

POS Release Notes

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://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79

Table of Contents

1.	Automated Finger Imaging System (AFIS) Results	2
2.	TAD Business Rules for Finger Imaging Compliance	4
3.	Change to Finger Imaging – AFIS Referral window	4
4.	Case Number Re-Use Interface Enhancements, Phase I	5
5.	New Change Case Data Edits	9
6.	Updates to match WMS Version 2008.2	9
7.	Completion Edits, Print Edits and Data Entry Window Changes for W-145HH	11
8.	New window: Casehead or Payee Determination	12
9.	Scheduling BEV Appointments via Open TI, Phase II	13
10.	Transmission of Updated Non-Custodial Parent Data to OCSE	16
11.	Update to POS Case Transfer activity	16
12.	Update to Individual Detail window	16
13.	Update in Substance Abuse and Alcohol Screening Window	16
14.	Updates to Utility Liaison Referral Outcome windows	17
15.	New TAD Business Rule for M3E Indicator	18
16.	Bug Fix: Error Correction of IN/EFS Issuance	18
17.	Updates to POS/WMS Synchronization Problem Resolution window	18
18.	Posting of Action Code 94NR to NYCWAY	20
19.	Client Copy Label on LDSS-2921	20
20.	TALX Inquiry	20
21.	Data Entry Window Changes for W-113K	20
22.	POS Forms and E-Forms	21

POS Release Notes

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.

Activity	Due Date	Alert	Case Name	Case No	Surf	Recd
Application Interview		AFIS Result Received			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
		NA			1	
Total: 27 Cases						

Changes to POS Tool Bar and Menu

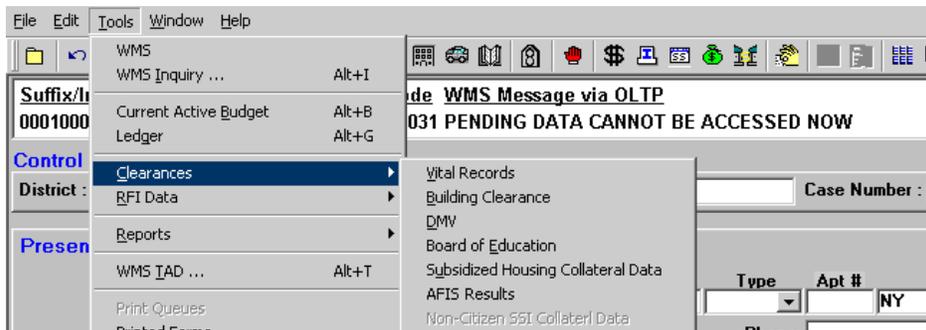
The POS tool bar and the Tools/Clearances menu will be updated to allow the Worker to view the details of the AFIS results:

- 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



POS Release Notes

Version 12.2, June 23, 2008

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

The screenshot shows a window titled "AFIS Return File" with a sub-header "AFIS Results". Below the header is a table with the following columns: Date Results Received, CIN, First Name, Last Name, SSN, DOB, and Sex. The table is currently empty. Below the table are two buttons: "View Details" and "Close".

AFIS Return File Details

The screenshot shows a window titled "AFIS Return File Details" with a sub-header "AFIS Results". The fields are as follows: Date Results Received (06/10/2008), Last Name (empty), First Name (empty), Middle Initial (empty), DOB (empty), SSN (empty), Sex (radio button), CIN (empty), Finger Image Status (empty), and Action (empty). A "Close" button is located at the bottom.

POS Release Notes

Version 12.2, June 23, 2008

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.”

POS Release Notes

Version 12.2, June 23, 2008

Revised Finger Imaging – AFIS Referral window

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

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

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

The applicant is not present at the interview
 agree to be finger imaged.
 I am exempt from finger-imaging because I meet one of the above exemption criteria.

