



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #10-67-SYS

FS POS RELEASE NOTES VERSION 4.2

Date: June 29, 2010	Subtopic(s): FS POS
<p> This procedure can now be accessed on the FIAweb.</p> <p> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Non Cash Assistance Food Stamp (NCA FS) Center staff that the latest version of the Paperless Office System (POS) migrated to production on June 21, 2010. Descriptions of the changes can be found in FS POS Release Notes Version 4.2 (Attachment A), Desk Guide – Introduction to POS Portal: Appendix A (Attachment B), FS Online Electronic Application: Appendix B (Attachment C), User Guide for Deferral Log: Appendix C (Attachment D), and FS POS Release Notes: Appendix D (Attachment E) and Appendix E (Attachment F).</p> <p>These release notes can also be found on the HRA Intranet at: http://hrawebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective Immediately</i></p> <p>Attachments:</p> <p>Attachment A FS POS Release Notes Version 4.2. Attachment B Desk Guide – Introduction to POS Portal: Appendix A Attachment C FS Online Electronic Application (“E-App”) Appendix B Attachment D User Guide for Deferral Log for NCA FS Centers: Appendix C Attachment E FS POS Release Notes: Appendix D Attachment F FS POS Release Notes: Appendix E</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

FS POS Release Notes

Version 4.2 June 21, 2010

These Release Notes contain descriptions of changes in FS POS Release 4.2 scheduled for June 21, 2010. 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

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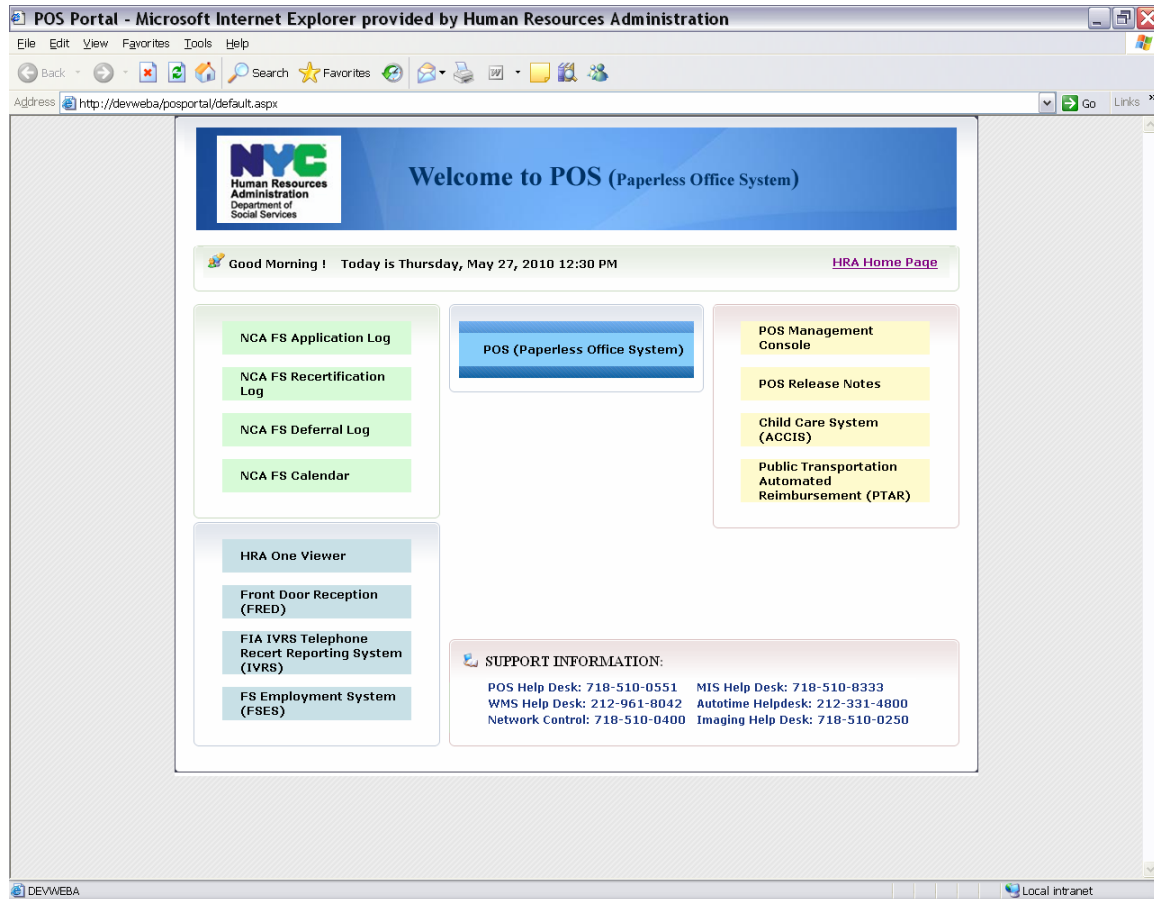
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FS POS Release Notes

