



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #08-112-SYS

FOOD STAMP PAPERLESS OFFICE SYSTEM RELEASE NOTES VERSION 2.2.1

Date: September 03, 2008	Subtopic(s): POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>The purpose of this policy bulletin is to inform Non Cash Assistance Food Stamp (NCA FS) Center staff that the latest version of the Food Stamp Paperless Office System (FS POS) is scheduled to migrate to production on September 8, 2008.</p> <p>Descriptions of the changes can be found in FS POS Release Notes Version 2.2.1 (Attachment A).</p> <p>These release notes can also be found on the FIAweb at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective September 8, 2008</i></p> <p>Attachments:</p> <p>Attachment A FS POS Release Notes Version 2.2.1</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*

FS POS Release Notes

Version 2.2.1 September 8, 2008

These Release Notes contain descriptions of changes in FS POS Release 2.2.1, scheduled for September 8, 2008. 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

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1. Application Pre-Population for NCA Cases

FS Applicants who return to continue their FS application are entitled to re-use the data from the prior application. The data re-use will be available for applicants who are returning for Food Stamps and are entitled to keep their prior FS file date. The income and shelter information must be verified for changes.

For cases meeting the pre-population criteria, POS will:

1. Pre-populate the individual details and documentation.
2. Pre-populate the absent parent, resource, potential income, medical, other expenses and training information with the prior POS application data. The Worker will be able to edit the application information, if necessary.

The following windows will not be pre-populated:

1. CIN Re-Use
2. Case Number Re-Use
3. Alien determination
4. Budget
5. TAD
5. An eligibility decision notice may need to be prepared, if the applicant did not receive Expedited Food Stamp benefits.

Prior POS forms will be available via the Review Case activity and the Printed Forms menu or within the current activity if the prior case number is re-used.

New Windows

The following new **Re-Application Reason** window will appear after the **Additional Suffix Information** window when the **Re-Use Data** is selected in the **Application Intake** activity.

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New window: Re-Application Reason

The new **Re-Application Reason** window will appear after the **Additional Suffix Information** window when the prior application data is re-used.

This window will display the denial reason for the original application and will allow the Worker to record the reason for the re-application and whether there have been any changes in the household since the last application.

Reapplication Reason Window

Version 11.1 - Paperless Office System - [Re-Application Reason] 10:19:45 AM Monday, May 07, 2007

File Edit Tools Window Help

Reason for Re-Application

Why Was the Prior Application Denied?

FS Denial Code (RJ or CL): N10 Failure to Keep/Complete Appointment

Did the Applicant Fail to Comply with the Required Eligibility Interview? Yes No

Did the Applicant Fail to Return with Previously Requested Documentation? Yes No

Other Reason: [Dropdown]

Please Provide Detailed Reason for Re-Applying:

Have There Been Any Changes in Your Household Since Your Last Application? Yes No

Please Provide Details Below:

Next Previous

Confirmation pop-up window

POS will ask the worker to verify the accuracy of the prior employment, income and shelter information in a new interface and will allow the re-use of the application data, if it is accurate. The Worker will be able to edit the application information, if necessary.

If there is data available and the Worker answers 'Yes' for this question, POS will display the **Confirmation** window and display the old data in a read-only window below the **Confirmation** window.

Confirmation

The window below displays the applicant's information from the original application for this question. Please review this information and answer the following question:

Is the information still accurate? Yes No

OK

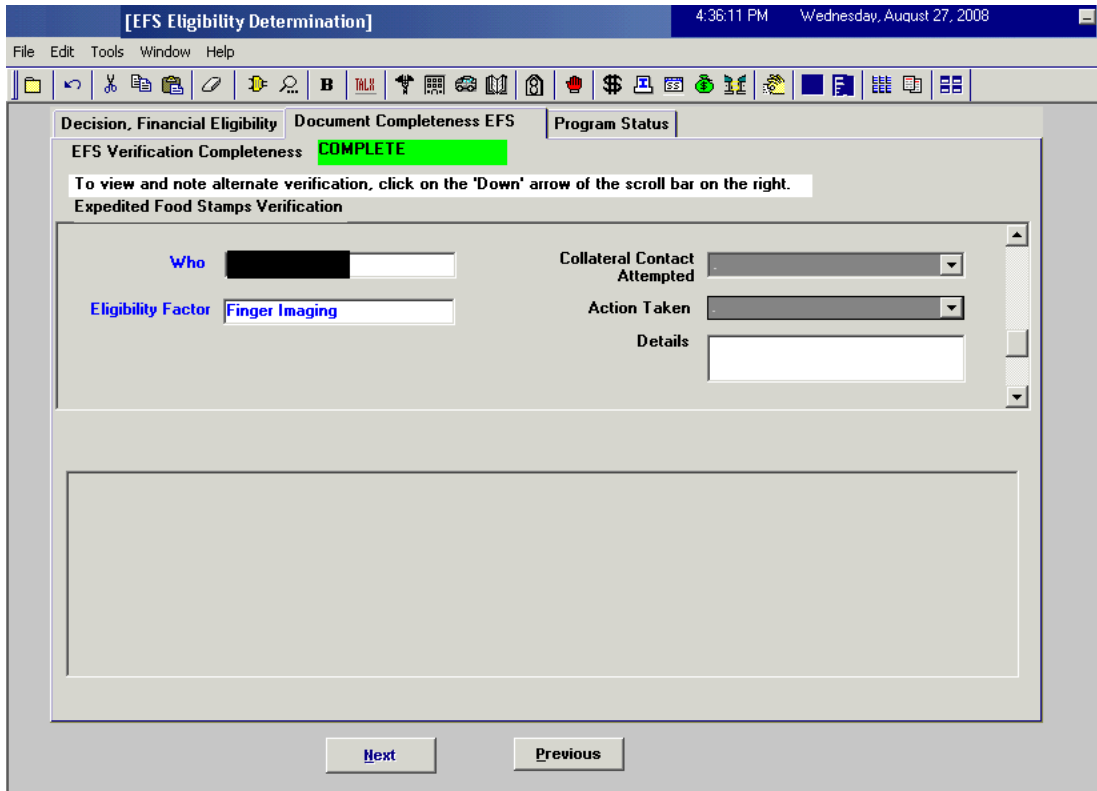
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2. AFIS Requirement for EFS Determination

