



FAMILY INDEPENDENCE ADMINISTRATION

Seth W. Diamond, Executive Deputy Commissioner




James K. Whelan, Deputy Commissioner
Policy, Procedures and Training

Lisa C. Fitzpatrick, Assistant Deputy Commissioner
Office of Procedures

POLICY BULLETIN #05-78-SYS

POS VERSION CHANGE 9.1.1

<p>Date: May 25, 2005</p>	<p>Subtopic(s): POS</p>
<p> This procedure can now be accessed on the FIAweb.</p> <p>Changes to Additional Suffix Level Data, Case Login and TAD Windows</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 policy bulletin is to inform staff of the following changes, which were implemented in POS Version 9.1.1 on May 23, 2005:</p> <ul style="list-style-type: none"> • Changes to Additional Suffix Level Data, Case Login and TAD Windows • New PA Opening Code, 114 • Change to Edit in Rent Restriction Field • New Additional Needs Type Codes, 47 and 48 • Changes to Finger Imaging Notice Data Entry Window • Removal of Phone Log and Phone Book Icons and Shortcuts • Changes to Certain Reports in the Management Console • Error Correction • Form Changes <p>To accommodate the revisions made to the Language Questionnaire (W-680FF) (see PB #05-54-OPE for details), the following changes have been made to the Additional Suffix Level Data window in the POS Application Interview, Change Case Data and Recertification Interview activities.</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*

The **Additional Suffix Level Data** window has been revised as follows:

- The question “In what language do you read?” has been changed to “Preferred Language for Written Notices.” The drop-down menu for this field contains the following language choices: Arabic, Chinese, Haitian-Creole, Korean, Russian, Spanish and English.
- A new question has been added: “Do you require free interpreter services?” The Worker must check **Yes** or **No** to this question, based on the applicant/participant’s response.

Additional Suffix Level Data window

This question has been reworded.

The **TAD** window in the **POS Interview** activities and in the **Case Login** window in the **Application Intake, Application Modification** and **Case Member Addition** activities are revised as follows:

- The **Language Read** drop-down menu now contains the following languages: Arabic, Chinese, Haitian-Creole, Korean, Russian, Spanish and English.

New PA Opening Code

A new Public Assistance (PA) Opening code, **114** (Employment Unit Override Code within Infraction Period), has been added to the POS TAD. For more information about this new PA code, please refer to PB #05-63-SYS (Public Assistance Sanction Periods in WMS).

Change to Edit in
Rent Restriction
Field

The “NYCHA Rent Restriction Address” edit prevents Workers from using the Lockbox address in the **Rent Restriction** field on the **Is There a Rent, Shelter or Mortgage Expense?** window. This edit has been updated to insure that the new NYCHA Lockbox address is not entered in this field. If the Worker attempts to use the NYCHA Lockbox Address in the **Restriction** fields, the following error message appears:

“NYCHA Lockbox address cannot be used for PA cases with a rent restriction. The NYCHA Account Number must be entered.”

New Additional
Needs Type Codes,
47 and **48**

The following updates have been made to the **Response to Question** window for the “Has Additional Expenses? Specify” question on the **Other Expenses** window:

- Two new Additional Needs type codes have been added to the **Specify Additional Expense** drop-down menu: **47** (Family Eviction Prevention [FEP] Supplement) and **48** (Rental Supplement for Adults without Children). These codes have also been added to the **POS Budget Household/Suffix Financial Needs** window.
 - If the Worker selects Additional Needs type code **47** on the **Other Expenses** window but there are no children under the age of 19 on the case, the following error message will appear when the Worker clicks on the **New Budget** button on the **POS Budget** window: “FEP Supplement is only allowed when at least one individual is under 19 years of age.”
 - If the Worker selects Additional Needs type code **47** on the **Other Expenses** window but fails to select restriction type **1** (Direct Involuntary) on the **Shelter** window, the following error message will appear: “FEP Supplement Requires a Restriction with Associated Code **70** and Restriction Code **1** – Direct Voluntary.”
 - Additional Needs type code **48** is to be used for singles and childless couples in receipt of the Housing Stability Plus (HSP) supplement.
- Two obsolete Additional Expense types, **Adult Taking Child To/From School** and **Child Awaiting School Pass**, have been removed.
- The field, **Pass Exp’d** from the **Other Expenses** window, is no longer in use and has been removed.

