

FS POS Release Notes

Version 3.2.1 August 31, 2009

These Release Notes contain descriptions of changes in FS POS Release 3.2.1, scheduled for August 31, 2009. These have been distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**. These and prior Release Notes may also be found on the HRA Intranet at http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79

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1. Updated Vital Records Collateral Call

POS will resume the Birth Verification process with NYC Vital Records for applicants/participants. POS will validate the Birth Certificate based on the Department of Health and Mental Health (DOHMH) records.

DOHMH will be hosting a web service which will return a system validation. The validation process should consist of two parts:

- Birth Authentication
- Death report check.

The death verification is based on the Death Report results from DOHMH. It represents the info about the demographics entered showing the individual as deceased. The data is passed to POS for possible follow up action by the worker. The System will process this validation as well as the Birth Records search.

Only POS workers who are allowed in the application interview and recertification activities can process the call to Vital Records for Birth Authentication:

- Entering the Birth Certification number in the Individual Details window (if available) will narrow the search and make it possible to receive a single exact match.
- Based on the results they obtained from DOHMH, the worker may have to continue to process the verification.
- The Vital records messages will determine if the worker must follow-up with any additional action.

Data from System

First Name	Last Name	DOB	Sex	Birth Cert No	County of Birth
Test111	Verification	05/23/1976	F		Brooklyn
Test	Verification	12/12/1975	M		New York

Instructions

Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action

Returned Results

Return	SSN	First Name	Last Name	Sex	DOB	Mothers Maiden Name	Birth Cert No	Deceased	Verification Date
NO Match Found	038-59-5000	Test111	Verification	F	05/23/1976				08/10/2009

Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

Close

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- The individuals born in a New York City borough will appear at the top of the window, with the data submitted to DOMMH.
- The User must click on the name to view the result of the collateral call:

Data from System					
First Name	Last Name	DOB	Sex	Birth Cert No	County of Birth
Test111	Verification	05/23/1976	F		Brooklyn
Test	Verification	12/12/1975	M		New York

- The results will be displayed for each selected individual:

Instructions
Displayed below are the results of the birth verification match with Vital Records NYC for the above named individual. Please review results and messages carefully. Some return codes require follow-up action

Returned Results

Return	SSN	First Name	Last Name	Sex	DOB	Mothers Maiden Name	Birth Cert No	Deceased	Verification Date
NO Match Found	038-59-5000	Test111	Verification	F	05/23/1976				08/10/2009

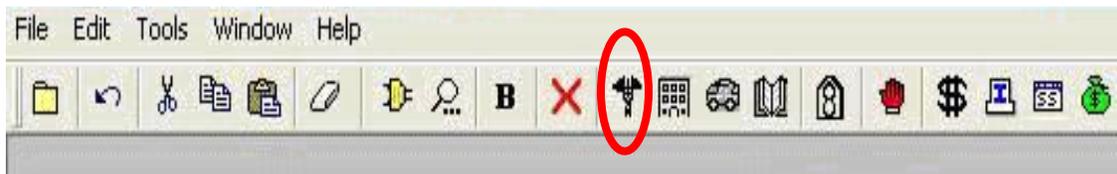
Messages: Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

The worker may need to add or change existing demographic information on the individual detail window based on the verification results.

They may also need to modify the birth certificate number if it has been entered incorrectly on this window and **click re-run BV process**.

Vital Records Collateral Call

The Vital Records result can also be seen by clicking on the Vital Records Icon in the toolbar.



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Vital Records Short Description/ Messages

Description	Return Message	Messages
The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov	Cannot Authenticate	The System cannot authenticate the Worker! Please contact: helpdesk-pos@hra.nyc.gov
You are missing some required entries. Please return to the Individual Details window and fill in all data including parents' names.	Return to Individual Details	You are missing some required fields. Please return to the Individual Details window and fill in all data including parents' names.
You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.	Exceeded no. of attempts	You have exceeded the maximum number of clearances allowed for this individual. Please continue with the next person on the case.
Multiple Match found based on spelling of first and last names, DOB, gender.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Multiple Match found based on spelling of first and last names, DOB, gender. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data, all of whom are deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Multiple Match found based on spelling of first and last names, DOB, gender and mother's maiden name. Individuals have been verified as Deceased.	Deceased - Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data, all of whom are deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
Multiple Match found based on spelling of first and last names, DOB, gender and Birth Certificate number.	Multiple Match	Birth Verification has been received from Vital Records. More than one person has been found with matching data.
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender).	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using five-factor matching (with exact spelling of first name, last name, date of birth, gender, and with mother's maiden name normalized)	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found using four-factor matching (exact spelling of first name, last name, date of birth, and gender) after failing using the five-factor matching (with exact spelling of first name, last name, date of birth, gender).	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match found with provided birth certificate number, first name, last name, gender and date of birth.	Single Match	Birth Verification has been received from Vital Records. The externally verified checkbox on the Individual Details window will be checked for citizenship and age. One additional document is needed for proof of identity if not already submitted.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from

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Description	Return Message	Messages
		Help Menu and submit Form BFI-14.
Single match was found for the individual. Individual has been verified as Deceased.	Deceased - Single Match	Birth Verification has been received from Vital Records. Only one person has been found with matching data and this person is deceased. Case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on Birth Certificate number, first and last names, DOB and gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. If Birth Certificate number entered has been verified, case should be referred to BFI. Select link from Help Menu and submit Form BFI-14.
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.
NO Match found based on spelling of first and last names, DOB, gender.	NO Match Found	Birth Verification clearance shows that no matches were found for this individual. Documentation for citizenship, identity and age should be collected if not already submitted.

2. POS Budget Synchronization

POS will synchronize with the “current active budget” (CAB) received from WMS to update budget-related information within the interview when it finds an update. For example, if the participant’s income is updated by a Mass Re-Budgeting (MRB) from WMS, POS will update the income window with the new income amount the next time that a Worker opens the case. This will help ensure that the information in POS and WMS matches.

3. Reminder: Unearned Income Reconciliation

A new window named **Unassigned Income from Current Active Budget** was added in POS release 3.2 to reconcile the POS budget and interview data when there is income with income source code of 98 or 99 that is not associated with a POS interview window.

This window appears when the Worker clicks on the **New Budget** button in the **Existing Budgets** window or when the Worker closes the **Latest Synchronized Budget** window in the **Change Case Data** activity.

The Worker will need to indicate the specific income type. If the income type is “Contributions for Excess Rent”, the Worker will need to indicate the contributor, what the contribution pays for and whether it is a loan. If the client is disputing the information from the current active budget, the Worker must indicate whether he/she has proof that he/she does not receive the budgeted income or that the income has stopped.

Once the income type has been specified, POS will update the appropriate interview section.

If there is additional unassigned income with source code 98 or 99, the window will appear for the next income row, until all unassigned unearned income is updated.

Unassigned Income from Current Active Budget

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Unassigned Income from CAB

Instructions

The following information was obtained from the Current Active Budget (CAB) in WMS. The Information with the blue font is income type 99 from the CAB that is not identified in POS.

Select the appropriate income type. If you are not able to determine the Income type, select 'Other Unearned Income' from the radio buttons. POS will update the interview questions. If the income type is 'Contributions for Excess rent', you must go to the Shelter window to complete the information for the next new POS budget.

If there is more than one income source, it will show up once you click on the 'Next' button. You must address all discrepancies before you can continue to authorize a new budget.

Unassigned CAB Income		
Line No	Name	
1	JOSE TESTTWO	
Ind PA & FS Statuses		
ACTIVE	ACTIVE	
Income Type		
99	Other Unearned Income	
Amount	Pd	Prog Ind.
20.00	Monthly	

Is the client present?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is the client disputing the information?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Does the client have documentation to support this claim?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Income Assignment	
<input type="radio"/> GI Dependency Allotment	<input type="radio"/> Contributions for Excess Rent
<input type="radio"/> No fault insurance benefit	<input type="radio"/> Contribution / Gift (non rent)
<input type="radio"/> Tuition Fees	<input type="radio"/> Training Allotment
<input type="radio"/> Income From a Trust	<input type="radio"/> Other Unearned Income

Contribution to Pay for General Earmarked & Verified

Loan? Yes No

Save Income to Interview

Cancel

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4. Updates to Refer Back to Worker Window

The “Refer Back to Worker” button and the “Refer to Worker” window in the Approval Elements window in POS approval activities allows Supervisors to send cases back to Workers for correction. The window was revised to allow Supervisors from Non-Cash Assistance Regional Offices to send a case back to a Worker from their office or from the “home center”.

Updated Refer Back to Worker Window – New Control for Change Center / Regional Offices

The screenshot shows the 'Refer to Worker' window. At the top, there is a 'Select Center' dropdown menu set to 'F43'. Below this, the 'Selected Case' section contains fields for 'No' (00010005298E), 'Case Name' (EFS NEW), 'CIN' (RW94978N), 'Suffix' (1), 'Casehead Name' (New Efs), and 'SSN'. The main part of the window is a table titled 'Refer Case To' with columns for Title, Unit, Last Name, First Name, U/W, and Phone Number. The table lists several workers, with the third row (FS Supervisor, RCT, Breton, Jose, FPOS4, (718) 510-8589) highlighted in blue. At the bottom of the window are 'OK' and 'Cancel' buttons.

Title	Unit	Last Name	First Name	U/W	Phone Number
FS Supervisor	FS	Batov	Olga	FPOS1	(718) 220-2222
FS Supervisor	FS	OSTA	Madhu	FPOS4	(718) 510-0564
FS Supervisor	RCT	Breton	Jose	FPOS4	(718) 510-8589
Supervisor		Shah	Kamal		
Supervisor	DEV	Chauhan	Haresh	POS1	
Supervisor	DEV	Papavasiliou	Kathy	POSDM	(718) 510-0483

5. Updates to Application Referrals Activity for Finger Imaging Referrals

Since AFIS operators only accept the POS generated W-519 AFIS Referral form, the Application Referral activity will be updated to allow the printing of the AFIS referral in the following instances:

- Closed or rejected cases and
- Clients on Single Issue or Active case status for whom the form was previously printed.