Version 4.2 June 21, 2010

1. New FS POS Web Portal

A new **FS POS Web Portal** allows staff to easily access the FS POS sign-on, FS POS web-based tools, Front Door Reception (FRED), other related systems and system documentation.



For additional details, please see the **Appendix A for the FS POS Web Portal**.

2. Online Food Stamp Applications (E-App)

Beginning June 21, 2010, New York City (NYC) residents are able to submit online applications for Food Stamp (FS) Benefits through the ACCESS NYC website at <http://www.nyc.gov/accessnyc>

These applications will be electronically submitted to the Human Resources Administration (HRA) for processing at the Mail Application Referral Unit (MARU).

A new activity is available in FS POS for MARU staff, allowing them to process these applications: **Online Food Stamp Application (E-App) Intake**. For additional details, please see the **Appendix B FS E-App**.

FS POS Release Notes

Version 4.2 June 21, 2010

3. Web-Based FS Deferral Log

The web-based **Deferral Log** allows FS centers to close cases in Single Issue (**SI**) status that were deferred for documentation and failed to return the required documents. The log has the following functionality:

1. Displays all cases in **SI** status for a selected timeframe.
2. Displays all cases closed using closing code **Y29** (Failure to Provide Verification-Expedited FS [Notice]) from the FS SI Deferral Log for a selected timeframe.
3. Allows a Supervisor or CA III to route a case to an Eligibility Specialist and updates all appropriate FS POS queues and tables automatically.
4. Generates a transaction to WMS that includes FS closing code **Y29** when the case has been closed for failure to return with documentation.
5. Allows the user to search by file date, case number or case name.
6. Allows the user to select the columns to display and print.
7. Displays and print filtered output based on the user's selection.
8. Show all case data for a single case row on the same printed page.
9. Allows Change Center staff to access the Log for multiple centers.
10. The user's WMS login information is used to confirm access.
11. Applies security settings according to the user's POS title.
12. The closing activity will appear in the POS case activity history as **Y29**.

For additional details, please see the **Appendix C for the FS Deferral Log**.

4. Web-Based FS Application Log

The **FS Application Log** is available on the Intranet through the POS Portal. The log has been updated to add a filter to track applications submitted through the ACCESS NYC website ("E-Apps").

Appendix

For additional information regarding the functionality of the FS Application Log, please see the **Appendix D for the FS Application Log**.

5. Web-Based FS Recertification Log

The FS Recertification Log is available on the Intranet through the POS Portal. The Log has been updated with the following new functionality and features:

- Filter for CBO Recertification
- AFIS Report
- New edits for transferred cases

CBO Recertification Filter

A filter allows staff to view recertifications that were submitted through the community-based organization (CBO) project.

AFIS Report

A new report listing individuals that may require finger imaging will be displayed.

FS POS Release Notes

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New Edits for Transferred Cases

New edits have been added to prevent changes to cases that have been transferred to another center.

Appendix

For additional information regarding the functionality of the FS Recertification Log, please see the **Appendix E for the FS Recertification Log**.

