



# POS Release Notes

Version 12.1, February 19, 2008

These Release Notes contain descriptions of changes in POS Release 12.1, scheduled for February 19, 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](http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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# POS Release Notes

Version 12.1, February 19, 2008

## 1. Food Stamp Categorical Eligibility

Effective January 1, 2008, New York State expanded Food Stamp (FS) categorical eligibility to include almost all FS program applicant/participant households except those who have a member who is sanctioned from the FS program or disqualified from participating due to an intentional program violation (IPV).

POS will retrieve information from WMS in the **Individual Detail** window to determine whether the case has a FS-sanctioned household member or a household member with an IPV. If no one on the case is sanctioned from the FS program or disqualified from participating due to an IPV, POS will check the new **No FS IPV or Sanction Found** checkbox on the Household Screen.

The screenshot displays the POS Individual Detail window for case 00007421939F01. The 'Control Information' section shows the district as 66, center as Melrose Job Center, worker as POSDP, and case number as 00007421939F. The 'Present Address' section lists 1455 JAMES Street, Apt 2, BRONX, NY 10452-0000. The 'Suffix Information' section shows the case is active with 'No FS IPV or Sanction Found' checked. The 'Case Member Information' table lists three members: Perkins Sam (Casehead), Perkins Judith (Natural Sister), and Perkins Kid (Natural Nephew).

Suff	Case Name	Cat	Stat	# AC	Stat	# AC	Monthly Rent	Actual Rent [ Less Any Contributions]	PA H/H RENT	PA Level Rent
1	PERKINS SAM	SNCA	AC	2	AC	2		0		0

For additional details, please see Policy Bulletin [# 07-155-ELI](#) (Food Stamp Categorical Eligibility) and Policy Bulletin [# 08-10-ELI](#) (Questions and Answers About the Expansion of Food Stamp Categorical Eligibility).

# POS Release Notes

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## 2. Required Question Edit and Changes to Questions in Recertification Interview

### New Required Question Edit

A new message in the Recertification Interview will advise the Worker when a required question was not answered: "You have not answered a required question."

The Worker will not be able to continue until the required questions are answered. All questions in the following interview windows require an answer:

- Required Household Information
- Employment Information
- Current Income
- Step Parent/Immigrant Information
- Medical
- Resources
- Shelter
- Other Expenses
- Education/Training
- Other Information

### Removed questions

The following questions will be removed from the Other Information window:

- Do you or does anyone who lives with you receive assistance or services now?
- Have you or anyone who lives with you received assistance or services in the past?

# POS Release Notes

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## Changes to Questions

The following questions and section headings will be updated:

Interview section	Old question text	Revised question text
Required Household Information	Does Anyone Applying Have a Husband or Wife?	Does Anyone Have a Husband or Wife?
Required Household Information	Anyone Applying under 21 Whose Parents(s) is (are) Unknown?	Anyone Under 21 Whose Parents(s) is (are) Unknown?
Required Household Information	Anyone Applying under 21 Whose Parents(s) is (are) Absent?	Anyone Under 21 Whose Parents(s) is (are) Absent?
Required Household Information	Anyone Applying Have a Child Under 18 Living Somewhere else?	Anyone Have a Child Under 18 Living Somewhere else?
Employment Information (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Resources (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Medical (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Shelter (Housing) Expenses (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Education and Training (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Other Information (heading)	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING:	INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU THAT IS APPLYING/RECERTIFYING:
Pre-Referrals	Alcohol and drug abuse screening	Alcohol and Substance Abuse Screening

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## 3. Noncitizens Who Become Citizens

If an individual is marked as a noncitizen in WMS and the Worker updates the POS Individual Detail window to indicate that the individual is now a citizen, POS will display the Alien Checklist window with the **Alien Type Reevaluation** task enabled. The Worker must click the **GO** button to open the new Naturalization window:

**Automatic Re-Evaluation Triggers**

**1 Instructions**

You have indicated that members of the household listed below are now citizens. Please fill in naturalization information in the fields below

<b>2 Individual</b>	<b>3 Certificate of Naturalization/ Passport #</b>	<b>4 Date of Naturalization</b>
Smuler Kathy		
Smuler John		
Smuler Bill		
Smuler Boris		

**5 Next >**      **6 Previous**

## 4. Changes to POS TAD

The POS TAD will be updated to match changes in WMS release 2008.1.

### New Case Level Rejection Code

Code E35 (Excess Unearned Income) is now a valid rejection code. It is used when rejecting a case due to excess unearned income. This code will distinguish these rejections from those rejected due to Excess Earned Income (E30).

### New CA Rejection, Closing and Sanction Codes

A new CA case-level and line-level rejection code will be added to the POS TAD:

- EX1, Left Residential Treatment Program Before Finishing Drug Abuse Treatment Program-Whereabouts Unknown

Two (2) new CA closing codes will be added to the POS TAD:

- EX1, Left Residential Treatment Program Before Finishing Drug Abuse Treatment Program-Whereabouts Unknown
- G55, In OASAS Chemical Dependence Residential Rehabilitation Services for Youth Program.

A new CA line-level sanction code will be added to the POS TAD:

- EY1, Left RTP [Residential Treatment Program] – Whereabouts Unknown.

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The following special edits apply to these new codes:

- Codes EX1, EY1 and G55 will only be available for Residential Treatment Service Center (RTSC Center 052) cases.
- Participants closed with G55 do not receive a separate FS determination.

## Availability of CA Opening Code A32

CA opening code A32 (CA Approval First Month Prorated) is available for use at HASA centers and at the Riverview Job Center (center number 037) when the CA case status is changed to SI (single issue) and the MA Suffix must be activated.

This code will also be available for the Riverview Annex (center number 018) and the Inwood Model Job Center (center number 026) when the CA case status is changed to SI (single issue) and the MA Suffix must be activated.

## 5. Changes to Grants Data Entry Window

Two new CA single issuance codes will be added in the Grants Data Entry window to match changes in WMS release 2008.1:

- D0, One Shot Deal Rent Replacement Check (Non-Recoupable).
- W3, MKB Retroactive Payment.

Code D0 can only be used with CA opening code Y39.

## 6. Budgeting of CA Households with a Filing-Unit Member in Receipt of SSI

The needs of a Supplemental Security Income (SSI) recipient cannot be included when determining the standard of need for a family. As a result, the POS budgeting of CA households with a filing-unit member in receipt of SSI will be updated to comply with Policy Directive [# 07-43-ELI](#) (Mass Rebudgeting of Cash Assistance for Households that Include a Filing-Unit Member Receiving Supplemental Security Income).

POS will enter an **N** (Individual with SSI is not in filing unit) in the **Rel** (Relationship) field of the **Budget** window so the SSI recipient's needs will not be prorated nor will the recipient be counted when determining the standard of need for the household.

## 7. Budgeting of VISTA Earnings

Budgeting of VISTA (Volunteers in Service to America) earnings in POS will be updated in order to comply with the changes described in Policy Directive [# 07-40-ELI](#) (Budgeting of VISTA Payments).

When it is determined that a CA applicant/participant is receiving VISTA income, POS will not budget these earnings for CA budgeting purposes.

If the individual received FS before joining VISTA, POS will not budget the VISTA income in WMS for FS budgeting purposes.

If the individual received VISTA income before receiving FS, POS will budget the income in WMS for FS only. POS will prefill Income Source Code 10 (VISTA) on the POS Budget Individual window with a Program Indicator of "F" to budget the VISTA payments solely to the FS portion of the case.

# POS Release Notes

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## 8. Addition of Budget Number Window in POS Separate FS Determination

The **Eligibility Determination** window in the Application Interview allows the Worker to initiate the 2-Day POS Separate Food Stamp (FS) determination process. However, changing the CA/FS suffix statuses from AP/SI to AP/AC on Day 1 requires the authorization of a FS Only Budget in WMS. As a result, the following message will appear when the Worker clicks the Next button on the Eligibility Determination window.

“The case scenario requires a FS-Only budget (Option 3) on the WMS budget screen and POS cannot calculate a FS-Only budget. You need to calculate a FS-Only budget manually in WMS using the CA case number then enter the budget number on the Budget Number Window in POS. Do you want to go to WMS now to calculate a budget?”

