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POLICY BULLETIN #08-48-SYS

POS RELEASE NOTES VERSION 12.1.1

Date: May 14, 2008	Subtopic(s): POS
🖥 This procedure can now be accessed on the FIAweb.	This policy bulletin is to inform Job Center staff that the latest version of the Paperless Office System (POS) migrated to production on April 28, 2008. Descriptions of the changes can be found in POS Release Notes Version 12.1.1 (**Attachment A**) and POS Release Notes Version 12.1.1 Appendices A through C (**Attachments B-D**). These release notes can also be found on the FIAweb at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79 *Effective Immediately* **Attachments:**
🖥 Please use Print on Demand to obtain copies of forms.	**Attachment A** POS Release Notes Version 12.1.1 **Attachment B** POS Release Notes Version 12.1.1 Appendix A **Attachment C** POS Release Notes Version 12.1.1 Appendix B **Attachment D** POS Release Notes Version 12.1.1 Appendix C

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center*

Distribution: X

POS Release Notes
Version 12.1.1, April 28, 2008

These Release Notes contain descriptions of changes in POS Release 12.1.1, scheduled for April 28, 2008. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**.   These and prior Release Notes may also be found on the HRA Intranet at http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Scheduling BEV Appointments via Open TI, Phase I

Workers will be able to schedule in-office BEV (Bureau of Eligibility Verification) appointments through the BEV Referral window in the **Application Interview** activity in POS through a new Open Transaction Integrator (Open TI) interface. To accommodate this new functionality, the BEV Referral window will be updated.

Current BEV Referral window

Revised BEV Referral window

The following changes were made in the window:

- The "Who?" drop down menu was removed because the BEV appointment is made for the casehead, not individual case members.
- The appointment will be marked as "In Office"
- A new button (View/Schedule BEV Appointment) was added.
- The BEV Worker Phone field was removed.
- The Recommendations, Recommendation Reason, Recommendation Date, Worker Name and Interview Date fields have been grouped in a new section labeled BEV Response.
- The window will show any open BEV appointment in the Appmt Date (Appointment Date), Appmt Time (Appointment Time) and Appmt type (Appointment Type) fields.

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Making the BEV Appointment

When the Worker clicks "Yes" for the **New Ref Necessary** (New Referral Necessary) field and selects the Case Type (New case, Reopen, SI Rent, SI Utility), the **View/Schedule BEV Appointment** button will be enabled. When the Worker clicks on this button, the **View/Schedule BEV Appointment** window will appear.

View/Schedule BEV Appointment window with no prior appointment

If there is no prior appointment, the **Make a New Appointment** button is enabled and the **Reschedule the Appointment** and **Cancel the Appointment** buttons are disabled.

View/Schedule BEV Appointment window with a prior appointment

If there is a prior appointment, the scheduled appointment date, time, type and referral reasons are displayed and the **Reschedule the Appointment** and **Cancel the Appointment** buttons are enabled.

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If the Worker clicks on the **Make a New Appointment** button or the **Reschedule the Appointment** button, POS displays the **BEV Referral Reasons** window. The Worker must select a BEV referral reason and click on the OK button. The Worker may select up to 3 three reason codes. If none of the reasons apply, the Worker must check the "**None of the above**" checkbox.

Once the Worker clicks the **OK** button in the **BEV Referral Reasons** window, POS connects to the BEV MAPPER database to retrieve the available appointments and opens the **Available Appointments** window. The Worker must select the appointment from the list and click on the **Schedule/Reschedule the Appointment** button.

POS Release Notes
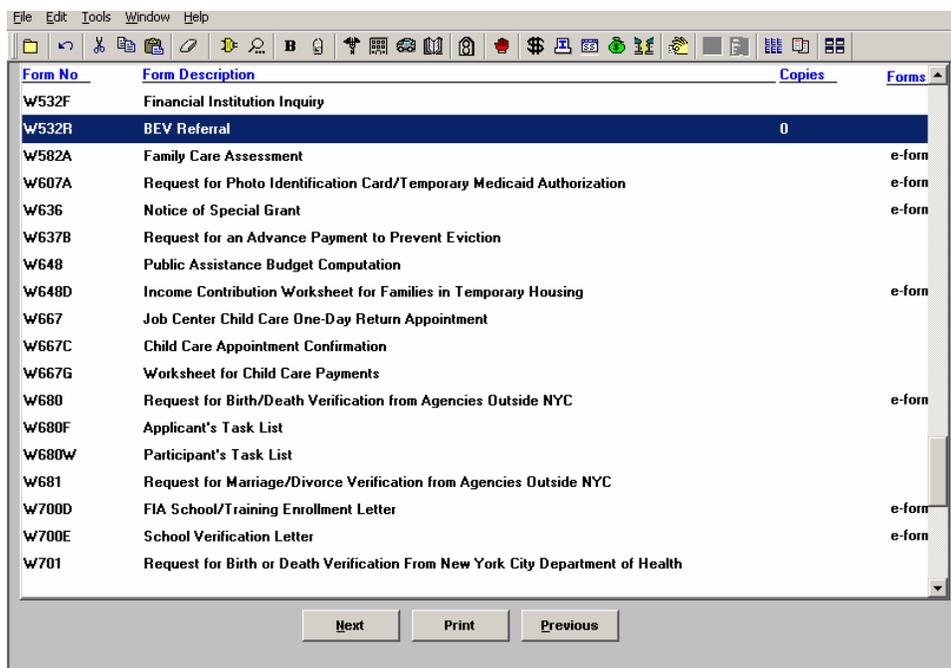## Version 12.1.1, April 28, 2008

BEV Referral Appointment Notice (Form W-532R)
After scheduling the BEV appointment, the Worker must access the **Print Forms** window, select the BEV Referral (W-532R) form and click on the **Print** button. The appointment notice will print and a signature capture window will appear.