For additional details, please see **Appendix F**.

6. FS Central Office Access Rights

FS Central Office, Special Project Change Centers and FS Fair hearing units have been given access to all FS Centers.

For additional details, please see **Appendix D**.

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7. Updates to Case Member Information

The Case Member window will have the following items updated:

- The Failed to Keep field will be cleared when the worker starts a new interview activity, even for cases that were previously marked as failed to keep on the FS Application Log or FS Recertification Log.
- The worker will need to indicate whether the applicant/participant failed to keep the interview.
- The “IVRS” field will now be changed to “**Potential IVRS**”.

8. Updates to FS Recertification Interview Log

The **FS Recertification Interview Log** will be updated to revise an existing filter and an existing column.

IVRS Filter

The IVRS filter will be renamed Potential IVRS in the appointment type and the case filter.

Appt Status	Case Status	Potential IVRS	Previous Appt	No Change	Requested Closing	Original Appt. Date
-------------	-------------	----------------	---------------	-----------	-------------------	---------------------

For additional details, please see **Appendix A**.

9. Updates to Application Interview Log

The **Food Stamp Application Log** will be updated to add a new column and a new filter to indicate an expedited case.

POS will identify these cases by checking to determine if the case received Expedited benefits

Number of Contacts	Assigned To	Spoken Lang	Interpre	Interview Started On	Expedited	Case Status	Previous Appt	Orig. Date
0		English	No		Yes	APPLYING		8/3/2009 9:00 A

For additional details, please see **Appendix B**.

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10. Restricting the TAD Window

Due to a number of errors occurring within POS based on the use of the dummy case number, POS will now provide the following error message when the worker attempts to open the TAD window for a case that was not yet registered in WMS.



This error message will be enabled in any activity in which a TAD window is accessible when the case has not been registered in WMS.

11. Minimum Wage Increase

The Federal Minimum wage has increased to \$7.25 per hour. As a result the POS Expedited FS /EFS window has been updated to reflect the new amount. In addition, the Working Families' Determination window and the associated business rules will reflect the Federal Minimum wage increase.

Working Families Window

A screenshot of a software window titled "FS POS RECEPTION: Working Families and Hardship Waiver F40". The window has a menu bar with "Food Stamps", "Open POS", "Help", and "Exit". The main content area is titled "Working Families Food Stamp Initiative (WFFSI)". It contains two questions with radio button options for "Yes" and "No". The first question asks if any adult (18 years or older) member of the household is working 30 or more hours per week or earning \$217.50 or more per week. The second question asks if two (2) adult members of the household each are working 20 or more hours per week or earning \$145 or more per week. Below these questions is a text input field with "No" entered, preceded by the question "Does the household qualify for WFFSI?". There is also a section for "Telephone Interview Selection" with a question about conducting the interview by telephone. At the bottom, there is a "Hardship Waiver Reason:" label followed by a dropdown menu. At the very bottom of the window are two buttons: "Next" and "Previous".

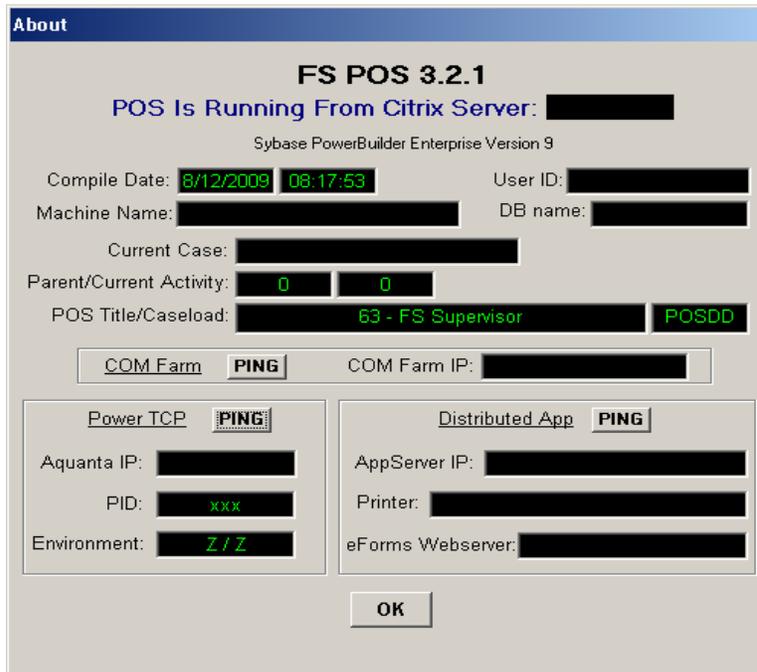
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12. Updates to POS “Help About” Window

The POS “**Help About**” Window will now have two additional indicators to assist Help Desk and development staff to easily determine user and PC information:

- POS Title
- Caseload



13. E-Forms

The following E-Forms will be **updated**:

- W-119 – Request for Contact on a Food Stamp Application
- W-120 - Food Stamp Benefits Application Signature Form
- W-129B – Food Stamp Benefits Application Attestation Signature Form

14. Food Stamp Appendices

The following updated and additional reminder appendices have been added to this release:

- **Appendix A – Updated Recertification Log**
- **Appendix B – Updated Application Log**
- **Appendix C – Failed to Keep FS Application Interview Process**
- **Appendix D – FS Regional Office Access to Home Center Intake and Logs**
- **Appendix E – Re-Opening Cases using Change Case Data and Recertification Interview Activities**
- **Appendix F – Printing Finger Imaging Referral Forms**

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Overview

The **Recertification Interview Log** allows Food Stamp (FS) Centers to view their past, current and future Recertification Interview appointments, to assign and reschedule their Recertification Interviews.

The Recertification Interview Log and Failed to Keep Recertification Log windows will be updated with the following new functionality and features:

- Revised IVRS filter

Revised IVRS Filter

A filter allows the Worker to filter for cases that may be eligible to complete their recertification via the Interactive Voice Response System (IVRS). The IVRS filter will be renamed **"Potential IVRS"** in the appointment type and the case filter and the matching log column will also be renamed **"Potential IVRS"**.

The screenshot shows the 'Recertification Interview Log' window. On the left, there is a filter section titled 'Appointment Type' with the following options:

- Telephone Interview (6d)
- In-Center Interview (6e)
- Potential IVRS (6g)
- No Change (6h)
- Original appointment date (6)
- LDSS-4826 Received (6f)

On the right, a table displays the results of the filter. The table has two columns: 'Case Status' (labeled 18) and 'Potential IVRS' (labeled 18a). The data rows are as follows:

Case Status (18)	Potential IVRS (18a)
Active	No
Active	Yes

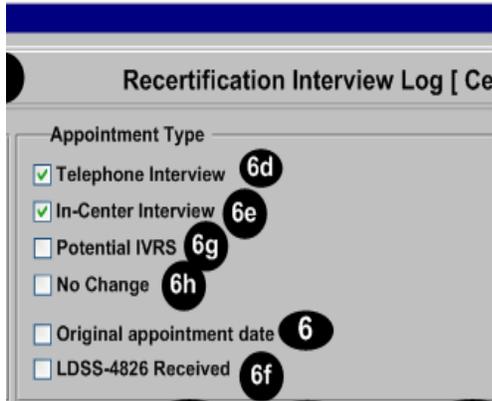
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Past Changes

No Change Filter

A filter was added to allow the Worker to filter for cases that were marked as “no change recertifications” in the FS Recertification Interview activity.



No Change Column

A column indicates whether the case was marked as a “no change recertification” in the FS Recertification Interview activity.

Enhanced Search Criteria

The FS sites will be able to find the cases by entering the case number. This will allow the Worker to find the case that may have been scheduled for a past or future date without running the log for a long date range.

Retrieve by Original Appointment Date

The FS sites will be able to view cases by the original appointment date. This will allow the site to replicate the reconciliation view that is currently done using the WINRO076 report.

Filtered View and Printing

The FS sites will be able to select the columns that they wish to view or print. The FS sites will be able to view all of the data for 1 case row on the same printed page.

CNS Notice Number Required Window

This window will be removed and a clearance has been issued that all failed to keep recertification closing should be processed using **Y10**.

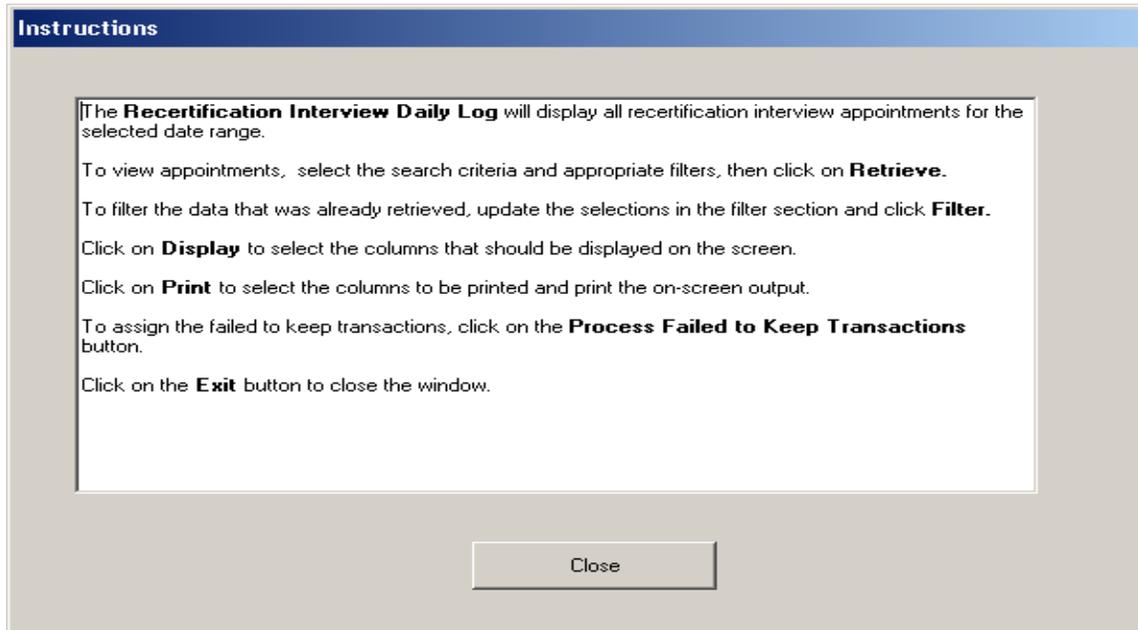
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Instructions

