

FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #08-69-SYS

POS RELEASE NOTES VERSION 12.2

Date: June 20, 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) is scheduled to migrate to production on June 23, 2008. Descriptions of the changes can be found in POS Release Notes Version 12.2 (Attachment A) and POS Release Notes Version 12.2 Appendix A (Attachment B).								
	These release notes can also be found on the FIAweb at:								
	http://hrawebapps	/HRAintranet/CMT_page_template.cfm?page_id=79							
	Effective June 23	2, 2008							
	Attachments:								
■ Please use Print on Demand to obtain copies of forms.	Attachment A Attachment B	POS Release Notes Version 12.2 POS Release Notes Version 12.2 Appendix A							

Attachment A **POS Release Notes**Variation 10.0 km a 92 9000

Version 12.2, June 23, 2008

These Release Notes contain descriptions of changes in POS Release 12.2, scheduled for June 23, 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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Version 12.2, June 23, 2008

1. Automated Finger Imaging System (AFIS) Results

AFIS results will be received from AFIS in a nightly file and will be displayed in the POS queues.

Change to POS Queue

The POS queue will be updated to alert the Worker when AFIS results are received. The words **AFIS Results Received** will appear in the Alert column when AFIS results are received for a pending application case. If an individual on the case is referred for finger imaging using form W-519 (Finger Imaging Referral) and fails to complete finger imaging within 3 business days, an alert of **No AFIS Results Received** will appear for the pending application case.

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Application Interview		AFIS Result Received	I		1	_
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		NA	I		1	
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		NA	I		1	
Total: 27 Cases						
1						Þ

Changes to POS Tool Bar and Menu

The POS tool bar and the Tools/Clearances menu will be updated to allow the Worker to view the details of the AFIS results:

- A new "red hand" icon labeled **AFIS Results** will appear in the tool bar.
- A new option with the same label will be added to the Tools/Clearances menu.

New AFIS Results Icon in Tool Bar



Tools > Clearances > AFIS Results menu option

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	Print Queues Printed Forms		Non-Citizen 551 Collateri Data	Phone: NY				

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AFIS Return File

When the Worker clicks on the "AFIS Results" icon or selects the "AFIS Results" menu option, the **AFIS Return File** window appears. The window lists all individuals for whom AFIS results were received. The Worker can view additional details by selecting the individual's name and clicking on the **View Details** button. The **AFIS Return File Details** window appears with the date that the results were received, the name, date of birth, Social Security Number, sex, finger image status and match status information received from AFIS in the nightly file.

AFIS Return File

	A	FIS Results			
Date Results Received CIN	First Name	Last Name	SSN	DOB	Sex
	View	Details			

AFIS Return File Details

AFIS Return File Details
AFIS Results
Date Results Received 06/10/2008
Last Name Middle Initial
DOB SSN Sex CIN
Finger Image Status
Action
Close

2. TAD Business Rules for Finger Imaging Compliance

New TAD business rules in the Application Interview activity will help ensure finger imaging compliance for CA applicants who are not exempt from finger imaging and have been referred. The new business rule will run when the Worker attempts to accept (AC) the individual for CA.

If an individual with a relationship of casehead, legal spouse or non-legal union with child in common was referred for finger imaging, at least 3 business days have passed since the referral and the individual has failed to comply with finger imaging, the following error message will appear when the Worker attempts to change the CA individual status to AC:

"Legally responsible relative was not finger imaged. Case should not be accepted for PA."

If the Worker double clicks on the error message, the following additional text will appear:

 "At least one Legally Responsible adult on this case has not been finger imaged and the case should not be accepted except if there is good cause for not complying. If there is good cause, please make a case record entry and click the 'Ignore Rules' button."

If an individual who does not have a relationship of casehead, legal spouse or non-legal union with child in common was referred for finger imaging, at least 3 business days have passed since the referral and the individual has failed to comply with finger imaging, the following error message will appear when the Worker attempts to change the CA individual status to AC:

"The individual was not finger imaged and should not be accepted for PA"

If the Worker double clicks on the error message, the following additional text will appear:

"The adult individual has not been finger imaged and he/she should not be accepted except if there
is good cause for not complying. If there is good cause, please make a case record entry and click
the 'Ignore Rules' button"

3. Change to Finger Imaging – AFIS Referral window

A new option will be added in the Finger Imaging – AFIS Referral window to allow the Worker to indicate that the applicant is not present at the interview.

If the "applicant is not present at the interview" radio button is selected, POS will:

- Suppress the printing of the W-519 form (Finger Imaging Referral) for the individual;
- Pre-fill the individual's name in the W-113K (Documentation Requirements and/or Assessment Follow-Up Form) and check the box marked "the following household member(s) must return in person to be finger imaged."

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Revised Finger Imaging – AFIS Referral window

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Finger Imaging Notice (Form ₩519) 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:									
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.									
C The applicant is not present at the interview									
• agree to be finger imaged.									
C 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 C 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 C 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 O entire Medicaid household (unless there are children up to age 19) will be ineligible to receive Medicaid (Medicaid only individual).									
Done Print Previous									

4. Case Number Re-Use Interface Enhancements, Phase I

The **Case Number Re-Use** window will be updated to improve the re-use case number selection interface and provide links to the case number re-use procedures. For full details on the Case Number Re-Use rules, please refer to Policy Bulletin #06-11-SYS (Public Assistance Case Number Reuse in WMS).

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Current Case Number Re-Use window

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Revised Case Number Re-Use window

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The cases below represent previous case number for the entered applicant. The "Suggested Previous Relevant Case" is the best possible																						
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Summary of Changes in Revised Window:

The revised window will include the following sections:

- Instructions
- View Procedure
- Application Information As Entered
- Suggested Previous Relevant Case
- View Detailed Clearances
- Other Possible Matches
- Disregard all Matches, Use a New Case Number

The Worker can only select one case number for re-use.

No matches found

If no possible matches are found, POS will display the following message when the window opens: "There are no existing case number matches for this applicant. The application registry number will be used for this applicant."