When the Worker clicks the “Yes” button, POS will start WMS. The Worker must calculate the FS-Only budget. When the Worker exits the WMS window, the **Budget Number Required** window will appear. The Worker must enter the budget number for the saved FS-only budget in this window. Following this window, the POS TAD will appear.

## 9. Removal of BEV Referral Window for EAA Cases

The BEV Referral window will no longer appear in the **Application Interview** for Cash Assistance (CA) cases with a category of EAA (Emergency Assistance for Adults).

## 10. Changes to M-858m (Utility Arrears/Emergency Heating) Form

The M-858m (Utility Arrears/Emergency Heating) form in POS will be updated to match made in Policy Directive [# 07-44-ELI](#) (Utilizing the Emergency HEAP Program to meet energy emergencies).

# POS Release Notes: Appendix A

Version 12.1, February 19, 2008

## Food Stamp Separate Determination through POS, Phase I

### Overview

In Phase I of Food Stamp Separate Determination through POS, the **Eligibility Determination** window and the **Application Interview** activity flow were updated to allow Workers to complete the current paper 2-day action to deny Cash Assistance (CA) and accept Food Stamps (FS) in one day using POS. When this process is used, the Non-Cash Assistance (NCA) FS case created through the automated Food Stamp Separate Determination process in WMS will be in active (AC) status.

This functionality is available for cases where the decision for CA and FS is being made at the same time.

The Day 1 action to accept the FS suffix is processed by the Worker and transmitted to WMS by the Supervisor, while the Day 2 action to deny the CA suffix is posted by POS once the FS acceptance is processed by WMS.

### Eligibility Determination window

The **Eligibility Determination** window only appears for cases for which the CA suffix is in applying (AP) or single issue (SI) status and for which the FS suffix is in AP or SI status.

### Revised Eligibility Determination window

Version 11.2 - Paperless Office System - [Eligibility Determination] 12:34:43 PM Monday, June 11, 2007

File Edit Tools Window Help

Decision Documents Referrals Others

Completeness Overall **COMPLETE** Documents **COMPLETE** Referral **COMPLETE** Other Factors **COMPLETE**

Final PA Determination  Accept  Deny **1** Final FS Determination  Accept  Deny **2**

Are All Individuals Being Activated for FS  Yes  No **3**

Pa Denial Status **4** REJECTED-Complia PA Status Reason **5** Failure to Complete Eligibility Process (MA Sep Determin

Fs Status **6** Active FS Status Reason **7** Y45 - Other

Case/Suffix Level Case Name PAYEE PAYEE Deny No

Current Status PA 1 Category SNCA New Status

PA AP PA APPLYING

MA AP MA APPLYING Delink MA from PA?

FS AP FS ACTIVE

Individual Level Name Payee Payee DOB 01/01/1982

Current Status

PA AP PA APPLYING

MA AP MA APPLYING Deny No

FS AP FS **8** ACTIVE

Comments

Next Previous

# POS Release Notes: Appendix A

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7 new fields were added to the **Eligibility Determination** window to handle the FS separate determination process:

1. Final PA Determination
2. Final FS Determination
3. Are all individuals being activated for FS?
4. PA Denial Status
5. PA Status Reason
6. FS Status
7. FS Status Reason

In the window, the Worker indicates the final CA and FS decisions. For cases that will be denied for CA and accepted for FS, the Worker enters the CA denial reason and the FS acceptance reason.

If the CA suffix is denied and the Worker selects a reason that does not require FS Separate Determination, POS displays an error message asking the Worker to select a different code or to change the FS determination to 'Deny'.

## Enabling or disabling the new fields on the Eligibility Determination window

When **Final PA Determination** (Field 1) has a value of 'Deny', **Final FS Determination** (Field 2) is enabled.

When **Final FS Determination** (Field 2) has a value of 'Accept', the Worker must answer the question "**Are all individuals being activated for FS?**" (Field 3)

If the answer for this question is 'Yes', the **Individual FS Status** (Field 8) is preset to 'Active' for each individual on the case and the fields are protected and disabled. If the answer is 'No', the Worker must select the proper individual status for each individual (Active, Rejected or Closed).

**PA Denial Status** (Field 4) and **PA Status Reason** (Field 5) are only enabled when **Final PA Determination** (Field 1) has a value of 'Deny'.

The **FS Status** field (Field 6) is pre-filled with a value of 'Active' when **Final PA Determination** (Field 1) has a value of 'Deny' and **Final FS Determination** (Field 2) has a value of 'Accept'. When the FS Status field is enabled, the Worker must select the FS opening code in the **FS Status Reason** (Field 7) drop-down menu.

## FS acceptance – FS suffix in AP status

Following the **Eligibility Determination** window, the Worker calculates a CA/FS budget for the Food Stamp acceptance action, authorizes the budget on the POS TAD and submits the case to the Supervisor. The Supervisor will process the acceptance of the FS case. POS will then automatically handle the CA denial transaction one day after the FS acceptance transaction is processed by WMS.

At the time of the FS decision, the Worker should return to the income, resource, shelter/housing expense and other expense windows to ensure that the interview data has the latest information provided by the applicant. After the **Budget** window, the **POS TAD** will appear.

## FS acceptance – FS suffix in SI status

The **Eligibility Determination** window in the Application Interview allows the Worker to initiate the 2-Day POS Separate Food Stamp (FS) determination process. However, changing the CA/FS suffix statuses from AP/SI to AP/AC on Day 1 requires the authorization of a FS Only Budget in WMS. As a result, the following message will be appear when the Worker clicks the Next button on the Eligibility Determination window.

"The case scenario requires a FS-Only budget (Option 3) on the WMS budget screen and POS cannot calculate a FS-Only budget. You need to calculate a FS-Only budget manually in WMS using the PA case number then enter the budget number on the Budget Number Window in POS. Do you want to go to WMS now to calculate a budget?"

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When the Worker clicks the “Yes” button, POS will start WMS. The Worker must calculate the FS-Only budget. When the Worker exits the WMS window, the **Budget Number Required** window will appear. The Worker must enter the budget number for the saved FS-only budget in this window. Following this window, the POS TAD will appear.

## TAD

The Worker must make all required updates at the suffix and individual levels on the TAD and run the business rules. For individuals who will be denied, the individual FS denial reason must be entered on the POS TAD.

## Grants Data Entry

After the **POS TAD** window, the **Grants Data Entry** window appears to allow the Worker to complete a benefit authorization form if the case requires any CA or FS grant.

## Print Forms

After the **Print Forms** window, the Worker will complete the activity and submit it to the Supervisor for review and approval.

## Supervisory Approval of FS Acceptance

The Supervisor will review and process the FS acceptance action. On the Approval Elements window, the Supervisor will click on the **Xmit** button to send the case action to WMS.

## 2<sup>nd</sup> Day Action by POS for CA Denial

POS will check the status of the FS acceptance transaction in WMS one day after the Supervisor transmits from the **Approve Eligibility Decision** activity. If the FS acceptance transaction was successfully processed by WMS, POS will transmit the CA denial transaction to WMS one day after the FS acceptance transaction is processed by WMS.

## Error Correction – FS Acceptance

An Error Correction activity will be scheduled for the Worker if the first day transaction errored out in WMS. The **EC – Application Interview** must be completed to process the FS acceptance for the case.

POS will check the status of the FS acceptance transaction in WMS one day after the Supervisor transmits from the **Approve Eligibility Decision** activity. If the FS acceptance transaction was successfully processed by WMS, POS will transmit the CA denial transaction to WMS one day after the FS acceptance transaction is processed by WMS.

## Error Correction – CA Denial with FS Separate Determination Code After FS Acceptance

An Error Correction activity will be scheduled for the Worker if the first day transaction for the FS acceptance was successfully processed by WMS, but the second day transaction for the CA denial errored out in WMS.

POS will schedule an Error Correction activity named **EC - Day 2 FS Sep Det** in the Worker’s queue. The Worker will complete a TAD action to deny the CA suffix with a FS Separate Determination code and close the FS suffix with an appropriate code.