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

New Instructions



The Instruction window will display new instructions for the NCA FS Centers

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

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Updated Recertification Log

10	11	11a	11b	12	13	12a	13b	13c	14	15	16	17	18	18a	19	6i	6j	6a
Case Number	Case Name	Spoken Lang	Interpreter	Appt Date	Appt Time	LDSS-4826 Received	Telephone Interview	Contact Number	Assigned To	Number of Contacts	Interview Started On	Appt Status	Case Status	Potential IVRS	Previous Appt	No Change	Closing Requested	Orig Appt
0000538905A	Lorne Anne	English	Yes	7/31/2007	10:00 AM	Yes	Yes	(212) 555-1200	A. Turner	1	7/31/2007	Kept Appt	Active	No	6/22/07	No	No	6/25/07 11:15 AM
00007422506B	Steel Dan	Spanish	Yes	7/31/2007	10:00 AM	Yes	Yes	(212) 555-1201	B. Jones	2	7/31/2007	Kept Appt	Active	No		No	No	
00007421970C	Chalmen Steve	Russian	Yes	7/31/2007	11:00 AM	Yes	Yes	(212) 555-1202	C. Allen	1	7/31/2007	Kept Appt	Active	No		No	No	
00007424834D	Mort Ralph	Arabic	Yes	7/31/2007	1:00 PM	Yes	Yes	(212) 555-1203	D. Roberts	2	7/31/2007	Kept Appt	Active	No		No	No	
00007446480E	Deep Zan	Haitian	No	7/31/2007	2:00 PM	No	Yes	(212) 555-1204	E. Spool	0			Active	No		No	No	
07061121115	Sands Raul	English	Yes	7/31/2007	3:00 PM	Yes	No		F. Wells	0			Active	Yes		Yes	Yes	

Definitions

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

New Search by Date Filters

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

New Appointment Type Filter

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

6. Original Appointment date
 - a. Originating Appointment
 - 6d. Telephone Interview
 - 6e. In-Center Interview
 - 6g. Potential IVRS
 - 6h. No Change
7. Kept Appointment
8. Failed to Keep Appointment
9. None
10. Case Number
11. Case Name
 - a. Spoken Language
 - b. Interpreter
12. Appt Date
13. Appt Time
 - a. LDSS-4826 Received
 - b. Telephone Interview
 - c. Contact Number
14. Assigned To
15. Number of Contacts
16. Interview Started On
17. Appt Status
18. Case Status
 - a. Potential IVRS
19. Previous Appt

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- 6i. No Change
- 6j. Closing Requested
- 6a. Original Appt

Existing Buttons in the Window

The following buttons also appear in the window:

1. Assign – See the *Assign procedure and Refer window* section below for additional details.
2. Reschedule- Displays the Recertification Interview Scheduler window for updating with new appointment
3. Kept Appointment- Will indicate that the appointment was kept
4. Failed to Keep Appointment- Will indicate that the participant did not keep the appointment
5. Process Failed to Keep Appointments- will display Fail to Keep Recertification Interview Log
6. Exit

Assign procedure and Refer window

If the title of the person who clicks on the **Assign** button is 'FS Clerk' or 'FS Eligibility Specialist', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor

If the title of the person who clicks on the **Assign** button is 'FS CA III', 'FS Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display only individuals with the following titles in the **Refer Action** window:

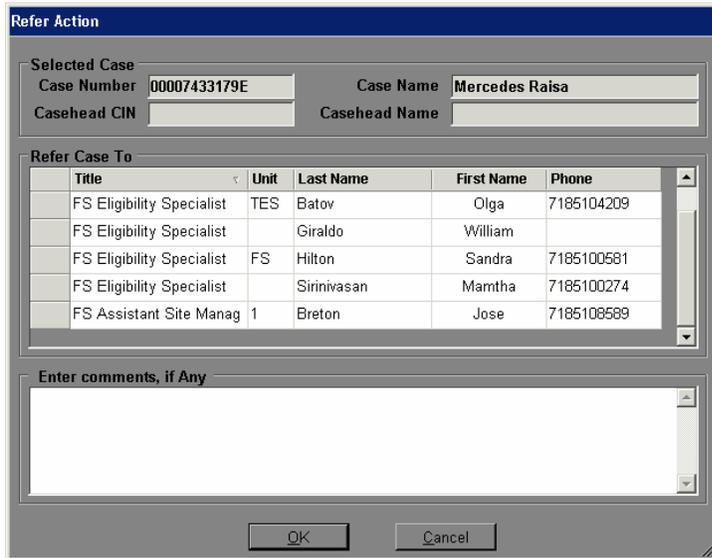
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

When the case is assigned to a FS Eligibility Specialist and the OK button is clicked in the Refer Action window, the caseload (unit worker value) will be updated in POS.

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Refer Action window



The Refer Action window displays case information and a list of potential refer cases.

Selected Case

Case Number	00007433179E	Case Name	Mercedes Raisa
Casehead CIN		Casehead Name	

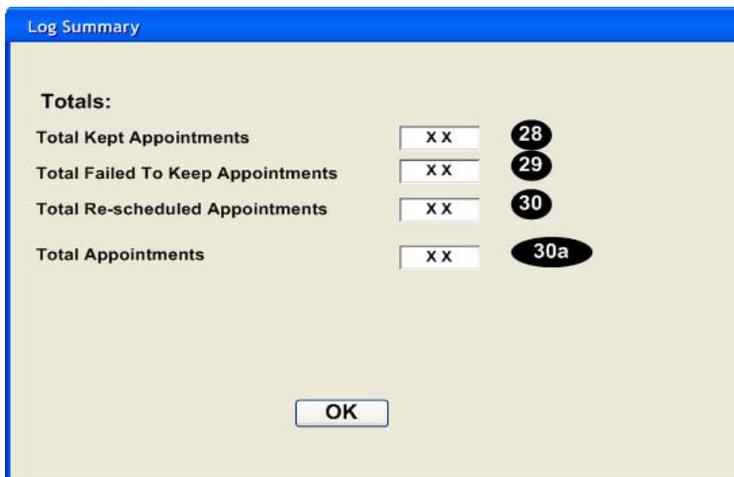
Refer Case To

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

Enter comments, if Any

OK Cancel

Log Summary window



The Log Summary window displays appointment statistics.

Totals:

Total Kept Appointments	XX	28
Total Failed To Keep Appointments	XX	29
Total Re-scheduled Appointments	XX	30
Total Appointments	XX	30a

OK

A new window (**Log Summary**) will summarize the kept, failed and re-scheduled appointments from the Application log.

LDSS-4826 Received Window

The LDSS-4826 Received window will appear when the LDSS-4826 Received button is clicked at the bottom of the FS Recertification Log window. This window allows the worker to indicate that the signed and completed recertification form (LDSS-4826) has been received, the specific interview type, record the date of receipt and any new contact information for the person.

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LDSS-4826 Received window

LDSS-4826 Received

Case Number: 00010000372C

Case Name: JOE BROWN

Casehead Name: Joe Brown

Date that the LDSS-4826 was received? Monday, December 10, 2007

Interview Type: Telephone In-Center

Contact Number: 212-488-8888 Extension:

Did the applicant request a new call time? Yes No

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

OK Cancel

Contact Attempted Window

The Contact Attempted window will appear when the Contact button is clicked at the bottom of the FS Recertification Log. This window allows the worker to record the number of attempted contacts with the client scheduled for a telephone interview. Each recorded contact and comment will be saved in the POS case activity history.

If there are two unsuccessful contacts recorded and no successful contact has been made, the appointment status will be automatically updated to "Failed to keep".

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Contact Attempted window: Successful Contact

Contact Attempted

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

Contact Attempt 1
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/01/2007
Time that the contact was attempted? 10:00 am

Contact Attempt 2
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted? 09:00 am

Contact Attempt 3
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted?

Contact Attempt 4
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted?

Comments:

Interview Type: Telephone In-Center

New Contact Number: Yes No

Contact Number: Extension:

OK Cancel

Definitions of Contact Attempted Window

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

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

Contact Attempted 1

7. Did you successfully contact the client?
8. Date that the contact was attempted?
9. Time that the contact was attempted?

Contact Attempted 2

10. Did you successfully contact the client?
11. Date that the contact was attempted?
12. Time that the contact was attempted?

Contact Attempted 3

13. Did you successfully contact the client?
14. Date that the contact was attempted?
15. Time that the contact was attempted?

Contact Attempted 4

16. Did you successfully contact the client?
17. Date that the contact was attempted?
18. Time that the contact was attempted?
19. Comments
20. Interview Type
21. New Contact Number
22. Contact Number
23. Extension
24. OK
25. Cancel

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

New Window: Select Columns to Print

Select Columns to Print

- Case Number
- Case Name
- Spoken Language
- Interpreter
- Appt Date
- Appt Time
- LDSS-4826 Received
- Telephone Interview
- Contact Number
- Assigned To
- Number of Contacts
- Interview Started On
- Appt Status
- Case Status
- IVRS
- Previous Appt
- Orig Appt

OK Cancel

A new window will allow the worker to decide which columns should be printed. This window will appear when the Worker clicks the Print option in the menu at the top of the log.

