

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

Table of Contents

1.	Application Pre-Population for NCA FS Cases	2
2.	AFIS Requirement for EFS Determination	4
3.	Updated Application Log for NCA Food Stamp Centers.....	4
4.	Updated Recertification Log for NCA FS Centers.....	5
5.	New E-Form: W-140VV Food Stamp Recertification Notice for F61 and F63.....	5
6.	Changes to the LDSS 4826 E-Form	6
7.	E-Forms.....	6
	Appendix A: Application Interview Log.....	7
	Appendix B: Recertification Interview Log	20

FS POS Release Notes

Version 2.2.1 September 8, 2008

1. Application Pre-Population for NCA FS 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
6. 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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

2. AFIS Requirement for EFS Determination

In order to process EFS benefits, the applicant must, at a minimum, verify his/her identity. If identity has been verified and other eligibility factors, including AFIS, are outstanding, EFS benefits can be issued but the status of the FS case must be Single Issue (SI).

Based on the Document completeness, POS will determine the status of the FS suffix as follows:

- If all eligibility factors, except AFIS, have been established the FS suffix will be SI;
- If any other eligibility factor is missing, the FS suffix will be SI;
- If all eligibility factors, including AFIS, have been established the FS suffix will be AC.

EFS Document Completeness Tab

The screenshot shows a software window titled "[EFS Eligibility Determination]" with a timestamp of "4:36:11 PM Wednesday, August 27, 2008". The interface includes a menu bar (File, Edit, Tools, Window, Help) and a toolbar with various icons. The main content area has several tabs: "Decision, Financial Eligibility", "Document Completeness EFS" (which is selected), and "Program Status".

Under the "Document Completeness EFS" tab, the "EFS Verification Completeness" is displayed as "COMPLETE" in a green box. Below this, there is a scrollable area containing the following fields:

- Who:** A text input field with a blacked-out value.
- Eligibility Factor:** A dropdown menu with "Finger Imaging" selected.
- Collateral Contact Attempted:** A dropdown menu.
- Action Taken:** A dropdown menu.
- Details:** A large empty text area.

At the bottom of the window, there are two buttons: "Next" and "Previous".

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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)

FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

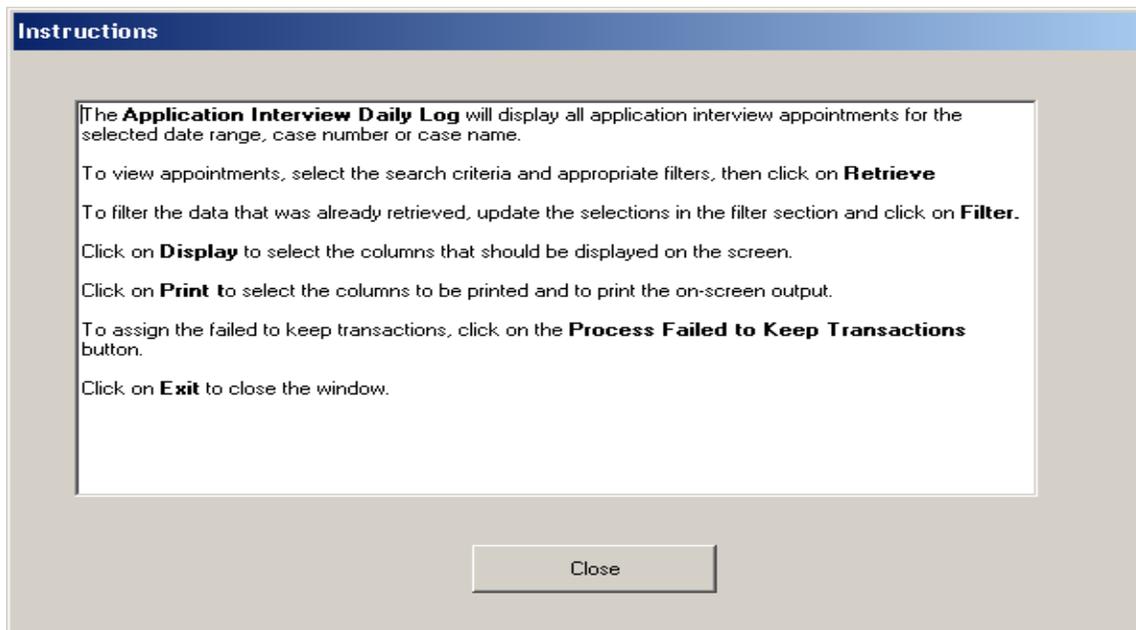
FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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
 Select Date 4
 Specify Range 3b
 From 00/00/00 To 00/00/00
 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