# FS POS Release Notes

Version 2.1, February 19, 2008

These Release Notes contain descriptions of changes in FS POS Release 2.1, scheduled for February 19, 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](http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79)

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# FS POS Release Notes

Version 2.1, February 19, 2008

## 1. Working Families Initiative

The Working Families Food Stamp Initiative will allow many households to complete their initial eligibility interview via the telephone. Changes will be made throughout FS POS to accommodate this new initiative. The telephone interview workflow will be implemented in the Queens, Jamaica and Rockaway Food Stamp centers on 2/19.

### Reception Intake

A new window named **Working Families Food Stamp Initiative** will appear in the **FS Reception Intake** activity to allow the Eligibility Specialist to determine the household's eligibility for the Working Families Food Stamp Initiative (WFFSI).

FS POS RECEPTION: Working Families.

Ticket List Quick Call FS Reception Configuration Open POS Help Exit

Working Families Food Stamp Initiative (WFFSI)

Is any **adult** (18 years of age or older) member of your household either working **30 or more** hours per week **or** earning **\$175.50 or more** per week?  Yes  No

Are any **two (2) adult** members of your household **each** either working **20 or more** hours per week **or** earning **\$117 or more** per week?  Yes  No

Does the household qualify for WFFSI?

Yes

Next Previous

The **Working Families Food Stamp Initiative** window will appear after the **Filing Date** window.

It will contain the following questions:

- Is any adult (18 years of age or older) member of your household either working 30 or hours per week or earning \$175.50 or more per week?
- Are any two (2) adult members of your household each either working 20 or more hours per week or earning \$117 or more per week?

If the answer to either question is "Yes", the household qualifies for the Working Families initiative. The eligibility determination will be indicated in a field labeled "Does the household qualify for WFFSI?"

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## Telephone Interview

For the Queens, Jamaica and Rockaway Food Stamp centers only, an additional question will allow the ES to indicate whether the applicant wants to complete their interview over the telephone:

- Does the applicant want to conduct their interview by telephone?

FS POS RECEPTION: Working Families.

FS Reception Configuration Open POS Help Exit

Working Families Food Stamp Initiative (WFFSI)

Is any **adult** (18 years of age or older) member of your household either working **30 or more** hours per week or earning **\$175.50 or more** per week?  Yes  No

Are any **two (2) adult** members of your household **each** either working **20 or more** hours per week or earning **\$117 or more** per week?  Yes  No

Does the household qualify for WFFSI?

Telephone Interview Selection

Does the applicant want to conduct their interview by telephone?  Yes  No

Next Previous

This question will be implemented at other FS POS centers during the rollout of the Working Families Initiative.

For Working Families cases scheduled for a telephone interview, the ES must prepare the W-129A and W-129B forms and ask the applicant to sign the attestation. The completed forms must be scanned and indexed. The original copies should be given to the applicant for their records. After completing the Intake activity, the ES must complete the **Application Modification** activity if there are additional household members and the **Application Referrals** activity to complete the CIN Re-Use, Case Number Re-Use and Finger Imaging – AFIS windows. The application interview will be completed by an ES at the Working Families/Change Center on the scheduled date.

### Warning message

**Presentation** [X]

Please prepare the W-129A (Telephone Interview Appointment Notice) and the W-129B (Food Stamp Attestation Signature Form) in duplicate. Give one copy of the W-129A and W-129B to the applicant along with the W-119D form (Documentation Guide). The center's copy of the W-129A and W-129B must be scanned and indexed.

OK

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## **Finger Imaging**

Applicants who qualify for the Working Families will be able to complete finger imaging at any Food Stamp AFIS site. The Finger Imaging – AFIS window was updated to allow the ES to indicate that the case will have a telephone interview or that an individual is not present at the interview. If the W-519 (Finger Imaging Referral) form is not printed for an individual, POS will submit a demographic record to a centralized database. This database will be accessible to the AFIS operators at the Food Stamp AFIS locations. The applicant will not be required to submit a paper referral in order to complete finger imaging. Once the individual completes finger imaging, the results will be submitted to POS through a nightly file and will be available for the Worker's review.

## **Application Interview Calendars**

A new calendar type will allow the Home Center manager to indicate the appointment slots that will be available to schedule a telephone interview for Working Families cases. This calendar type will be implemented at other FS centers using FS POS during the rollout of the Working Families Initiative.

## **Generic Mail Processing Unit (MPU) Queues for Pending Applications**

For the Queens, Jamaica and Rockaway Food Stamp centers, if the applicant is not eligible for expedited FS benefits, EFS benefits cannot be issued (e.g. identity cannot be verified for the casehead) or if the applicant receives expedited FS benefits pending verification (FS issuance code 55), POS will move the suspended **FS Application Interview** to a generic Mail Processing Unit (MPU) queue when the Supervisor approves the **Approve EFS Issuance** activity.

Cases in applying (AP) status will be moved to the MPU AP queue and cases in single issue (SI) status will be moved to the MPU SI queue.

The MPU supervisors will monitor the MPU queues to ensure that a timely decision is made on the case and will assign cases that are ready for a decision. MPU eligibility staff will complete the decision on the case using the suspended FS Application Interview once the requested documentation or other required eligibility information is received.

These queues will be implemented at other FS centers using FS POS during the rollout of the Working Families Initiative.

# FS POS Release Notes

Version 2.1, February 19, 2008

## 2. Food Stamp Categorical Eligibility

Effective January 1, 2008, New York State expanded FS categorical eligibility to include almost all FS program applicant/participant households except those who have a member who is sanctioned from the FS program or disqualified from participating due to an intentional program violation (IPV).

POS will retrieve information from WMS in the **Individual Detail** window to determine whether the case has a FS-sanctioned household member or a household member with an IPV. If no one on the case is sanctioned from the FS program or disqualified from participating due to an IPV, POS will check the new **No FS IPV or Sanction Found** checkbox on the Household Screen.

The screenshot shows the 'Individual Detail' window for case 00007443178E1. The window is divided into several sections:

- Control Information:** District: 66, Center: Melrose FS Center, Worker: SEPDT, Case Number: 00007443178E
- Present Address:** Street Number: 21, Direction: (None), Name: WESTEND, Type: Avenue, Apt #: , City: BRONX, State: NY, Zip Code: 10452-0000, Phone: - -
- Suffix Information:** Active (selected), Applying (unselected), No FS IPV or Sanction Found (checked). FS Suffix: 1, FS Status: AC, FS # AC: 1. A table below shows Suffix 1 for COMELATE JOHNNY.
- Case Member Information:** A table with columns: Suff Ln, CIN, Name, Relation, DOB, SSN, Val Sex, Citizen / National, FS AFIS. The table contains one row: 1, 1, TA00570R, Comelate Johnny, Casehead, 12/15/1968, 121-50-1968, 1, M, [checked], AC.

Buttons for 'Next' and 'Previous' are visible at the bottom.

For households that do not contain a sanctioned or IPV-disqualified individual, POS will not request verification of resources on the W-113K (**Documentation Requirements**) form.

For additional details, please see Policy Bulletin [# 07-155-ELI](#) (Food Stamp Categorical Eligibility) and Policy Bulletin [# 08-10-ELI](#) (Questions and Answers About the Expansion of Food Stamp Categorical Eligibility).

# FS POS Release Notes

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## 3. Case Re-Opening in FS Recertification Interview

FS POS will be updated to allow Eligibility Specialists to process a recertification related case re-opening through the **FS Recertification Interview** activity.

When the Eligibility Specialist (ES) starts the FS Recertification Interview for a FS case in closed (CL) status in WMS, POS will display the **Re-Open the Case** and **Individual Status Change** windows after the **Case Member Addition** window to allow the ES to process the case re-opening and to proceed with the interview.

### Re-Open the FS Case window

This window will allow the ES to update the case status, select the status reason and record the contact date.

Current WMS Status	New POS Status	Status Reason	Contact Date
CL	ACTIVE	PA Approval - Same Benefit each Month	12/07/2007

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## Individual Status Change window

Following the **Re-Open the FS Case** window, the **Individual Status Change** window will appear. This window will allow the Eligibility Specialist to indicate which individuals should be re-activated on the case. When this window is completed, the Eligibility Specialist clicks the Next button to continue the activity.