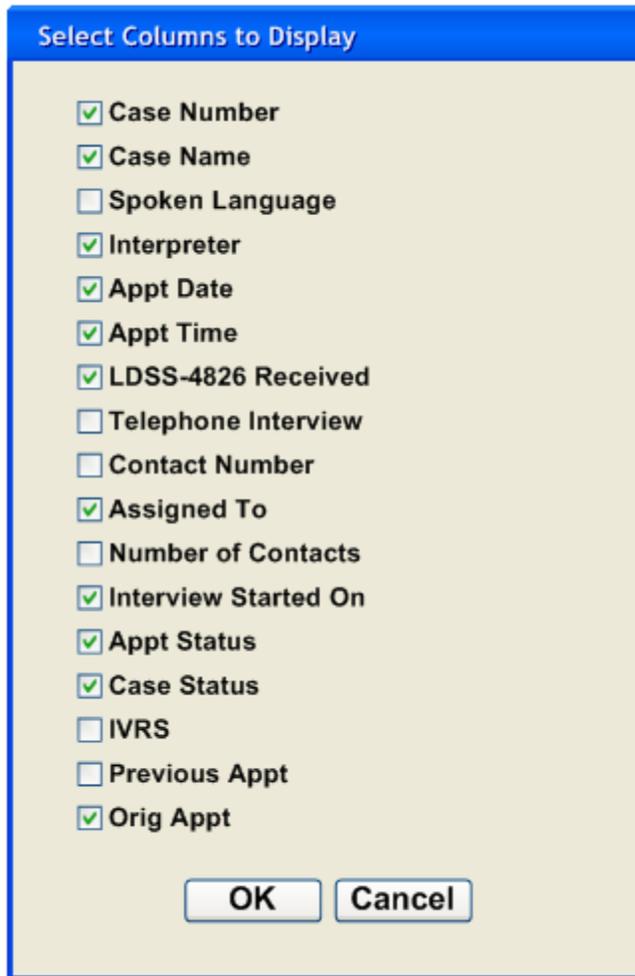
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks OK, the print job will be sent to the printer. If the worker clicks cancel, POS will return to the Log.

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

New Window: Select Columns to Display



A new window will allow the Worker to decide which columns should be displayed. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected and protected.

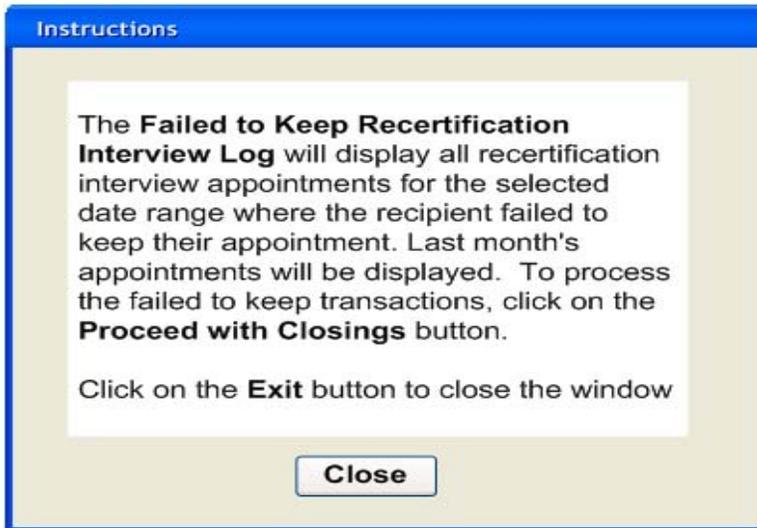
When the Worker clicks OK, POS will display only the selected columns. If the Worker clicks cancel, POS will return to the Log without any changes to the display.

FS POS Release Notes: Appendix A

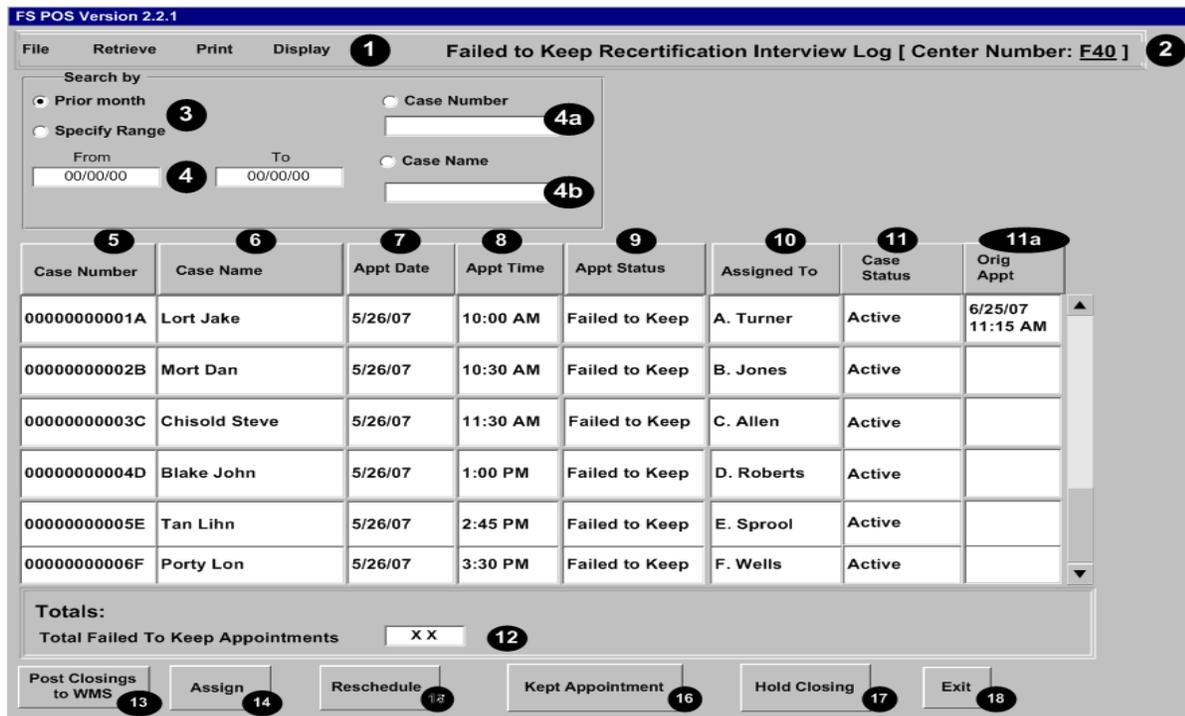
Version 3.2.1 August 31, 2009

Failed to Keep Recertification Interview Log

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



Updated Failed to Keep Recertification Interview Log



The list of the prior month's appointments where the client failed to keep will be displayed in this window beginning on the 16th day of the month.

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

The following columns appear in the Fail to Keep Recertification Log:

1. File, Retrieve, Print and Display
2. Failed to Keep Recertification Log
 - i. Search by Feature
3. Prior Month
4. Specify Range
 - a. Case Number
 - b. Case Name
5. Case Number
6. Case Name
7. Appointment Date
8. Appointment Time
9. Appointment Status
10. Assigned to
11. Case Status
 - a. Originating Appointment
12. Total Failed to Keep Appointments- Read Only

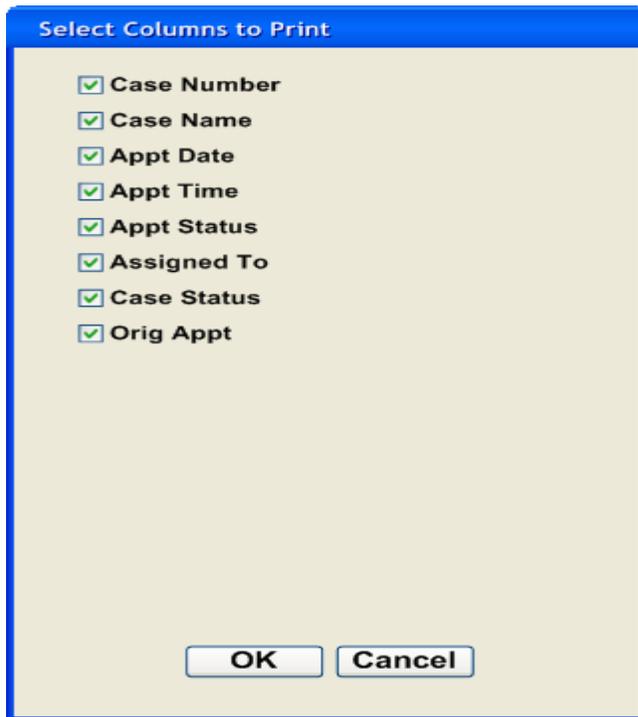
Buttons in Log

13. Post Closings to WMS-All closing will be processed Y10
14. Assign- Click on this button to assign the case, the case will no longer appear on the Failed to Keep Log
15. Reschedule-Click on this button to reschedule the case, the Recertification Interview Scheduler window will be displayed.
16. Kept Appointment- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
17. Hold Closing- Updates the appointment status and removes the case from the Failed to Keep Recertification Interview Log
18. Exit

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

New Window: Select Columns to Print



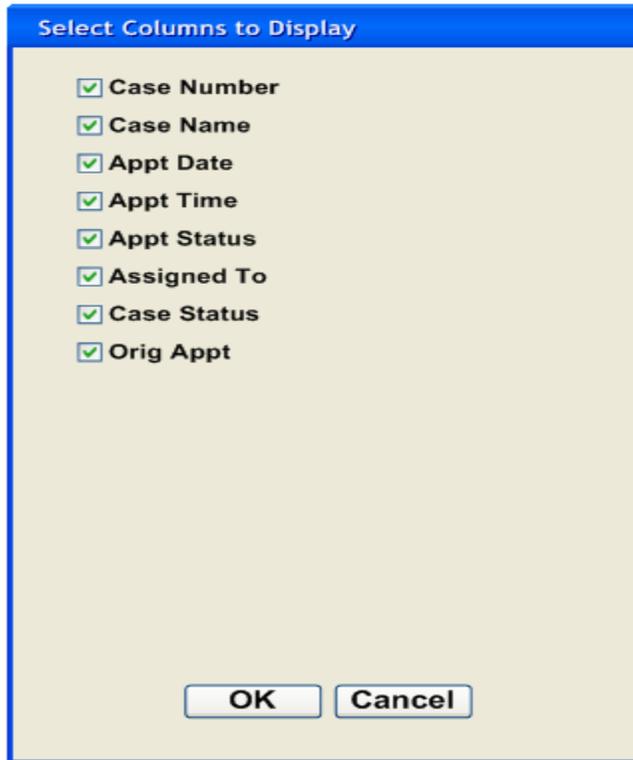
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks OK, the print job will be sent to the printer. If the Worker clicks cancel, POS will return to the Log.