View Procedure

A link to <u>PB # 06-11-SYS</u> (Public Assistance Case Number Reuse in WMS) will be displayed in the View Procedure section.

If the case category is Family Assistance, a link to the New York State procedure <u>05-ADM-16</u> (Temporary Assistance Case Number Reuse) will also be displayed.

Application Information As Entered

The name, date of birth and date of birth entered in the Application Intake activity will appear in this section.

Suggested Previous Relevant Case

In this section, POS will display the latest closed (CL) or rejected (RJ) CA case if the application is a Family Assistance (FA) case and the current casehead/payee was also the casehead, payee or spouse on the CL/RJ case.

The following data will be displayed for the case:

- View (button)
- Case Number
- Case Name
- SSN (Social Security Number)
- DOB (Date of Birth)
- Ctr (Center)
- Case PA/MA/FS (status)
- Individual PA/MA/FS (status)
- Select (checkbox)

The Worker must review the detailed case data by clicking on the View button to determine whether the case meets the criteria in the Case Number Re-Use policy.

If the case meets the criteria, the Worker will click on the "Select" checkbox to select the suggested case number for re-use.

If the case does not meet the criteria, the Worker will review the cases listed in the Other Possible Matches section.

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Other Possible Matches

All other cases found in the clearance will be displayed in this section. The Worker will be able to select CA cases in closed (CL) or rejected (RJ) status for re-use. CA Cases in applying (AP), single issue (SI) or active status will be displayed, but cannot be selected for re-use.

The following data will be displayed for each case:

- View (button)
- Case Number
- Case Name
- SSN (Social Security Number)
- DOB (Date of Birth)
- Ctr (Center)
- Case PA/MA/FS (status)
- Individual PA/MA/FS (status)
- Select (checkbox)

The Worker can click on the "Select" checkbox to select one of the listed case numbers for re-use.

Disregard all Matches, Use a New Case Number

This checkbox will allow the Worker to disregard all possible re-use matches found for the case. If this checkbox is selected, the application registration number will be used as the case number.

View Detailed Clearances button

The **View** button(s) in the **Suggested Previous Relevant Case** and **Other Possible Matches** sections allows the Worker to view the WMS summary and individual inquiry window for the case listed next to the button.

Screenshot of Inquiry window

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5. New Change Case Data Edits

At the direction of FIA Management, the Change Case Data activity will no longer be available for application cases.

If the Worker attempts to access the Change Case Data or EC – Change Case Data activity from the Choose a Case window or their queue for a Family Assistance or Safety Net case in AP or SI status for Cash Assistance (CA) or for an Emergency Assistance case in AP or SI status, POS will display the following error message:

"Error – This is an application case and cannot be processed through the Change Case Data activity."

Making changes for application cases

To make a change for a case in applying (AP) status for CA, the Worker must use the Application Interview or Application Modification activities.

To issue an emergency or expedited grant for a case in AP or SI status prior to the final CA determination, the Worker must use the IN/EFS Issuance or Non-Food Emergency Interview/Special Grant activity, as appropriate.

The final CA determination for application cases must be made using the Application Interview activity.

Closing One Shot Deal Cases

The Change Case Data activity will be available to process the required closing of One Shot Deal cases that are in single issue (SI) status after the applicant has received the benefits.

6. Updates to match WMS Version 2008.2

The updates listed below will be made to match changes in the New York State Welfare Management System (WMS) version 2008.2. For additional details, please see the Policy Directive for WMS version 2008.2 under separate cover.

Inquiry Screens

The following inquiry screens will be updated to match changes in WMS:

- NQCS3A (Current Case Composition-Historical Suffix Information)
- NQCP01 (Pending Case level Data)
- NQIN2A (Individual Inquiry)
- NQCP06 (Pending Suffix Application Data)
- NQIN2B (Client Information)
- NQCS6A (All Change Actions)
- NQIN20 (IM Financial Profile- Income and deductions)

Income Source Code 13 and 59

Currently, Adoption Subsidy payments (income 13) are only budgeted for CA and Foster Care payments (income source code 59) are not budgeted for CA and FS.

Effective WMS version 2008.2, adoption subsidy payments and foster care payments will now be budgeted for the Food Stamp (FS) Program.

When adoption subsidy payments are recorded in the POS interview, income source code 13 will be budgeted for CA and FS in the budget individual income and needs window.

Attachment A **POS Release Notes**

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When foster care payments are recorded in the POS interview, income source code 59 will be budgeted for FS in the budget individual income and needs window.

The response to question window for foster care payments will be updated to include the program type field:

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New CA opening codes

The following Cash Assistance (CA) opening codes will be added to the POS TAD:

- Y17, Meets Eligibility Requirements Application Filed While in Jail/Prison
- Y18, Work Advantage One Shot Deal

Opening code Y18 can only be used for a One Shot Deal case that is accepted for benefits using CA status of single issue (SI). The CA closing code must be E30, E35 or Y95 for a case that was opened using opening code Y18.

New CA closing code

The following CA closing code will be added to the POS TAD:

• E86, Unable to prove identity to an Investigatory Agency

For Undercare cases, closing code E86 can only be used for center 052 (Residential Treatment Service Center) cases.

New Involvement Code A (FS Eligible Alien)

A new Alien Involvement code "A (FS Eligible Alien)" will be added for the WMS Budget Individual Income/Needs window. This involvement code is only valid for Safety Net Cash Assistance (SNCA) and Safety Net Non-Cash assistance (SNNC) cases with shelter types 06, 30, 33, 34 or 35.

7. Completion Edits, Print Edits and Data Entry Window Changes for W-145HH

New Completion Edits for Form W-145HH

When an applicant makes a CA grant request, the Worker must prepare form W-145HH (Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance [For Applicants Only]) to inform the applicant about the decision made on their request for assistance to meet an immediate need or special allowance. The Supervisor must then print and mail the form to the applicant once s/he has approved the Worker's decision.