Finger imaging (AFIS) will now be a condition of document completeness during the EFS eligibility determination. The worker will not be able to override the AFIS requirements in the EFS Document Completeness tab.

EFS Document Completeness Tab



If any of the adults who are required to complete finger imaging do not comply with this requirement, the case will not be considered fully verified.

If the case is eligible for EFS and all other documentation has been verified except the AFIS requirement the case status will be Single Issuance (SI).

3. Updated Application Log for NCA Food Stamp Centers

The Application Interview Log and Failed to Keep Application Interview Log windows will be updated with the following new functionality and features:

- New search criteria
- Add the original appointment date column.
- Allow the FS site to select the columns that should be displayed.
- Allow the FS site to select the columns that should be printed.
- Add filtered printing functionality.
- Print all output for one case row on the same page.

See Appendix A for full details.

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4. Updated Recertification Log for NCA FS Centers

The Recertification Interview Log and Failed to Keep Recertification Log windows will be updated with the following new functionality and features:

- New search criteria
- Add the original appointment date column.
- Allow the FS site to select the columns that should be displayed.
- Allow the FS site to select the columns that should be printed.
- Add filtered printing functionality.
- Print all output for one case on the same page.

CNS Notice Number Required Window

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

See Appendix B for full details.

5. New E-Form: W-140VV Food Stamp Recertification Notice for F61 and F63

The Office of Procedures has created a new FS Recertification Notice for the FS Centers F61 (Residential) and F63 (Homebound). This new form will be added to FS POS.

The W-140VV has been added and a data entry window is available to F61 & F63. A new response window has been created for these specific sites.

The screenshot shows a dialog box titled "Response to Question" with a subtitle "Food Stamp Recertification Notice (F61 and F63)". It contains three input fields: "Food Stamp Benefits Expiration Date:" with the value "00/00/0000", "The application must be received by:" with the value "00/00/0000", and "Center Fax Number:" with the value "() -". At the bottom of the dialog are two buttons: "OK" and "Cancel".

If a worker from another site attempts to access this form the following error message will be displayed:

- "The W-140VV form can only be printed for F61 and F63 cases."

When the Worker clicks OK on the message they will not be able to open the response window.

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6. Changes to the LDSS 4826 E-Form

The LDSS-4826 form (Food Stamp Benefits Application/Recertification) has been updated by the New York State Office of Temporary and Disability Assistance (NYS-OTDA). The E-Form used within POS will be updated accordingly.

The following changes will be made:

- The telephone number field on the cover page will be replaced with a new toll-free telephone number for the applicant/participant.
- One question regarding the parole and warrant status of the applicant/participant will be replaced with two questions on page 1
- Two checkboxes will be added on page 6 to keep track of whether the application was completed in-person or over the telephone.
- A new page numbered 1A will be added after page 1 and will allow the entry of information for additional household members and the entry of additional income information.

7. E-Forms

The following forms have been converted to E-Forms:

- **EXP-76R** (Documentation Receipt)
- **W-34A** (Referral/Information Form)

The following form has been updated:

- **LDSS-3938 NYC** (Food Stamp Application Expedited Processing Summary Sheet - NYC)
- **W-113K** (Documentation Requirements and/or Assessment Follow-up)

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Appendix A: Application Interview Log

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and allows the processing of failed to keep transactions by designated staff.

The Application Interview Log and Failed to Keep Application Interview Log windows will be updated with the following new functionality and features:

- New search criteria
- Add the original appointment date column.
- Allow the FS site to select the columns that should be displayed.
- Allow the FS site to select the columns that should be printed.
- Add filtered printing functionality.
- Print all output for one case row on the same page.

New 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.

They will also be allowed to search by the last name of the casehead or payee.

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 Paper Logs.

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 also be able to view all of the data for 1 case row on the same printed page.