FS POS Release Notes: Appendix A

Version 3.2.1 August 31, 2009

New Window: Select Column to Display



The new window will allow the Worker to decide which columns should be displayed from the Failed to Keep Recertification Log. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected.

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

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Overview

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and allows the processing of failed to keep transactions by designated staff.

The Application Interview Log and Failed to Keep Application Interview Log windows will be updated with the following new features:

- Add an expedited filter to indicate which cases are eligible for expedited processing.

Past Changes

New Search Criteria

The FS sites will be able to find the cases by entering the case number. This will allow the Worker to find the case that may have been scheduled for a past or future date without running the log for a long date range.

They will also be allowed to search by the last name of the casehead or payee.

Retrieve by Original Appointment Date

The FS sites will be able to view cases by the original appointment date. This will allow the site to replicate the reconciliation view that is currently done using the Paper Logs.

Filtered View and Printing

The FS sites will be able to select the columns that they wish to view or print. The FS sites will also be able to view all of the data for 1 case row on the same printed page.

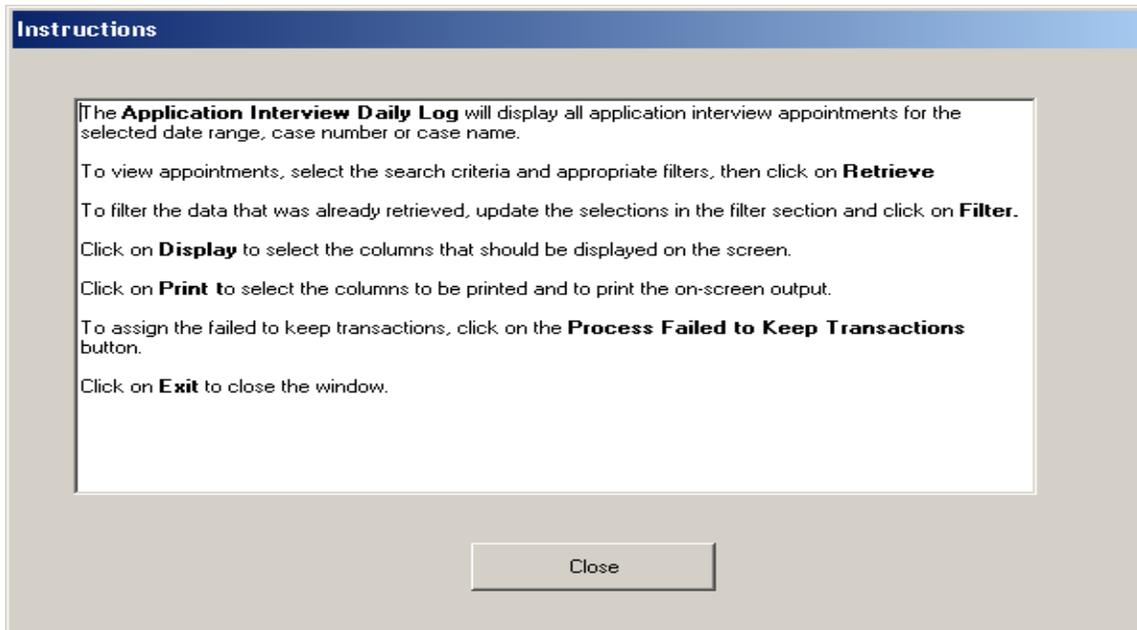
FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Instructions

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

New Instructions



The Instruction window will display new instructions for the NCA FS Centers.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Updated Application Log

FS POS Version 2.2.1

File Retrieve Print Filter Display Summary **1** Application Interview Log [Center Number: F40] **2**

Search by **3**

Appointment Date **3**

Select Date **3a**

Specify Range **3b**

From: 00/00/00 To: 00/00/00

Case Number **4**

Last Name of Casehead or Payee **5**

Application Type Filter

Working Families **7a**

In-Center **7**

CBO **8**

Telephone **9**

Expedited **9a**

Exclude dummy case numbers **10**

Original appointment date **6**

Appointment Status Filter

Kept Appointment **11**

Failed to Keep Appointment **12**

None **13**

14	15	16	17	18	19	20	21	22	22a	23	24	24a	25	25a	26	27	6a
Intv Date	Case Number	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number	Number of Contacts	Assigned To	Spoken Lang	Interpreter	Inter Started On	Expedited	Case Status	Previous Appt	Orig Appt
6/25/07	00000538905A	Lorne Anne	6/26/07	10:00 AM	Kept Appt	Yes	No		1	A. Turner	English	Yes	6/26/07	Yes	Active	6/25/07 11:15 AM	6/25/07 11:15 AM
6/25/07	00007422506B	Steel Dan	6/26/07	10:30 AM	Failed to Keep	No	No		2	B. Jones	Spanish	No		No	Applying		
6/25/07	00007421970C	Chatmen Steve	6/26/07	11:30 AM	Kept Appt	No	No		1	C. Allen	Russian	No	6/26/07	No	Active		
6/25/07	00007424634D	Mort Ralph	6/26/07	1:00 PM	Failed to Keep	Yes	Yes	(718) 555-1212 Ext 224	2	D. Roberts	Arabic	Yes		Yes	Applying		
6/23/07	00007446480E	Deep Zan	6/26/07	2:45 PM	Kept Appt	No	No		0	E. Spool	Haitian	No	6/26/07	No	Applying		
6/25/07	070611121115	Sands Raul	6/26/07	3:30 PM		Yes	No		0	F. Wells	English	Yes		Yes	Applying		

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

There will be additional fields in the Updated Application Log.

Definitions

Tool Bar

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

Title

2. Application Interview Log

Date Filters

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

Application Type Filter

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

Appointment Status Filter

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

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Application Log Columns- All Column Headers are Sortable

14. Intake Date
15. Case Number
16. Case Name
17. Appointment Date
18. Appointment Time
19. Appointment Status
20. POS CBOs'
21. Telephone Interview
22. Contact Number
 - a. Number of Contacts
23. Assigned to
24. Spoken Language
 - a. Interpreter
25. Interview Started On
 - a. **Expedited**
26. Case Status
27. Previous Appointment
- 6a Original Appointment**

Application Log Buttons

31. Assign- See *Assign procedure and Refer Action window* below
32. Reschedule – Displays Application Interviewer Scheduler Window
33. Kept Appointment – Click on button to indicate applicant kept appointment
34. Failed to Keep Appointments – Click on this button to indicate that the applicant did not keep appointment
35. Process Failed to Keep Transactions – Click on button to process Failed to Keep rejections
36. Exit

Assign procedure and Refer window

If the title of the person who clicks on the **Assign** button is 'FS Clerk' or 'FS Eligibility Specialist', POS will display only individuals with the following titles in the **Refer Action** window:

- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor

If the title of the person who clicks on the **Assign** button is 'FS CA III', 'FS Supervisor', 'FS Assistant Site Manager' or 'FS Site Manager', POS will display only individuals with the following titles in the **Refer Action** window:

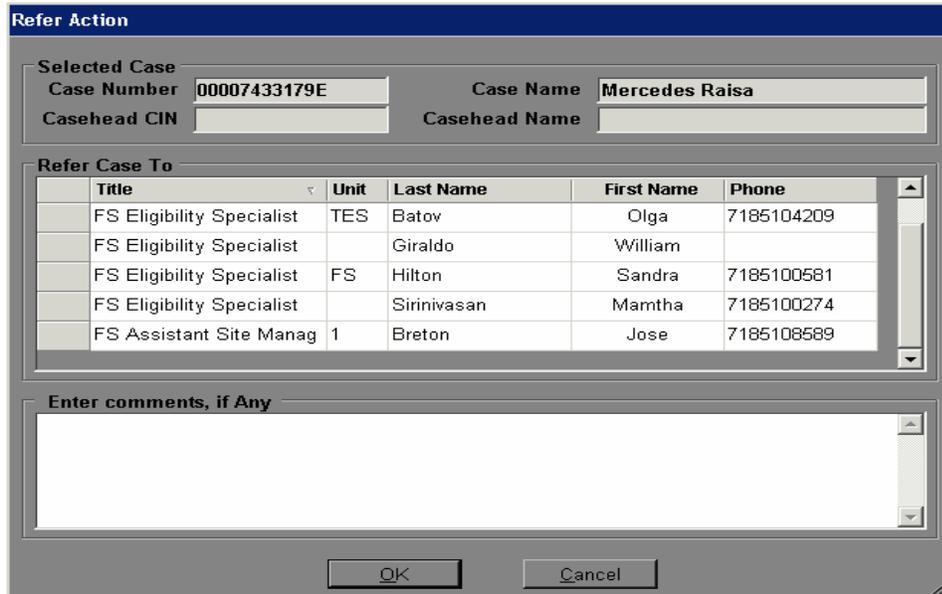
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

When the case is assigned to a FS Eligibility Specialist and the OK button is clicked in the Refer Action window, the caseload (unit worker value) will be updated in POS.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Refer Action window



The 'Refer Action' window displays case information and a list of potential refer cases. The 'Selected Case' section shows Case Number 00007433179E and Case Name Mercedes Raisa. The 'Refer Case To' table lists five candidates with their titles, units, last names, first names, and phone numbers. A text area for comments is provided at the bottom, along with OK and Cancel buttons.

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

New Application Log Summary window



The 'Log Summary' window displays appointment statistics. It shows four rows of data: Total Kept Appointments (28), Total Failed To Keep Appointments (29), Total Re-scheduled Appointments (30), and Total Appointments (30a). Each row includes a text input field with 'X X' and a circular button with the corresponding number. An OK button is located at the bottom.