New completion edits will help ensure that this required form is completed. If the Supervisor fails to print the form, the following error message will appear: "The form W-145HH was not printed. You cannot complete the case without the Form W-145HH."

This edit will be run for all application cases where:

- The applicant is ineligible for EFS, or
- A request for immediate needs is made or
- A grant is issued for an applicant case, or
- The W-145HH form data entry is completed by the Worker, or
- The Non-Food Emergency/Special Grant activity is completed by the Worker, or
- The case is a One Shot Deal application with a case category of EAA, EAF or E-SN.

New Data Entry Edits for Form W-145HH

New completion edits will help ensure that the W-145HH form data entry window is completed for application cases where the form is required. If the Worker fails to complete the data entry window, the following error message will appear: "The data entry window for form W-145HH was not completed. You cannot complete the case without completing the window."

Print Edits for Form W-145HH

A new edit will run in the Print Forms window to help ensure that the W-145HH form is not printed blank. If there is no immediate needs determination for the case and the W-145HH data entry window was not completed, the following error message will appear for the Supervisor:

"The data entry window for form W-145HH was not completed. The form cannot be printed blank. Please return the case to the Worker for processing of the data entry window."

If the Worker attempts to print the form and there is no immediate needs determination and the W-145HH data entry was not completed, the following error message will appear:

"The data entry window for form W-145HH was not completed and no Immediate Needs determination has been completed. You cannot print the form without completing the window or an Immediate Needs determination."

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Changes to Data Entry Window for Form W-145HH

The W-145HH data entry window will be updated to allow the Worker to record the outcome on more than one applicant grant request and the Print Forms window will be updated to print one form per applicant grant request.

To enter the first decision, the Worker must select the casehead or payee in the Who (item A) drop down menu, enter the request date, select the request or immediate need type and enter the decision detail.

To enter another decision, the Worker must click on the down arrow in the **Scroll between rows** tool (item B).

Response to Question	
Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (Applicants Only) Who: Utility Case	-
Request Date: 00/00/0000 Request or Immediate Need: Decision:	
C Approved for an emergency grant Amount: From: 00/00/0000 To: 00/00/0000	•
<u>D</u> K <u>Cancel</u>	Scroll Between Rows

8. New window: Casehead or Payee Determination

A new window named **Casehead or Payee Determination** window will open in the beginning of the Application Interview, Change Case Data, IN/EFS Issuance, Non-Food Emergency Interview/Special Grant and Recertification Interview activities if POS cannot determine the casehead or payee for the case.

asehead	or Payee De	termination Window					
Instru case f	ctions: POS (from the list s	could not determine the hown below and indicat	casehead or payee for t e whether the selected i	nis case. Pleas ndividual is the	e select the casehead o	casehead or payee for ti r payee for the current ca	nis ase.
PI	ease select t	he casehead or payee	from the list below				
auff Ln	CIN	Name	Relation	DOB	SSN	Ctzn Val Sex / Ntl HB PA	MA FS
			Legal Spouse				
Tł	ne selected ir	ndividual is the:	© Casehead O OK Suspend Acti	Payee]		

This window will allow the Worker to select the casehead or payee:

Attachment A **POS Release Notes** Version 12.2, June 23, 2008

9. Scheduling BEV Appointments via Open TI, Phase II

Workers will be able to schedule homebound BEV (Bureau of Eligibility Verification) appointments through the BEV Referral window in the **Application Interview** activity in POS.

	Response to Question			
Previous BEV Referral C Yes © No	New Ref Necessary Yes O No	O In Office O Homebound	Case Typ	v.
Previous BEV Referral Date	View/Schedule BEV Appointmen	Appmt. Date	Appmt. Time	Appmt. type
Previous BEV Recommendations	BEV Response Recommendations	Rec	commendation Reaso	on T
Previous BEV Deny Reason	Recommendation Date	Worker Name	 00	nterview Date 0/00/0000
Case Change Since Last BEV Ref	Document	Scan	Comment	
	<u> </u>	<u>C</u> ancel		

The following change will be made in the window:

• The Worker will be able to select "Homebound" as the appointment type.

Making the In-Office BEV Appointment

When the Worker clicks "Yes" for the **New Ref Necessary** (New Referral Necessary) field, sets the appointment to "In-Office" 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.

Making the Homebound BEV Appointment

When the Worker clicks "Yes" for the **New Ref Necessary** (New Referral Necessary) field, sets the appointment to "Homebound" 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.

matructions.			
Click on the Ma	ke a New Appointment button	to schedule the appointment.	
l Schedule	d Date Scheduled Time	Appt. Type FA	
Code	Referral Rea BEV Referral Desc	sons rription	_
le a New Annaistment	Perchadula the Anneistmen	Concelling Approximate	Dana

View/Schedule BEV Appointment

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.

Click on	the Make a New Appointment Dutton to schedule the appointment.
1	
Sch	heduled Date Scheduled Time Appt. Type
200	8/03/28 09:00 FA
	Referral Reasons
Code	BEV Referral Description
20	PO Box used as a mailing address
42	Children/adults in household w/o birth certificate
18	Concealed Income
1	
New Appoint	ment Reschedule the Appointment Cancel the Appointment Don
man appoint	Cancer the Appointment Cancer the Appointment

Referral Reasons

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.