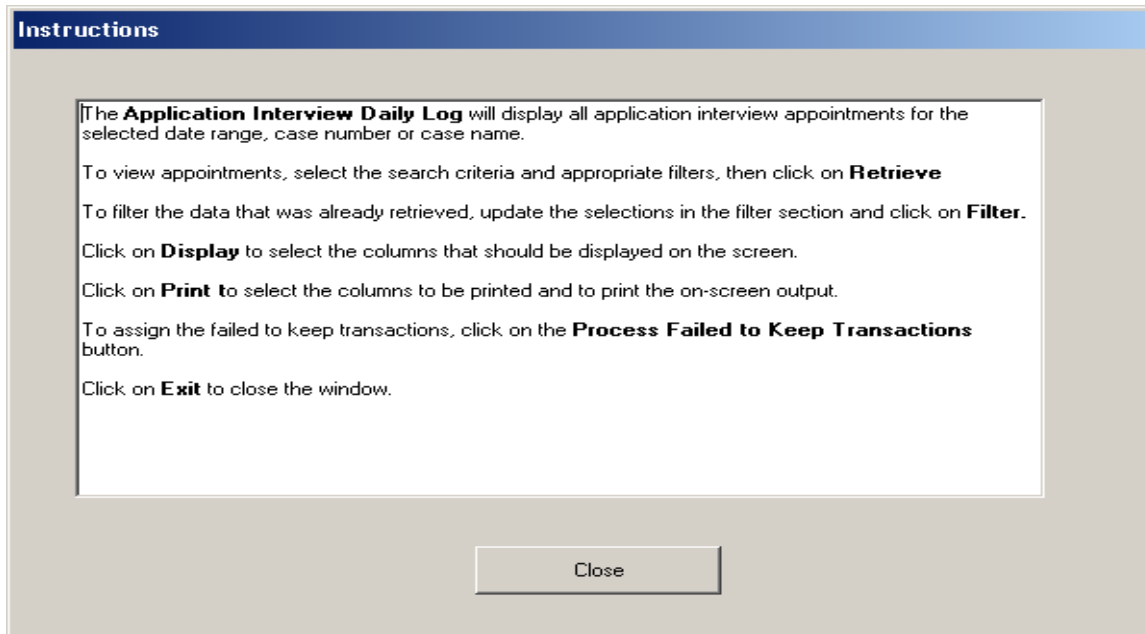
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Instructions

When the Worker clicks OK on the Instructions window for the **Application Interview Log** window will be displayed.

New Instructions



The Instruction window will display new instructions for the NCA FS Centers.

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Updated Application Log

FS POS Version 2.2.1

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

Search by **3**

Appointment Date **3a** Case Number **4**

Specify Range **3b** From To **3b** Last Name of Casehead or Payee **5**

Application Type Filter

Working Families **7a**

In-Center **7**

CBO **8**

Telephone **9**

Exclude dummy case numbers **10**

Original appointment date **6**

Appointment Status Filter

Kept Appointment **11**

Failed to Keep Appointment **12**

None **13**

14	15	16	17	18	19	20	21	22	22a	23	24	24a	25	26	27	6a
Intake Date	Case Number	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number	Number of Contacts	Assigned To	Spoken Lang	Interpreter	Inter Started On	Case Status	Previous Appt	Orig Appt
6/25/07	00000538905A	Lorne Anne	6/26/07	10:00 AM	Kept Appt	Yes	No		1	A. Turner	English	Yes	6/26/07	Active	6/25/07 11:15 AM	6/25/07 11:15 AM
6/25/07	00007422506B	Steel Dan	6/26/07	10:30 AM	Failed to Keep	No	No		2	B. Jones	Spanish	No		Applying		
6/25/07	00007421970C	Chatmen Steve	6/26/07	11:30 AM	Kept Appt	No	No		1	C. Allen	Russian	No	6/26/07	Active		
6/25/07	00007424834D	Mort Ralph	6/26/07	1:00 PM	Failed to Keep	Yes	Yes	(718) 555-1212 Ext 224	2	D. Roberts	Arabic	Yes		Applying		
6/23/07	00007446480E	Deep Zan	6/26/07	2:45 PM	Kept Appt	No	No		0	E. Spool	Haitian	No	6/26/07	Applying		
6/25/07	070611121115	Sands Raul	6/26/07	3:30 PM		Yes	No		0	F. Wells	English	Yes		Applying		

Assign **31** Reschedule **32** Contact **32a** Kept Appointment **33** Failed to Keep Appointment **34** Process Failed to Keep Transactions **35** Exit **36**

There will be additional fields in the Updated Application Log.

Definitions

Tool Bar

- This tool bar allows you to File, Print, Filter, Display, Summary.

Title

- Application Interview Log

Date Filters

- Search by Appointment date
 - Select Date
 - Specify Range
- Case Number
- Last name of case head or payee

Application Type Filter

- Original appointment date
- In-Center
 - Working Families
- POS CBO's
- Telephone Interview
- Exclude Dummy Case Numbers

Appointment Status Filter

- Kept Appointment
- Failed to Keep Appointment
- None

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Application Log Columns- All Column Headers are Sortable

14. Intake Date
15. Case Number
16. Case Name
17. Appointment Date
18. Appointment Time
19. Appointment Status
20. POS CBOs'
21. Telephone Interview
22. Contact Number
 - a. Number of Contacts
23. Assigned to
24. Spoken Language
 - a. Interpreter
25. Interview Started On
26. Case Status
27. Previous Appointment
- 6a Original Appointment**

Application Log Buttons

31. Assign- See *Assign procedure and Refer Action window* below
32. Reschedule – Displays Application Interviewer Scheduler Window
33. Kept Appointment – Click on button to indicate applicant kept appointment
34. Failed to Keep Appointments – Click on this button to indicate that the applicant did not keep appointment
35. Process Failed to Keep Transactions – Click on button to process Failed to Keep rejections
36. 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:

