel PA MA FS LN CIN First Name M Last Sex Birth PA MA FS ES CDP I
01 01 01 01 [redacted] [redacted] F [redacted] AC AC AC 20 P
01 01 01 02 [redacted] [redacted] F [redacted] AC AC AC 20 P
01 01 01 03 [redacted] [redacted] F [redacted] AC AC AC 20 P
Next case # CMD
    
```

The provided screenshots display Turn-Around Document (TAD) data for each individual and illustrate the process of transmitting this data to WMS.

# CA POS Release Notes

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Version 28.1 - Paperless Office System - [TAD Data - Undercare]

File Edit Tools Window Help

**UNDERCARE**

WMS Data POS Data

First Name Last Name Middle Name Sex **M** Marital Status Buy-In Indicator

Primary Spoken Language: English REST EXCEP CD ABAWD DAI

Reuse CIN Relation to Casehead DGC BVI Birth Date CHT TPHI AD-EX

STATE/FEDERAL Legal Spouse 3 00/00/0000 MA Coverage Code From Date To Date CBIC CC CDC SSN Number Valid Student ID

01 02/01/2024 00/00/0000 P M 1-

Line No CIN Citizen/Alien Status Alien Type Alien No Date of Status SNAP Alien Ind Date Entered

2 Citizen 00/00/0000 TASA 00/00/0000 00/00/0000

BCS H - No Referral: Casehead or Other Adult SSI

SNAP Emp Code 20-Work required/Non-exempt VET

CA Emp Code 20-Mandatory Employable/Non-exempt

OTM Non-Veteran

Highest Degree Earned Code Education Level

Associates Degree Twelfth Grade

Individual Cat Code 26 Mother of Child Override?

Waivers D/A IVD LF TL Oth Exemption Indicator TL-EX AFIS-EX

Save Changes A - County Specific Approv

Next Previous Ignore Errors return to Case level Dat Run Rules Create CNS

Version 28.1 - Paperless Office System - [TAD Data - Undercare]

File Edit Tools Window Help

**UNDERCARE**

WMS Data POS Data

First Name Last Name Middle Name Sex **F** Marital Status Buy-In Indicator

Primary Spoken Language: English REST EXCEP CD ABAWD DAI

Reuse CIN Relation to Casehead DGC BVI Birth Date CHT TPHI AD-EX

STATE/FEDERAL Natural Sister 3 00/00/0000 MA Coverage Code From Date To Date CBIC CC CDC SSN Number Valid Student ID

01 02/01/2024 00/00/0000 P M 1-

Line No CIN Citizen/Alien Status Alien Type Alien No Date of Status SNAP Alien Ind Date Entered

3 Citizen K - Lawful Permanent Resident Without 40 Quart 10/10/2015 TASA 10/10/2015

BCS H - No Referral: Casehead or Other Adult SSI

SNAP Emp Code 20-Work required/Non-exempt VET

CA Emp Code 20-Mandatory Employable/Non-exempt

OTM Non-Veteran

Highest Degree Earned Code Education Level

Associates Degree Twelfth Grade

Individual Cat Code 26 Mother of Child Override?

Waivers D/A IVD LF TL Oth Exemption Indicator TL-EX AFIS-EX

Save Changes A - County Specific Approv

Next Previous Ignore Errors return to Case level Dat Run Rules Create CNS

# CA POS Release Notes

CA POS Version 28.1 February 19, 2024

```

NQCS01 (Z) Case Composition - Suffix/Individual Summary 02/09/24
Case # Ctr U/W MRS FS Rent 931.00 RVI TI Pg 1 of 01
[REDACTED] 040 CASIJ PA Rent 286.00 APP SRC RCRT SRC AVS RCT
Address City Zip Phone No.
[REDACTED] BRONX 104740000 ( )- -
Case Name Case Name
[REDACTED] SF-NET SF-NET
SUF 01 FS SUF 01 Case SNCA Lang SP E | SUF FS SUF Case Lang SP
Pg Stat Type Lang Read E | Pg Stat Type Lang Read
PA AC TB Ind | PA TB Ind
MA AC Parent TB Date | MA Parent TB Date
FS AC Ind 2 / / | FS Ind / /
NEXT RECERT 12/09/24 FSINTW -----
LAST PA RCT 02/09/24 LAST MA RCT / / Next PA 02/20/24 Next ATP 03/05/24 M S
Suffix Individual Data Status CAS A
Sel PA MA FS LN CIN First Name M Last Sex Birth PA MA FS ES CDP I
01 01 01 01 [REDACTED] F [REDACTED] AC AC AC 20 P
01 01 01 02 [REDACTED] M [REDACTED] AC AC AC 20 P
01 01 01 03 [REDACTED] F [REDACTED] AC AC AC 20 P
    
```

## 2.2 Inclusion of the Sex field option “X” to the CWI system.

This implementation release involves the addition of a new "Sex" field option selection of "X" alongside the existing "M-Male", "F-Female", and "U-Unborn" options on the Centralized Web Indexing (CWI) screen.

The screenshots below show that the Case Information area also has tabular data that shows household member information about the case that can only be read. There are column headers in the data grid for Line Number, Client Identification Number (CIN), Suffix, Name, Sex, Social Security Number (SSN), Date of Birth (DOB), and Relation. The newly added sex value can be seen in the Case Information section.



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**NYC** Human Resources Administration  
Department of Social Services

## login Centralized Image Indexing

Enter your WMS User ID and Password to login

User ID

Password

Sites Centralized Document Processing Unit (088) ▼

All data contained in this system is confidential by City, State and Federal law and regulations. Failure to protect this information from unauthorized use or disclosure may subject you to discipline as well as financial, civil and criminal penalties, up to and including incarceration.

**By logging into this system, you agree to these terms of use.**

Modified on 06/01/2022

If you have forgotten your WMS password, please create an Incident via <https://nychrapro.service-now.com/sp> and email [wmsadmin@dss.nyc.gov](mailto:wmsadmin@dss.nyc.gov) with your ticket number. You may also call the ITS Service Desk at 929-294-7335.

[POS Portal](#) [HRA Home](#) [Help](#)

**CENTRALIZED WEB INDEXING - DOCUMENT PREVIEW** Associatir

Scanned Folder List

Search By All Folders Center

All Folders \* F40

Scanned Folder List for All Folders And Center 'F40'

Folder Store Images (F40)

View / Search Case Data

Select Search Criteria Case Number

Case Number

Search Results for WMS. (1) Results for Case Number

Case Information

Case Number Case Suffix 01

Case Category FS Program Status PA NA MA NA FS AP

Case Head Address

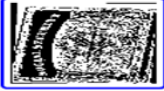

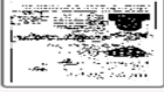
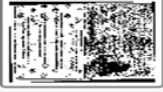


Ln	CIN	Name	Sex	SSN	DOB	Relation
01			X			Applicant/Payee
02			X			Legal Spouse

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**CENTRALIZED WEB INDEXING - DOCUMENT INDEXING** Associating Batch to C

Images (11) Show All

	Not Indexed		Not Indexed
	Not Indexed		Not Indexed
	Not Indexed		Not Indexed

[Index to Document Type and Household Member](#)

Search By Document Keyword

Document Keyword

CIN	Name	Sex	SSN	DOB	Relation
<input type="radio"/>		X			Applicant/Payee
<input type="radio"/>		X			Legal Spouse

Image 20200