6. Recertification Improvement Project at Community-Based Organizations (CBO)

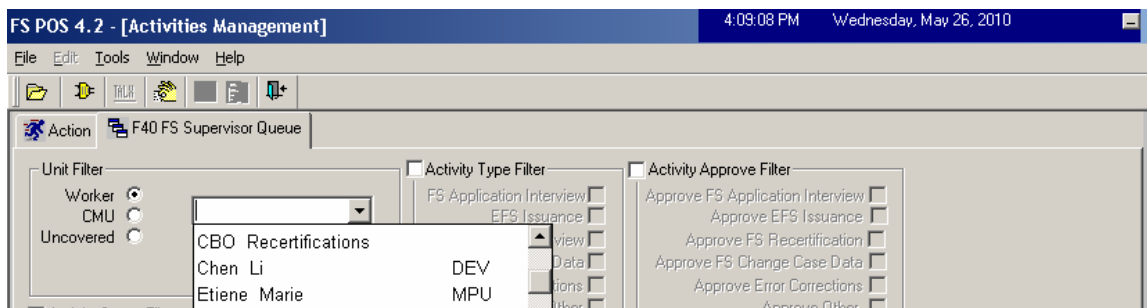
FS recipients will have an opportunity to complete their recertification at a Community Based organization (CBO). The completion of these questions at the CBO site will reduce the time it takes for HRA to complete the recertification and should help reduce the rate of recipients that fail to complete their interviews.

Updates to the FS Recertification Log

A new **CBO** filter and a new **CBO** column has been added in the **FS Recertification Log** window to allow the center staff to determine the recertifications that were completed at a CBO site.

CBO Recertification Queue

The completed recertifications have been placed in the **CBO Recertification Queue** to allow the staff to continue the activity at the time of the telephone interview with the recipient or the authorized representative.



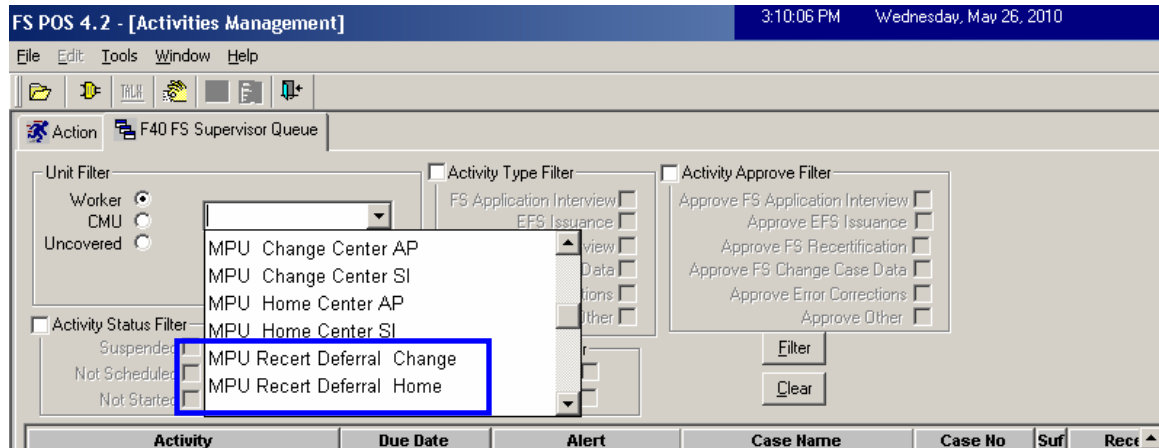
FS POS Release Notes

Version 4.2 June 21, 2010

7. Updates to MPU Queues for Deferred Recertifications

Cases deferred during the FS Recertification activity are moved automatically to **Deferred Recert Queues**. This process occur three business days following the printing of the Document Requirements/ Assessment Follow-up Form (**W-113K**) if the FS Recertification is still pending.