Select	Name	Current POS TAD Status	New POS TAD Status	New POS TAD Status Reason	Effective Date
<input type="checkbox"/>	Patrick Joseph	ACTIVE			00/00/0000

## 4. Updates to Application Interview Log

The Application Interview Log will be updated to allow Eligibility Specialists at Working Families/Change Centers to record contact attempts for cases scheduled for a telephone interview and to grant additional rights to Clerical Associate staff.

For full details, please see **Appendix A (Food Stamp Application Interview Log)**.

## 5. Update to Recertification Interview Log

The Recertification Interview Log will be updated to mark cases scheduled for a telephone interview as "Failed to Keep" after four (4) unsuccessful contacts and to grant additional rights to Clerical Associate staff.

For full details, please see **Appendix B (Food Stamp Recertification Interview Log)**.

## 6. Update to the Failed to Keep FS Application Interview Activity

The 7 day edit will be removed from the **FTK FS Application Interview** activity. The activity will be available on the day after the applicant fails to keep their initial eligibility interview.

For full details, please see **Appendix C (Failed to Keep FS Application Interview Activity)**.

# FS POS Release Notes

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## 7. Budgeting of VISTA Earnings

Budgeting of VISTA (Volunteers in Service to America) earnings in POS will be updated in order to comply with the changes described in Policy Directive [# 07-40-ELI](#) (Budgeting of VISTA Payments).

If the applicant received VISTA income before receiving FS, POS will budget the income in WMS. POS will add Income Source Code 10 (VISTA) on the POS Budget Individual window.

**Note:** VISTA participants are exempt from work requirements. However, until a specific employability code is developed for VISTA, Workers should enter Employability Code WE (Employed Part-time or Full-time Exempt).

## 8. Changes to POS TAD

The POS TAD will be updated to match changes in WMS release 2008.1.

### Changes to Existing FS Closing Codes

The descriptions for FS closing codes E30 and E35 will be updated:

- E30, Excess Earned Income.
- E35, Excess Unearned Income (Not SSI or Childcare).

### New FS Rejection Code

A new FS rejection code will be added to the POS TAD.

- E35, Excess Unearned Income (Not SSI or Childcare).

## 9. New Activity: Application Referrals

A new activity named **Application Referrals** will be added in FS POS. This activity will allow the Eligibility Specialist to complete the CIN Re-Use, Case Number Re-Use and Finger Imaging – AFIS windows prior to the start of the FS Application Interview for applying individuals.

For full details, please see **Appendix D (Application Referrals Activity)**.

# FS POS Release Notes

Version 2.1, February 19, 2008

## 10. Changes to Finger Imaging – AFIS window

The **Finger Imaging – AFIS** window will be updated to allow the Worker to indicate that a telephone interview will be conducted for the applicant or that the adult is not present at the interview.

If the checkbox labeled “Telephone Interview” is selected, the **Print** button will be disabled and the W-519 form will not be printed. If the radio button labeled “The applicant is not present at the interview”, the W-519 form will not be printed for the adult.

### *Finger Imaging – AFIS window*

FS POS 1.3.1a - [Finger Imaging - AFIS] 2:13:20 PM Tuesday, January 15, 2008

File Edit Tools Window Help

**Finger Imaging Notice (Form W519)**  
 State regulations require all case members 18 years of age and older and minor head of households applying for or in receipt of cash assistance, food stamps and/or Medicaid, including applicants for emergency assistance, be finger-imaged.

**An individual is exempt from this requirement if they meet any of the following criteria:**

- "Payee only" applicants/participants (unless non-public assistance Food Stamp or Medicaid household members).
- Individuals physically unable to comply with this requirement because of injury or disability. However, if the condition is temporary an appointment to return for finger imaging will be made.
- Applicants/Participants under 18 years of age unless payees for their own cases or suffixes.
- SSI (F-15), Residential Treatment (F-61) or Homebound (F-63) case.
- Emergency Assistance to Adults (EAA) household.

**Telephone Interview**

The applicant is not present at the interview

I agree to be finger imaged.

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

I do **Not** agree to be finger-imaged. By not agreeing to be finger imaged, you are ineligible to receive Public Assistance, Food Stamps, and Medicaid. Your case may be rejected or closed as appropriate. (PA Individuals)

I do **Not** agree to be finger-imaged. By not agreeing to be finger imaged, you and the entire Food Stamp household will be ineligible to receive Food Stamp Benefits (NPA FS individual).

I do **Not** agree to be finger imaged. By not agreeing to be finger-imaged, you and the entire Medicaid household (unless there are children up to age 19) will be ineligible to receive Medicaid (Medicaid only individual).

Sepa Sepa

Reset

Done Print Previous

# FS POS Release Notes

Version 2.1, February 19, 2008

## 11. Updates to POS Queue

The following changes will be made in the POS individual queue:

- The **FS Application Interview** radio button will be removed from the **Unit Filter**. This radio button retrieved all pending FS Application Interviews for the center. The pending interviews can be retrieved using the **FS Application Interview Log**.
- The **FS Recertification Interview** radio button will be removed from the Unit Filter. This radio button retrieved all pending FS Recertification Interviews for the center. The pending interviews can be retrieved using the **FS Recertification Interview Log**.
- A checkbox labeled **Removed** was added to the **Activity Status Filter**. It will retrieve all activities removed from the queue for the past 90 days.
- A checkbox labeled **Completed** was added to the **Activity Status Filter**. It will retrieve all activities completed in the queue for the past 90 days.

Activity	Due Date	Alert	Case Name	Case No	Suf	Receive
FS Application Interview		NA	Hilton Sandy	00010002868H	1	
FS Application Interview		NA	Arroyo Rosemary	00010002864G	1	
FS Application Interview		NA	Millon John	00010002863I	1	
FS Application Interview		NA	Change Center	071114163174	1	

## 12. Revised E-Form

The English version of the LDSS-4826 (Food Stamp Benefit Application/Recertification) E-Form will be revised to match text and signature changes made by New York State.

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

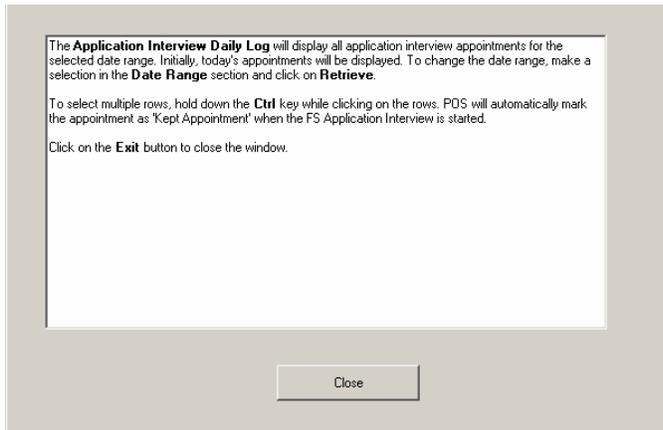
## Overview

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.