To capture the signature, the Worker must:

- Retrieve the form from the printer and place it on the signature pad;
- Click on the Signature object to open the **Signature Pop-Up** window;
- Ask the applicant to sign using the electronic pen;
- Click on the **Accept** button to save the signature;
  - Click **Erase** to try again if the signature is not legible.
- Click on the **Close** icon in the **Topaz Signature Capture** window to save the signature;
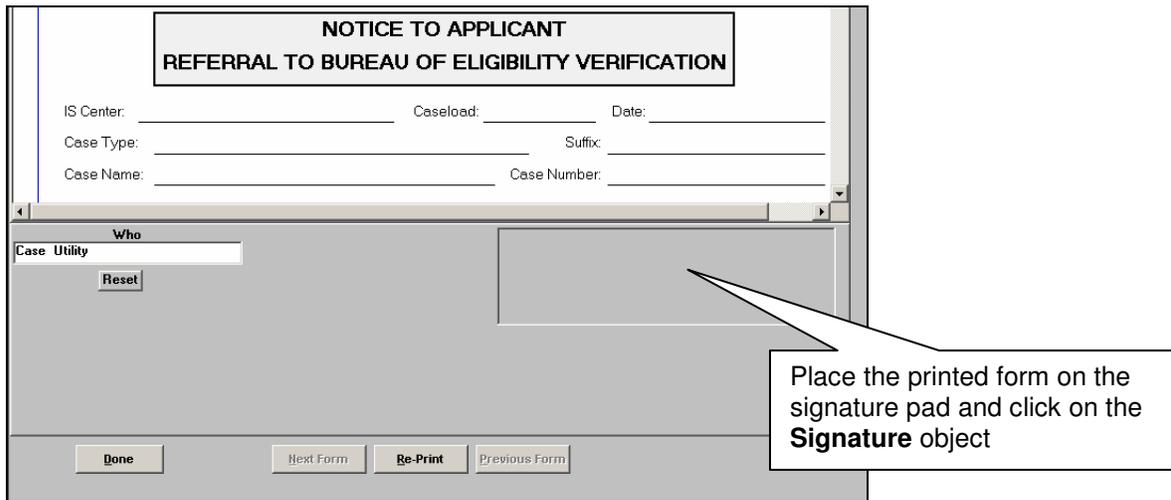- Click the **Done** button to return to the **Print Forms** window.
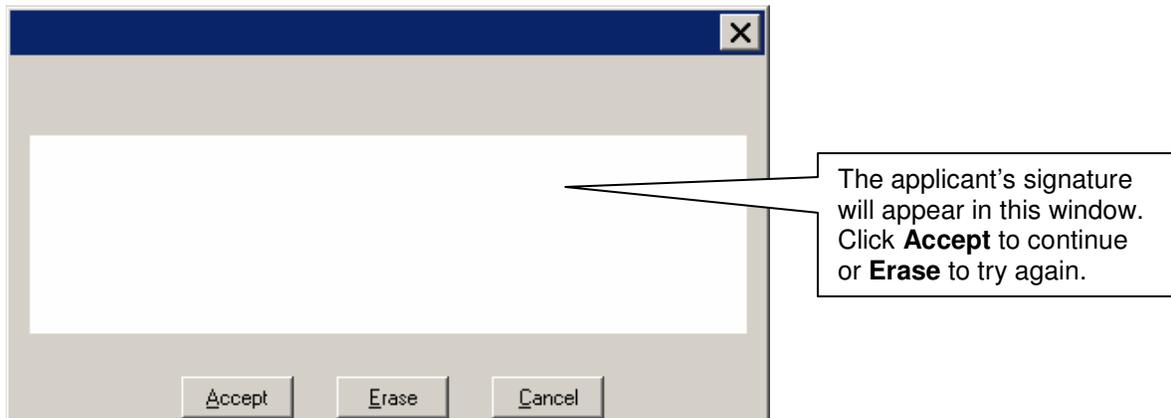
Print Forms window
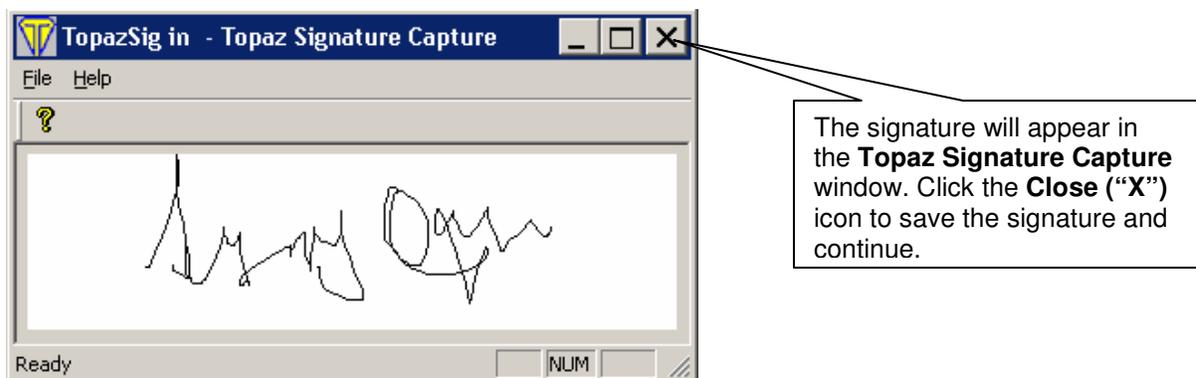
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Signature Capture window – prior to signature

NOTICE TO APPLICANT
REFERRAL TO BUREAU OF ELIGIBILITY VERIFICATION

IS Center: _____ Caseload: _____ Date: _____

Case Type: _____ Suffix: _____

Case Name: _____ Case Number: _____

Who

Case Utility

Reset

Done   Next Form   Re-Print   Previous Form

Place the printed form on the signature pad and click on the **Signature** object

Signature Pop-Up window

Accept   Erase   Cancel

The applicant's signature will appear in this window. Click **Accept** to continue or **Erase** to try again.

Topaz Signature Capture window

TopazSig in - Topaz Signature Capture

File   Help

Ready   NUM

The signature will appear in the **Topaz Signature Capture** window. Click the **Close ("X")** icon to save the signature and continue.

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Signature Capture window – saved signature

The saved signature appears in the window.

Click the Done button to return to the Print Forms window if no other forms require signature capture.

Homebound BEV Appointments
The functionality to schedule homebound BEV appointments will be added in a later phase. To schedule a homebound BEV appointment, the Worker must access the BEV subsystem via MAPPER.

Reminder – Case Types that do not require a BEV Referral
The POS BEV Referral window is not available for the following case types:

- HASA
- Cases with a category of EAA (Emergency Assistance for Adults)
- Cases in Active Status

Reminder – Inappropriate BEV Referrals
Applicants found to be ineligible for CA during their initial application interview are not to be referred to BEV. The CA case is to be denied and the appropriate notices must be issued in accordance with current procedures. For additional information, please see PB # 08-26-OPE (Inappropriate Referrals to the Bureau of Eligibility Verification).

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2. New Failed to Keep Application Interview Window

A new window will appear to allow the Worker to determine whether an applicant failed to keep the initial eligibility interview and implement a shortened flow to process the rejection for applicants that failed to keep.