I do **Not** agree to be finger-imaged. By not agreeing to be finger imaged, you are ineligible to receive Public Assistance, Food Stamps, and Medicaid. Your case may be rejected or closed as appropriate. (PA Individuals)
 I do **Not** agree to be finger-imaged. By not agreeing to be finger imaged, you and the entire Food Stamp household will be ineligible to receive Food Stamp Benefits (NPA FS individual).
 I do **Not** agree to be finger imaged. By not agreeing to be finger-imaged, you and the entire Medicaid household (unless there are children up to age 19) will be ineligible to receive Medicaid (Medicaid only individual).

Family Working

Reset

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).

POS Release Notes

Version 12.2, June 23, 2008

Current Case Number Re-Use window

Revised Case Number Re-Use window

POS Release Notes

Version 12.2, June 23, 2008

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 [PB # 06-11-SYS](#) (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 [05-ADM-16](#) (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.

POS Release Notes

Version 12.2, June 23, 2008

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

The screenshot displays a software window titled "Inquiry Screens" with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main area is divided into several sections:

- Case Information:** Case No. [redacted], Case Suffix: 1, Last Data Saved: 5/29/2008 13:09:23. Fields for Case Number, Center, Unit, Worker, QRS, FS Rent, PA Rent, Restriction, and Phone Number are visible.
- Case Name and Address:** Case Name [redacted], Address [redacted], City [redacted], Zip [redacted].
- Case Details Table:**

Case Name Suffix 01	FS Suffix 01	Case FS Type	Lang Spoken E	LFLN Ind Lang Read	Case Name Suffix	Fs Suffix	Case Type	LFLN Ind Lang Spoken
PG Status	Parent Ind	TB Ind	TB Date	PA	MA	FS	Safety Net Ind	TB Ind
- Recurrence and Issuance:** Date Last Recert //, Date Next Recert //, Issuance Date Pa //, Issuance Date Fs //.
- Personal Information Table:**

PA	MA	FS	LN	CIN	First Name	M	Last Name	Sex	DOB	PA	MA	FS	ES	CA	CD
[redacted]															
- SSN and DMV Information:** SSN: [redacted], SSN Validation: 1, SSN Date: // // 00/00/. Fields for Chap Code, SSI Code, Bcs, Otm, Edc, Wk Program, Veteran, Railroad Ind, 30-1-3 Begin, 30-1-3 End, State Fed, Date Of Entry, D-A Ind, TL, LF, OTH.
- Student Information:** Student Id, Student Id Code, Tasa Ind, Aci Ind, Alien Number, C.
- Case Number Table:**

Case Number	Center	Case Type	Line	Relation
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
- Reasons Table:**

PA	MA	FS	Status	Date	Reason
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
- Inquiry Screens List:**
 - 1. Case Composition - Suffix/Individual Summary (NQCS01.NQIN2A)
 - 2. Case Composition - Suffix Summary (NQCS02.NQCS3A)
 - 3. Case Composition - Individual Summary (NQCS3B)
 - 4. Case Composition - EAA/EAF Indicator Summary (NQCS8A)
 - 5. Case Inquiry Associated Names and Addresses (NQCS13)
 - 6. All Change Actions for period (NQCS6A)
 - 7. Recertification, mailout-response, discrepancy and recert-result data (NQCS27)

POS Release Notes

Version 12.2, June 23, 2008

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.

POS Release Notes

Version 12.2, June 23, 2008

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:

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.

POS Release Notes

Version 12.2, June 23, 2008

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."

POS Release Notes

Version 12.2, June 23, 2008

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).

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.

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

Suff Ln	CIN	Name	Relation	DOB	SSN	Val	Sex	Ctn	NI	HB	PA	MA	FS
			Legal Spouse										

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.

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.

View/Schedule BEV Appointment

POS Release Notes

Version 12.2, June 23, 2008

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.

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.

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.

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

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

POS Release Notes

Version 12.2, June 23, 2008

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.

Observations from Case Record
(if available)
(If two or more boxes are checked the system will change “Is A Drug/Alcohol Referral Necessary” to YES.)