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

Title

2. Application Interview Log

Date Filters

3. Search by Appointment date
 - a. Select Date
 - b. Specify Range
4. Case Number
5. Last name of case head or payee

Application Type Filter

6. Original appointment date
7. In-Center
 - a. Working Families
8. POS CBO's
9. Telephone Interview
10. Exclude Dummy Case Numbers

Appointment Status Filter

11. Kept Appointment
12. Failed to Keep Appointment
13. None

FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

Refer Action window

Refer Action

Selected Case
 Case Number Case Name
 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

New Application Log Summary window

Log Summary

Totals:

Total Kept Appointments	<input type="text" value="XX"/>	28
Total Failed To Keep Appointments	<input type="text" value="XX"/>	29
Total Re-scheduled Appointments	<input type="text" value="XX"/>	30
Total Appointments	<input type="text" value="XX"/>	30a

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

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

Contact Attempted

Case Number: 00007440715G
Case Name: JULIA RIVERIO
Casehead Name: Julia Riverio
Contact Number: 718-555-1212 Extension:
Requested call time:

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:

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:

Comments:

Interview Type: Telephone In-Center

New Contact Number: Yes No

Contact Number: Extension:

OK Cancel

Definitions of Contact Attempted Window

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

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

Version 2.2.1 September 8, 2008

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 Case Number

Yesterday **3** Case Number **4a**

Past 14 Days

Specify Range

From To **4** Last Name of Casehead or Payee **4b**

5	6	7	8	9	10	11	12	13	14	14a
Intake Date	Case Number	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Assigned To	Case Status	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. Spool	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**

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

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

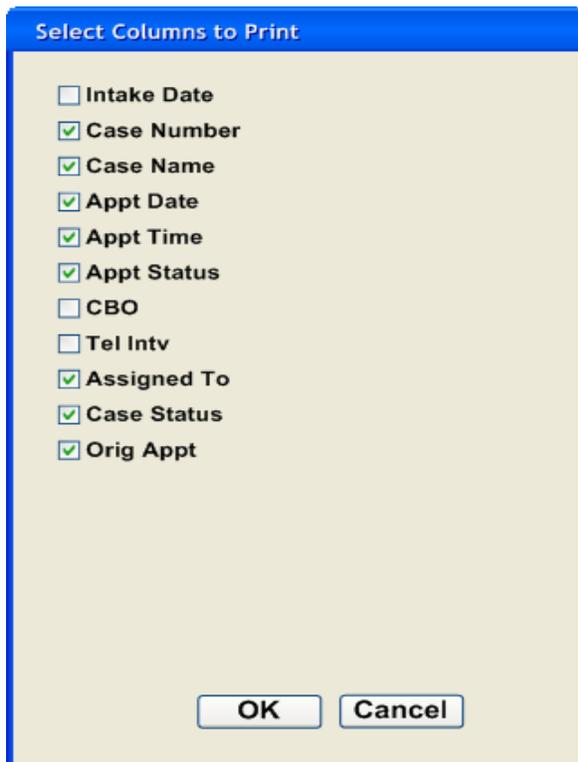
Enter comments, if Any

OK Cancel

FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

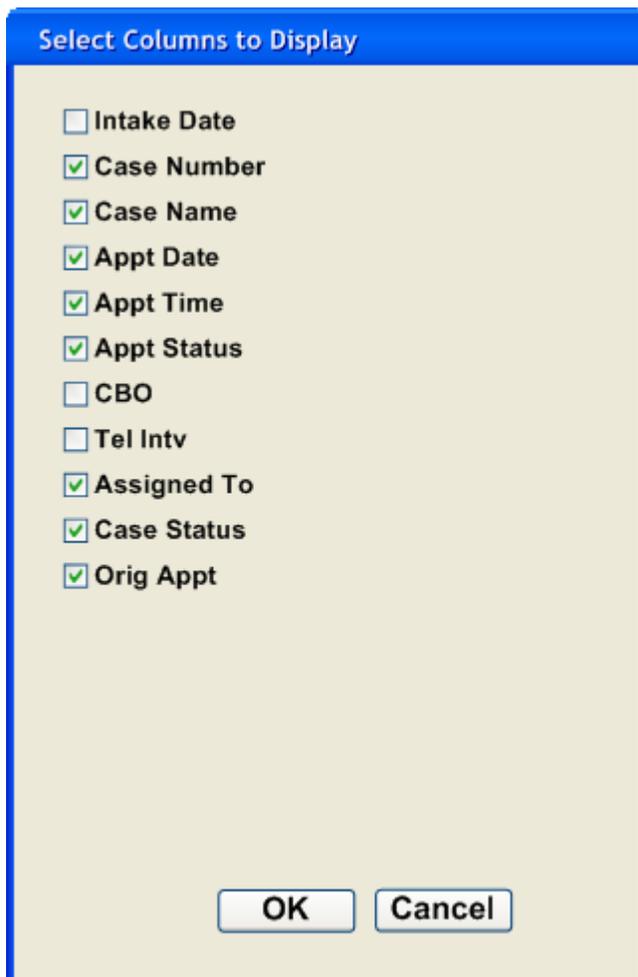
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row should appear on one page.