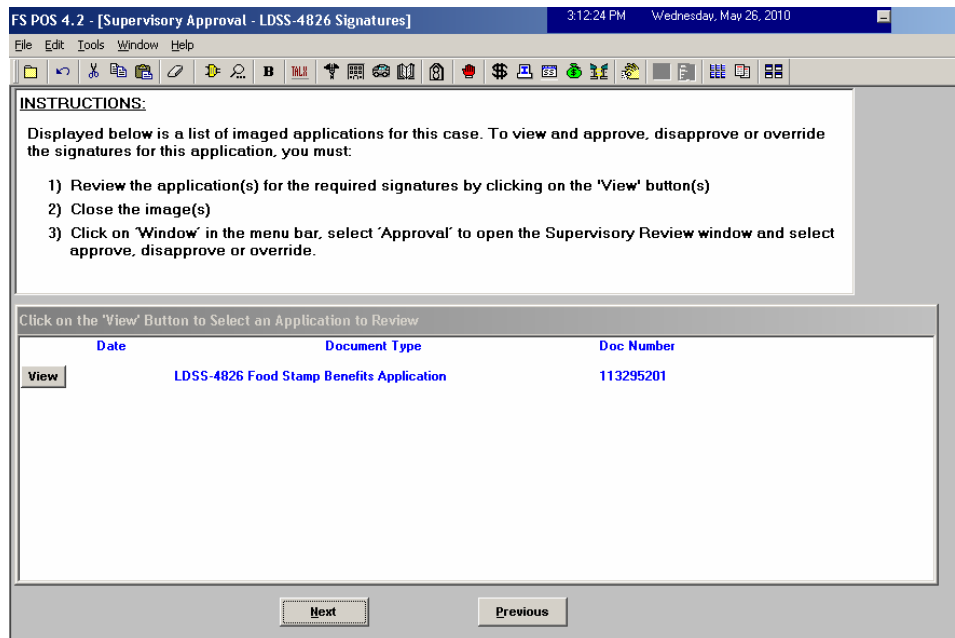
If the interview was completed by a home center worker, the case will be placed in the **MPU Recert Deferral Home** queue. If the interview was completed by a change center worker, the case will be placed in the **MPU Recert Deferral Change** queue.



8. Updates to LDSS-4826 Signatures Approval Window

The approval window for the **LDSS-4826 Signatures** will now retrieve the following forms if they are available in the HRA One Viewer:

- **W-120** (Food Stamp Benefits Application Signature) form
- **W-129B** (Food Stamp Benefits Application Attestation Signature) form

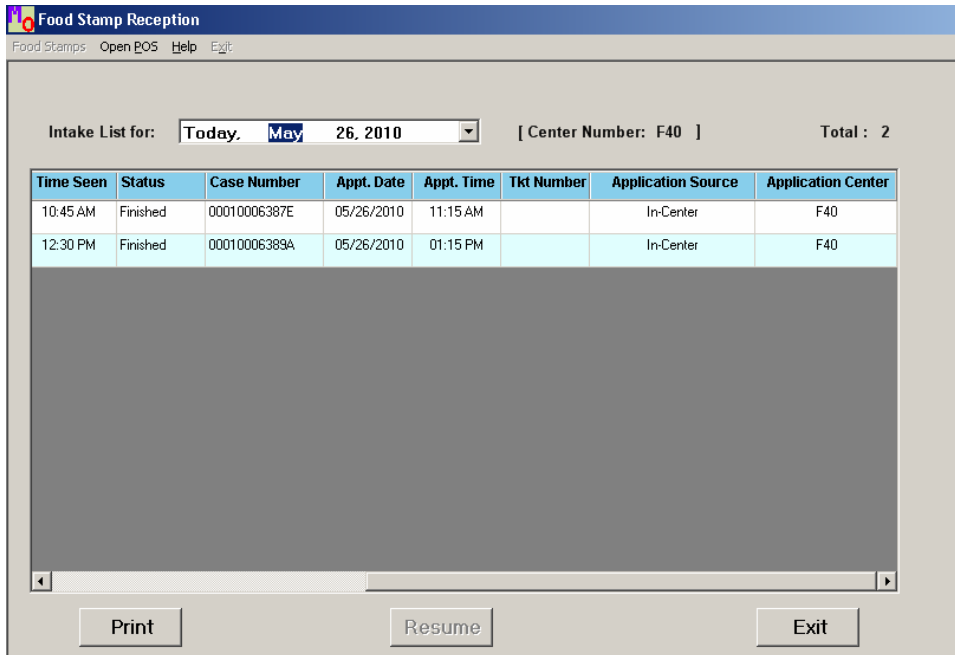


FS POS Release Notes

Version 4.2 June 21, 2010

9. Updates to FS Intake List

The **FS Intake List** has been updated to indicate the source of the application, including applications submitted through the ACCESS NYC website.