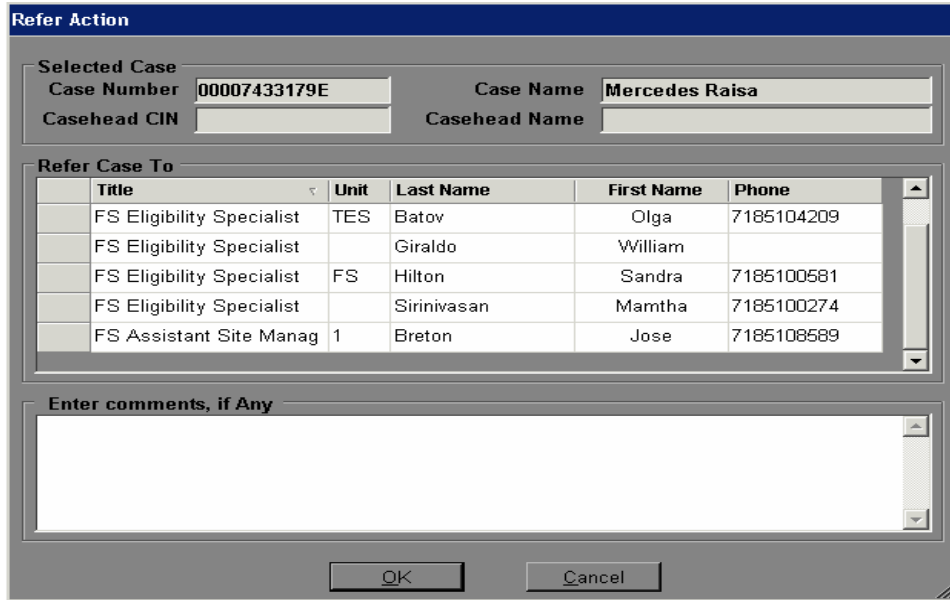
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

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) will be updated in POS.

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Refer Action window



The 'Refer Action' window contains the following fields and table:

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

New Application Log Summary window



The 'Log Summary' window displays the following totals:

Totals:		
Total Kept Appointments	<input type="checkbox"/> X X	28
Total Failed To Keep Appointments	<input type="checkbox"/> X X	29
Total Re-scheduled Appointments	<input type="checkbox"/> X X	30
Total Appointments	<input type="checkbox"/> X X	30a

OK

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

Read-Only Totals

- 28. Total Kept Appointments
- 29. Total Failed to Keep Appointments
- 30. Total Re-Scheduled Appointments
 - a. Total Appointments

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Contact Attempted

This window allows the Worker to record attempted contacts with the client. Each recorded contact will be recorded in the case activity table. Comments will be recorded in the case comments table.

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”.

Contact Attempted window: Successful Contact

The screenshot shows the 'Contact Attempted' window with the following data:

- Case Number: 00007440715G
- Case Name: JULIA RIVERIO
- Casehead Name: Julia Riverio
- Contact Number: 718-555-1212
- Extension: [Empty]
- Requested call time: [Empty]
- Contact Attempt 1: Did you successfully contact the client? Yes No. Date: 11/01/2007, Time: 10:00 am.
- Contact Attempt 2: Did you successfully contact the client? Yes No. Date: 11/05/2007, Time: 09:00 am.
- Contact Attempt 3: Did you successfully contact the client? Yes No. Date: 11/05/2007, Time: [Empty].
- Contact Attempt 4: Did you successfully contact the client? Yes No. Date: 11/05/2007, Time: [Empty].
- Comments: [Empty text area]
- Interview Type: Telephone In-Center
- New Contact Number: Yes No
- Contact Number: [Empty] Extension: [Empty]

Definitions of Contact Attempted Window

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

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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

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New window: Select Columns to Print

Select Columns to Print

- Intake Date
- Case Number
- Case Name
- Appt Date
- Appt Time
- Appt Status
- CBO
- Tel Intv
- Contact Number
- Number of Contacts
- Assigned To
- Spoken Language
- Interpreter
- Interview Started On
- Case Status
- Previous Appt
- Orig Appt

OK Cancel

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 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, return to the Log.

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New Window: Select Columns to Display

Select Columns to Display

- Intake Date
- Case Number
- Case Name
- Appt Date
- Appt Time
- Appt Status
- CBO
- Tel Intv
- Contact Number
- Number of Contacts
- Assigned To
- Spoken Language
- Interpreter
- Interview Started On
- Case Status
- Previous Appt
- Orig Appt

OK Cancel

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, return to the Log without any changes to the display.

FS POS Release Notes

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Failed to Keep Application Interview Log

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and will allow for the processing of failed to keep transactions by designated staff.

The instructions popup window will appear each time the window is opened.



Failed To Keep Application Log

FS POS Version 2.2.1

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

Search By

- Appointment Date **3**
 - Yesterday **3**
 - Past 14 Days
 - Specify Range

From	To
00/00/00	00/00/00

4
- Case Number **4a**
- Last Name of Casehead or Payee **4b**

5 Intake Date	6 Case Number	7 Case Name	8 Appt Date	9 Appt Time	10 Appt Status	11 CBO	12 Tel Intv	13 Assigned To	14 Case Status	14a Orig Appt
6/25/07	0000000001A	Lort Jake	6/26/07	10:00 AM	Failed to Keep	Yes	No	A. Turner	Applying	6/25/07 11:15 AM
6/25/07	0000000002B	Mort Dan	6/26/07	10:30 AM	Failed to Keep	No	No	B. Jones	Applying	
6/25/07	0000000003C	Chisold Steve	6/26/07	11:30 AM	Failed to Keep	No	No	C. Allen	Applying	
6/25/07	0000000004D	Blake John	6/26/07	1:00 PM	Failed to Keep	Yes	No	D. Roberts	Applying	
6/23/07	0000000005E	Tan Lihn	6/26/07	2:45 PM	Failed to Keep	No	No	E. Sprool	Applying	
6/25/07	0000000006F	Porty Lon	6/26/07	3:30 PM	Failed to Keep	Yes	No	F. Wells	Applying	

Totals:
Total Failed To Keep Appointments **15**

Assign Rejection **16** Assign Interview **17** Reschedule **18** Kept Appointment **19** Hold Rejection **20** Exit **21**

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The **Failed to Keep log** will have the same **search by functionality** as the **Application Log**. In addition, the originating appointment column has been added to the log.