## Instructions

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

### Instructions



## Application Interview Log

FS POS Version 1.2 [03:35:30 PM Tuesday, June 26 2007]

File **1** Retrieve  Print

Application Interview Log **2**

View Current and Past Appointments   
  View Future Appointments **3**

**Date-Range** **4**: Today, Yesterday, Past 7 Days, Specify Range (From **5** To **5**)  
**Future Appointments** **6a**: Select Date **6**, Specify Range (From **6b** To **6b**)

**Application Type Filter** **7a**:  Working Families,  In-Center **7**,  CBO **8**,  Telephone **9**,  Exclude dummy case numbers **10**

**Appointment Status Filter**:  Kept Appointment **11**,  Failed to Keep Appointment **12**,  None **13**

<b>14</b> Intake Date	<b>15</b> Case Number	<b>16</b> Case Name	<b>17</b> Appt Date	<b>18</b> Appt Time	<b>19</b> Appt Status	<b>20</b> CBO	<b>21</b> Tel Intv	<b>22</b> Contact Number	<b>22a</b> Number of Contacts	<b>23</b> Assigned To	<b>24</b> Spoken Lang	<b>25</b> Intvw Started On	<b>26</b> Case Status	<b>27</b> Previous Appt
6/25/07	00000538905A	Lorne Anne	6/26/07	10:00 AM	Kept Appt	Yes	No		1	A. Turner	English	6/26/07	Active	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		Applying	
6/25/07	00007421970C	Chatmen Steve	6/26/07	11:30 AM	Kept Appt	No	No		1	C. Allen	Russian	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		Applying	
6/23/07	00007446480E	Deep Zan	6/26/07	2:45 PM	Kept Appt	No	No		0	E. Sprool	Haitian	6/26/07	Applying	
6/25/07	070611121115	Sands Raul	6/26/07	3:30 PM		Yes	No		0	F. Wells	English		Applying	

**Totals:**  
 Total Kept Appointments **28**   
 Total Failed to Keep Appointments **29**   
 Total Re-scheduled Appointments **30**

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

## Definitions

### Tool Bar

1. This tool bar allows you to save, exit, retrieve data or print.

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

## Title

2. Application Interview Log

## Date Filters

3. View Current and Past Appointments, View Future Appointments
4. Date Range (Current and Past Appointments)
5. Specify Range (Current and Past Appointments) From / To Date
6. Mini-Calendar – Date cannot be more than 14 days in the future
- 6a. Select date
- 6b. Specify Range (Future Appointments) From / To Date

## Application Type Filter

- 7a. Working Families (new)
7. In-Center
8. POS CBOs
9. Telephone Interview
10. Exclude Dummy Case Numbers

## Appointment Status Filter

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

## 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
- 22a. Number of Contacts (new)
23. Assigned to
24. Spoken Language
25. Interview Started On
26. Case Status
27. Previous Appointment

## Read-Only Totals

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

## Buttons

31. Assign- See *Assign procedure and Refer Action window* below
32. Reschedule – Displays Application Interviewer Scheduler Window
- 32a. Contact – Displays Contact Attempted window (new)
33. Kept Appointment – Click on button to indicate applicant kept appointment. Clerical associates will be given access to this functionality (new).
34. Failed to Keep Appointments – Click on this button to indicate that the applicant did not keep appointment. Clerical associates will be given access to this functionality (new).
35. Process Failed to Keep Transactions – Click on button to process Failed to Keep rejections
36. Exit

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

## Contact Attempted Window

The new Contact Attempted window will appear when the Contact button is clicked at the bottom of the FS Application 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. This window will be used at centers that conduct telephone interviews for the Working Families initiative.

*Contact Attempted window: Successful Contact*

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

- Case Information:**
  - 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: [ ]
- Buttons:** OK, Cancel

If the Worker making the final required call is unable to make contact, he or she must notify their Supervisor. The Supervisor will mark the appointment status as "Failed to keep".

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

## 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 Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display individuals with the following titles in the **Refer Action** window:

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

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**

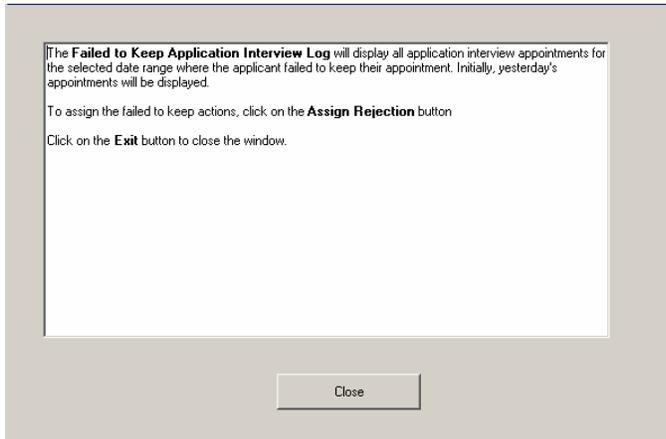
OK      Cancel

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

## Failed to Keep Application Interview Log

The **Failed to Keep Application Interview Log** allows Food Stamp (FS) Centers to assign 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 Interview Log

FS POS Version 1.2 [10:35:30 AM Tuesday, June 27, 2007]

File 1 Retrieve Print Failed to Keep Application Interview Log 2

Date-Range

- Yesterday 3
- Past 14 Days
- Specify Range

From 00/00/00 4 To 00/00/00

Intake Date 5	Case Number 6	Case Name 7	Appt Date 8	Appt Time 9	Appt Status 10	CBO 11	Tel Intv 12	Assigned To 13	Case Status 14
6/25/07	0000000001A	Lort Jake	6/26/07	10:00 AM	Failed to Keep	Yes	No	A. Turner	Applying
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 XX 15

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

# FS POS Release Notes: Appendix A

Version 2.1, February 19, 2008

## Functions

1. File/Save, Retrieve, Print
2. Screen Title

## Appointment Status Filter

3. Date Range: Yesterday, Past 14 Days, Specify Range
4. From / To Date

## Application Log Columns- All Column Headers are Sortable

5. Intake Date
6. Case Number
7. Case Name
8. Appointment Date
9. Appointment Time
10. Appointment Status
11. POS CBOs
12. Telephone Interview
13. Assigned to
14. Case Status

## Read-Only Totals

15. Total Failed to Keep Appointments

## Buttons

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

Use of the Assign Interview, Reschedule, Kept Appointment and Hold Rejection buttons removes the case from the Failed to Keep Application Interview Log.

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

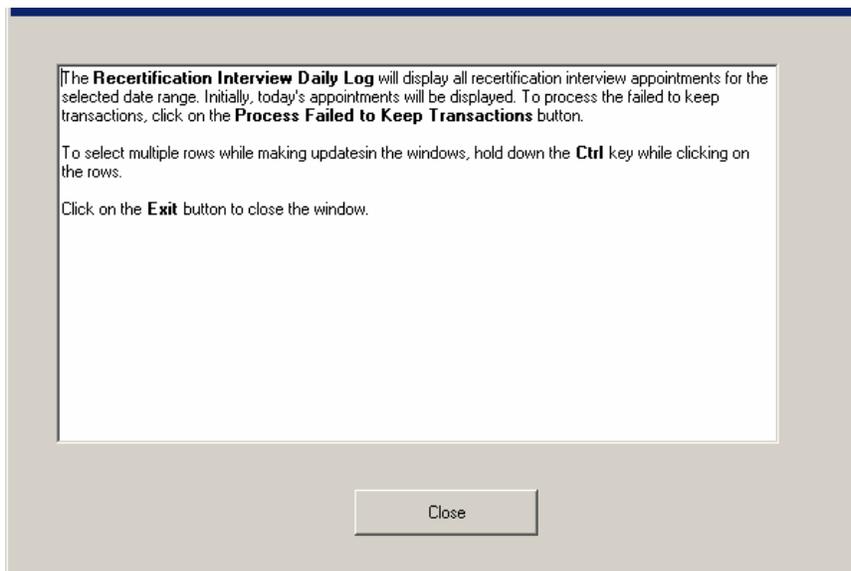
## Overview

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.

## Instructions

When the Worker clicks OK on the Instructions window for the **Recertification Interview Log** window is displayed.

### *Instructions*



When the Worker clicks on the **Close** button, the **Recertification Interview Log** appears.

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

## Recertification Interview Log

File Retrieve Print

### Recertification Interview Log

View Current and Past Appointments
  View Future Appointments

Case No	Case Name	Spoken Lang	Appt Date	Appt Time	LDSS-4826 Received	Tel Intv	Contact Num
00010002496H	PATRICK JOSEPH	Polish	12/10/2007	10:00 AM	No	No	
00010002497F	PIERRE ROLANDA		12/10/2007	10:00 AM	No	No	

**Totals:**  
 Total Kept Appointments: 
 Total Failed To Keep Appointments: 
 Total Re-scheduled Appointments: 
 Total:

### View Current and Past Appointments

In the Current and Past Appointments Date Range Filter, the Worker can select the date range of appointments that will be retrieved. The default value is "Today." The Worker may select one of the following options:

- Today
- Yesterday
- Past 7 Days
- Date Range

The Worker may view appointments up to 60 days in the past.