Totals:	Input	Value
Total Kept Appointments	X X	28
Total Failed To Keep Appointments	X X	29
Total Re-scheduled Appointments	X X	30
Total Appointments	X X	30a

A new window (Log Summary) will summarize the kept, failed and re-scheduled appointments from the Application log.

Read-Only Totals

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

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Contact Attempted

This window allows the Worker to record attempted contacts with the client. Each recorded contact will be recorded in the case activity table. Comments will be recorded in the case comments table.

If there are two unsuccessful contacts recorded and no successful contact has been made, the appointment status will be automatically updated to “Failed to keep”.

Contact Attempted window: Successful Contact

Contact Attempted

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

Contact Attempt 1
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/01/2007
Time that the contact was attempted? 10:00 am

Contact Attempt 2
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted? 09:00 am

Contact Attempt 3
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted:

Contact Attempt 4
Did you successfully contact the client? Yes No
Date that the contact was attempted? 11/05/2007
Time that the contact was attempted:

Comments:

Interview Type: Telephone In-Center
New Contact Number: Yes No
Contact Number: Extension:

OK Cancel

Definitions of Contact Attempted Window

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

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Contact Attempted 1

- 7. Did you successfully contact the client?
- 8. Date that the contact was attempted?
- 9. Time that the contact was attempted?

Contact Attempted 2

- 10. Did you successfully contact the client?
- 11. Date that the contact was attempted?
- 12. Time that the contact was attempted?

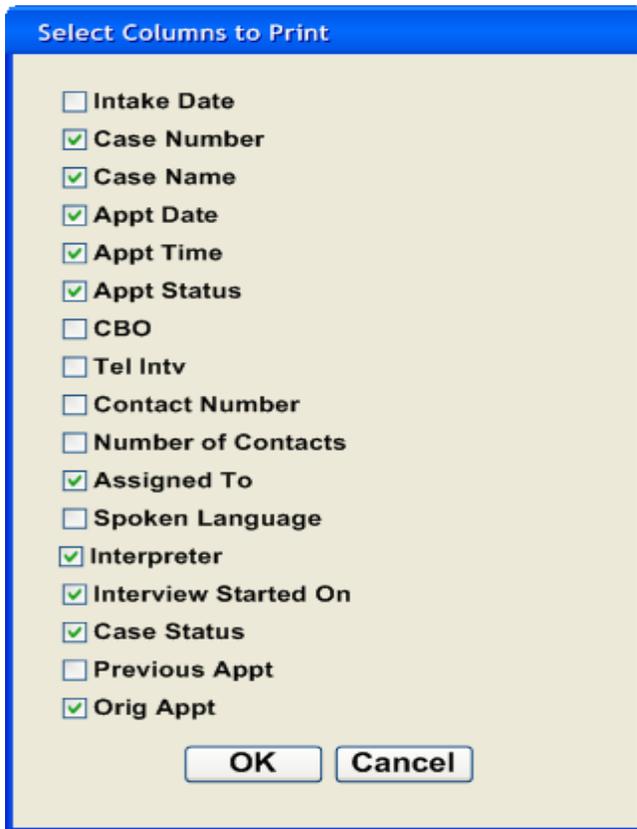
Contact Attempted 3

- 13. Did you successfully contact the client?
- 14. Date that the contact was attempted?
- 15. Time that the contact was attempted?

Contact Attempted 4

- 16. Did you successfully contact the client?
- 17. Date that the contact was attempted?
- 18. Time that the contact was attempted?
- 19. Comments
- 20. Interview Type
- 21. New Contact Number
- 22. Contact Number
- 23. Extension
- 24. OK
- 25. Cancel

New window: Select Columns to Print



A new window will allow the worker to decide which columns should be printed. This window will appear when the Worker clicks the Print option in the menu at the top of the log.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

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

Once the Worker clicks OK, the print job will be sent to the printer. If the worker clicks cancel, return to the Log.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

New Window: Select Columns to Display

Select Columns to Display

- Intake Date
- Case Number
- Case Name
- Appt Date
- Appt Time
- Appt Status
- CBO
- Tel Intv
- Contact Number
- Number of Contacts
- Assigned To
- Spoken Language
- Interpreter
- Interview Started On
- Case Status
- Previous Appt
- Orig Appt

OK Cancel

A new window will allow the Worker to decide which columns should be displayed. This window will appear when the Worker clicks the Display option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected and protected. When the Worker clicks OK, POS will display only the selected columns. If the Worker clicks cancel, return to the Log without any changes to the display.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

Failed to Keep Application Interview Log

The **Application Interview Log** allows Food Stamp (FS) Centers to assign and reschedule application interviews and will allow for the processing of failed to keep transactions by designated staff.

The instructions popup window will appear each time the window is opened.



Failed To Keep Application Log

FS POS Version 2.2.1

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

Search By

Appointment Date Case Number

Yesterday **3** **4a**

Past 14 Days

Specify Range

From To **4** **4b**

5	6	7	8	9	10	11	12	13	14	14a
Intake Date	Case Number	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Assigned To	Case Status	Orig Appt
6/25/07	0000000001A	Lort Jake	6/26/07	10:00 AM	Failed to Keep	Yes	No	A. Turner	Applying	6/25/07 11:15 AM
6/25/07	0000000002B	Mort Dan	6/26/07	10:30 AM	Failed to Keep	No	No	B. Jones	Applying	
6/25/07	0000000003C	Chisold Steve	6/26/07	11:30 AM	Failed to Keep	No	No	C. Allen	Applying	
6/25/07	0000000004D	Blake John	6/26/07	1:00 PM	Failed to Keep	Yes	No	D. Roberts	Applying	
6/23/07	0000000005E	Tan Lihn	6/26/07	2:45 PM	Failed to Keep	No	No	E. Sprool	Applying	
6/25/07	0000000006F	Porty Lon	6/26/07	3:30 PM	Failed to Keep	Yes	No	F. Wells	Applying	

Totals:

Total Failed To Keep Appointments **15**

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

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

The **Failed to Keep log** will have the same **search by functionality** as the **Application Log**. In addition, the originating appointment column has been added to the log.

Additional buttons

The following buttons will also allow Supervisors and Managers the ability to assign a case for further processing:

Assign Interview
Reschedule
Kept Appointment
Hold Rejection

Use of these buttons will remove the case from the Failed to Keep Log and place the case back on the Application Interview Log awaiting further action.

The **Assign Rejection** button will be utilized by FS Supervisors, FS Assistant Managers and FS Site Managers. Once clicked supervisors and managers can assign the case to a worker to proceed with the rejection process for cases that failed to keep the initial interview.

Refer Action window

Refer Action

Selected Case
Case Number: 00007433179E Case Name: Mercedes Raisa
Casehead CIN: Casehead Name:

Refer Case To

Title	Unit	Last Name	First Name	Phone
FS Eligibility Specialist	TES	Batov	Olga	7185104209
FS Eligibility Specialist		Giraldo	William	
FS Eligibility Specialist	FS	Hilton	Sandra	7185100581
FS Eligibility Specialist		Sirinivasan	Mamtha	7185100274
FS Assistant Site Manag	1	Breton	Jose	7185108589

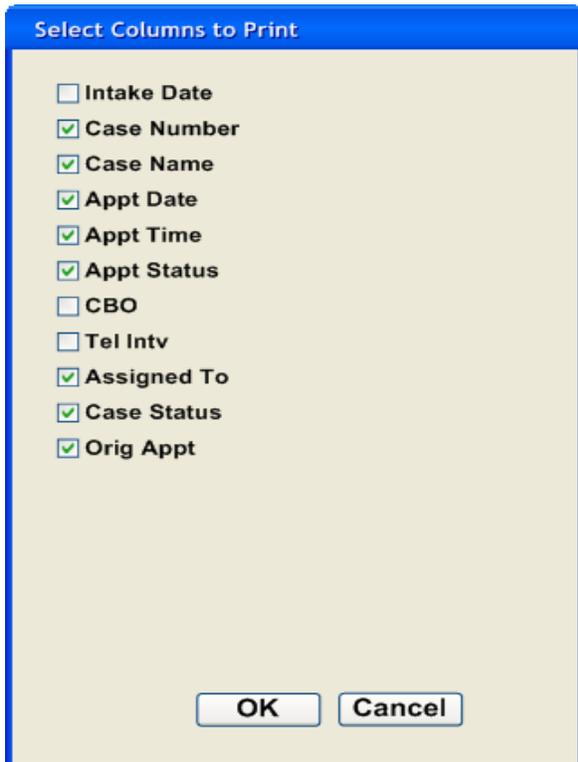
Enter comments, if Any

OK Cancel

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

New Window: Select Columns to Print



A new window will allow the worker to decide which columns should be printed. This window will appear when the Worker clicks the Print option in the menu at the top of the log.

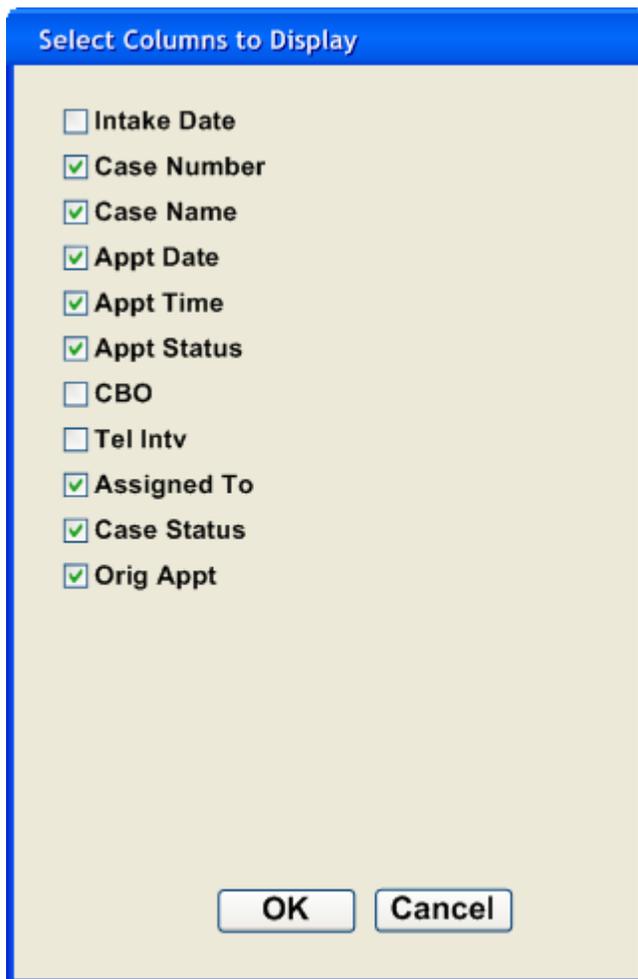
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row should appear on one page.