FS POS Release Notes

Version 4.2 June 21, 2010

10. AFIS Alert in FS Recertification Interview

A new alert for individuals who may need finger-imaging will appear in the **Household Screen** in the **FS Recertification Interview** activity.

The **Alert** window indicates which individuals should be reviewed for finger imaging and the following instructions:

“The following individual(s) have a temporary or missing AFIS indicator and must be reviewed for finger imaging.

If the individual is exempt, please update the AFIS indicator on the **FS TAD** window.

If finger imaging is required, please access the Application Referrals activity in the **Activity Description** menu to print the **W-519** referral form.”

AFIS Alert Window

The following individual(s) have a temporary or missing AFIS indicator and must be reviewed for finger imaging.

If the individual is exempt, please update the AFIS indicator on the FS TAD window.

If finger imaging is required, please access the Application Referrals activity in the Activity Description menu to print the W-519 referral form.

Case Number	Line	Cin Number	Client First Name	Client Last Name	Birth Date	Sex	Relationship Code	Ssi Ind	AFIS Ind
00000979601C	03	VQ66576G	ARIEL	RAMIREZ	06/11/1991	F	05		
00000979601C	05	TP96568A	JOSEFINA	MARCHENA	07/03/1924	F	19		

OK

11. Changes for WMS Release 2010.2

The following changes have been made to match the updates in the Welfare Management System (WMS) version 2010.1, which will be released on June 21, 2010:

New Income Source Code 76 (Youth Build)

A new Income Source Code **76** identifying income from Youth Build (a federal training and work program) for young people between the ages of 16 and 24 has been added to the **Other Income** window.

Youth Build income will be counted as earned income for Cash Assistance and as exempt income for FS cases. This code will be available for cases with budget effective dates of 05/A/10 or later.

FS POS Release Notes

Version 4.2 June 21, 2010

12. Addition of Deceased Status in FS Change Case Data

The **FS Change Case Data** activity has been updated to add the status of **DD (Deceased)** to allow the removal of dead individuals in the **Individual Status Change** window.

13. Changes to Other Income Window

The **Other Income** response window in the **Current Income** window has been updated to add new income types and update budgeting for in-kind income.

Other Income

Who	Income Type	Amount	Frequency	Start Date	Expected End Date
Johnson Mary	Rental Income		M	00/00/0000	00/00/0000
	School to Employment Program (STEP)				
	Severance pay - Lump Sum Payment				
	Severance pay (Not Lump Sum)				
	TEAP				
	Union Benefits (Including Strike Benefits)				
	Volunteer in Service to America (VISTA)				
	Work-Experience Non-Win			00/00/0000	

Income-in-kind will be treated as exempt income and will no longer carry over to the budget.

A new income type named "Youth Build" has been added as a result of changes in the WMS 2010.2 release. This income type will be treated as exempt income and will no longer carry over to the budget.

The following income types have been added for the FS Online Electronic Application ("E-App") project:

- Assistance from another state
- Money from another person
- Money from a charity
- Payments from an annuity
- Payments from property sold
- Sick disability

Assistance from another state, money from another person and money from a charity will be treated as exempt income and will not carry over to the budget.

Payments from an annuity will carry over to the budget under Income Source code **15** (Dividends, Interest or Periodic Receipts from Stocks, Bonds, Mortgages, Bank Accounts, Trust Funds, Annuities, Credit Unions, Estates, etc.).

Payments from property sold will carry over to the budget under Income Source code **99** (Other Unearned Income).