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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**.

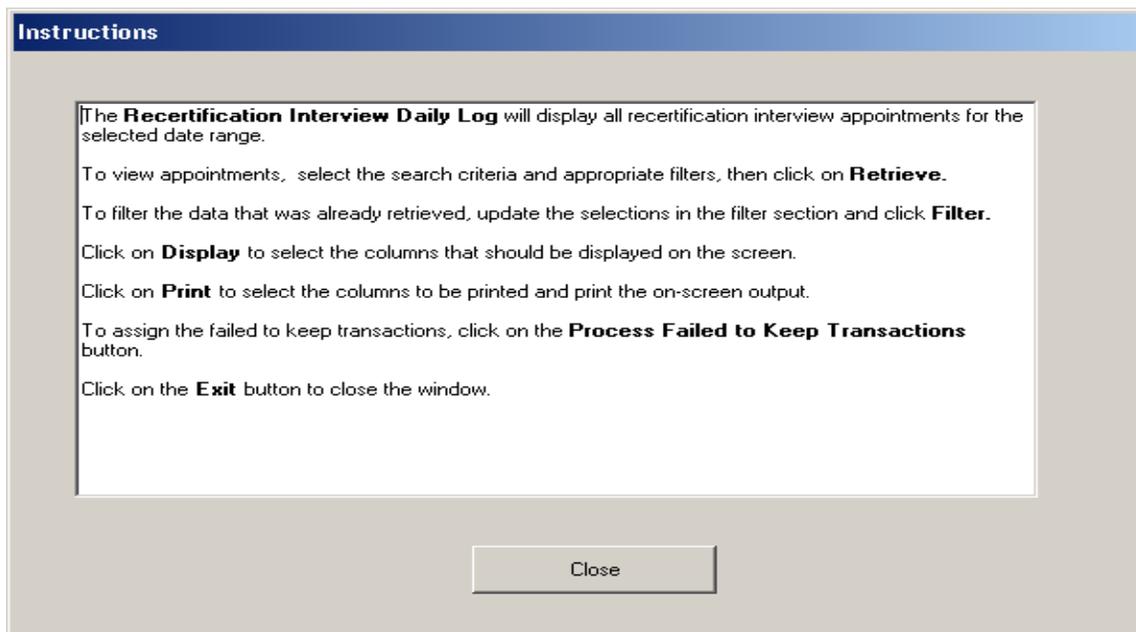
FS POS Release Notes

Version 2.2.1 September 8, 2008

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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** Case Number **4**

Specify Range **3b** Case Name **5**

Appointment Type **6**

Telephone Interview **6d**

In-Center Interview **6e**

Original appointment date

Appointment Status Filter **7**

Kept Appointment **7**

Failed to Keep Appointment **8**

None **9**

10 Case Number	11 Case Name	11a Spoken Lang	11b Interpreter	12 Appt Date	13 Appt Time	13a LDSS-4826 Received	13b Telephone Interview	13c Contact Number	14 Assigned To	15 Number of Contacts	16 Interview Started On	17 Appt Status	18 Case Status	18a IVRS	19 Previous Appt	6a 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

1. File, Retrieve, Print, Filter, Display, Summary
2. Recertification Log

New Search by Date Filters

3. Appointment date
 - a. Select Date
 - b. Specify Range

4. Case Number

5. Last name of case head or payee

New Appointment Type Filter

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

6. Original Appointment date
 - a. Originating Appointment
 - 6d. Telephone Interview
 - 6e. In-Center Interview
7. Kept Appointment
8. Failed to Keep Appointment
9. None
10. Case Number
11. Case Name
 - a. Spoken Language
12. Appt Date
13. Appt Time
 - a. LDSS-4826 Received
 - b. Telephone Interview
 - c. Contact Number

14. Assigned To

15. Number of Contacts

16. Interview Started On

17. Appt Status

18. Case Status

19. IVRS

20. Previous Appt

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

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

FS POS Release Notes

Version 2.2.1 September 8, 2008

Log Summary window

The screenshot shows a window titled "Log Summary" with a blue header. The main area is light beige and contains a table of appointment statistics. Each row has a label, a text input field with "X X", and a circular badge with a number. An "OK" button is at the bottom center.

