



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #04-14-SYS

PAPERLESS OFFICE SYSTEM (POS) VERSION 7.3.1

Date: January 23, 2004	Subtopic(s): POS
<p>  This procedure can now be accessed on the FIAweb. </p> <p>Document Intake Activity</p>	<p>The Paperless Office System (POS) is updated on a regular basis to make the system more user-friendly and to reflect changes in City, State, and federal regulations. The purpose of this bulletin is to inform staff of the following changes which were implemented as POS Version 7.3.1 on January 20, 2004:</p> <ul style="list-style-type: none"> • Enhancements to the Document Intake activity • Update to POS Applications Report in Management Console • Modifications to the In-Center Referral activity • Additions of two new recertification messages • Addition of new business rules for error reduction • Enhancements to the Case Transfer activity • Automatic save of Expedited Service Worksheet in Electronic Case Record • Modification to Expedited Food Stamps in the Past inquiry • Forms which have either been revised or are now for the first time available in POS, and • Other changes including revision to the PA Single Issuance Benefit window and the addition of State Fed Charge business rules. <p>The Document Intake activity in POS can be used by staff other than the assigned Worker to collect, scan, and index documents. When documents are scanned and indexed into POS through Document Intake, a notification will appear in the queue of any Worker(s) or Supervisor(s) with a pending action for the case. The pending action will be highlighted in blue and the Alert field will indicate "Document."</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 2 at the prompt followed by 765 or
send an e-mail to *FIA Call Center*

Activities Management Screen (with pending action)

Pending action in queue

The screenshot shows the 'Activities Management' interface. The top bar indicates 'Version 7.3.1 - Paperless Office System - [Activities Management]' and the date 'Tuesday, January 20, 2004'. The interface includes several filter sections: 'Unit Filter' (Worker, CMU, Uncovered), 'Activity Type Filter' (Begin Recert Prep, Change Case Data, Recert Prep, IN & EFS, Recert Interview, Error Corrections, Application Interview), 'Activity Status Filter' (Suspended, Not Scheduled, Not Started), and 'Activity Alert Filter' (Coming Due, Overdue). A table lists activities with columns for Activity, Due Date, Alert, Case Name, Case No, Suf, and Rec. One row is highlighted in blue, indicating a pending action: 'Application Interview' with Due Date '1/30/04', Alert 'Document', Case Name 'One Sample', Case No '00007433318I', Suf '1', and Rec 'Shepard M'. At the bottom, there are buttons for 'Start', 'Assign', 'Remove', 'Schedule', 'Reopening', 'Update Disposition', 'WMS', 'View Your Schedule', and 'Comment'.

When documents are scanned and indexed into POS through Document Intake, the Worker can also elect to send a notification to the queue of a Worker or Supervisor. If the selected Worker or Supervisor does not have any pending action for the case in POS, a row will appear in their queue indicating "Documents Indexed for Case" in the **Activity** field, as well as the case number and suffix.

Activities Management screen (without pending action)

"Documents Indexed for Case" in Activity field

The screenshot shows the 'Activities Management' interface for a different user, 'Perdichizzi Andrew'. The top bar indicates 'Version 7.3.1 - Paperless Office System - [Activities Management]' and the date 'Tuesday, January 20, 2004'. The interface includes the same filter sections as the previous screenshot. The table lists activities with columns for Activity, Due Date, Alert, Case Name, Case No, Suf, and Rec. The first two rows are highlighted in blue, indicating pending actions: 'EC - Application Interview' with Case Name 'Jain Vivek', Case No '00007421483E', Suf '1', and Rec 'Perdichizz'; and 'Documents Indexed for Case' with Case Name 'Verification Test', Case No '00007410433C', Suf '1', and Rec 'Perdichizz'. Other activities include 'Document Intake', 'Change Case Data', and 'Application Interview'. At the bottom, there are buttons for 'Start', 'Assign', 'Remove', 'Schedule', 'Reopening', 'Update Disposition', 'WMS', 'View Your Schedule', and 'Comment'.