Sick disability will carry over to the budget under Income Source code **26** (Sick Pay [Individual Provided Insurance]).

FS POS Release Notes

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14. Self-Employment Window Update

The **Business Type** text box in the **Self-Employment** window has been converted into a drop-down menu with the following options:

- Accounting
- Cosmetic Sales
- Bait business
- Bakery
- Business Owner or Operator
- Carpentry or Construction
- Crafts
- Clamming
- Corporation
- Car repair or restoration
- Computer service
- Catering
- Contract work
- Cycle shop
- Electrician
- Farming
- Fishing
- Gambling
- Housekeeping
- Hunting
- Insurance Agent
- Junking
- Kennels
- Lawn care
- Logging
- Manufacturing
- Musician
- Odd jobs
- Other
- Painting
- Newspaper delivery
- Photography
- Plumbing
- Partnership
- Real estate agent
- Sawmill
- Selling blood
- Selling produce
- Sewing
- Tavern
- Truck driving
- Tattoo parlor
- Trapping
- Tax preparation

FS POS Release Notes

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Self-Employment Window

The 'Response to Question' dialog box contains the following fields and sections:

- Info from WRS:** Who (dropdown), Start Date (00/00/0000), Expected End Date (00/00/0000).
- Employee:** Company Name (Yes/No), Name, Gross Income (\$0), Frequency, Taxes Withheld (Yes/No), Day Paid.
- Employer:** Business Address, Business Type (Yes/No), Business Tel #, Hours Per Frequency, Expenses (Yes/No), Monthly Net Income Amount (\$0.00).
- Street:** Street address field.
- City:** City field.
- Zip:** Zip code field.
- Wage Year Quarter:** Wage, Year, Quarter fields.
- Document... Scan Comment...:** Fields for document name, a scan checkbox, and a comment field.

15. Update to FS TAD Window

A new field named **APP SRC** has been added to the **FS TAD** window. This field will have a value of **N** if the application was submitted online through the **ACCESS NYC** website or **E** if it was submitted online through the New York State **MyBenefits** website.

FS TAD Window

The screenshot shows the 'FS POS 4.2 - [ELIGIBILITY]' application window. The 'Food Stamp Tad Window' is active, displaying the following data:

Case Number	Suf	Center	Unit Worker	Rule Status	Proj.No	Acct.No	Reuse case No
00010006338H	T	Melrose Food Stamp C	FSPOS				

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

Case Name	Language	Language Read	Notice Language	FSINTW	LFLN	Homebound Ind
SINGLE EROL	English	English	English	F-Fact		Yes No

Category	Prg	Status	Status Reason	From Date	To Date
FS	FS	SINGLE ISSUE		00/00/0000	00/00/0000

Individual Name	Line#	CIN	Prg	Status	Deny ?	Status Reason	Date
Erol Single	1	PJ29574F	FS	SINGLE ISSUE			05/12/2010
Nola Fora	2	PJ29564K	FS	SINGLE ISSUE			05/12/2010

Buttons at the bottom: Next, Previous, Ignore Errors, Show Individual Data, Run Rules.

16. Saving Data for Individuals with the Same Name

When two individuals with the same name appear in a response window, the data occasionally saved under the wrong individual's name. The response windows have been updated to resolve this type of error.

FS POS Release Notes

Version 4.2 June 21, 2010

17. Model Office (MONIQ) Updates

The following configuration updates were made in the Model Office systems (FRED and MONIQ) in April and May 2010:

- The Special Assessment, HEAP and OEM queues at the Richmond Job Center (**099**) were disabled.
- The CA Info Verification queue was activated at every CA model center, including the Family Services Call Center satellites. Three NYCWAY appt codes are mapped to it: **10DC** (Active CC Provider Peg CALL-In), **10DR** (Active CC Provider Return Appt) and **10DT** (Active CC Provider Reschedule Appt).
- The Concourse Job Center (**045**) was closed. However, Management Console users will be able to generate Model Office Time Reports for a few weeks. The other MO reports won't be affected by the closure.
- The Concourse FS Center (**F45**) opened on April 26, 2010 as a Model Center.
- Effective May 3, 2010, the CA In-House queue was be activated at all Model CA centers.