Totals:	Input	Count
Total Kept Appointments	X X	28
Total Failed To Keep Appointments	X X	29
Total Re-scheduled Appointments	X X	30
Total Appointments	X X	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:
- Case Name:
- Casehead Name:
- Date that the LDSS-4826 was received?:
- Interview Type: Telephone In-Center
- Contact Number: Extension:
- Did the applicant request a new call time?: Yes No
- Date: Time:

Buttons for "OK" and "Cancel" are at the bottom.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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 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)

Four contact attempt sections are visible:

- 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).

Additional fields include:

- 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

FS POS Release Notes

Version 2.2.1 September 8, 2008

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?

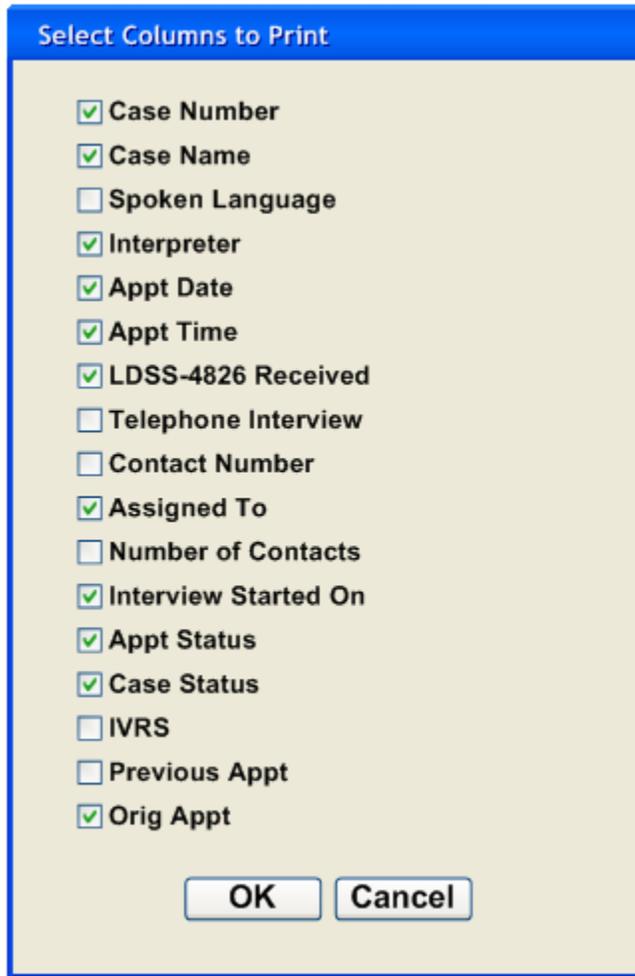
Contact Attempted 4

- 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

FS POS Release Notes

Version 2.2.1 September 8, 2008

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 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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

New Window: Select Columns to Display

Select Columns to Display

- 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 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.

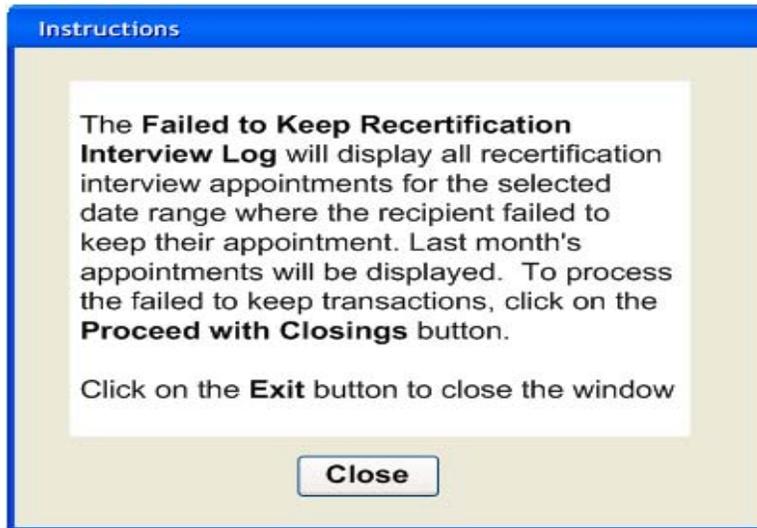
When the Worker clicks OK, POS will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