HRA Employee Resource file integration RFI hit Client recently left work force New Hires Match E vidence of ownership of personal assets Supported by loans from family/filends Concealed Income E vidence of real property ownership Expenses exceed income/grant w/o explanation Self employed without business records Working off the books Expenses exceed income/grant w/o explanation Address/Household Composition Rent paid to a relative Guestionable Landlord signature/document PO Box used as a mailing address Moved into the country within the last 6 months PO Box used as a mailing address Frequent address changes Client unsure of own address Not primary tenant Out of state applicant Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Social Security validation match Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identify Client states they managed by living on strets Children in household under 6 w/o bith certification Childer-vidual in household Questionable documents/shelter forms Clivet agained intervidual in household under 6 w/o bith certification Childer-vidual in household work bithin certificate Duplicate ass	Income/Resources		
Set employed without business records Working off the books Address/Household Composition Questionable Landord signature/document Household composition Questionable Landord signature/document Household composition Rent paid to a relative Moved into the country within the last 6 months P0 Box used as a mailing address Frequent address changes Client unsure of own address Not primary tenant Dut of state applicant Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Other Social Security validation match Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identity Client states they managed by living on strets Children in household under 6 w/o birth certificate Sanctioned individual in household Questionable documents/shelter forms Other applications requiring investigation Childer-Yaduts in household Questionable canother active case Lives alone but accomparied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	HRA Employee New Hires Match Concealed Income	Resource file integration RFI hit Evidence of ownership of personal assets Evidence of real property ownership	Client recently left work force Supported by loans from family/friends Expenses exceed income/grant w/o explanation
Questionable Landlord signature/document Household composition Rent paid to a relative Moved into the country within the last 6 months P0 Box used as a mailing address Frequent address changes Client unsure of own address Not primary tenant Out of state applicant Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Other Social Security validation match Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identity Client states they managed by living on strest Othidre applications requiring investigation Children/adults in household w/o bith certificate Duplicate assistance another active case Utives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Address/Household Composition		
Moved into the country within the last 6 months P0 Box used as a mailing address Frequent address changes Client unsure of own address Not primary tenant Dut of state applicant Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Other Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identity Client states they managed by living on streets Othidren in household under 6 w/o birth certification Sanctioned individual in household Questionable documents/shelter forms Othidre applications requiring investigation Childer values Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Questionable Landlord signature/document	Household composition	Rent paid to a relative
Client unsure of own address Not primary tenant Out of state applicant Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Other	Moved into the country within the last 6 months	PO Box used as a mailing address	Frequent address changes
Questionable address or suspect mail drop Primary tenant with no utilities Landlord does not verify household composition Other	Client unsure of own address	Not primary tenant	Out of state applicant
Other Social Security validation match Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identity Client states they managed by living on streets Children in household under 6 w/o birth certification Sanctioned individual in household Questionable documents/shelter forms Other applications requiring investigation Children/adults in household w/o birth certificate Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Questionable address or suspect mail drop	Primary tenant with no utilities	Landlord does not verify household composition
Social Security validation match Client's past maintenance is questionable Previously active with a spouse or parent An individual has no identification to verify identity Client states they managed by living on strest Finidem in household under 6 w/o birth certification Sanctioned Individual in Nousehold Questionable documents/shelter forms Other applications requiring investigation Children/adults in household w/o birth certificate Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Other		
An individual has no identification to verify identity Client states they managed by living on streats Children in household under 6 w/o birth certificate Sanctioned individual in household Questionable documents/shelter forms Other applications requiring investigation Children/adults in household w/o birth certificate Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Social Security validation match	Client's past maintenance is questionable	Previously active with a spouse or parent
Sanctioned individual in household Questionable documents/shelter forms Other applications requiring investigation Children/adults in household w/o birth certificate Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	An individual has no identification to verify identity	Client states they managed by living on streets	🗌 🥅 Children in household under 6 w/o birth certificate
Children/adults in household w/o birth certificate Duplicate assistance another active case Lives alone but accompanied by an adult Prior history of case closing Applicant is inconsistent Missing absent parent information	Sanctioned individual in household	Questionable documents/shelter forms	Other applications requiring investigation
Prior history of case closing Applicant is inconsistent Missing absent parent information	Children/adults in household w/o birth certificate	Duplicate assistance another active case	Lives alone but accompanied by an adult
	Prior history of case closing	Applicant is inconsistent	Missing absent parent information

Attachment A **POS Release Notes** Version 12.2, June 23, 2008

Available Appointments

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.

ailable App	ointment	s Instructions:			
Please sele Appointme appointme	ect the acc nt' button. nt, click 'C	ceptable appointment and c To exit the window without ancel'.	lick 'Schedule/Resc scheduling or resche	hedule the eduling an	4
	А	vailable Appoint	ments		
Center	Floor	Date (YYYYMMDD)	Time (HHMM)	Slots	
040	5th	20080327	0900	0009	
040	5th	20080327	1130	0010	
040	5th	20080328	0900	0010	
040	5th	20080328	1130	0010	
040	5th	20080331	0900	0010	
040	5th	20080331	1130	0010	
040	5th	20080401	0900	0010	
040	5th	20080401	1130	0010	_
,					
Sched	ule/Reso	hedule the Appointmer	nt C	ancel	1

Reminder: BEV Referral Appointment Notice for In-Office Appointment (Form W-532R)

If the applicant is scheduled for an in-office appointment, 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.

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

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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).

10. Transmission of Updated Non-Custodial Parent Data to OCSE

When the answer for the question "Anyone applying under 21 whose parents is (are) absent?" is "Yes", the Paperless Office System (POS) retrieves any non-custodial parent information available from the Office of Child Support Enforcement (OCSE) database and displays it for the Worker in a Response to Question window.

When the Worker clicks "Yes" for the question "Does the applicant have any new information about the non-custodial parent?" in the window, s/he is able to enter updated information for the non-custodial parent. The new information entered by the Worker will now be electronically transferred from POS to the OCSE database when the Worker closes the window.

11. Update to POS Case Transfer activity

The POS Case Transfer activity will be updated to:

- Replace references to the Application Job/Profile (Form W-680B) with the Statewide Common Application for PA/MA/FS (Form LDSS-2921) in the POS Case Transfer – Application window.
- Include the center number in the "New Center" drop-down menu in the Mailing Address and Center Information window.

12. Update to Individual Detail window

The "Unknown" option will be removed from the Father's Last Name/First Name and Mother's Last/Name fields in the Individual Detail window.

13. Update in Substance Abuse and Alcohol Screening Window

The Browser button in the Observations from Case Record window drill down window in Substance Abuse and Alcohol Screening window within Pre-Referrals section in the application interview allows the worker to view documents from the case record. This button previously opened the POS document browser. It will now open the HRA OneViewer.