### Future Appointments Filter

In the Future Appointments Filter, the Worker can select the date range of appointments that will be retrieved. The default value is the next business day. The Worker may select one of the following options:

- Date
- Date Range

The Worker may view appointments up to 60 days in the future.

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

## Appointment Type Filter

There is an Appointment Type filter, with two options:

- Telephone Interview
- In-Center Interview

## Appointment Status Filter

There is an Appointment Status filter, with three options:

- Kept Appointment
- Failed to Keep Appointment
- None

## Column Order

The columns in the Log appear in the following order:

1. Case Number
2. Case Name
3. Spoken Language
4. Appt Date
5. Appt Time
6. LDSS-4826 Received
7. Telephone Interview
8. Contact Number
9. Assigned To
10. Number of Contacts
11. Interview Started On
12. Appt Status
13. Case Status
14. IVRS
15. Previous Appt

The following buttons appear in the window:

1. Assign – See the *Assign procedure and Refer window* section below for additional details.
2. LDSS-4826 Received- Opens LDSS-4826 Received window
3. Contact – Opens Contact Attempted window
4. Reschedule – Displays the Recertification Interview Scheduler window for updating with new appointment
5. Kept Appointment – Will indicate that the appointment was kept. Clerical associates will be given access to this functionality (new).
6. Failed to Keep Appointment – Will indicate that the participant did not keep the appointment. Clerical associates will be given access to this functionality (new).
7. Process Failed to Keep Appointments- will display Fail to Keep Recertification Interview Log
8. Exit

## Read-Only Totals

The data in the following totals is read-only:

1. Total Kept Appointments
2. Total failed to Keep Appointments
3. Total Re-Scheduled Appointments
4. Total

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

## 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 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

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*

**Refer Action**

**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: Appendix B

Version 2.1, February 19, 2008

## 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*

LDSS-4826 Received

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  In-Center

Contact Number: 212-488-8888 Extension:

Did the applicant request a new call time?  Yes  No

Date: Monday, December 10, 2007 Time: 06:45 pm

OK Cancel

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 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.

*Contact Attempted window: Successful Contact*

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

- Case Information:**
  - 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:** [ ]
- Buttons:** OK, Cancel

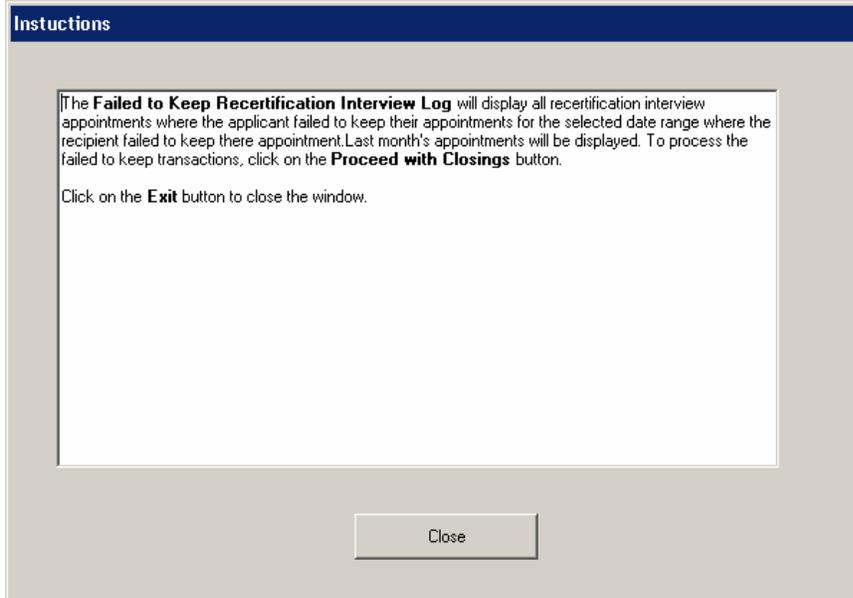
If the Worker is unable to make contact after 4 attempts, he or she must notify their Supervisor. The Supervisor will mark the appointment status as "Failed to keep".

# FS POS Release Notes: Appendix B

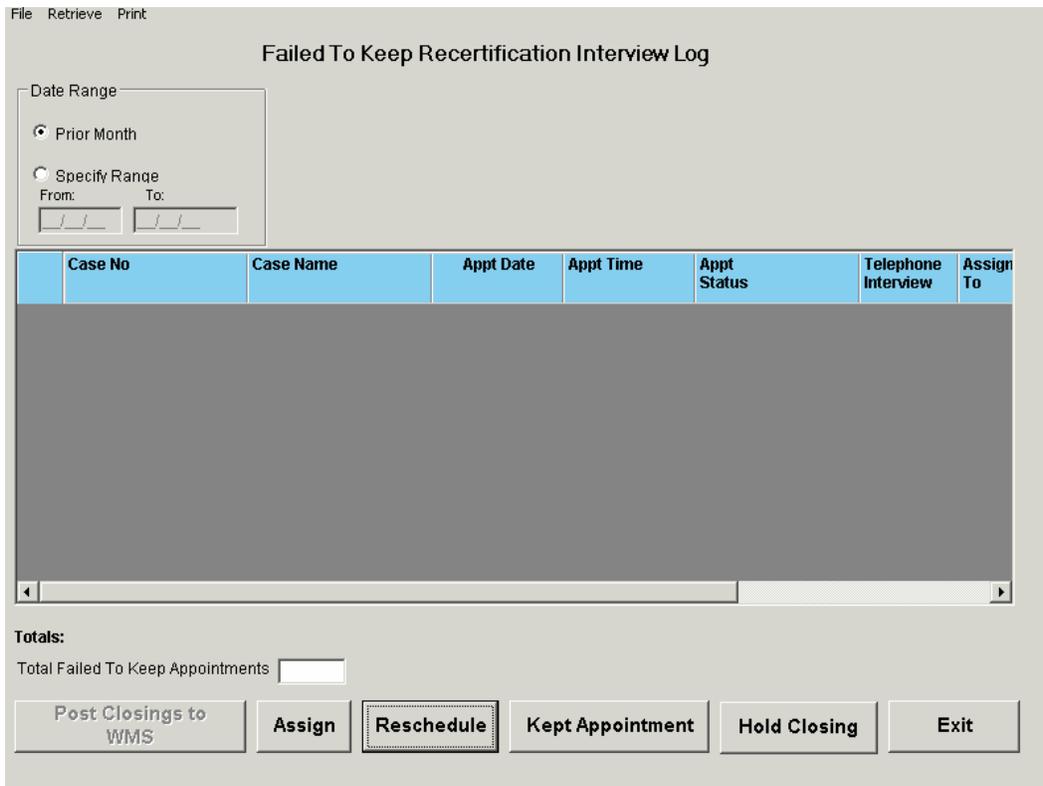
Version 2.1, February 19, 2008

## Failed to Keep Recertification Interview Log

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



## Failed to Keep Recertification Interview Log



# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

## Date Range Filter

The list of the prior month's appointments where the client failed to keep will be displayed in this window beginning on the 16<sup>th</sup> day of the month. The Date Range filter contains two options:

- Prior Month
- Specify Range

## Columns in Failed to Keep Recertification Interview Log

The following columns appear in this log:

1. Case Number
2. Case Name
3. Appointment Date
4. Appointment Time
5. Appointment Status
6. Assigned to
7. Case Status
8. Total Failed to Keep Appointments – Read Only

## Buttons in Log

1. Post Closings to WMS – Click on this button to post the case closing to WMS
2. Assign – Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
3. Reschedule – Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
4. Kept Appointment – Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
5. Hold Closing – Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
6. Exit

When the Post Closings to WMS button is clicked, a warning message will appear with Yes and No buttons: "These cases will be closed for failing to keep the interview. Would you like to continue?"

- If the Worker clicks No, the closing transaction will not be sent to WMS.
- If the Worker clicks Yes and the client did not submit a signed LDSS-4826, a transaction with closing code Y10 will be posted to WMS for the case.
- If the Worker clicks Yes and the client submitted a signed LDSS-4826, the **CNS Notice Number Required** window will appear to allow the Worker to enter the CNS notice number for the case. When the Worker enters the CNS notice number and clicks the OK button, a transaction with closing code N10 will be posted to WMS for the case.