Once the Worker clicks OK, the print job will be sent to the printer. If the worker clicks cancel, POS will return to the Log.

FS POS Release Notes: Appendix B

Version 3.2.1, August 31, 2009

New window: Select Columns to Display



The new window will allow the Worker to decide which columns should be displayed from the Failed to Keep Application Interview Log. This window will appear when the Worker clicks the Display option in the menu at the top of the log.

The Case Number and Appt Date checkboxes will be pre-selected.

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

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Failed to Keep FS Application Interview Activity

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

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

Assign Rejection button in Failed to Keep Application Interview Log



Starting the activity in the queue

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

Queue in Activities Management window

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

File Edit Tools Window Help

FS Assistant Site Manager Queue

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

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

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

Activity Status Filter: Suspended, Not Scheduled, Not Started

Activity Alert Filter: Coming Due, Overdue

Filter Clear

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

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

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Activity flow

The following windows appear in the activity:

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

Household Screen

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

File Edit Tools Window Help

No messages from WMS via OLTP

Control Information

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

Present Address

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

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

Suffix Information Active Applying

FS Suffix FS Status AP FS # AC 0

Suff Case Name

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

Case Member Information

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

Next Previous

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Address Information window

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

File Edit Tools Window Help

Present Address

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

Mailing Address

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

Authorized Representative

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

Other Phone

Contact Person: Phone: - -

Next Previous

Individual Detail window

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

File Edit Tools Window Help

Case No: 00010002678A

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

1 T RX237885 Kelly B Miller Identity

SSN Valid Sex Relation

Date SSN Card Applied For Marital Status

00/00/0000

Ethnic/Race Affiliation

Hispanic/Latino Yes No

Native American/Alaska Native Yes No

Asian Yes No

Black or African American Yes No

Native Hawaiian/Pacific Islander Yes No

White Yes No

DOB Mother's: First Name Middle Maiden Name

12/12/1970

Father's: First Name Middle Last Name

US Citizen/National Immigrant Type Immigrant No Date of Entry

Yes No 00/00/0000

Qualified Immigrant Type and Description

Residency

Student ID

Status PA NA MA NA FS AP Other Names

Next Previous

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

CIN Re-Use window

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

File Edit Tools Window Help

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

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

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

The selected CIN match is indicated by the arrow.

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

Next Previous

Case Number Re-Use window

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

File Edit Tools Window Help

Case Number: Case Suffix:

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

POSSIBLE MATCHES

Next Previous

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

TAD window

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

File Edit Tools Window Help

WMS Data POS Data

Food Stamp Tad Window

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

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

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

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

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

Next Previous Ignore Errors Show Individual Data Run Rules

Worker Entry in TAD

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

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

WMS Plug in Tool Bar



FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Form Data Entry window

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

Spanish Next Previous

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

Close window

Close

Closing Window : **Household Screen**

Current Activity : **FS Application Interview**

Complete Activity **Suspend Activity**

Cancel

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

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Approval Flow

The following windows appear in the activity:

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

Print Forms

The screenshot shows a software window titled "FS POS 1.3 - [Print Forms]" with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main area contains a table with the following data:

Form No	Form Description	Copies	Forms
DSS3151	Food Stamp Change Report Form		e-form
DSS3152	Action Taken on Your Food Stamp Case		
DSS3574	Food Stamps Single Issuance		
DSS3938	Food Stamp Application Expedited Processing Summary Sheet		e-form
DSS4753	Food Stamps - Request for Contact/Missed Interview		e-form
EBT_23	Notice of Special Benefit		e-form
EXP76R	Documentation Receipt		
M3G	Notice to Report to Center		e-form
M3MM	Notification of Application Withdrawal (Cash Assistance, Food Stamps and Medical Assistance)		e-form
M40K	Notice of Denial of Expedited Food Stamp Processing or Inability to Issue Food Stamp Benefits		e-form
M42G	Referral for a Medicaid Eligibility Determination		e-form
SS5	Social Security Card Application		
W102	Notification to Participant of New Worker		e-form
W113K	Documentation Requirements		e-form
W119	Request for Contact on Mailed or Faxed Application		e-form
W119D	Eligibility Factors and Suggested Documentation Guide		
W129RR	Notice of Food Stamp Recertification Appointment		e-form
W133D	Social Security Number Verification		

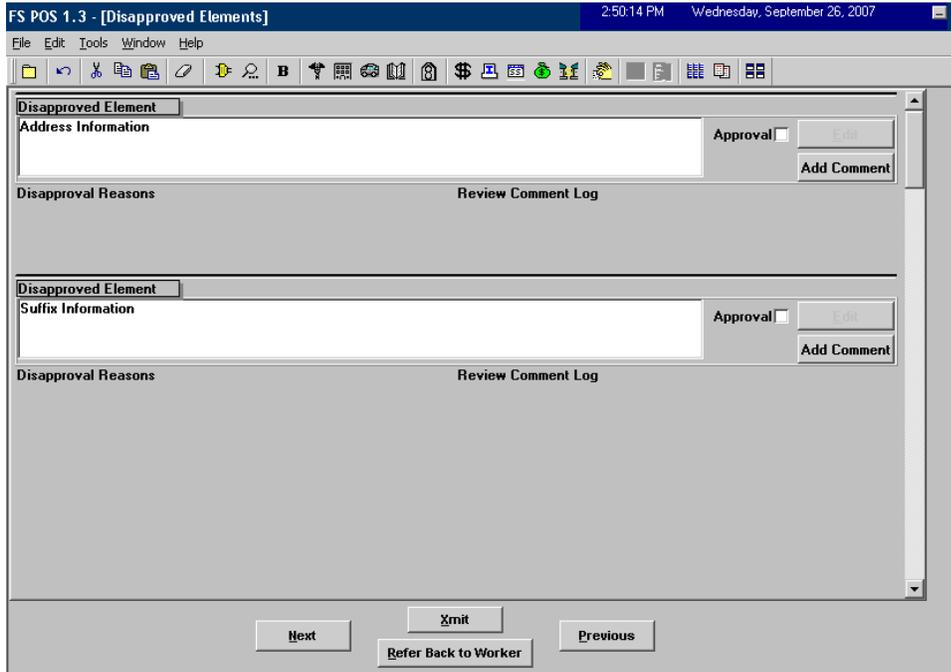
At the bottom of the window, there are three buttons: "Next", "Print", and "Previous".

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

FS POS Release Notes: Appendix C

Version 3.2.1, August 31, 2009

Approval Elements



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

FS POS Release Notes: Appendix D

Version 3.2.1 August 31, 2009

Overview

The following changes were made in a prior version the **Food Stamp** menu in the **Food Stamps /MONIQ** window and the **Referral** window in the FS Logs to allow the Food Stamp Regional Office (FRO) to access the Home Center Intake activities and lists:

- The FS Reception menu includes the “New Intake” and “Intake List” options for all Home Centers citywide.
- A new **Center** field was added in the **Referral window** to allow authorized FRO supervisors and managers to re-assign case actions to a Home Center queue to a Change queue and from a Change Center queue to a Home Center queue if the applicant/participant changes their choice of interview type. The **Referral** window appears when the supervisor or manager clicks on a case row and click on the **Assign** button.

Access instructions

The FRO staff has access to the following menu options for all Home Centers:

- **Intake List**
- **New Intake**
- **Application Log**
- **Recertification Log**



FS POS Release Notes: Appendix D

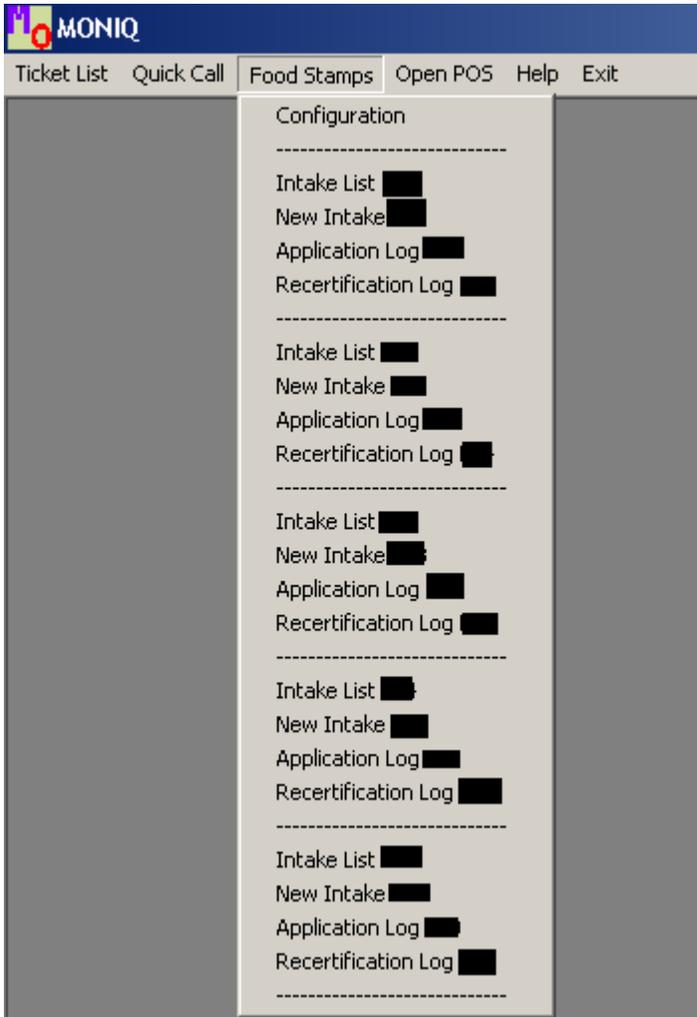
Version 3.2.1 August 31, 2009

Intakes by FRO staff working at a Model Center

When working from a Model Center computer, the FRO staff will also have access to view and process tickets according to the rights assigned to the computer from which they are working.