Additional buttons

The following buttons will also allow Supervisors and Managers the ability to assign a case for further processing:

- Assign Interview
- Reschedule
- Kept Appointment
- Hold Rejection

Use of these buttons will remove the case from the Failed to Keep Log and place the case back on the Application Interview Log awaiting further action.

The **Assign Rejection** button will be utilized by FS Supervisors, FS Assistant Managers and FS Site Managers. Once clicked supervisors and managers can assign the case to a worker to proceed with the rejection process for cases that failed to keep the initial interview.

Refer Action window

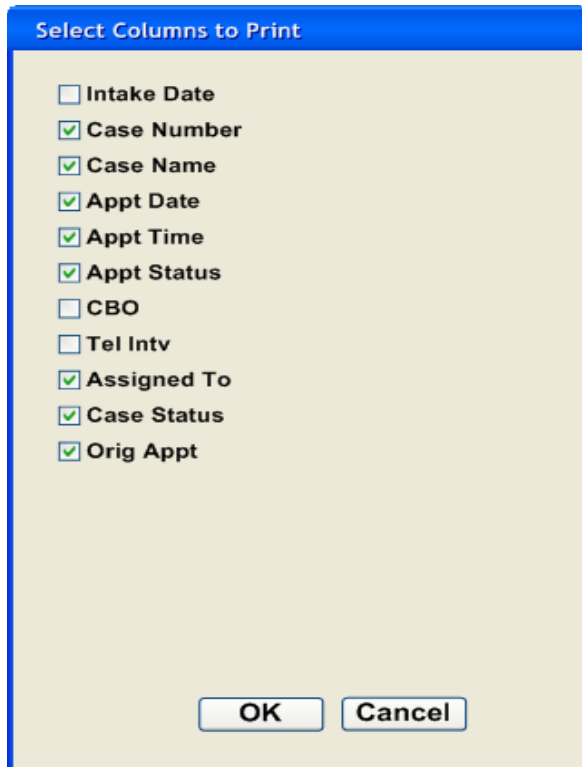
The screenshot shows a 'Refer Action' dialog box. At the top, it has a title bar 'Refer Action'. Below that, there are two sections for case information. The first section, 'Selected Case', contains fields for 'Case Number' (00007433179E), 'Case Name' (Mercedes Raisa), 'Casehead CIN', and 'Casehead Name'. The second section, 'Refer Case To', is a table with columns for Title, Unit, Last Name, First Name, and Phone. Below the table is a text area labeled 'Enter comments, if Any' and two buttons: 'OK' and 'Cancel'.

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

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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.

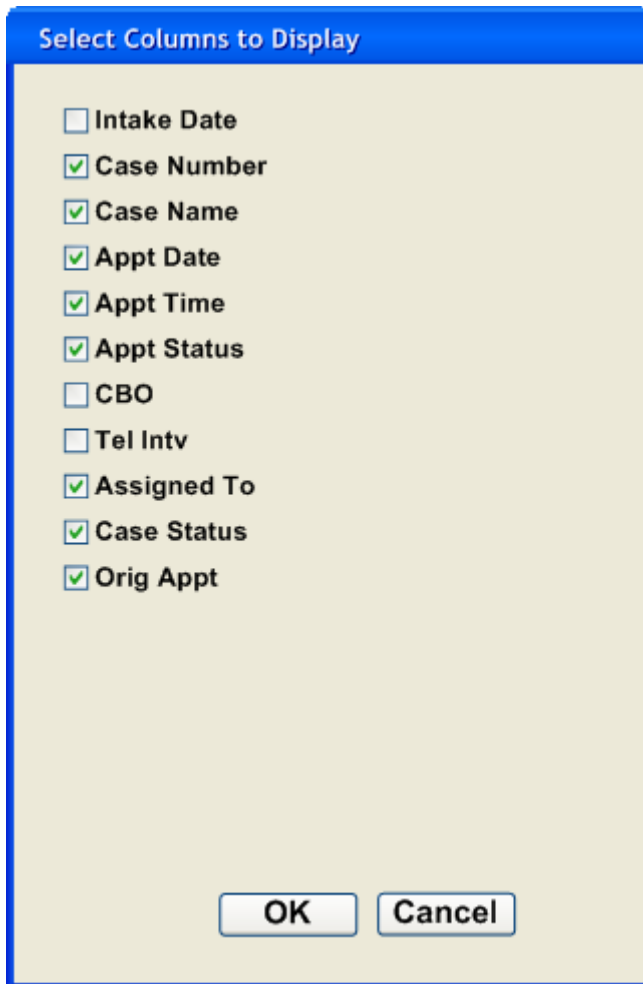
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row should appear on one page.

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.

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New window: Select Columns to Display



The new window will allow the Worker to decide which columns should be displayed from the Failed to Keep Application Interview 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, return to the Log without any changes to the display.

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Appendix B: Recertification Interview Log

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 will be updated with the following new functionality and features:

- New search criteria
- Add the original appointment date column.
- Allow the FS site to select the columns that should be displayed.
- Allow the FS site to select the columns that should be printed.
- Add filtered printing functionality.
- Print all output for one case row on the same page.
- Process all “failed to keep interview” closings with closing code **Y10**.