The new window will appear when the Worker starts the Application Interview if:

- The case is in applying (AP) status for Cash Assistance (CA) in the Welfare Management System (WMS); and
- The case is in applying (AP) status for Food Stamps in WMS or is not applying (NA) for FS; and
- The interview question set has not been started.

The following fields appear in the windows:

1. Case Name
2. Case Number
3. Suffix
4. Scheduled Date
5. Scheduled Time
6. Did the applicant fail to return to complete the initial eligibility interview?
7. Has the applicant made contact or attempted to reschedule the appointment?
8. Comment
9. Done
10. Cancel

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The Worker must answer the question "Did the applicant fail to return to complete the <u>initial</u> eligibility interview?"

- If the answer is "No", POS will display the following message: "Please proceed with the Application Interview". The Worker must click OK to continue the activity. The Household Screen window will appear.
- If the answer is "Yes" for the question "Did the applicant fail to return to complete the <u>initial</u> eligibility interview?" POS will enable the question "Has the applicant made contact or attempted to reschedule the appointment?"

The Worker must answer the question "Has the applicant made contact or attempted to reschedule the appointment?" when it is enabled.

- If the answer is "Yes", POS will display the following message:
  - "The applicant has attempted to reschedule their appointment date. POS will now suspend the Application Interview. Please use the queue to reschedule the applicant's appointment."
  - The Worker must click the OK button to close the activity and reschedule the appointment.
- If the answer is "No", POS will enable the Comments field. The Worker must enter the case comment and click the "Done" button. POS will display the following message:
  - "The applicant has failed to return to complete their initial interview. POS will now display the Form Data Entry window to allow you to complete the LDSS-4753 form. Following the Form Data Entry window, the CIN Re-Use, Case Number Re-Use, TAD and Print Forms windows will appear."
  - The Worker must click the OK button to access the Form Data Entry window.

Flow of the Application Interview for applicants who failed to keep the initial eligibility interview
For applicants who failed to keep the initial eligibility interview, the Worker must:

- Complete the data entry window for the LDSS-4753 form (Request for Contact/Missed Interview) on the **Form Data Entry** window, if the household applied for FS.
- Complete the **CIN Re-Use** and **Case Number Re-Use** windows.
- Process the case rejection on the **TAD** window.
- Print the LDSS-4753 form on the **Print Forms** window, if the household applied for FS.
- Click on the **Complete Activity** button in the **Close** window.
- Select the Supervisor in the **Approval Assignment** window.

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3. Change to Flow of Alien Type windows

Window flow
The flow of the alien type windows will be changed to match the alien desk guide. The new order of windows in the Alien Type Determination is:

- Initial Summary
- North American Indian Born in Canada
- Hmong or Highland Laotian
- Victims of Trafficking and Violence (this window appears earlier in the flow)
- Cuban/Haitian Entrants
- Refugee or Amerasian Immigrants
- Asylee
- Deportation or Removal Withheld
- Conditional Entrant
- Legal Permanent Resident
- Parolee for at Least One Year
- Battered (Abused) Spouse and/or…
- Battered Documentation Window
- Evidence of Battery or Abuse window
- Parolee for less than One Year
- PRUCOL (PA)
- PRUCOL (MA)
- Undocumented immigrant or non-immigrant
- Additional Information

Change for Victims of Trafficking and Violence
The alien number field in the **Additional Information** window will have a default value of "A000999999" for non-immigrants with an alien type of "Victim of Trafficking and Violence." The Worker will be able to enter the actual alien number if the non-immigrant has received an alien number from the United States Citizenship and Immigration Service (USCIS).

4. Change to Flow of POS Interviews

The CIN Re-Use window and Case Number Re-Use windows will appear earlier in the POS interviews:

- In the Application Interview**,** the **CIN Re-Use** and **Case Number Re-Use** windows will now appear after the **Additional Suffix Information** window.
- In the Recertification Interview and Change Case Data**,** the **CIN Re-Use** window will now appear after the **Additional Suffix Information** window. In the Recertification Interview and Change Case Data activities, the CIN Re-Use window is only enabled for individuals in applying status.

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5. Update to Total Resources window

The Total Resources window will be updated to add two new fields and to change the label of an existing field:

- A new checkbox (No FS IPV or Sanction Found) will be added to the window to match the FS categorical eligibility changes made in the **Household Screen** and **Individual Detail** windows in POS version 12.1.
- A new field labeled **Total Available and Countable Resources (PA)** will allow the Worker to record the countable PA resource amount.
- The **Total Available and Countable Resources** field will be relabeled **Total Available and Countable Resources (FS)** to help differentiate it from the Cash Assistance resource field**.**

For additional information on resource policy, please see Policy Directive # 08-13-ELI (Cash Assistance Resource Policy) and Policy Directive # 08-01-ELI (Food Stamp Resource Policy).

6. New Completion Edits in Approve IN/EFS activity

A new completion edit in the Approve IN/EFS and EC – Approve IN/EFS activities will require the Supervisor to print the LDSS-3152 (Action Taken on Your Food Stamp Case) for cases eligible for expedited FS benefits if the CNS notice is suppressed with an M3E Indicator or the FS opening code begins with a number or the letters "Y" or "Q".

A new completion edit in the Approve IN/EFS and EC – Approve IN/EFS activities will require the Supervisor to print the M-40K (Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits) for cases ineligible for expedited FS benefits.

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7. Change to Finger Imaging – AFIS window

The W-519 (Finger Imaging Notice) form will become an eForm. To accommodate this change, the **Finger Imaging – AFIS** window will be updated:

- The signature box will be removed from the window.

When the Worker makes the selection in the window for each adult and clicks on the **Print** button, an eForm signature window will appear for each individual that must sign the W-519 form.

To capture the signature, the Worker must:

- Retrieve the form from the printer and place it on the signature pad;
- Click on the **Sign** button to open the **Signature Capture** window;
- Ask the applicant to sign using the electronic pen;
- Click on the **Accept** button to save the signature;
  - Click **Erase** to try again if the signature is not legible.
- Click the **Next** button to save the E-Form and open the next E-Form signature window or to return to the Finger Imaging – AFIS window once all required signatures are electronically captured.

Revised Finger Imaging – AFIS window

Select each adult applicant's response and click the Print button.