Update to POS Applications Report in Management Console

Recent changes to the POS Applications report on the Management Console include the addition of selection criteria to allow for more focused tracking. The Manager can currently select the date range for which to review cases. S/he now has the option to exclude unregistered cases (a.k.a. “dummy case numbers”) from that date range and may also review a specific Worker’s cases by selecting the Worker’s Unit Number.

Modifications to the In-Center Referral Activity

The In-Center Referral Activity allows Supervisors and Reception staff to refer new activities to the queue of a POS Worker for processing. To make this feature easier to use, the **In-Center Referral** window has been modified so that searching for another user’s queue via the list of Center staff is more efficient.

The **WMS ID** column has been replaced with a **Unit** column, and the Worker will also be able to sort the Center staff list by clicking on any of the following column names: **Title, Unit, Last Name, First Name, User/Worker (U/W), and Phone Number.**

Unit column

Title	Unit	Last Name	First Name	U/W	Phone Number
Supervisor	BEG	test	test	BEGRM	
Supervisor	DES	Green	Arlene		
Supervisor	DES	Mears	Yvonne	DESYM	
Supervisor	DES	Shepard	Michale	POSDP	

Recertification Messages

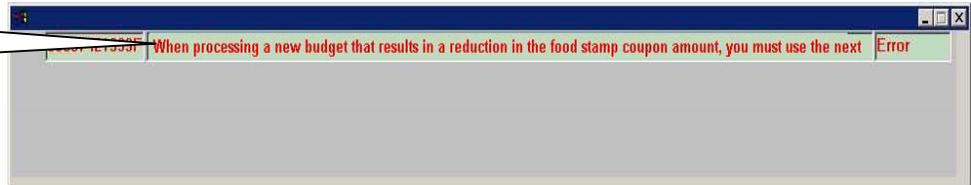
Two new messages have been added to POS to alert the Worker to errors made while processing changes for the participant.

When completing the **Recertification** activity, if the Worker fails to select a budget number, the error message “You must authorize a new budget when processing a Recertification where the case remains active” will be displayed.



When a budget with a decreased FS coupon amount is detected and the Worker fails to select a budget with an “A” cycle, POS will now display the error message “When processing a new budget that results in a reduction in the Food Stamp coupon amount, you must use the next available ‘A’ cycle following the end of the budget clock-down. Please return to the budget window and reauthorize the budget with a new effective cycle.” Workers can double-click the text to view the error message in full.

Double-click to view full text of the error message.



New Business Rules for Error Reduction

Business rules run in POS to help the Worker correct his or her entries before the case is transmitted to WMS. Updated business rules have been added to POS in this release to minimize the common WMS errors described below:

- **E1227** – TASA Indicator Required
- **E1798** – Incompatible Relationship, Individual Status
- **E1845** – Pregnancy Cat Code Requires EDC Female

Case Transfer Activity

Currently, POS does not allow Workers to make any entry in the **Caseload** field. However, situations do exist where the case may need to be transferred to a different unit within the same Center. The Case Transfer Activity will be updated so the Worker can make such entries when necessary. The **Mailing Address and Center Information** window will now include a listing of all Centers, including the current Center, and will provide the Worker with an editable **Caseload** field. The default value in the field will be **00000**.

Mailing Address and Center Information window

Caseload field

Automatic Save of Expedited Service Worksheet in Electronic Case Record

With the implementation of version 7.3.1, POS will automatically save a copy of the Expedited Service Worksheet (from the Application/Job Profile) within the Electronic Case Record upon completion of the Expedited Food Stamp (EFS) interview. The worksheet can then be viewed or reprinted from the **Approval** and **Review** activities at any time.