Observa	ations from Case Record
	(if available)
(If two or more boxes are checked the	system will change "Is A Drug/Alcohol Referral Necessary" to YES.)
Homeless	Information in case history (DWL failing work assignment):
Active child welfare case	
	C Other:
On temporary assistance 48 months or r	more
Active employment sanction	Non Applicable
On temporary assistance more than once in the past two (2) years	Browser

14. Updates to Utility Liaison Referral Outcome windows

New fields will be added to the Utility Liaison Referral Outcome - Fuel and Utility Liaison Referral Outcome - Utilities windows to show payment history and additional vendor information entered by the utility liaison.

Utility Liaison Referral Outcomes – Utilities

I Itility Liaison Referral Autcome - Htiliti	96		
	90 		
Payment History			
\$10.00 01/01/2008			
00/00/0000			
00/00/0000			
00/00/0000			
Response From HFAP			
Final Decision: Approved O Denie	d Date: 3/12/2008		
Denial Reason:			
Denial freason.			
Utility Liaison Recommendation:			
Payment Recommended: C Yes C No	Denial Reason:		
Payment Amount: \$.	Payment Period From:	To:	
Abeyance Amount: \$.	Abeyance Period From:	To:	
Action Required: 🔲 Utility Guarantee	🗌 Restriction 🔲 Other		
	Next Previou	us	

A. Payment History

Utility Liaison Referral Outcomes - Fuel

Participating Vendor? Yes ? No A Contract with company? Yes ? No Expires: 00/00/0000 Payment History B C C \$\$10.00 10/10/12008 D C C \$\$10.00 10/10/12008 D C C \$\$10.00 10/10/12008 D C C \$\$10.00 00/00/0000 D D C C Payment History D D D C C Payment Recommendation: Payment Recommendation: Payment Recommendation: New Vendor Mew Vendor Payment Recommendation: Payment Period From: 1/1/2008 To: 1/31/2008 New Vendor Account #: Company Name: Company City: Company State: Company Phone: Abeyance Amount: \$1 Abeyance Period From: To: Company Phone: Abeyance Period From: To: Action Required: Utility Guarantee Restriction Other To: To: Fuel on the Budget To: D D D To:	Utility Liaison Referral Outcome - Fuel			
\$10.00 01/01/2008 00/00/0000 00/00/0000 00/00/0000 00/00/0000 Response From HEAP: Date: 2/13/2008 Final Decision: ^ Approved ^ Denied	Participating Vendor? C Yes © No Payment History	A Contr	ract with company?	s · No Expires: 00/00/0000
Response From IEAP; Final Decision: ○ Approved ○ Denied Date: 2/13/2008 Denial Reason: Client's vendor is not approved. Vendor will not become approved. (IEAP denied) Utility Liaison Recommendation: Payment Recommendation: Payment Recommendation: Payment Amount: \$125. Company Name: Company Address: Company City: Company Address: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee © Fuel on the Budget	\$10.00 01/01/2008 00/00/0000 00/00/0000 00/00/0000 00/00/0000	1		
Company Address: Company Carpor				
Denial Reason: Client's vendor is not approved. Vendor will not become approved. (HEAP denied) <u>Utility Liaison Recommendation:</u> Payment Recommended: © Yes No Denial Reason: Payment Recommended: © Yes No Denial Reason: Payment Recommended: © Yes No Denial Reason: Payment Amount: \$125. Payment Period From: To: Account #: Company Name: Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee Restriction Other Ør Fuel on the Budget	Final Decision: C Approved	Date: 2/13/200	8	
Utility Liaison Recommendation: Payment Recommended: © Yes O No Denial Reason: Payment Recommended: © Yes O No Denial Reason: Payment Amount: \$125. Payment Period From: 1/1/2008 To: 1/31/2008 New Vendor Account #: Company Name: Company Name: Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee Restriction Other Ør Fuel on the Budget Vendor Denial Reason:	Denial Reason: Client's vendor is not ap	proved. Vendor will not become ap	proved. (HEAP denied)	
Payment Recommended: ⓒ Yes ○ No Denial Reason: Payment Amount: \$125. Payment Period From: 1/1/2008 To: 1/31/2008 ▼ New Vendor Account II: Company Name: Company Name: Company Name: Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee □ Restriction □ Other ♥ Fuel on the Budget	Utility Liaison Recommendation:			
Payment Amount: \$125. Payment Period From: 1/1/2008 To: 1/31/2008 ☑ New Vendor Account #: Company Name: Company Name: Company State: Company Phone: Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee □ Restriction □ ☑ Fuel on the Budget	Payment Recommended: • Yes C No	Denial Reason:		
Account #: Company Name: Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee Restriction Other If Fuel on the Budget Company City: Vertice Vertice	Payment Amount: \$125.	Payment Period From: 1/1/2008	To: 1/31/2008	New Vendor
Company Address: Company City: Company State: Company Phone: Abeyance Amount: \$. Abeyance Period From: To: Action Required: In Utility Guarantee In Restriction In Other If Fuel on the Budget Image: State Sta	Account #:	Company Name:		
Abeyance Amount: \$. Abeyance Period From: To: Action Required: Utility Guarantee Restriction Other Fuel on the Budget 	Company Address:	Company City:	Company State: Comp	oany Phone:
Action Required: Utility Guarantee Restriction Other	Abeuance Amount: \$	Abevance Period From:	In	
✓ Fuel on the Budget	Action Beguired:	Bestriction Dther	10.	
	✓ Fuel on the Budget			
Haut		Hout	Branioua	
<u>Hevr</u>		Щем	Frevious	

- A. Participating Vendor? (Yes/No)B. Contract with company? (Yes/No)
- C. Expires (date)
- D. Payment History

15. New TAD Business Rule for M3E Indicator

Application decision notices can be generated through the Client Notice System in WMS for most application cases. Improper usage of M3E Indicator "A" or "T" can prevent the creation of separate determination FS cases and unnecessary generation of manual notices.