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E-Form Signature window
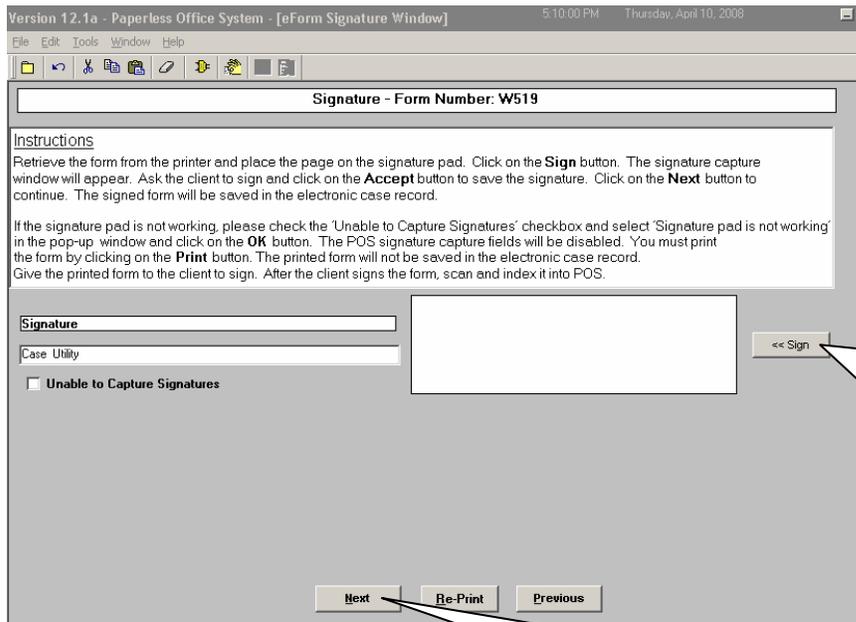
One signature window will appear for each adult applicant.

Click the Sign button to open the Signature Capture window

Click the Next button once the signature is captured to display the next signature window or to return to the Finger Imaging – AFIS window.

Signature Capture window
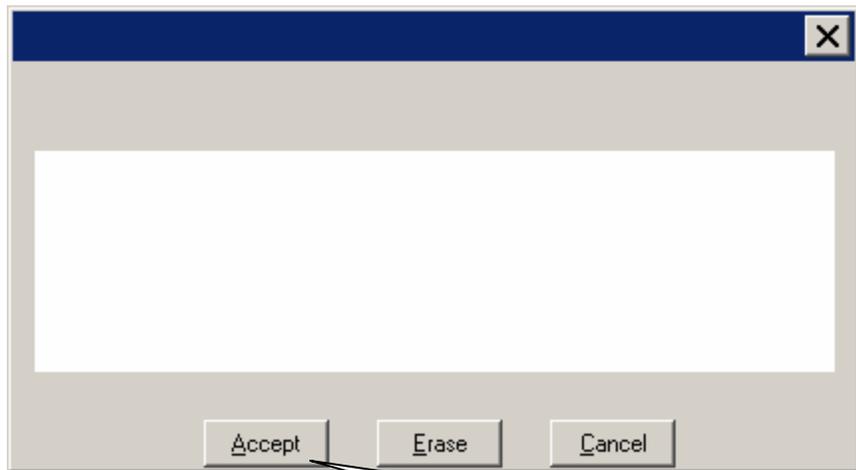
Ask the applicant to sign and click the Accept button to save the signature

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8. New Activity: Make Case Comment

A new activity named "Make Case Comment" will allow Workers, Supervisors and Managers at CA centers to make a case comment on a case without opening a change action. This new activity will include the following windows:

- Household Screen
- Case Comments

Case Comments window

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9. Pilot of FS Separate Determination through POS, Phase II

In a new pilot of Phase II of Food Stamp Separate Determination through POS, new functionality will allow Workers at selected Cash Assistance (CA) centers to make a decision on Non-Cash Assistance (NCA) Food Stamp (FS) cases created in applying (AP) or single issue (SI) status through the automated WMS FS Separate Determination process.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Functionality
The following activities will be added at the pilot centers to allow the Supervisor to assign cases and allow Workers to complete the required determinations:

- Assign FS Sep Det – Eligibility Decision
- FS Sep Det – Eligibility Decision
- Approve FS Sep Det – Eligibility Decision
- EC – FS Sep Det – Eligibility Decision
- Approve EC – FS Sep Det – Eligibility Decision

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10. Pilot of FS Application Registration for One-Shot Deal Applicants

Overview
In a new pilot of Phase II of Food Stamp Separate Determination through POS, new functionality will allow Workers at selected Cash Assistance (CA) centers to register a case for One Shot Deal applicants that also wants FS. The Worker will also be able complete the expedited Food Stamp eligibility determination and make a decision on these cases.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Functionality
The following activities will be added at the pilot centers to allow the Worker to complete the required determinations:

- FS Sep Det – Eligibility Decision
- Approve FS Sep Det – Eligibility Decision
- EC – FS Sep Det – Eligibility Decision
- Approve EC – FS Sep Det – Eligibility Decision
- EFS Issuance
- Approve EFS Issuance

Selection on Site Determination window
For CA applicants that apply for a One Shot Deal and indicate in the Site Determination window that they would also like to apply for FS, POS will use WMS inquiry information to determine whether the applicant is in applying (AP), single issue (SI) or active (AC) status on another Food Stamp (FS) case.

NCA FS Case Registration
If the applicant is not on another open case, POS will register an NCA FS case for the household, copy the application data from the CA case to the NCA FS case and place a **FS Sep Det – Eligibility Decision** activity in the Worker's queue when the Worker clicks the **Next** button in the **Print Forms** window in the **Application Interview**. POS will also re-use the data from the CA interview for the NCA FS case.

Loading of Decision Activity
A new activity named **FS Sep Det – Eligibility Decision** will be added to the Worker's queue after the NCA FS case is registered.

EFS Launch for One Shot Deal applicant cases
If the "EFS Issuance" activity has not been started for the case since the FS file date and less than seven (7) days have passed, POS will suspend the separate determination activity and will launch the "EFS Issuance" activity when the Worker clicks the "Next" button in the Print Forms window.

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11. Pilot of New Activity: Assign FS Separate Determination Eligibility Decision

A new activity named **Assign FS Sep Det – Eligibility Decision** will allow Supervisors at selected CA centers to assign an activity to a Worker to make a decision on NCA FS cases created through the automated WMS FS Separate Determination process. The Supervisor will access this new activity through the "Activity Description" list in the **Action** tab of the **Activities Management** window.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Tracking of FS Separate Determination Cases
CA staff will continue to use the following reports to identify the created separate determination FS cases that require a decision:

- **WINRO824** (Exception Report): This report lists cases where WMS was able to create an NCA FS application for an undercare case, but could not create an eligibility decision transaction via the automated separate determination process.
- **WINRO827** (Pending Food Stamp Separate Determination Cases): This report lists the cases where a separate Food Stamp determination is pending and the NCA FS case was registered systemically in AP or SI status.