If the FRO staff person calls an **NCA Intake** ticket via the **Ticket List** or **Quick Call**, the activity will be processed under the Model Center's number.

If the FRO staff person selects the **New Intake** option under the **Food Stamps** menu, the activity will be processed under the center number for the selected option.



FS POS Release Notes: Appendix D

Version 3.2.1 August 31, 2009

Referral window

A new **Center** field was added in the **Referral window** to allow authorized FRO supervisors and managers to re-assign case actions to a Home Center queue to a Change queue and from a Change Center queue to a Home Center queue if the applicant/participant changes their choice of interview type.

The screenshot shows a software window titled "Referral Window". It contains several input fields and a table. At the bottom, there are "OK" and "Cancel" buttons.

Selected Case

Case Number	[Redacted]	Case Name	[Redacted]
Casehead CIN	[Redacted]	Casehead Name	[Redacted]

Center : [Redacted] ▼

Refer Case To

	Title	Unit	Last Name	First Name	Phone
▶	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Enter comments, if Any

[Large empty text area with scrollbars]

OK Cancel

FS POS Release Notes: Appendix D

Version 3.2.1 August 31, 2009

Re-assigning a case action from the Home Center to the Change Center

To re-assign a case action from a Home Center queue to the queue of a Change Center user, the FRO supervisor or manager must:

- Access the Home Center Application Interview Log or the Home Center Recertification Interview Log;
- Find and select the case action that will be re-assigned;
- Click on the Assign button;
- Select **the Change Center** in the **Center** menu on the **Available Workers** window.
- Select the Change Center user to whom the case action will be re-assigned and click OK.

FS POS Version 2.3.1
File Retrieve Print Filter Display Summary

Application Interview Log [Center Number: F40]

Search By:

Appointment Date Case Number

Selected Date
07/16/2009

Date Range
From: To:

Last Name of Casehead or Payee

Application Type Filter

Working Families
 In-Center
 CBO
 Telephone
 Exclude dummy case numbers
 Original Appointment Date

Appointment Status Filter

Kept Appointment
 Failed to Keep Appointment
 None

Intake Date	Case No	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number
[Redacted]								

Assign Reschedule Contact Kept Appointment Failed to Keep Appointment Process Failed to Keep Transaction Exit

Referral Window

Selected Case

Case Number: [Redacted] Case Name: [Redacted]

Casehead CIN: [Redacted] Casehead Name: [Redacted]

Center: [Redacted]

Refer Case To

Title	Unit	Last Name	First Name	Phone
[Redacted]				

Enter comments, if Any

[Redacted]

OK Cancel

FS POS Release Notes: Appendix D

Version 3.2.1 August 31, 2009

Note: Cases cannot be re-assigned using the logs once the interview is started. To re-assign a case after the interview start date, please use the FRO User Queue.

Re-assigning a case action from the Change Center to the Home Center

To re-assign a case action from a Change Center queue to the queue of a Home Center user, the FRO supervisor or manager must:

- Access the Home Center Log;
- Find and select the case action that will be re-assigned;
- Click on the Assign button;
- Select **the Home Center** in the **Center** menu on the **Available Workers** window.
- Select the Home Center user to whom the case action will be re-assigned and click OK.

FS POS Version 2.3.1
File Retrieve Print Filter Display Summary

Application Interview Log [Center Number: F40]

Search By:

Appointment Date Case Number

Selected Date Last Name of Casehead or Payee

07/16/2009

From: To:

Application Type Filter:

Working Families
 In-Center
 CBO
 Telephone
 Exclude dummy case numbers
 Original Appointment Date

Appointment Status Filter:

Kept Appointment
 Failed to Keep Appointment
 None

Intake Date	Case No	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Contact Number
[Redacted Table Content]								

Assign Reschedule Contact Kept Appointment Failed to Keep Appointment Process Failed to Keep Transaction Exit

Referral Window

Selected Case

Case Number: [Redacted] Case Name: [Redacted]

Casehead CIN: [Redacted] Casehead Name: [Redacted]

Center: [Redacted]

Refer Case To

Title	Unit	Last Name	First Name	Phone
[Redacted Row]				

Enter comments, if Any

OK Cancel

Note: Cases cannot be re-assigned using the logs once the interview is started. To re-assign a case after the interview start date, please use FRO User Queue.

FS POS Release Notes: Appendix E

Version 3.2.1 August 31, 2009

Re-Opening a Case Using Change Case Data and Recertification Interview

FS POS allows Eligibility Specialists to process a case re-opening through the **FS Change Case Data** and **FS Recertification Interview** activities.

Case Re-Opening in FS Change Case Data

FS POS allows Eligibility Specialists to process a non-recertification related case re-opening through the **FS Change Case Data** activity.

A checkbox named “Re-Open the FS Case (Closing is not related to recertification)” is currently in the **Changes to FS Case** window. When this checkbox is selected, the re-opening flow will be implemented.

Changes to FS Case window

The screenshot shows a software window titled "Instructions" with a menu bar (File, Edit, Tools, Window, Help) and a toolbar. The main content area contains the following text:

Instructions
This activity will allow you to indicate what changes must be made to the active case. First, select the source of the changes. Then, select the changes that are needed on the case by clicking on the appropriate checkbox(es) below. You may click on as many changes as necessary. Then, click the Next button. The windows needed to make the changes will appear according to the selected checkbox(es).

Please select the changes needed below: Source of Change(s):

Household Composition:

- Add a Person to the Case
- Remove a Person from the Case

Changes:

- Address, Telephone Number and/or Authorized Representative
- Landlord Information
- Rent, Mortgage, Shelter or Utility Expenses
- Demographics, Citizenship or Alien Status
- Income
- Resources
- Close the Case
- Re-Open the Case (Closing is not related to recertification)

Benefits and Forms:

- Issue Skipped Assistance or Other FS Benefits
- Prepare Forms

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

FS POS Release Notes: Appendix E

Version 3.2.1 August 31, 2009

POS displays the new **Re-Open the FS Case** window when the ES clicks the Next button in the **Changes to FS Case** window. This window allows the ES to update the case status, select the status reason and record the contact date.

Re-Open the FS Case window

File Edit Tools Window Help

Instructions

This FS case is currently closed in WMS. To re-open the case, please select the new case status, the status reason, enter the contact date and click the Next button to continue.

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

Next Previous

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

Individual Status Change window

File Edit Tools Window Help

Instructions

Select the line(s) that must be re-opened or accepted, select the new POS TAD status(es), the new POS TAD status reason(s) and enter the new effective date(s).

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

Next Previous

FS POS Release Notes: Appendix E

Version 3.2.1 August 31, 2009

1. Case Re-Opening in FS Recertification Interview

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

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

Re-Open the FS Case window

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

Instructions

This FS case is currently closed in WMS. To re-open the case, please select the new case status, the status reason, enter the contact date and click the Next button to continue.

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

Next Previous

Individual Status Change window

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

Instructions

Select the line(s) that must be re-opened or accepted, select the new POS TAD status(es), the new POS TAD status reason(s) and enter the new effective date(s).

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

Next Previous

FS POS Release Notes: Appendix F

Version 3.2.1 August 31, 2009

Overview

Finger-imaging (AFIS) is mandatory for certain individuals. This desk guide covers the steps that must be completed to generate the W-519 (Finger Imaging Notice) form for Food Stamp (FS) cases in single issue (SI) or active (AC) status.

Printing the W-519

To print the W-519 form for a FS case in single issue (SI) or active (AC), follow the steps listed below:

- Access the **Application Referrals** Activity from the Action Menu

- The CIN Re-use window will appear. Go past the CIN Re-use Window and access Finger Imaging Referral Window.

FS POS Release Notes: Appendix F

Version 3.2.1 August 31, 2009

Printing the W-519 (continued)

- For individuals who need to be finger-imaged, select “Agrees to be Finger Imaged”.

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

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

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

Telephone Interview

The applicant is not present at the interview

I agree to be finger imaged.

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

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

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

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

Perez Maga

Done Print Previous

- For individuals who do not need to be finger-imaged, select “Not present at Interview”.

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

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

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

Telephone Interview

The applicant is not present at the interview

I agree to be finger imaged.

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

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

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

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

Torez Frank

Done Print Previous

FS POS Release Notes: Appendix F

Version 3.2.1 August 31, 2009

Printing the W-519 (continued)

- Capture signatures of those marked as “Agrees to be Finger-Imaged”.
- Click Next to save each signed form:
 - If there are additional individuals who have agreed to be finger-imaged, a new signature window will appear.
 - Once all required signatures are captured, the Finger Imaging Referral window will appear again.

The screenshot shows a software window titled "Signature - Form Number: W519". The window has a menu bar with "File", "Edit", "Tools", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main content area contains "Instructions" and a "Signature" field. The "Instructions" section reads: "Retrieve the form from the printer and place the page on the signature pad. Click on the **Sign** button. The signature capture window will appear. Ask the client to sign and click on the **Accept** button to save the signature. Click on the **Next** button to continue. The signed form will be saved in the electronic case record." Below this, a note states: "If the signature pad is not working, please check the 'Unable to Capture Signatures' checkbox and select 'Signature pad is not working' in the pop-up window and click on the **OK** button. The POS signature capture fields will be disabled. You must print the form by clicking on the **Print** button. The printed form will not be saved in the electronic case record. Give the printed form to the client to sign. After the client signs the form, scan and index it into POS." The "Signature" field contains the text "Maga Perez". To the right of the signature field is a button labeled "<< Sign". Below the signature field is a checkbox labeled "Unable to Capture Signatures". At the bottom of the window are three buttons: "Next", "Re-Print", and "Previous".

- End the activity by clicking “Done”.