<input type="checkbox"/> Homeless <input type="checkbox"/> Active child welfare case <input type="checkbox"/> On temporary assistance 48 months or more <input type="checkbox"/> Active employment sanction <input type="checkbox"/> On temporary assistance more than once in the past two (2) years	<input type="checkbox"/> Information in case history (DWI, failing work assignment): <div style="border: 1px solid gray; height: 30px; margin: 5px 0;"></div> <input type="checkbox"/> Other: <div style="border: 1px solid gray; height: 30px; margin: 5px 0;"></div> <input type="checkbox"/> Non Applicable
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POS Release Notes

Version 12.2, June 23, 2008

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

A. Payment History

Utility Liaison Referral Outcomes – Fuel

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

POS Release Notes

Version 12.2, June 23, 2008

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 → 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.

POS Release Notes

Version 12.2, June 23, 2008

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.

WMS → POS Synchronization Problem Resolution

POS has retrieved the latest case information from WMS. An individual was found in WMS whose CIN does not exist in POS. This usually occurs when an action is done for the case outside of POS.

Individual on WMS case whose CIN does not exist in POS

Case No	Suf	Ln	CIN	First Name	MI	Last Name	DoB	Sex	SSN

You must complete one of the following actions:

1. If the individual listed above who was found in WMS matches one of the POS lines listed below, click on the "Match" button for the POS line. If you click on the "Match" button, the demographics of the WMS line will overwrite those of the POS line.
2. If the individual listed above who was found in WMS does not match one of the POS lines listed below, click on the "Add the individual to the POS case" button to add the individual as a new line on the POS case.

Information on POS

Case No	Suf	Ln	CIN	First Name	MI	Last Name	DoB	Sex	SSN

Match

Match

Match

Add the individual to the POS 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.

WMS → POS Synchronization Problem Resolution

POS has retrieved the latest case information from WMS. A non-applying individual was found in POS whose CIN does not exist in WMS. This usually occurs when an application case is linked and there are closed lines on the link case.

Extra Individual from POS Case

Case No	Suf	Ln	CIN	First Name	MI	Last Name	DoB	Sex	SSN

You must complete one of the following actions:

1. If the individual listed above who was found in POS matches one of the closed WMS lines listed below, click on the "Match" button for the closed WMS line. If you click on the "Match" button, the demographics of the WMS line will overwrite those of the POS line.
2. If the individual listed above who was found in POS does not match one of the closed WMS lines listed below, click on the "No Match: Remove line from POS case" button or the "No Match: set individual status to NA NA NA" button.

Information on POS

Case No	Suf	Ln	CIN	First Name	MI	Last Name	DoB	Sex	SSN

Match

Match

Match

No Match: remove line from POS case

No Match: set individual status to NA, NA, NA

POS Release Notes

Version 12.2, June 23, 2008

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.

Revised W-113K data entry window

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

POS Release Notes

Version 12.2, June 23, 2008

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**.

POS Release Notes: Appendix A

Version 12.2, June 23, 2008

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.

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.

Revised W-113K data entry window

Response to Question

Form W113K—Documentation Requirements

Due Date: 05/22/2008

Must See Worker Upon Return

RETURN APPOINTMENTS FOR ADULTS

[Dropdown] Must return in person

To be Finger Imaged

For an employability assessment

To sign the public assistance application

[Dropdown] Must return in person

To be Finger Imaged

For an employability assessment

To sign the public assistance application

OK Cancel

Response to Question

[Dropdown] Must return in person

To be Finger Imaged

For an employability assessment

To sign the public assistance application

[Dropdown] Must return in person

To be Finger Imaged

For an employability assessment

To sign the public assistance application

PA APPOINTMENTS

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

POS Release Notes: Appendix A

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).

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 **A**

Request Date: 00/00/0000

Request or Immediate Need:

Decision:

Approved for an emergency grant

Amount: From: 00/00/0000 To: 00/00/0000

OK Cancel

Scroll Between Rows **B**

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

Version 12.2, June 23, 2008

- 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.