18. E-Form

The **W-515X** (SAVE Referral) E-Form has been updated:

19. Reminder: Appendices

- Appendix A, FS POS Web Portal
- Appendix B, Electronic Application (E-APP)
- Appendix C, FS Deferral Log
- Appendix D, FS Application Log
- Appendix E, FS Recertification Log

FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Overview

The Web-Based POS Portal provides a centralized point of access to the Paperless Office System and several other applications regularly used by FIA Center staff. The user will have one central location to assist them in accessing, reviewing and processing cases. An icon has been placed on the desktop for access to the Web-Based POS Portal.

The POS Portal will allow access to the Paperless Office System, POS Management Console and the POS release notes. In addition; the POS portal will also provide access to the following Non-Cash Assistance Logs: Application Log, Recertification Log, Deferral Log and to the NCA FS calendars. The web-based Front Door Reception (FRED) application will also be included in the portal.

The POS Portal also provides access to other applications outside of the Paperless Office System. The following links are available to the user from the POS Portal Home Page:

- HRA Home Page
- HRA One Viewer
- FIA Telephone Recertification Reporting System (IVRS)
- Food Stamp Employment Tracking System (FSE)
- Automated Child Care Information System (ACCIS)
- Public Transportation Automated Reimbursement system (PTAR).

POS Portal Home Page Window

OS\Portal\Default.aspx

NYC
Human Resources
Administration
Department of
Social Services

Welcome to POS (Paperless Office System)

Good Morning ! Today is Friday, May 28, 2010 10:27 AM [HRA Home Page](#)

POS (Paperless Office System)

NCA FS Application Log

NCA FS Recertification Log

NCA FS Deferral Log

NCA FS Calendar

HRA One Viewer

Front Door Reception (FRED)

FIA IVRS Telephone Recert Reporting System (IVRS)

FS Employment System (FSES)

POS Management Console

POS Release Notes

Child Care System (ACCIS)

Public Transportation Automated Reimbursement (PTAR)

SUPPORT INFORMATION:

POS Help Desk: 718-510-0551 MIS Help Desk: 718-510-8333
WMS Help Desk: 212-961-8042 Autotime Helpdesk: 212-331-4800
Network Control: 718-510-0400 Imaging Help Desk: 718-510-0250

FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Definitions

NCA Food Stamp Application Log

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.

NYC Human Resources Administration
Department of Social Services

login NCA FS Application Log

Enter your WMS User ID and Password to login

User ID

Password

FS Sites Fordham Food Stamp Center (F44) ▼

LOGIN CLEAR

[POS Portal](#) [HRA Home](#) [Help](#)

If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov

NCA Food Stamp Recertification Log

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.

NYC Human Resources Administration
Department of Social Services

login NCA FS Recertification Log

Enter your WMS User ID and Password to login

User ID

Password

FS Sites Fordham Food Stamp Center (F44) ▼

LOGIN CLEAR

[POS Portal](#) [HRA Home](#) [Help](#)

If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov

FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Food Stamp Deferral Log

The deferral log will allow the closing of cases in Single Issue (**SI**) status that were deferred for documentation and failed to return with the requested documentation.

The screenshot shows the login interface for the NCA FS Deferral Log. At the top left is the NYC logo and the text "Human Resources Administration Department of Social Services". The main heading is "NCA FS Deferral Log". Below this, it says "Enter your WMS User ID and Password to login". There are three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "North Brooklyn Food Stamp Center (F26)"). Below the fields are "LOGIN" and "CLEAR" buttons. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, there is a note: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

NCA FS Calendar

The Non Cash Assistance Food Stamp (NCA FS) calendar gives FS Site Managers and Assistant Site Managers the ability to create and maintain application appointment slots for designated NCA and Continuing Based Organization (CBO) staff. In addition, FS Site Managers and Assistant Site Managers will have the ability to create new calendars as needed.