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

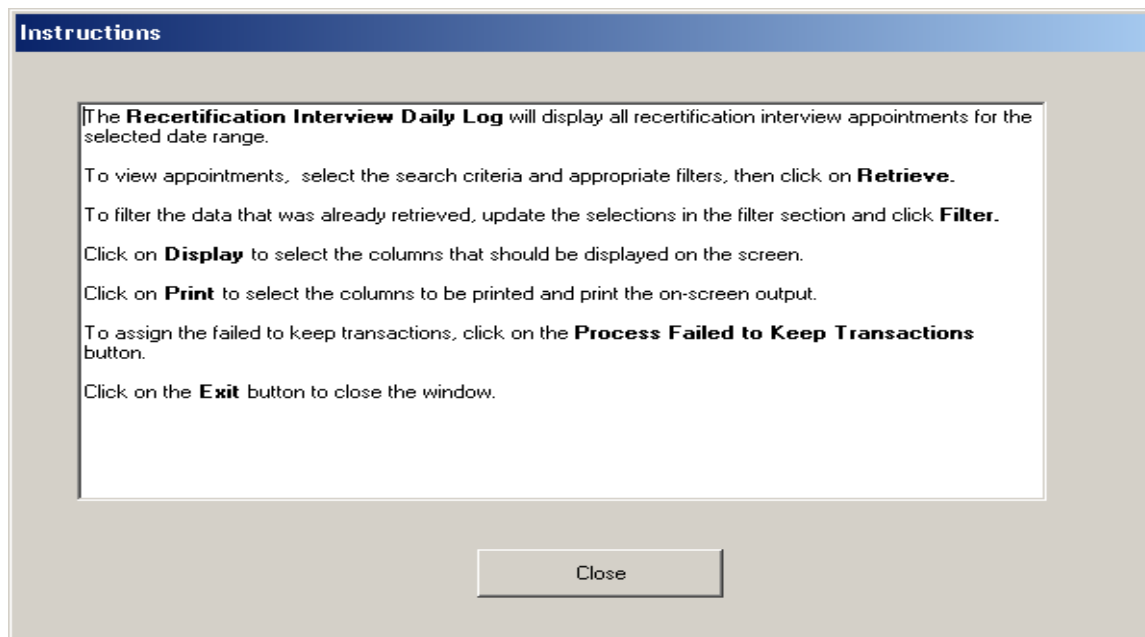
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Instructions

When the Worker clicks OK on the Instructions window for 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.

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Updated Recertification Log

FS POS Version 2.2.1

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 From 00/00/00 To 00/00/00 4 Case Number 5 Case Name

Appointment Type

Telephone Interview 6d
 In-Center Interview 6e
 Original appointment date 6

Appointment Status Filter

Kept Appointment 7
 Failed to Keep Appointment 8
 None 9

10	11	11a	11b	12	13	13a	13b	13c	14	15	16	17	18	18a	19	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	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	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		
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		
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		
00007446480E	Deep Zan	Haitian	No	7/31/2007	2:00 PM	No	Yes	(212) 555-1204	E. Sprool	0			Active	No		
070611121115	Sands Raul	English	Yes	7/31/2007	3:00 PM	Yes	No		F. Wells	0			Active	No		

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

- File, Retrieve, Print, Filter, Display, Summary
- Recertification Log

New Search by Date Filters

- Appointment date
 - Select Date
 - Specify Range
- Case Number
- Last name of case head or payee

New Appointment Type Filter

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

- Original Appointment date
 - Originating Appointment
 - Telephone Interview
 - In-Center Interview
 - Kept Appointment
 - Failed to Keep Appointment
 - None
- Case Number
- Case Name
 - Spoken Language
- 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

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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) will be updated in POS.

Refer Action window

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

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Log Summary window



The screenshot shows a window titled "Log Summary" with a blue header. The main area is light beige and contains a "Totals:" section. It lists four categories with input fields and corresponding values in black circles: "Total Kept Appointments" (XX, 28), "Total Failed To Keep Appointments" (XX, 29), "Total Re-scheduled Appointments" (XX, 30), and "Total Appointments" (XX, 30a). An "OK" button is at the bottom center.

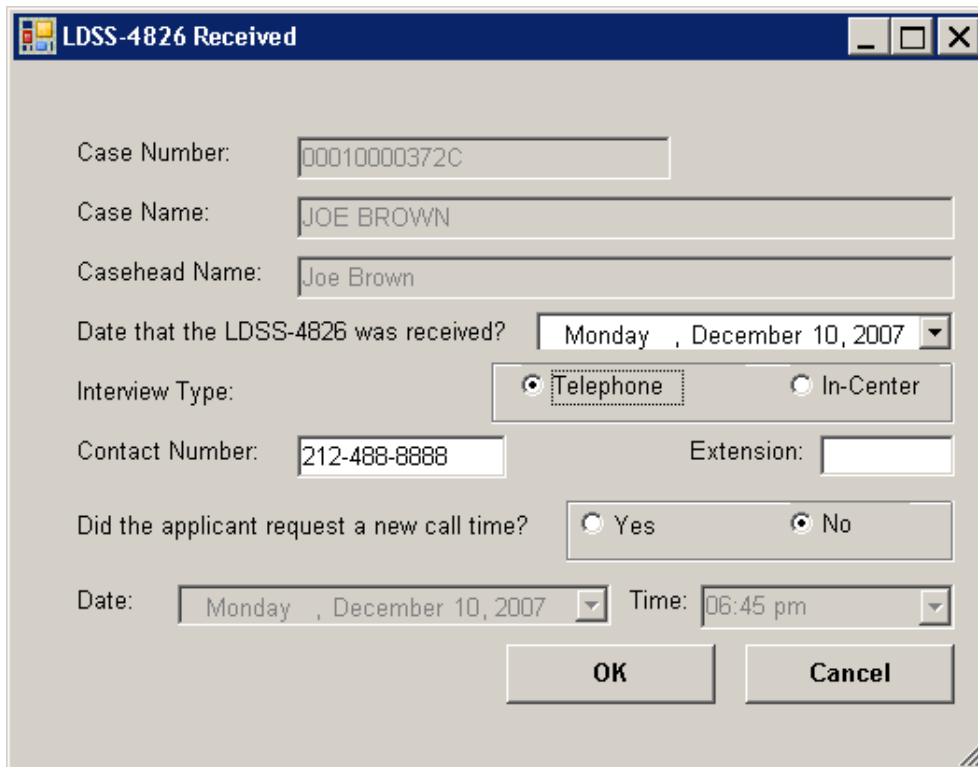
Category	Input	Value
Total Kept Appointments	XX	28
Total Failed To Keep Appointments	XX	29
Total Re-scheduled Appointments	XX	30
Total Appointments	XX	30a