A new TAD business rule will help prevent the unnecessary use of M3E Indicators "A" and "T". If the Worker selects "A" or "T" in the M3E Indicator field for a case type where the CNS notice can be generated, the following error message will appear:

 "CNS Notices can be generated for this case scenario. Please remove M3E Indicator and generate the notice by accessing the CNS System."

16. Bug Fix: Error Correction of IN/EFS Issuance

In order to help prevent erroneous changes to the EFS determination when attempting to correct a WMS error in the EC – IN/EFS Issuance activity, the **Expedited Food Stamp Questions** window will be removed from the activity. When the Worker clicks the **Next** button on the **Household Screen** in this activity, the **IN/EFS Eligibility Determination** will appear.

Important Note:

To reassess the EFS eligibility determination for a case, the Worker must access the **IN/EFS Issuance** activity through the **Action** tab in the **Activities Management** window.

For example, the applicant may have been determined eligible for Expedited Food Stamps (EFS) on the date of application, but benefits could not be issued because of missing proof of casehead identity on the date of the initial interview. If the applicant verifies their identity within 7 days of the FS file date, the Worker must update the identity document selection in the **Application Interview** and return to the **IN/EFS Issuance** activity to issue the EFS grant.

For full details, please refer to Policy Directive # 08-07-OPE (Expedited Food Stamp Service Rules).

17. Updates to POS/WMS Synchronization Problem Resolution window

If POS is unavailable due to an outage, the Center may complete one of the following actions for a case that was started in POS:

- Added an individual to a case through the WMS Application Maintenance; or
- Added an individual to a case through WMS Undercare Maintenance; or
- Processed an eligibility case action that involves the re-use of a case number.

When this type of action occurs and POS is unable to reconcile the individual information received from the latest WMS TAD, POS displays a window named "WMS \rightarrow POS Synchronization Problem Resolution" that allows the Worker to match the WMS CIN information with the individuals that were originally entered on the POS case. The instructions on this window will be updated to clarify its use.

The header of the window will indicate the type of problem that was found by POS and will ask the Worker to complete an action to resolve the problem.

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Individual found in WMS whose CIN does not exist in POS

When an individual is found in WMS with a CIN that does not exist in POS, the WMS/POS Synchronization Problem Resolution window is displayed. The Worker must either match the individual found on the WMS case to an existing line on the POS case or add the individual as a new line in POS.

	Synchron	ization P	roblem Res	olution					
POS has rel	trieved the	latest car	se informatio	on from W	MS. An individual	was found in	1 WMS	whose C	IN
does not exi	ist in POS.	This usu	ally occurs	when an a	ction is done for th	ne case outs	ide of F	OS.	
ndividual on	WMS case	whose Cli	N does note	dist in POS					
Case No	Suf Ln	CIN	First Name	мі	Last Name	DoB	Sex	SSN	-
/ou must co	omplete on	e of the fo	ollowing acti	ons:					
click on the of the WM of the individual of the	vidual liste vidual liste ck on the " DS case.	d above v overwrite d above v Add the ir	vho was four those of the vho was four ndividual to t	ne. If you POS line nd in WMS	s does not match of a contract	" button, the	OS line:	s listed	
C	ase No	Suf Ln	CIN F	irst Name	MI Last Name	DoB	Sex	SSN	_
Match									
match									
Match									
Match									
Match									
Match									
Match Match	individual	to the P0	DS case						
Match Match Add the	individual	to the PC	DS case						

Application case linked to old case number outside of POS

If a non-applying individual is added in POS during the application interview and the application case is subsequently linked to a previous case number outside of POS (TAD data entered into WMS) that has old closed lines. The Worker must match the extra individual from the POS case to a closed line from the WMS case, remove the extra individual from the POS case or click the "No Match" button to keep the individual as a non-applying individual for the case.

Case No	Suf Ln	CIN	First Name	MI Lost Name	DoB	Sez	SSN	-
ou must co	mplete one	e of the	following action	s:				_
If the indiv	idual listed	d above	who was found for the closed W	in POS matches one of th /MS line. If you click on th	ie closed Wl e "Match" bu	VIS lines	s listed b e	elow,
click on th	e "Match" I	outton .						
click on th demograp	e "Match" I hics of the	WMS I	ine will overwrite	e those of the POS line.				
click on th demograp If the indiv below, clic	e "Match" I hics of the ridual listed :k on the "N	WMS I I above No Mato	ine will overwrite who was found :h: Remove line	e those of the POS line. In POS <u>does not</u> match o from POS case" button of	ne of the clo the "No Ma	sed WM	IS lines Individua	listed al
click on th demograp If the indiv below, clic status to N	e "Match" I hics of the idual listed k on the "N JA NA NA"	WMS I d above No Mato	ine will overwrite who was found h: Remove line	e those of the POS line. I in POS <u>does not</u> match o from POS case" button of	ne of the clo the "No Ma	sed WM tch: set	1S lines individua	listed al
If the indiv demograp If the indiv below, clic status to N	e "Match" I hics of the ridual listed k on the "N VA NA NA" <u>1 on POS</u>	WMS I d above No Mato button.	ine will overwrite who was found th: Remove line	e those of the POS line. In POS <u>does not</u> match o from POS case" button or Name MI Last Name	ne of the clo the "No Ma	sed WM tch: set	1S lines individua ssn	listed al
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18. Posting of Action Code 94NR to NYCWAY

Effective April 28, 2008, POS sends Action code 94NR (OCSE Referral Not Required) in a nightly file to NYCWAY for cases where the Office of Child Support Enforcement (OCSE) returned a recommendation of "No Referral Required" to the Paperless Office System in the Application Interview.

For additional details, please refer to Policy Bulletin # <u>08-31-SYS</u> (NYCWAY Updates – New Action codes).

19. Client Copy Label on LDSS-2921

When the Worker prints the LDSS-2921 (Statewide Common Application for PA/MA/FS) in the Application Interview to capture the applicant's signature, the following label will appear at the top of each page: "Client Copy".