FS POS Version 2.2.1

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

Search by

Prior month **3** Case Number **4a**

Specify Range

From **4** To

Case Name **4b**

5	6	7	8	9	10	11	11a
Case Number	Case Name	Appt Date	Appt Time	Appt Status	Assigned To	Case Status	Orig Appt
0000000001A	Lort Jake	5/26/07	10:00 AM	Failed to Keep	A. Turner	Active	6/25/07 11:15 AM
0000000002B	Mort Dan	5/26/07	10:30 AM	Failed to Keep	B. Jones	Active	
0000000003C	Chisold Steve	5/26/07	11:30 AM	Failed to Keep	C. Allen	Active	
0000000004D	Blake John	5/26/07	1:00 PM	Failed to Keep	D. Roberts	Active	
0000000005E	Tan Lihn	5/26/07	2:45 PM	Failed to Keep	E. Spool	Active	
0000000006F	Porty Lon	5/26/07	3:30 PM	Failed to Keep	F. Wells	Active	

Totals:

Total Failed To Keep Appointments **12**

Post Closings to WMS **13** Assign **14** Reschedule **15** Kept Appointment **16** Hold Closing **17** Exit **18**

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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

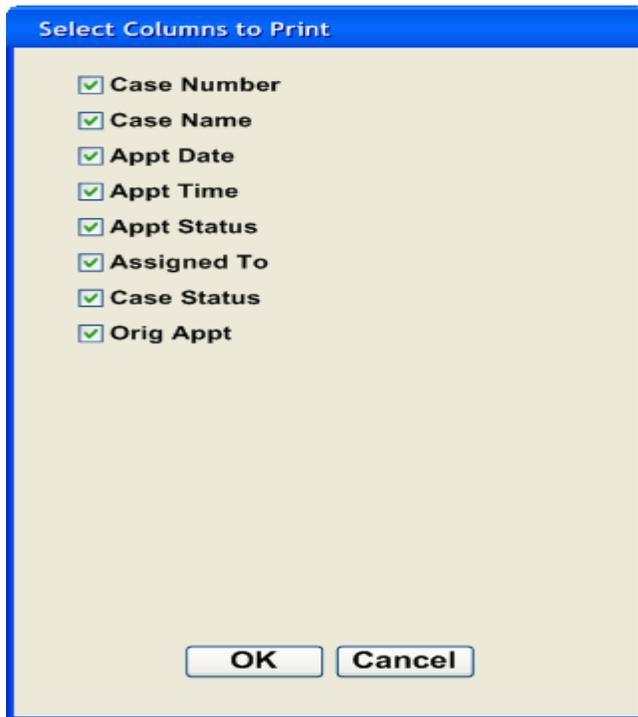
Buttons in Log

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

FS POS Release Notes

Version 2.2.1 September 8, 2008

New Window: Select Columns to Print



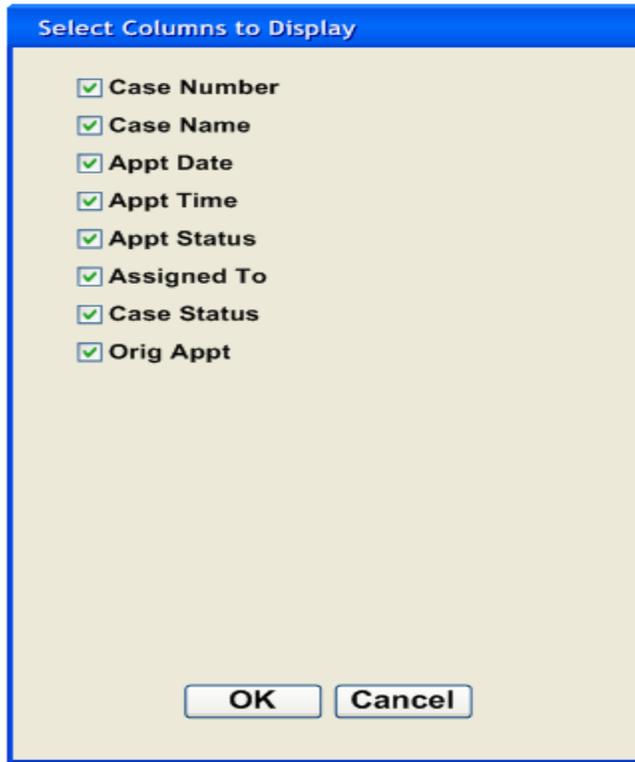
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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.

FS POS Release Notes

Version 2.2.1 September 8, 2008

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**.