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

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 window titled "LDSS-4826 Received" with a blue header and standard window controls. The form contains the following fields: "Case Number" (00010000372C), "Case Name" (JOE BROWN), "Casehead Name" (Joe Brown), "Date that the LDSS-4826 was received?" (Monday, December 10, 2007), "Interview Type" (Telephone selected, In-Center), "Contact Number" (212-488-8888), "Extension" (empty), "Did the applicant request a new call time?" (No selected, Yes), "Date" (Monday, December 10, 2007), and "Time" (06:45 pm). "OK" and "Cancel" buttons are at the bottom.

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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".

Contact Attempted window: Successful Contact

The screenshot shows a window titled "Contact Attempted" with the following fields and sections:

- Case Number: 00007440715G
- Case Name: JULIA RIVERIO
- Casehead Name: Julia Riverio
- Contact Number: 718-555-1212
- Extension: [Empty]
- Requested call time: [Empty]
- 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? [Empty]
- 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? [Empty]
- Comments: [Empty text area]
- Interview Type: Telephone In-Center
- New Contact Number: Yes No
- Contact Number: [Empty] Extension: [Empty]
- Buttons: OK, Cancel

Definitions of Contact Attempted Window

- 26. Case Number
- 27. Case Name
- 28. Case head Name
- 29. Contact Number
- 30. Extension
- 31. Request call time

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Contact Attempted 1

- 32. Did you successfully contact the client?
- 33. Date that the contact was attempted?
- 34. Time that the contact was attempted?

Contact Attempted 2

- 35. Did you successfully contact the client?
- 36. Date that the contact was attempted?
- 37. Time that the contact was attempted?

Contact Attempted 3

- 38. Did you successfully contact the client?
- 39. Date that the contact was attempted?
- 40. Time that the contact was attempted?

Contact Attempted 4

- 41. Did you successfully contact the client?
- 42. Date that the contact was attempted?
- 43. Time that the contact was attempted?
- 44. Comments
- 45. Interview Type
- 46. New Contact Number
- 47. Contact Number
- 48. Extension
- 49. OK
- 50. Cancel

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New Window: Select Columns to Print

Select Columns to Print

- Case Number
- Case Name
- Spoken Language
- 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
- Orig Appt

OK Cancel

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.

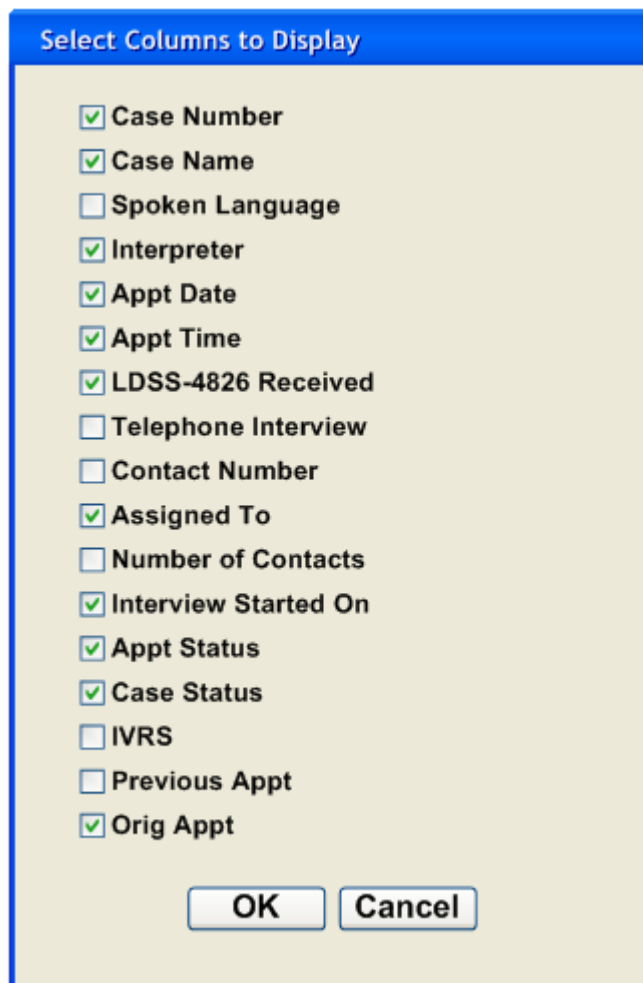
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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.