Activity Flow
This activity will include two windows: (1) Household Screen; (2) Case Assignment

Household Screen
This window will provide a summary of the current case information from WMS.

Case Assignment window
This window will allow the Supervisor to select the Worker to whom the case will be assigned for processing.

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12. Pilot of New Activity: FS Separate Determination Eligibility Decision

A new activity named **FS Sep Det – Eligibility Decision** will allow Workers at selected CA centers to make a decision on NCA FS cases created through the automated WMS FS Separate Determination process and for cases registered for a One Shot Deal applicant that also wants FS.

The activity will include the FS POS versions of the following windows:

- Household Screen
- Address Information
- Additional Suffix Level Data
- CIN Re-Use
- Case Number Re-Use
- Individual Details
- Aliens (if needed)
- Food Stamp Household Composition
- Employment Information
- Current Income
- Medical
- Resources
- Shelter (Housing) Expenses
- Other Expenses
- Education/Training
- Other Information
- Form LDSS-2921 Review Window
- Print Forms
- Eligibility Determination
- Budget
- TAD
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

For full details, please see **Appendix A: New Activity – FS Separate Determination Eligibility Decision**.

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13. Pilot of New Activity: Approve FS Separate Determination Eligibility Decision

A new activity named **Approve FS Sep Det – Eligibility Decision** will allow Supervisors to review and approve eligibility decisions made in POS by Workers at selected CA centers for NCA FS cases created in AP or SI status through the automated WMS FS Separate Determination process and for NCA FS cases registered for One Shot Deal applicants that also want to apply for FS.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Activity Flow
This activity will include the FS POS versions of the following approval windows:

- Household Screen
- Address Information
- Additional Suffix Information
- CIN Re-Use (will only appear if at least one individual is in 'AP' status for FS)
- Case Number Re-Use (will only appear if the FS case is in 'AP' status)
- Individual Details
- Aliens (if needed)
- Food Stamp Household Composition
- Employment Information
- Current Income
- Medical
- Resources
- Shelter (Housing) Expenses
- Other Expenses
- Education/Training
- Other Information
- Form LDSS-2921 Review Window
- Eligibility Determination
- Budget
- TAD
- Grants
- Print Forms
- Approval Elements

The Supervisor must review and approve or disapprove each window in the flow. If the Supervisor selects "Disapprove", a comment is required and will be saved in the "Comment Log" section.

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14. Pilot of New Activity: EFS Issuance

Workers at selected CA centers will have access to the FS POS EFS Issuance activity, which will allow the Worker to complete the expedited FS benefits determination for NCA FS cases registered for One Shot Deal applicants that also want to apply for FS.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

For full details, please see **Appendix B: New Activity – EFS Issuance**.

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15. Pilot of New Activity: Approve EFS Issuance

A new activity named **Approve EFFS Issuance** will allow Supervisors to review and approve expedited FS eligibility decisions made in POS by Workers at selected CA centers for NCA FS cases registered for One Shot Deal applicants that also want to apply for FS.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Activity Flow – Eligible for EFS
This activity contains the following windows if the applicant is eligible for expedited FS benefits:

- Household Screen
- Expedited Food Stamp Questions
- Activity Checklist
- EFS Eligibility Determination
- EFS Summary
- Budget
- TAD
- CBIC Payee Status
- EFS Decision Form
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

Activity Flow – Ineligible for EFS
This activity contains the following windows if the applicant is ineligible for expedited FS benefits:

- Household Screen
- Expedited Food Stamp Questions
- Activity Checklist
- EFS Eligibility Determination
- EFS Summary
- EFS Decision
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

The Supervisor must review and approve or disapprove each window in the flow. If the Supervisor selects "Disapprove", a comment is required and will be saved in the "Comment Log" section.

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16. New and Revised E-Forms, POS Forms and Data Entry Windows

The following forms have been added to city wide E-Forms:

- M-15, Inquiry Regarding Veteran's Benefits and Servicemen's Allotments
- M-15f, Agreement To Repay Public Assistance
- LDSS-2474, SSI Referral and Certification of Contact
- LDSS-4198, Third Party Health Insurance Data Entry Worksheet
- LDSS-4279, Notice of Responsibilities and Rights for Support
- LDSS-4529, Agreement to Repay any Home Relief Overpayments Still Owed after Case is Closed
- LDSS-4530, Assignment of Wages, Salary, Commissions or Other Compensation for Services
- LDSS-4571, Alcohol and Drug Abuse Screening and Referral Form
- LDSS-4733, DFR Legal Residence Statement
- M-528n, Request for Child Care Assistance or Request to Close My Public Assistance (PA) Case
- W-133D, Social Security Number Verification
- W-147CC, Certification of Move Statement
- W-153P, Rental Assistance Unit (RAU) Case Documentation Transmittal
- W-519, Finger Imaging Notice
- W-637B, Request for Advance Payment to Prevent Eviction
- W-897P, Notification of Rent Payment Responsibility
- W-908CC, Notice of Rescheduled Appointment for Recertification Interview

These forms will be saved to the FileNET image repository upon printing and will be available through the OneViewer in POS. E-Forms are not available through the **Tools > Printed Forms** menu.

LDSS-4279 Form Print Edit
For applicants, POS connects to the Office of Child Support Enforcement (OCSE) database and receives information available in the OCSE database for the non-custodial parent. Based on this data exchange and their business rules, OCSE sends a recommendation to POS to indicate if a referral is required. For cases where a referral is required, POS allows the Worker to schedule the appointment and record the appointment and generates the appointment notice for the client.

For these cases, the LDSS-4279 (Notice of Responsibilities and Rights for Support) form must be printed. If the Worker has not printed the form, POS displays the following message when the Worker clicks the "Next" button in the Print Forms window: "You must print form LDSS-4279".

Removed POS Forms
The following forms will be removed from POS:

- W-532A, Conciliation Notification
- W-667, Job Center Child Care One-Day Return Appointment

Data Entry Window for Form W-153P and W-637B
Data entry windows will be added for the W-153P (Rental Assistance Unit [RAU] Case Documentation Transmittal) and W-637B (Request for Advance Payment to Prevent Eviction) forms in the **Form Data Entry** window.

For full details, please see **Appendix C: POS Forms and E-Forms**.

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Pilot of New Activity – Food Stamp Separate Determination Eligibility Decision

A new activity named **FS Sep Det – Eligibility Decision** will allow Workers at selected CA centers to make a decision in POS for NCA FS cases created in applying (AP) or single issue (SI) status through the automated WMS FS Separate Determination process and for NCA FS cases registered for One Shot Deal applicants that also want to apply for FS.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Activity Flow: NCA FS Case Created by WMS in AP Status
If the NCA FS case was created by the automated WMS separate determination process in AP status, the Supervisor will assign the case to the Worker using the **Assign FS Sep Det – Eligibility Decision** activity.