20. TALX Inquiry

MIS will receive a new file with employment information for CA clients with upcoming recertifications on a monthly basis from TALX. A new inquiry item in the POS Tools menu will allow the Worker to access this information.

TALX Inquiry window

Talx Return File Public Assistance Recertification	×
TALX RETURN FILE PUBLIC ASSISTANCE RECERTIFICATION	
Employee SSN First Name Middle Last Name Employee Address Employee Address	
Employee City State Postal Employee Dob Termination message Position Info Eff Date	
Employee Recent Hire Dt Length of Service Disp Employee Mess Fraud Alert Military Alert	
Employee Termination Dt Pay Frequency Code Frequency message Pay rate Ave hrs worked per pp	
Pay Period Begin Date1 Pay Period End Date1 Pay Date1 Hours Worked1 Gross Earnings1 Net Earnings1 Ytd Gross Earn1	
Pay Period Begin Date2 Pay Period End Date2 Pay Date2 Hours Worked2 Gross Earnings2 Net Earnings2 Ytd Gross Earn2	
Pay Period Begin Date3 Pay Period End Date3 Pay Date3 Hours Worked3 Gross Earnings3 Net Earnings3 Ytd Gross Earn3	
Pay Period Begin Date4 Pay Period End Date4 Pay Date4 Hours Worked4 Gross Earnings4 Net Earnings4 Ytd Gross Earn4	
Employer Name Employer Address Employer Address Employer City Employer State Employer Postal Country	
Med Insurance Available Med Employee Eligible Med Employee Enrolled Med Carrier Name Med Number Dep Cov	
<u>۲</u>	▶
Close	

21. Data Entry Window Changes for W-113K

The W-113K data entry window will be updated to add 1 new form and remove 2 obsolete forms from the Forms Reminder section, and to add two additional spaces for the Household Member section.

Removed and Added Checkboxes in Forms Reminder

The M-30T (Verification of Earnings) and W-133D (Social Security Number Verification) checkboxes will be removed from the Forms Reminder section because the forms are now obsolete. A new LDSS-2474 (SSI Referral and Certification of Contact) checkbox will be added to the Forms Reminder section.

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Additional Household Member Spaces

Two additional spaces will allow the Worker to indicate that an adult household member must return in person to be finger imaged, for an employability assessment and/or to sign the public assistance application.

If the Worker indicates that an adult household member is not present at the interview in the Finger Imaging AFIS Referral window, the individual's name will be pre-filled in the return appointment section of the W-113K data entry window and the "to be finger imaged" checkbox will be pre-selected.



Response to Question				
Form W113K-Documentation Requirements				
Due Date: 05/22/2008	Must See Worker Upon Return			
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application			
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application			
<u>0</u>	K Cancel			

Response to Question			
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application		
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application		
PA APPOINTMENTS 5			
BEV- Bureau of Eligibility Verification Appointment	SACC- Substance Abuse Case Control Appointment		
OCSE-Office of Child Support Enforcement Appointment	WeCare- Wellness, Comprehensive Assessment Medical Provider Appointment		
OK	Cancel		

22. POS Forms and E-Forms

Removed POS Forms

The following forms will be removed from POS:

- M-30T, Verification of Earnings
- W-133D, Social Security Number Verification

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Temporarily Removed Forms

The following forms will be removed from POS temporarily due to recent updates that are not available in POS:

- W-648, Cash Assistance Budget Computation
- W-648D, Income Contribution Worksheet for Families in Temporary Housing

The Worker should use the paper version of these forms. Scan and index the completed forms into POS until further notice.

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-858d, Utility Guarantee
- M-858v, Notification to Utility Company
- W-145A, Notice to Landlord/Primary Tenant of Rent Restriction Payment Status
- W-532R, Notice to Applicant Referral to Bureau of Eligibility Verification (BEV)

Updated E-Forms for CA Centers

The following E-Forms will be updated:

- W-113K, Documentation Requirements and/or Assessment Follow-Up
- W-147, Letter to Landlord
- W-680FF, Language Questionnaire

Updated Text on W-908T for Home Visit Appointments

For participants scheduled for a home visit for recertification, the Location Name field on the W-908T (Notice of Recertification Appointment) will be filled with the words "At Your Home".

New Print Edit for Form W-147Q

In POS, the W-147Q form (Primary Tenant's Statement Regarding Occupancy of Secondary Tenant) can only be printed for a secondary tenant. If the Worker attempts to print the form and the applicant/participant is not marked as a secondary tenant, the following error message will appear in the Print Forms window: "The W-147Q form can only be printed for a secondary tenant. To mark this household as "Secondary Tenant", please update the Additional Suffix Level Data window."

For full details, please refer to **Appendix A: POS Forms and E-Forms**.

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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 reprinting through the OneViewer in POS.

Removed POS Forms

The following forms will be removed from POS:

- M-30T, Verification of Earnings
- W-133D, Social Security Number Verification

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-858d, Utility Guarantee
- M-858v, Notification to Utility Company
- W-145A, Notice to Landlord/Primary Tenant of Rent Restriction Payment Status
- W-532R, Notice to Applicant Referral to Bureau of Eligibility Verification (BEV)

Updated E-Forms for CA Centers

The following E-Forms will be updated:

- W-113K, Documentation Requirements and/or Assessment Follow-Up
- W-147, Letter to Landlord
- W-680FF, Language Questionnaire

Updated Text on W-908T for Home Visit Appointments

For participants scheduled for a home visit for recertification, the Location Name field on the W-908T (Notice of Recertification Appointment) will be filled with the words "At Your Home".

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

Client Copy Label on LDSS-2921

When the Worker prints the LDSS-2921 (Statewide Common Application for PA/MA/FS) in the Application Interview to capture the applicant's signature, the following label will appear at the top of each page: "Client Copy".

POS Release Notes: Appendix A

Version 12.2, June 23, 2008

Data Entry Window Changes for W-113K

The W-113K data entry window will be updated to add 1 new form and remove 2 obsolete forms from the Forms Reminder section, and to add two additional spaces for the Household Member section.