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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

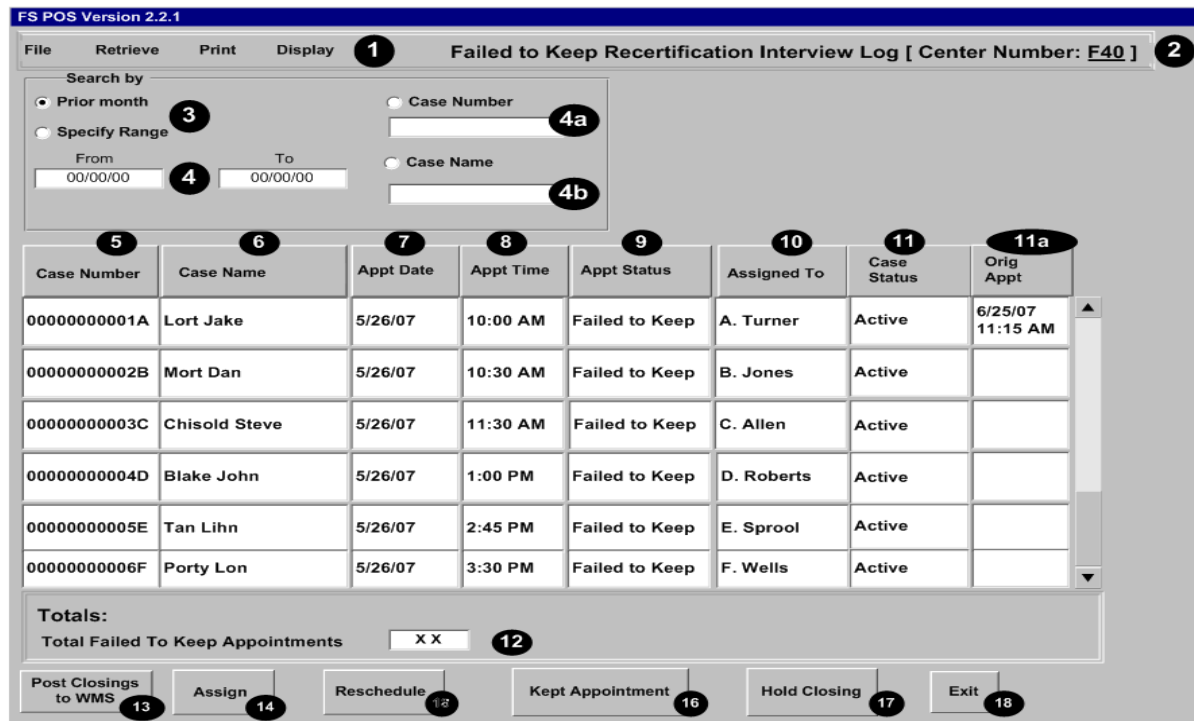
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Failed to Keep Recertification Interview Log

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



Updated Failed to Keep Recertification Interview Log



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.

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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

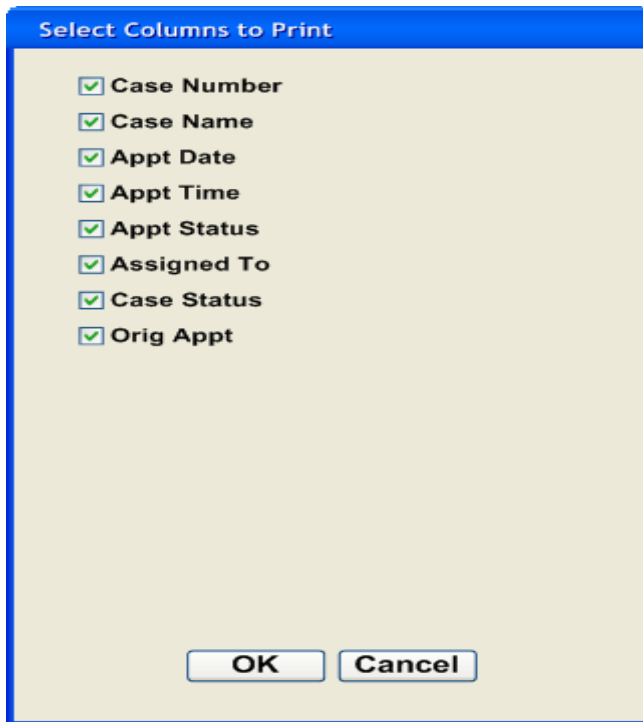
Buttons in Log

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

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New Window: Select Columns to Print



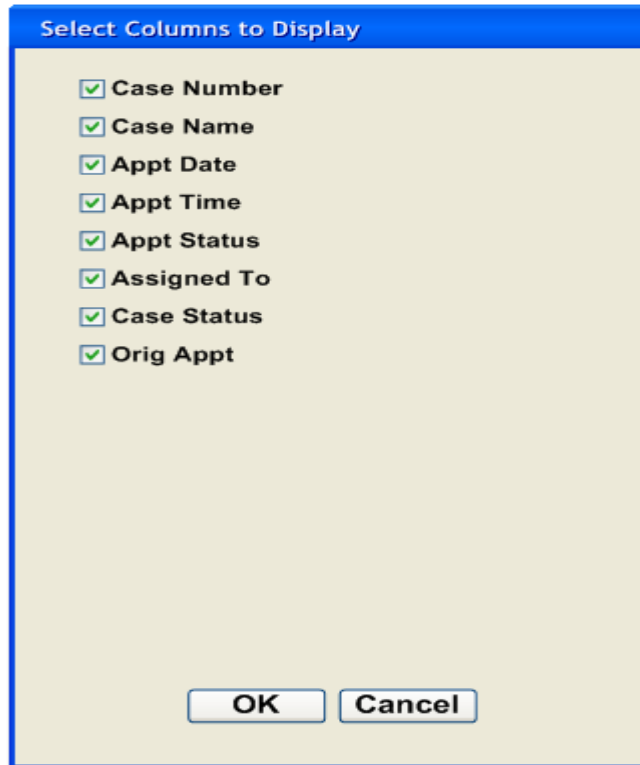
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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.

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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.

CNS Notice Number Required Window

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