The activity will include the following windows:

- Household Screen
- Address Information
- Additional Suffix Level Data
- CIN Re-Use
- Case Number Re-Use
- Individual Details
- Aliens (if needed)
- Food Stamp Household Composition
- Employment Information
- Current Income
- Medical
- Resources
- Shelter (Housing) Expenses
- Other Expenses
- Education/Training
- Other Information
- Form LDSS-2921 Review Window
- Print Forms
- Eligibility Determination
- Budget
- TAD
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

Activity Flow: NCA FS Case Created by WMS in SI Status

If the NCA FS case was created by the automated WMS separate determination process in SI status, the Supervisor will assign the case to the Worker using the **Assign FS Sep Det – Eligibility Decision** activity.

The activity will include the following windows:

- Household Screen
- Address Information
- Additional Suffix Level Data
- CIN Re-Use
- Individual Details
- Aliens (if needed)
- Food Stamp Household Composition
- Employment Information
- Current Income
- Medical
- Resources
- Shelter (Housing) Expenses
- Other Expenses
- Education/Training
- Other Information
- Form LDSS-2921 Review Window
- Print Forms
- Eligibility Determination
- Budget
- TAD
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

Activity Flow: NCA FS Case Registered by POS for One Shot Deal Applicant
If the NCA FS case was registered by POS for a One Shot Deal applicant that also wants FS, the Supervisor will assign the case to the Worker using the **Assign FS Sep Det – Eligibility Decision** activity.

The activity will include the following windows:

- Household Screen
- Address Information
- Additional Suffix Level Data
- CIN Re-Use
- Case Number Re-Use
- Individual Details
- Aliens (if needed)
- Food Stamp Household Composition
- Employment Information
- Current Income
- Medical
- Resources
- Shelter (Housing) Expenses
- Other Expenses
- Education/Training
- Other Information
- Form LDSS-2921 Review Window
- Print Forms
    - POS will suspend the activity and will start the EFS Issuance activity from this window.
- Eligibility Determination
- Budget
- TAD
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close
- Approval Assignment

POS Release Notes: Appendix A
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Household Screen
This window will provide a summary of the current case information from WMS.

Address Information
This window will allow the Worker to update the case address and telephone information.

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Version 12.1.1, April 28, 2008

Additional Suffix Level Data window
This window will allow the Worker to update spoken language, written language, interpreter services, Lifeline and tenant information.

CIN Re-Use window
This window will allow the Worker to select the proper client identification number (CIN) for re-use for each applicant, if applicable.

Case Number Re-Use window

This window will allow the Worker to select the appropriate case number for re-use, if applicable. The window will only appear if the FS case is in applying (AP) status.

Individual Detail window

This window will allow the Worker to update demographics, citizenship and ethnicity information. The Worker will also be able to select the documents that verify identity, citizenship, Social Security Number, relationship and residency for each household member, as required.

If at least one individual is a non-citizen, the Alien determinations will appear after the Individual Detail window.

Alien Determination windows
The Alien Determination windows will allow the Worker to determine the non-citizen's alien type and eligibility for FS.

Food Stamp Household Composition
This window will allow the Worker to indicate whether the household members buy food and/or prepare meals with the casehead, so the Worker can determine the FS household composition.

Data Re-Use for Food Stamp Separate Determination
For cases assigned from the WINRO separate determination reports or registered manually in WMS, POS will use Open TI calls to retrieve the CA/FS cases for the casehead or payee on the NCA FS separate determination case. POS will select the latest closed or rejected CA/FS case for data re-use. If no cases are found for data re-use, a message will appear that no matching data was found.

For the selected case, POS will copy the data from the CA/FS case to the NCA FS case and will display the following message:

▪ "Please wait… Mapping data from the prior Cash Assistance case to the Food Stamp case".

Interview sections
The interview sections (Employment, Income, Medical, Resources, Shelter Expenses, Other Expenses, Education/Training and Other Information) will display data re-used from the Cash Assistance case, if any. The Worker can update the interview data using these windows.

Employment Information

Current Income

Medical

Resources

INDICATE IF YOU OR ANYONE WHO LIVES WITH YOU WHO IS APPLYING:	Yes	No
Is Anyone In Your Household An Immigrant Who Was Sponsored For Admission Into The US?	⦿	⦿
Does The Step Parent Of Any Children Who Live With You Have Any Resources Or Receive Income Of Any Kind?	○	○
Does Anyone Applying Have a Child Under 18 Living Some Place Else?	○	○
Has Title Or Registration To A Motor Vehicle(s) Or Other Vehicle(s)?	○	○
Has Saving Bonds?	○	○
Has Own Home Or Cooperative Or Condominium Apartment?	○	○
Has Cash On Hand?	○	○
Has A Checking Account(s)?	○	○
Has A Saving Account(s) Or C.D. (Cert. Of Deposit)?	○	○
Has A Credit Union Account(s)?	○	○
Has Stocks, Bonds, Certificates Or Mutual Funds?	○	○
Has An IRA, KEOGH, 401-K, Or Deferred Compensation Account(s)?	○	○
Has a burial fund?	○	○
Has A Burial Space?	○	○

Spanish   Next   Previous

Shelter (Housing) Expenses

	Yes	No
Do You (Or Anyone Who Lives With You) Have A Rent, Mortgage Or Other Shelter Expenses?	⦿	⦿
Do You (Or Anyone Who Lives With You) Have A Heat Bill Separate From Your Rent Or Shelter Expense?	○	○
Do You (Or Anyone Who Lives With You) Have An Electricity And/Or Gas Bill Separate From Your Rent Or Mortgage?	○	○
Do You (Or Anyone Who Lives With You) Have Air Conditioning Bill Separate From Your Rent Or Mortgage?	○	○
Do You (Or Anyone Who Lives With You) Have Other Utilities (Water, ETC.) Bill Separate From Your Rent Or Mortgage?	○	○
Does Any Person, Group Or Organization Outside The Household Pay Any Of The Household Expenses?	○	○
Does Any Person Living In The Household Who Is Not Applying, Pay Any Of Your Household Expenses?		
Did The Household Receive A HEAP Payment For The Current (HEAP) Program Year or are They Anticipating Receiving a HEAP Payment?	○	○

Spanish   Next   Previous

Other Expenses

Education and Training

Other Information

Form LDSS-2921 Review Window
The **Form LDSS-2921 Review** window will allow the CA Worker to review the imaged LDSS-2921 (PA/MA/FS application) forms associated with the CA case number that was selected for data re-use.