Expenses removed from
the **Other Expenses**
window

Please refer to PB #05-18-OPE (Issuance of Carfare) for more details.

Changes to Finger Imaging Notice Data Entry Window

The following new checkbox has been added to the **Finger Imaging Notice Data Entry** window in the **Application Referrals** activity, in accordance with the changes made to the Finger Imaging Notice (**W-519**) form on February 1, 2005:

- I am exempt from finger imaging because I meet one of the above exemption criteria.

The preview of the **W-519** on the window has also been adjusted to display the latest version of the form.

Removal of Phone Log and Phone Book Icons and Shortcuts

The **Phone Log** and **Phone Book** tools are no longer used in POS. The icons and shortcuts for these tools have been removed from the **Tool bar** and the **Tools** menu.

Changes to Certain Reports in the Management Console

The changes to certain reports in the Management Console are as follows.

“POS FFR” report

The following changes were made to the “POS Face to Face Recertification” (FFR) report in April 2005:

- In the **Area** filter, the “Excluding HASA Caseloads” and “Only HASA Caseloads” options have been removed.
- In the **Disposition** filter, the “Case Continue Active” option was renamed “Case Continues Active.” The “Outstanding (all except SIC)” option was renamed “Outstanding” and the “Closed – FTK (**V20**)” option was renamed “Closed – FTR (**V20**).”

“AFIS” report

The following changes were made to the “Automated Finger Imaging System” (AFIS) report in April 2005:

- The report lists all Public Assistance (PA) and Food Stamp (FS) individuals age 18 or older with a blank AFIS indicator or with the value of **3** (Temporarily Unavailable or Unusable, One Finger [System Generated]) or **4** (Temporarily Unavailable or Unusable, Two Fingers [System Generated]) in the AFIS Indicator field.
- The columns in the report are now sortable.

“Timeliness” report

The following changes were made to the “Timeliness” report in April 2005:

- The PA file date is now used for the PA timeliness calculations.
- When the PA due date is equal to the Electronic Benefit Transfer (EBT) pick up date for the case “toe digit,” the case is not entitled to a code **02** (Regular Allowance-Recurring Needs) grant. For these cases, the processing date and the PA file date are used to measure PA timeliness.
- In the **Workers** filter, a new “Worker” option has been added. It allows the user to filter according to the Worker who conducted the interview. The “Unit Worker” option now lists the caseloads for the Center.
- The default selection for Safety Net (SN) Time Limits (Calendar Days) filter has been changed to 45 days.
- The “Last User” column was removed from the report.
- Withdrawn cases are excluded from the report.

The columns in the PA section of the report now appear in the following order when “Display Data” is selected in the **Report Output** filter:

- Case Number
- Suffix
- Casehead Name
- Pers Section (Unit of the Interviewer)
- Unit Worker (Caseload)
- Cat (Case Category)
- Interviewer
- File Date
- PA Stat (PA Status)
- PA Proc Date (PA Processed Date)
- PA Days to Proc (PA Days to Process)
- Days Over (Processing)
- PA Issue Date (PA Benefits Issuance Date)
- PA Days to Issue
- Days Over (Issuance)
- PA Timely

“POS Applications”
report

The following changes will be made in June 2005 to the “POS Applications” report:

Filters

- The **Timeframe Selection** filter will be renamed “Entry Date.”
- “Worker” will be added as a new menu option in the **Workers** filter: When the user selects this menu option, all Workers listed in the Center’s POS Enrollment Table will appear in the drop-down, in alphabetical order. If a caseload is associated with the Worker in the POS Enrollment Table, it will be listed to the right of his/her name.
- When the **Unit Worker** menu option is selected, all caseloads for the Center within the POS Enrollment Table will appear in the drop-down menu.
- A new filter will be added: **Show Only Separate MA Cases**. When the Worker clicks **Yes** for this filter, only denied applications that were closed or rejected with a PA code listed on the Referral from Public Assistance for Separate Determination of Medical Assistance (**M-42f**) form will appear in the Applications report for the selected timeframe.