Other Changes

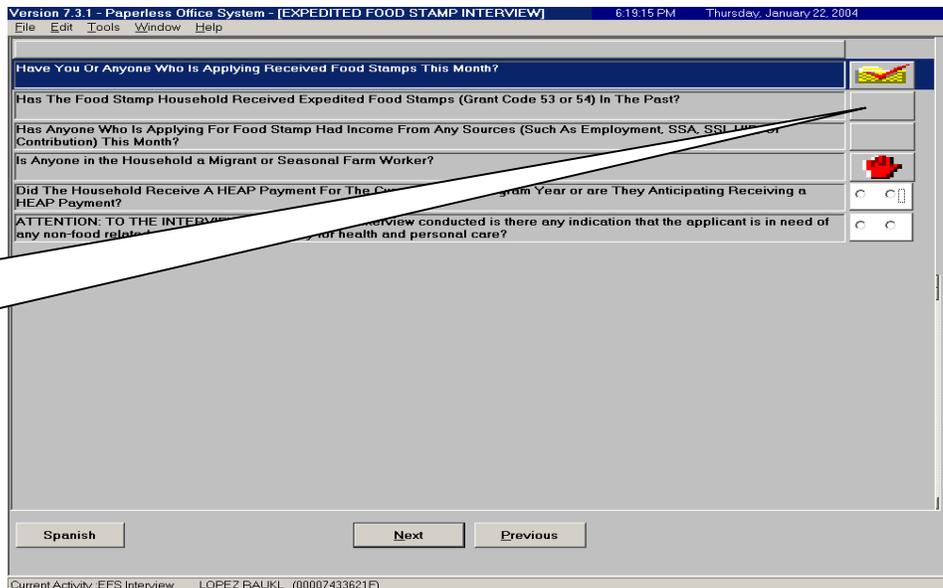
The following is a list of additional changes which have been made to POS:

- The **Replacement Check Number** field on the **PA Single Issuance Benefit** window will be expanded from six characters to eight characters.
- The State Fed Charge business rules have been migrated to the business rules engine.

Modification to Expedited Food Stamps in the Past inquiry

Within the **Expedited Food Stamps (EFS) Interview** activity, the Worker is presented with the question “Has the Food Stamp Household Received Expedited Food Stamps (Code **53** or **54**) in the Past?” If the answer is yes, POS will automatically launch the **EFS In The Past** inquiry. Previously, this inquiry allowed Workers to view benefit issuances without restriction as to time frame. This has been fixed to automate a date range of 10 months prior to the current date for inquiries.

Worker clicks here and the benefit issuance history is retrieved by POS.



The system will automatically look back 10 months from the current day (e.g., for an application on January 22, 2004, it will automatically look back using a range of 03/01/03 to 01/22/04, going back to the beginning of the 10th month). It will then display the results of the inquiry for EFS in the past (see screen shot on top of p. 6).

Results of the benefit issuance history are shown in the "Response to Question" section.

Version 7.3.1 - Paperless Office System - [EXPEDITED FOOD STAMP INTERVIEW] 6:19:59 PM Thursday, January 22, 2004

File Edit Tools Window Help

Have You Or Anyone Who Is Applying Received Food Stamps This Month?

Has The Food Stamp Household Received Expedited Food Stamps (Grant Code 53 or 54) In The Past?

Has Anyone Who Is Applying For Food Stamp Had Income From Any Sources (Such As Employment, SSA, SSI, UIB, Or Contribution) This Month?

Is Anyone in the Household a Migrant or Seasonal Farm Worker?

Did The Household Receive A HEAP Payment For The Current (HEAP) Program Year or are They Anticipating Receiving a HEAP Payment?

ATTENTION: TO THE INTERVIEWER: Based on the interview conducted is there any indication that the applicant is in need of a non-food related personal item necessary for health and personal care?

Response to Question

Instructions

The information presented below is for informational purposes only. POS will use this data to determine the level of documentation required for this case.

Case Number	007432971F	Did the client receive a grant code 53 or 54 in the past	No	Date Issued	00.00.0000
		Have recurring Food Stamp benefits been authorized since the last EFS issuance	No	Begin Date	00.00.0000
Case Number	007433400E	Did the client receive a grant code 53 or 54 in the past	No	Date Issued	00.00.0000
		Have recurring Food Stamp benefits been authorized since the last EFS issuance	No	Begin Date	00.00.0000

Redo OK Cancel

Forms

The following forms have either been revised or are now for the first time available in POS:

- The POS version of the Notice of Decision on Assistance to Meet an Immediate Need (**W-145HH**) has been revised to match the paper version of the form.
- The POS **LDSS-3152** now includes a cover sheet which instructs the applicant/participant in English, as well as nine other languages, to contact their Worker if they need assistance in reading the form.
- The Notification of Rent Payment Responsibility (**W-897P**) form is now available in POS.

Effective Immediately