# FS POS Release Notes: Appendix B

Version 2.1, February 19, 2008

## CNS Notice Number Required window

If the client submitted a signed LDSS-4826, but failed to keep the recertification appointment, the case must be closed using recertification-related closing code N10 (Failed to Keep/Complete Appointment). This closing code requires the creation of a notice number in the Client Notice System (CNS) Subsystem in WMS under transaction type 08.

*CNS Notice Number Required window*

**CNS Notice Number Required**

This case closing requires a CNS notice number. Please access the Client Notice Number Subsystem in WMS and generate a notice number for the case using Transaction Type 08 (Recert Closing) and FS Closing Code N10. The appointment date must also be entered in CNS.

Once the notice is generated, please enter the CNS Notice Number in this window in the "CNS Notice Number" field.

Case Number: 00001234567A

Appointment Date: 11/01/2007

CNS Notice Number: N0

OK Cancel

Field Descriptions:

1. Instructions
2. Case Number Field (read-only)
3. Appointment Date (read-only)
4. CNS Notice Number – Entry of CNS Notice Number is required in this field.

# FS POS Release Notes: Appendix C

Version 2.1, February 19, 2008

## Failed to Keep FS Application Interview Activity

An activity named **FTK FS Application Interview** (Failed to Keep Food Stamp Application Interview) allows Workers to complete an eligibility action to the Worker for clients who failed to keep the application interview appointment.

The Supervisor assigns the case to the Worker using the **Failed to Keep Application Interview Log** in **FS Reception**. The Supervisor must select the case, click on the **Assign Rejection** button and select the Worker in the Refer window that appears. The FTK FS Application Interview will appear in the selected Worker's queue. Pending FS Application Interview activities will be automatically completed by POS.

*Assign Rejection button in Failed to Keep Application Interview Log*



### Starting the activity in the queue

The Worker must select the **FTK FS Application Interview** activity in their queue and click on the **Start** button. POS will retrieve the latest TAD from WMS to verify that the case in applying (AP) status for FS. If the case is not in AP status, an error message will appear and the activity will be removed from the queue.

*Queue in Activities Management window*

FS POS 1.3 - [Activities Management] 2:35:33 PM Wednesday, September 26, 2007

File Edit Tools Window Help

FS Assistant Site Manager Queue

Unit Filter: Worker (selected), CMU, Uncovered, FS Application Interview, FS Recertification Interview

Activity Type Filter: FS Application Interview, EFS Issuance, FS Recert Interview, FS Change Case Data, Error Corrections, Other

Activity Approve Filter: Approve FS Application Interview, Approve EFS Issuance, Approve FS Recertification, Approve FS Change Case Data, Approve Error Corrections, Approve Other

Activity Status Filter: Suspended, Not Scheduled, Not Started

Activity Alert Filter: Coming Due, Overdue

Filter Clear

Activity	Due Date	Alert	Case Name	Case No	Surf	Rec'd
FTK FS Application Interview		NA	Kelly Miller	00010002678A	1	
FS Recert Interview		NA	Manuela Johnson	00007433180C	1	
FS Recert Interview		NA	Comelate Johnny	00007443178E	1	
FS Reception Intake		NA	Syed W Azmat	070815162803	1	
FS Reception Intake		NA	Tuesday Azmat	070911162847	1	
FS Reception Intake		NA	Li Chen	070829162829	1	
FS Reception Intake		NA	Waqas Azmat	070910162842	1	
FS Reception Intake		NA	Test Azmat	070911162846	1	
<b>Total: 17 Cases</b>						

Start Assign Remove Schedule Reggping Update Disposition WMS View Your Schedule Comment

# FS POS Release Notes: Appendix C

Version 2.1, February 19, 2008

## Activity flow

The following windows appear in the activity:

- Household Screen
- Address Information
- Individual Detail
- CIN Re-Use
- Case Number Re-Use
- TAD
- Form Data Entry
- Close

## Household Screen

FS POS 1.3 - [Household Screen] 2:40:44 PM Wednesday, September 26, 2007

File Edit Tools Window Help

No messages from WMS via OLTP

**Control Information**

District : 66 Center : Melrose FS Center Worker : Case Number : 00010002678A

**Present Address**

Street Number	Direction	Name	Type	Apt #	City
99	[None]	Undomiciled			Bronx

State: NY Zip Code: 00001-0451 Phone: - -

**Suffix Information**  Active  Applying

FS Suffix FS Status AP FS # AC 0

Suff Case Name

1	Kelly Miller
---	--------------

**Case Member Information**

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Citizen / National	FS AFIS
1	1	RX237885	Miller Kelly B	Casehead	12/12/1970	-	-	F	<input type="checkbox"/> AP

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## Address Information window

FS POS 1.3 - [Address Information] 2:40:55 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Present Address

St No/Dir/Name: 99 [None] Undomiciled Type Apt # City  
 State: NY Zip Code: 00001 0451 Phone: - -

Mailing Address

Care of Name: Miller K c/o GPO Type Apt # City  
 St No/Dir/Name: 558 [None] Grand Concourse Type Apt # City  
 State: NY Zip Code: 10451 0000 Phone: - -

Authorized Representative

St No/Dir/Name: [None] Type Apt # City  
 State: Zip Code: 00000 0000 Phone: - -

Other Phone

Contact Person: Phone: - -

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## Individual Detail window

FS POS 1.3 - [Individual Detail] 2:41:01 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Case No: 00010002678A

Suf Ln CIN First Name Middle Last Name Document Externally Scan Verified

1 1 RX237885 Kelly B Miller Identity

SSN Valid Sex Relation

Date SSN Card Applied For Marital Status

00/00/0000

Ethnic/Race Affiliation

Hispanic/Latino  Yes  No

Native American/Alaska Native  Yes  No

Asian  Yes  No

Black or African American  Yes  No

Native Hawaiian/Pacific Islander  Yes  No

White  Yes  No

DOB Mother's: First Name Middle Maiden Name

12/12/1970

Father's: First Name Middle Last Name

Relationship

Residency

US Citizen/National  Yes  No Immigrant Type Immigrant No Date of Entry

00/00/0000

Qualified Immigrant Type and Description

Student ID

Status PA NA MA NA FS AP Other Names

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# FS POS Release Notes: Appendix C

Version 2.1, February 19, 2008

## CIN Re-Use window

FS POS 1.3 - [CIN Re-use] 2:41:08 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Registry # Application Date Unit/Worker Case # Case Name Suffix Case Type Request New Clearance

Ln	Suf	First Name	MI	Last Name	Sex	SSN	DOB	AFIS Ex Ind	CIN	CNTR	Case/Reg #

Ln Suf	Name	Sex	SSN	DOB	Afis	CIN	CNTR	Case/Reg #	Case Type	Case Stat	Oth co	Re Ind Stat	PAMAFS Name up	PAMAFS Score

The selected CIN match is indicated by the arrow.

Do you wish to use a new CIN because there is no appropriate Cin match in the clearance ? Yes  No

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## Case Number Re-Use window

FS POS 1.3 - [Case Number Re-Use] 2:41:11 PM Wednesday, September 26, 2007

File Edit Tools Window Help

Case Number: Case Suffix:

Line	Seq No	First Name	MI	Last Name	Sex	SSN	DOB	CIN

POSSIBLE MATCHES

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# FS POS Release Notes: Appendix C

Version 2.1, February 19, 2008

TAD window

FS POS 1.3 - [ELIGIBILITY] 2:48:25 PM Wednesday, September 26, 2007

File Edit Tools Window Help

WMS Data POS Data

**Food Stamp Tad Window**

Case Number	Suf	Center	Unit Worker	Rule Status	Proj.No	Acct.No	Reuse case No
000100026616	T	Melrose FS Center	FSP05				

Case Suffix	M3E Ind	WMS Bdgt#	Notice Bdgt#	Notice #
T				

Case Name	Language	Language Read	Notice Language	LFLN	Homebound Ind
FTK TEST	English	English	English	Yes	<input type="radio"/> Yes <input type="radio"/> No

Category	Prg	Status	Status Reason	From Date	To Date
FS	FS	APPLYING		08/19/2007	00/00/0000

Individual Name	Line#	CIN	Prg	Status	Deny ?	Status Reason	Date
Test Ftk	1	TA17031T	FS	APPLYING			08/19/2007

Next Previous Ignore Errors Show Individual Data Run Rules

## Worker Entry in TAD

The Eligibility Specialist must change the status to "**Rejected**" and select status reason **N10** (Failed to Keep Initial Interview). The ES must then click on the Show Individual Data button and enter the required data element. Once the required entries are made, the ES will click on the **Return to Case Level Data** button.