If no LDSS-2921 form is found, the message "No imaged application could be found at this time" will appear on the window.

Print Forms

Form No	Form Description	Copies	Forms
DOH4220	Access NY Health Care		e-form
DSS3151	Food Stamp Change Report Form		e-form
DSS3152	Action Taken on Your Food Stamp Case		e-form
DSS3574	Food Stamps Single Issuance		
DSS3938	Food Stamp Application Expedited Processing Summary Sheet		e-form
DSS4753	Food Stamps - Request for Contact/Missed Interview		e-form
EBT_23	Notice of Special Benefit		e-form
EXP76R	Documentation Receipt		
M3G	Notice to Report to Center		e-form
M3MM	Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance)		e-form
M40K	Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits		e-form
M42G	Referral for a Medicaid Eligibility Determination		e-form
SS5	Social Security Card Application		
W102	Notification to Participant of New Worker		e-form
W113K	Documentation Requirements		e-form
W119	Request for Contact on Mailed or Faxed Application		e-form
W119D	Eligibility Factors and Suggested Documentation Guide		
W129RR	Notice of Food Stamp Recertification Appointment		e-form

[Next] [Print] [Previous]

Eligibility Determination

This window will allow the Worker to update the case and individual levels and view eligibility factors for which documentation may be missing.   The Worker can also enter a comment on this window.

Budget
The FS budget window will allow the Worker to calculate a FS-Only budget for the case.

FS TAD
This window will allow the Worker to view the current information for the case in WMS and to update the case status, authorize new budgets, change individual statuses and change individual level codes.

TAD – WMS data

TAD – POS Data: Case Level

TAD – POS Data: Individual Level

POS Release Notes: Appendix A

Grants Data Entry
This window will allow the Worker to record any required NCA FS grant. The grants prepared using this window must be printed using form LDSS-3574 on the **Print Forms** window.

Form Data Entry
This window will allow the Worker to enter additional information on the listed forms.

Notice Data Entry

This window will allow the Worker to enter additional information on the listed forms.

Print Forms

This window will allow the Worker to print the listed forms.

Approval Elements
This window will display all elements that will require supervisory approval. The Worker must click the Next button.

Close and Approval Assignment
When the Worker has completed the activity, the Close window will appear. The Worker must click on the Complete Activity button. The Approval Assignment window appears. The Worker will select the Supervisor, enter a case comment and click on the OK button to send the case to the Supervisor.

POS Release Notes: Appendix B
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Pilot of New Activity – EFS Issuance

Workers at selected CA centers will have access to the FS POS EFS Issuance activity, which will allow the Worker to complete the expedited FS benefits determination for NCA FS cases registered for One Shot Deal applicants that also want to apply for FS.

Selected Centers
The following sites will have access to this new functionality during the pilot period:

CA Site	CA Center Name	Associated NCA FS Site	FS Center Name
064	Dekalb	F26	North Brooklyn
066	Bushwick	F21	Williamsburg
067	Linden	F23	Boro Hall

Activity Flow – Eligible for EFS
This activity contains the following windows if the applicant is eligible for expedited FS benefits:

- Household Screen
- Expedited Food Stamp Questions
- Activity Checklist
- EFS Eligibility Determination
- EFS Summary
- Budget
- TAD
- CBIC Payee Status
- EFS Decision Form
- Grants Data Entry
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

Activity Flow – Ineligible for EFS
This activity contains the following windows if the applicant is ineligible for expedited FS benefits:

- Household Screen
- Expedited Food Stamp Questions
- Activity Checklist
- EFS Eligibility Determination
- EFS Summary
- EFS Decision
- Form Data Entry
- Notice Data Entry
- Print Forms
- Approval Elements
- Close and Approval Assignment

POS Release Notes: Appendix B
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Household Screen
This window will provide a summary of the current case information from WMS.

Expedited Food Stamp Questions
This window will allow the Worker to determine whether anyone who is applying received FS this month, whether the FS household received expedited FS in the past and the amount of income received in the current month.

Checklist

This window will allow the Worker to confirm whether the expedited FS questions, identity, citizenship, residency and SSN eligibility factors were completed.

EFS Eligibility Determination: Financial Eligibility

This section of the EFS Eligibility Determination window will allow the Worker to view the EFS financial eligibility for the case and the reason for the eligibility decision.

POS Release Notes: Appendix B

Version 12.1.1, April 28, 2008

EFS Eligibility Determination: Document Completeness tab

This section of the EFS Eligibility Determination window will allow the Worker to view the EFS verification completeness, to view eligibility factors with missing documentation and to record collateral contacts made.

EFS Eligibility Determination: Program Status tab (before Run Rules button is clicked)

This section of the EFS Eligibility Determination window will allow the Worker to view the EFS eligibility determination and the eligibility reason, to view the new status for the case if the applicant is eligible for expedited benefits. The Worker must click on the **Run Rules** button to run the business rules and obtain the determination.

EFS Eligibility Determination: Program Status tab (after Run Rules button is clicked)

EFS Summary
This window will give the Worker a summary of the EFS determination.

POS Release Notes: Appendix B
Version 12.1.1, April 28, 2008

CIN Re-Use
This window will allow the Worker to select the proper client identification number (CIN) for re-use for each applicant, if applicable. The window will only appear if at least one case member is in applying (AP) status.

Case Number Re-Use
This window will allow the Worker to select the appropriate case number for re-use, if applicable. The window will only appear if the FS case is in applying (AP) status.

POS Release Notes: Appendix B
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Budget
The FS budget window will allow the Worker to calculate a FS-Only budget for the case.

TAD – POS Data: Case Level and Individual Status
This window will allow the Worker to view the current information for the case in WMS and to update the case status, authorize new budgets, change individual statuses and change individual level codes.

POS Release Notes: Appendix B
Version 12.1.1, April 28, 2008

TAD – POS Data: Individual Codes

Grants Data Entry

This window will allow the Worker to record any required NCA FS grant. The grants prepared using this window must be printed using form LDSS-3574 on the **Print Forms** window.

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Form Data Entry
This window will allow the Worker to enter additional information on the listed forms.

Notice Data Entry
This window will allow the Worker to enter additional information on the listed forms.

Print Forms
This window will allow the Worker to print the listed forms.