Columns in Report

The following changes will be made to the columns in the report:

- The “Financial Planner” column will be removed from the report.
- The “FP Disposition” column will be renamed “JOS Disposition.”
- The “Problems” and “Scheduled ‘I’ Date” columns will appear at the end of the report.
- Five new columns will be added to the report: “PA File Date,” “FS File Date,” “Date Intake Ended,” “No Food” and “Sep MA.”

The columns will appear in the following order on the report (see the next page; new columns are in **bold**):

“POS Applications”
report columns

Column	Description
Row Number	Row number of the report
Case No	Case number
Case Name	Last and first name of the casehead
Suffix	Case suffix
Case Category	Case category (EAF, SNCA, etc.)
Entry Date & Time	Date and time client was logged into Center using Site Determination
PA File Date	PA file date
FS File Date	FS file date
CMU	Section code from the enrollment table
Caseload	Unit Worker number of the case
Receptionist	Last name and first initial of user doing Site Determination
Receptionist Disposition	Disposition made by the Receptionist and time of disposition
Assign Intake Date	Date the case is assigned to someone's queue
JOS Disposition	Disposition made by the user assigned to the case and time of disposition
Date Intake Started	The date and time the Intake activity is opened
Date Intake Ended	The date and time the Intake activity is completed
Date Initial Intv Started	The date and time the Application Interview activity is opened
Date Initial Intv Ended	The date and time the Application Interview activity is completed
No Food	Display “Y” only if “No Food” is selected as a problem
IN/EFS Start Date	The date and time the EFS Interview activity is opened
IN/EFS Intv Completed	The date and time the EFS Interview activity is closed/completed
IN/EFS Issued	Whether IN/EFS is issued (IN, EFS or None)
IN/EFS Approval Date	The date and time the Approve IN/EFS activity is completed
IN/EFS Processed	The result and date of the transmittal to WMS
Interviewer	Last name, first initial of the user that does the “I” interview
PA Status	PA status from the POS database
MA Status	MA status from the POS database
FS Status	FS status from the POS database
Spvr Approval of “I”	The date and time the Approve Eligibility Decision is completed
“I” Processed on WMS	The result and date of the transmittal to WMS
Sep MA	Display code only if a PA CL/RJ code requiring Sep MA is used
Problems	At least one problem is indicated on the Site Determin. window
Scheduled “I” Date	Occurs when the applicant mails or faxes in the PA application
Zip Code	Zip code of the case

Error Correction

The transmission rules for the individual category **Language** and **Relationship** codes have been adjusted to help prevent WMS errors.

The business rules for the Medicaid Coverage code and dates on the POS TAD have been revised in accordance with changes in PB #05-55-ELI (Medicaid Coverage).

Form Changes

The following forms have been revised to match changes in the paper forms:

- **EBT-23** Notice of Special Public Assistance or Food Stamps Grant
- **EBT-23 (S)** Notice of Special Public Assistance or Food Stamps Grant (Spanish)
- **M-40k** Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits
- **M-40k (S)** Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits (Spanish)
- **M-858c** Notice of Intent to Restrict Home Energy Allowance (Timely)
- **M-858c (S)** Notice of Intent to Restrict Home Energy Allowance (Timely) (Spanish)
- **M-858x** Notice of Intent to Recoup Utility Grant (Timely)
- **M-858x (S)** Notice of Intent to Recoup Utility Grant (Timely) (Spanish)
- **M-858ff** Notice of Intent to Restrict Home Energy Allowance (Timely)
- **M-858ff (S)** Notice of Intent to Restrict Home Energy Allowance (Timely) (Spanish)
- **W-102** Notice to Participant of New Worker
- **W-102 (S)** Notice to Participant of New Worker (Spanish)
- **W-145** Notice of Intent to Restrict Shelter Allowance
- **W-145 (S)** Notice of Intent to Restrict Shelter Allowance (Spanish)
- **W-145HH** Notice of Decision on Assistance to Meet an Immediate Need
- **W-145HH (S)** Notice of Decision on Assistance to Meet an Immediate Need (Spanish)
- **W-147** Letter to Landlord – Request for Residence Verification
- **W-147 (S)** Letter to Landlord – Request for Residence Verification (Spanish)
- **W-519** Finger Imaging Notice
- **W-519 (S)** Finger Imaging Notice (Spanish)
- **W-680FF** Language Questionnaire
- **W-680FF (S)** Language Questionnaire (Spanish)

Effective Immediately