Then, the ES will click on the **WMS Plug** in the tool bar and access the Client Notice System (CNS) to generate the notice for the case. The notice number from CNS must be entered in the **Notice Number** field on the FS TAD. Once the required entries are made, click on the **Next** button to run the business rules. After the case has passed the business rules, click the **Yes** button to continue.

WMS Plug in Tool Bar





# FS POS Release Notes: Appendix C

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## Form Data Entry window

	Yes	No
Request for Identification Card/Temporary Medicaid Authorization (Form W607A)	<input type="radio"/>	<input type="radio"/>
Financial Institution Inquiry (Form W532F)	<input type="radio"/>	<input type="radio"/>
Request for Birth or Death Verification from Agencies Outside New York City (Form W680)	<input type="radio"/>	<input type="radio"/>
Documentation Requirements (Form W-113K)	<input type="radio"/>	<input type="radio"/>
Social Security Administration - Consent for Release of Information (Form W515R)	<input type="radio"/>	<input type="radio"/>
Request for Marriage or Divorce Verification from Agencies outside New York City (Form W681)	<input type="radio"/>	<input type="radio"/>
Request For Contact/ Missed Interview (LDSS-4753 Food Stamp)	<input checked="" type="radio"/>	<input type="radio"/>
Request for Contact on a Food Stamp Application (Form W-119)	<input type="radio"/>	<input type="radio"/>
Systematic Alien Verification for Entitlement (SAVE) Referral (Form W-515X)	<input type="radio"/>	<input type="radio"/>
FIA School/Training Enrollment Letter (Form W-700D)	<input type="radio"/>	<input type="radio"/>
Notice of Food Stamp Recertification Appointment (Form W-129RR)	<input type="radio"/>	<input type="radio"/>
School Verification Letter (Form W-700E)	<input type="radio"/>	<input type="radio"/>
Family Care Assessment (Form W-582A)	<input type="radio"/>	<input type="radio"/>
Declaration of Application for a Social Security Number (Form EXP-83H)	<input type="radio"/>	<input type="radio"/>

Spanish      Next      Previous

An edit in the Form Data Entry will remind the Worker to complete the LDSS-4753 form data entry window.

## Close window

**Close**

Closing Window : **Household Screen**

Current Activity : **FS Application Interview**

**Complete Activity**      **Suspend Activity**

**Cancel**

When the Worker clicks on Complete Activity, an approval activity will be sent to the Supervisor.

# FS POS Release Notes: Appendix C

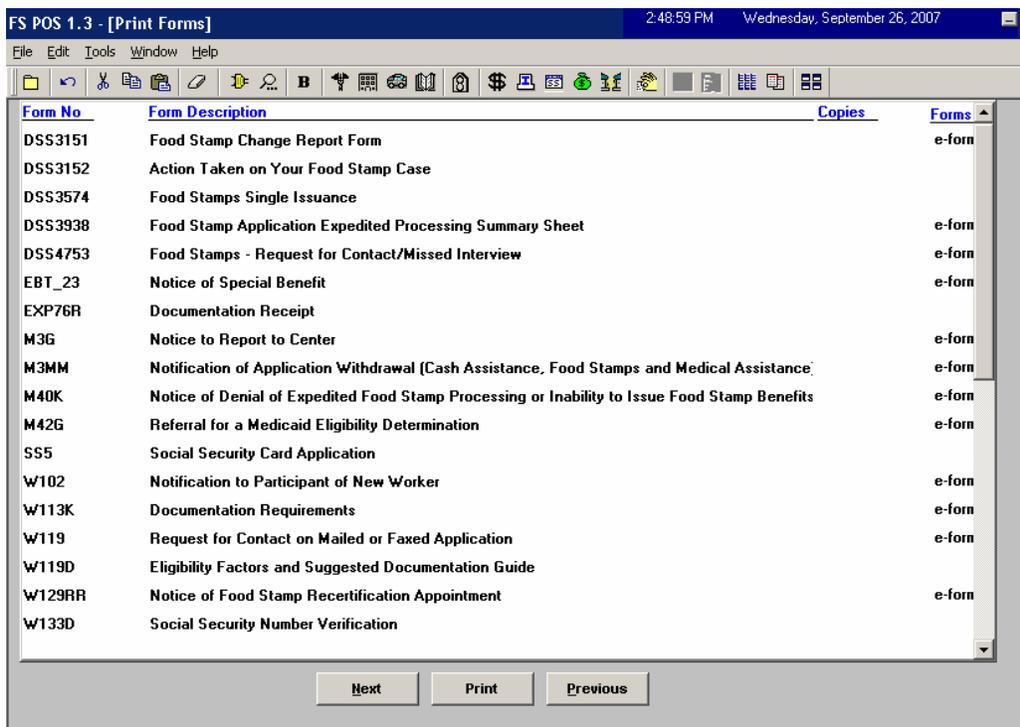
Version 2.1, February 19, 2008

## Approval Flow

The following windows appear in the activity:

- Household Screen
- Address Information
- Individual Detail
- CIN Re-Use
- Case Number Re-Use
- TAD
- Print Forms
- Approval Elements

## Print Forms

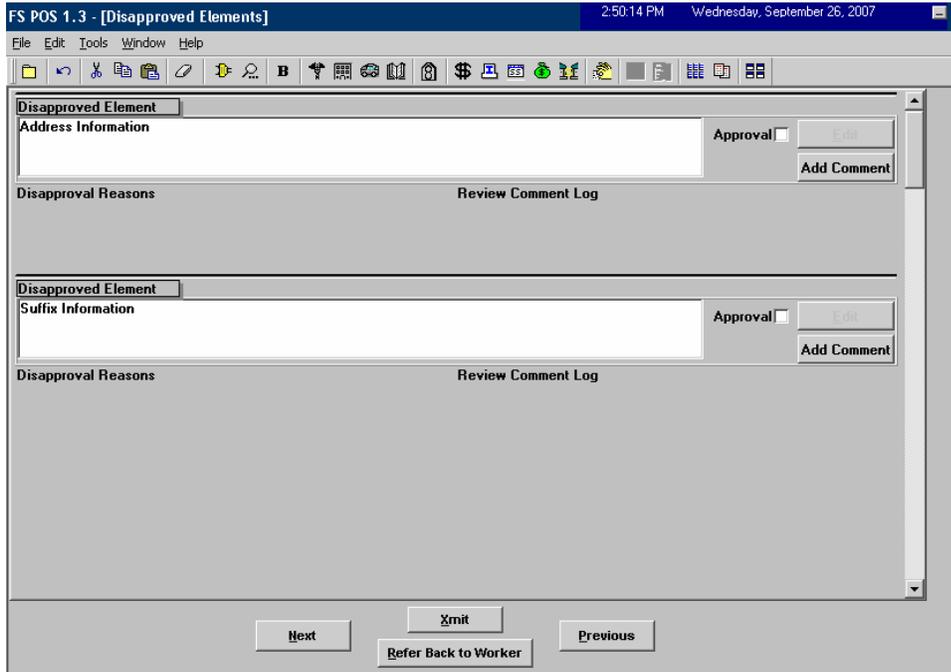


In the **Print Forms** window, a message will remind the Supervisor to print the **LDSS-4753** (Request for Contact/Missed Interview) notice.

# FS POS Release Notes: Appendix C

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## Approval Elements



Following the Print Forms window, the Supervisor must click on the **Xmit** button in the **Approval Elements** window to submit the failed to keep transaction to WMS.