Approval Elements
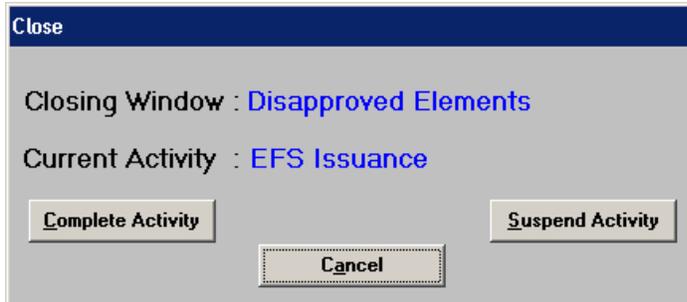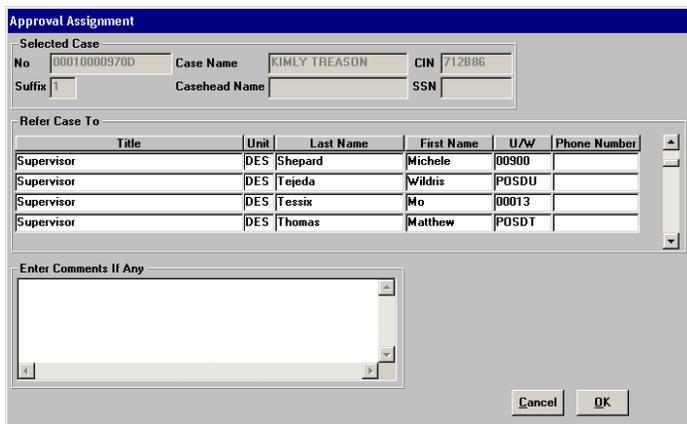This window will display all elements that will require supervisory approval. The Worker must click the Next button.

Close and Approval Assignment

When the Worker has completed the activity, the Close will appear. The Worker must click on the Complete Activity button. The Approval Assignment window appears. The Worker will select the Supervisor, enter a case comment and click on the OK button to send the case to the Supervisor.

POS Release Notes: Appendix C
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POS Forms and E-Forms

Printed POS forms are saved in the POS Printed Forms area, which is available in POS interview and approval activities and in the Review Case activity.

Printed E-Forms are saved in the FileNET image repository. The forms are available for viewing and re-printing through the OneViewer in POS. E-Forms are not available through the **Tools > Printed Forms** menu.

Removed POS Forms
The following forms will be removed from POS:

- W-532A, Conciliation Notification
- W-667, Job Center Child Care One-Day Return Appointment

New E-Forms for CA Centers

The following forms have been added to citywide E-Forms. They will be saved in the FileNET image repository upon printing and will be available review and re-printing in the OneViewer in POS:

- M-15, Inquiry Regarding Veteran's Benefits and Servicemen's Allotments
- M-15f, Agreement To Repay Public Assistance
- LDSS-2474, SSI Referral and Certification of Contact
- LDSS-4198, Third Party Health Insurance Data Entry Worksheet
- LDSS-4279, Notice of Responsibilities and Rights for Support
- LDSS-4529, Agreement to Repay any Home Relief Overpayments Still Owed after Case is Closed
- LDSS-4530, Assignment of Wages, Salary, Commissions or Other Compensation for Services
- LDSS-4571, Alcohol and Drug Abuse Screening and Referral Form
- LDSS-4733, DFR Legal Residence Statement
- M-528n, Request for Child Care Assistance or Request to Close My Public Assistance (PA) Case
- W-133D, Social Security Number Verification
- W-147CC, Certification of Move Statement
- W-153P, Rental Assistance Unit (RAU) Case Documentation Transmittal
- W-519, Finger Imaging Notice
- W-637B, Request for Advance Payment to Prevent Eviction
- W-897P, Notification of Rent Payment Responsibility
- W-908CC, Notice of Rescheduled Appointment for Recertification Interview

Existing E-Forms for CA Centers

The following forms are available as citywide E-Forms. They are saved in the FileNET image repository upon printing and are available for review and re-printing in the OneViewer in POS:

- EBT-23, Notice of Special Public Assistance and/or Food Stamp Benefit
- M-3mm, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Assistance)
- M-40K, Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits
- M-858ff, Notice of Intent to Restrict Home Energy Allowance (Timely)
- M-858w, Participant Request for Restriction of Home Energy Allowance
- LDSS-2921, Statewide Common Application
- LDSS-3151, Food Stamp Change Report Form
- LDSS-3152, Action Taken on Your Food Stamp Case
- LDSS-3938, Food Stamp Application Expedited Processing Summary Sheet
- LDSS-4013A, Action Taken on Your Application: PA, MA and FS, Part A
- LDSS-4013B, Action Taken on Your Application: PA, MA and FS, Part B
- LDSS-4753, Food Stamps - Request for Contact/Missed Interview
- M-3g, Notice to Report to Center
- M-687m, Safety Net Assistance (SNA) Application Supplement
- M-858c, Notice of Intent to Restrict Home Energy Allowance for Family Assistance Cases
- M-858x, Notice of Intent to Recoup Utility Grant (Timely)
- W-102, Notice To Participant Of New Worker
- W-113K, Documentation Requirements and/or Assessment Follow-Up
- W-119, Request for Contact on a Mailed or Faxed Application
- W-119D, Eligibility Factors and Suggested Documentation Guide
- W-145, Notice Of Intent To Restrict Shelter Allowance (Timely)
- W-145HH, Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (For Applicants Only)
- W-146E, Request to Pay Rent Arrears in Excess of Public Assistance Maximum Shelter Allowance
- W-147, Letter to Landlord
- W-147E, NYCHA Security Agreement
- W-147M, Landlord's Statement
- W-147Q, Primary Tenant's Statement Regarding Occupancy of Secondary Tenant
- W-186C, Fair Hearing Compliance Statement
- W-186D, Fair Hearing Compliance Request
- W-451, NYPD - Job Center Report/Referral
- W-515X, Systematic Alien Verification for Entitlements (SAVE) Referral
- W-582A, Family Care Assessment
- W-607A, Request for ID Card/Temporary MA Authorization/Update Existing CBIC
- W-636, Notice of Special Grant
- W-648D, Income Contribution Worksheet for Families in Temporary Housing
- W-680, Request for Birth or Death Verification from Agencies Outside New York City
- W-680FF, Language Questionnaire
- W-700D, FIA School/Training Enrollment Letter
- W-700E, School Attendance Verification Letter

The W-908T form is generated as a batch form through the Schedule Recertification Appointment activity.

Data Entry Window for Form W-153P
A data entry window will be added for the W-153P (Rental Assistance Unit [RAU] Case Documentation Transmittal) in the **Form Data Entry** window.

Data Entry Window for Form W-637B
A data entry window will be added for the W-637B (Request for Advance Payment to Prevent Eviction) in the **Form Data Entry** window.