Removed and Added Checkboxes in Forms Reminder

The M-30T (Verification of Earnings) and W-133D (Social Security Number Verification) checkboxes will be removed from the Forms Reminder section because the forms are now obsolete. A new LDSS-2474 (SSI Referral and Certification of Contact) checkbox will be added to the Forms Reminder section.

Additional Household Member Spaces

Two additional spaces will allow the Worker to indicate that an adult household member must return in person to be finger imaged, for an employability assessment and/or to sign the public assistance application.

If the Worker indicates that an adult household member is not present at the interview in the Finger Imaging AFIS Referral window, the individual's name will be pre-filled in the return appointment section of the W-113K data entry window and the "to be finger imaged" checkbox will be pre-selected.

		Response to Question	
	Form W113K-E	Documentation Requirements	<u>^</u>
Due Date: 05/22/2008	FOR ADULTS	Must See Worker Upon Return	
	Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application] -
	Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application	
, 11	<u>0</u>	<u>Cancel</u>	

Revised W-113K data entry window

Response to Question				
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application			
Must return in person	To be Finger Imaged For an employability assessment To sign the public assistance application			
PA APPOINTMENTS 5				
BEV- Bureau of Eligibility Verification Appointment	SACC- Substance Abuse Case Control Appointment			
CCSE-Office of Child Support Enforcement Appointment	WeCare- Wellness, Comprehensive Assessment Medical Provider Appointment			
	Cancel			

Version 12.2, June 23, 2008

Completion Edits, Print Edits and Data Entry Window Changes for Form W-145HH

New Completion Edits for Form W-145HH

When an applicant makes a CA grant request, the Worker must prepare form W-145HH (Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance [For Applicants Only]) to inform the applicant about the decision made on their request for assistance to meet an immediate need or special allowance. The Supervisor must then print and mail the form to the applicant once s/he has approved the Worker's decision.

New completion edits will help ensure that this required form is completed. If the Supervisor fails to print the form, the following error message will appear: "The form W-145HH was not printed. You cannot complete the case without the Form W-145HH."

This edit will be place for all application cases where:

- The applicant is ineligible for EF, or
- A request for immediate needs is made or
- A grant is issued for an applicant case, or
- The W-145HH form data entry is completed by the Worker, or
- The Non-Food Emergency/Special Grant activity is completed by the Worker, or
- The case is a One Shot Deal application with a case category of EAA, EAF or E-SN.

New Data Entry Edits for Form W-145HH

New completion edits will help ensure that the W-145HH form data entry window is completed for application cases where the form is required. If the Worker fails to complete the data entry window, the following error message will appear: "The data entry window for form W-145HH was not completed. You cannot complete the case without completing the window."

Print Edits for Form W-145HH

A new edit will run in the Print Forms window to help ensure that the W-145HH form is not printed blank. If there is no immediate needs determination for the case and the W-145HH data entry window was not completed, the following error message will appear for the Supervisor:

"The data entry window for form W-145HH was not completed. The form cannot be printed blank. Please return the case to the Worker for processing of the data entry window."

If the Worker attempts to print the form and there is no immediate needs determination and the W-145HH data entry was not completed, the following error message will appear:

"The data entry window for form W-145HH was not completed and no Immediate Needs determination has been completed. You cannot print the form without completing the window or an Immediate Needs determination."

Changes to Data Entry Window for Form W-145HH

The W-145HH data entry window will be updated to allow the Worker to record the outcome on more than one applicant grant request and the Print Forms window will be updated to print one form per applicant grant request.

To enter the first decision, the Worker must select the casehead or payee in the Who (item A) drop down menu, enter the request date, select the request or immediate need type and enter the decision detail.

To enter another decision, the Worker must click on the down arrow in the **Scroll between rows** tool (item B).

Attachment B

POS Release Notes: Appendix A

Version 12.2, June 23, 2008

Revised W-145HH form data entry window

Response to Question	
Notice of Decision on Assistance to Meet an Immediate Need or Special Allowance (Applicants Only) Who: Utility Case	1
Request Date: 00/00/0000 Request or Immediate Need: Decision:	
C Approved for an emergency grant Amount: From: 00/00/0000 To: 00/00/0000	Ŧ
<u>O</u> K <u>C</u> ancel	Scroll Between Rows

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
- LDSS-2474, SSI Referral and Certification of Contact
- 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-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
- LDSS-4753, Food Stamps Request for Contact/Missed Interview
- M-3g, Notice to Report to Center
- M-3mm, Notification of Application Withdrawal (Cash Assistance, Food Stamps and Assistance)
- M-15, Inquiry Regarding Veteran's Benefits and Servicemen's Allotments
- M-15f, Agreement To Repay Public Assistance
- M-40K, Notice of Denial of Expedited Food Stamp Service or Inability to Issue Food Stamp Benefits
- M-528n, Request for Child Care Assistance or Request to Close My Cash Assistance (CA) Case
- M-687m, Safety Net Assistance (SNA) Application Supplement
- M-858ff, Notice of Intent to Restrict Home Energy Allowance (Timely)
- M-858w, Participant Request for Restriction of Home Energy Allowance
- 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

POS Release Notes: Appendix A

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- 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-147CC, Certification of Move Statement
- W-147E, NYCHA Security Agreement
- W-147M, Landlord's Statement
- W-147Q, Primary Tenant's Statement Regarding Occupancy of Secondary Tenant
- W-153P, Rental Assistance Unit (RAU) Case Documentation Transmittal
- 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-519, Finger Imaging Notice
- W-582A, Family Care Assessment
- W-607A, Request for ID Card/Temporary MA Authorization/Update Existing CBIC
- W-636, Notice of Special Grant
- W-637B, Request for Advance Payment to Prevent Eviction
- 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
- W-897P, Notification of Rent Payment Responsibility
- W-908CC, Notice of Rescheduled Appointment for Recertification Interview

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