The screenshot shows the login interface for the NCA FS Calendar. At the top left is the NYC logo and the text "Human Resources Administration Department of Social Services". The main heading is "NCA FS Calendar". Below this, it says "Enter your WMS User ID and Password to login". There are three input fields: "User ID", "Password", and "FS Sites" (a dropdown menu currently showing "Fordham Food Stamp Center (F44)"). Below the fields are "LOGIN" and "CLEAR" buttons. At the bottom left are links for "POS Portal", "HRA Home", and "Help". At the bottom right, there is a note: "If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hra.nyc.gov".

FS POS Release Notes: Appendix A

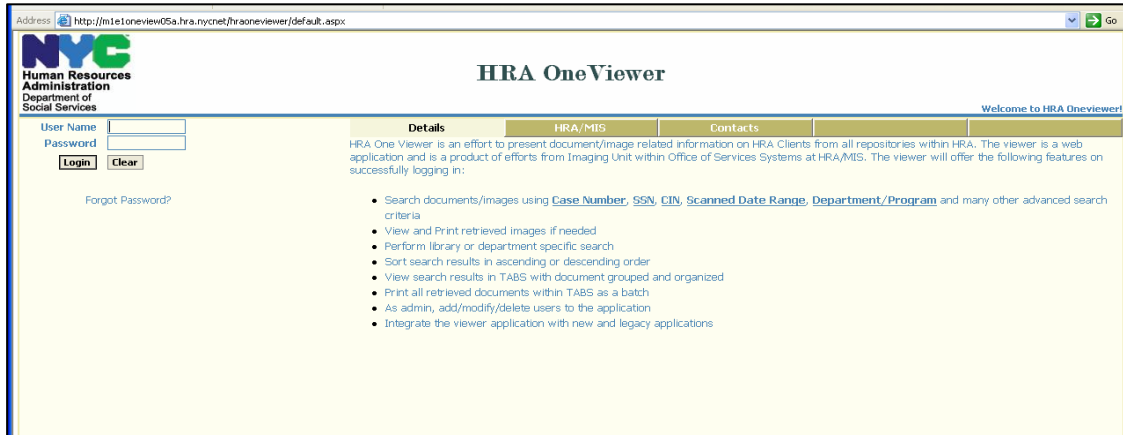
Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

The POS portal also provides external links to other HRA applications that assist the FIA managers and workers in maintaining, updating, processing and reviewing cases.

HRA One Viewer

Provides FIA staff with the ability to search and retrieve documents and document-related information.



Front-Door Reception (FRED)

Provides assistance to the receptionist at Job Centers/NCA Sites in routing applying individuals and those in receipt of benefits to the correct location within the offices.



FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Interactive Voice Response System (IVRS)

IVRS provides certain NCA FS households with the opportunity to recertify for benefits by use of an automated telephone response system.

The screenshot shows the login interface for the HRA Telephone Recert Reporting System. At the top left is the logo for the Human Resources Administration, City of New York. The title "HRA Telephone Recert Reporting System" is displayed in a blue banner. Below the banner are three blue buttons: "First time user and need a User ID and Password? Click here", "Already have a User ID and Password, please sign in below", and "Forgot your User ID or Password? Click here". The central login area contains two input fields labeled "User ID" and "Password", and a "Login" button. At the bottom, the copyright notice "© City of New York, HRA" is visible.

Food Stamp Employment system (FSE)

This system facilitates the management, enrollment and tracking of FS participants who are potentially required to participate in work activities.

The screenshot displays the login page for the Food Stamp Employment System (FSE). The header includes the NYC Human Resources Administration logo and the title "Food Stamp Employment System". Below the header, it states "Environment: TEST". A large blue "Log In" button is centered. Underneath, a blue banner reads "Already have a User ID and Password, please sign in below". The login form consists of two input fields labeled "User ID:" and "Password:", followed by an "Enter" button. At the bottom, there are links for "NYC.gov Home Page" and "Privacy Statement". A disclaimer paragraph is provided, and the version number "FSES v1.92" is shown at the very bottom.

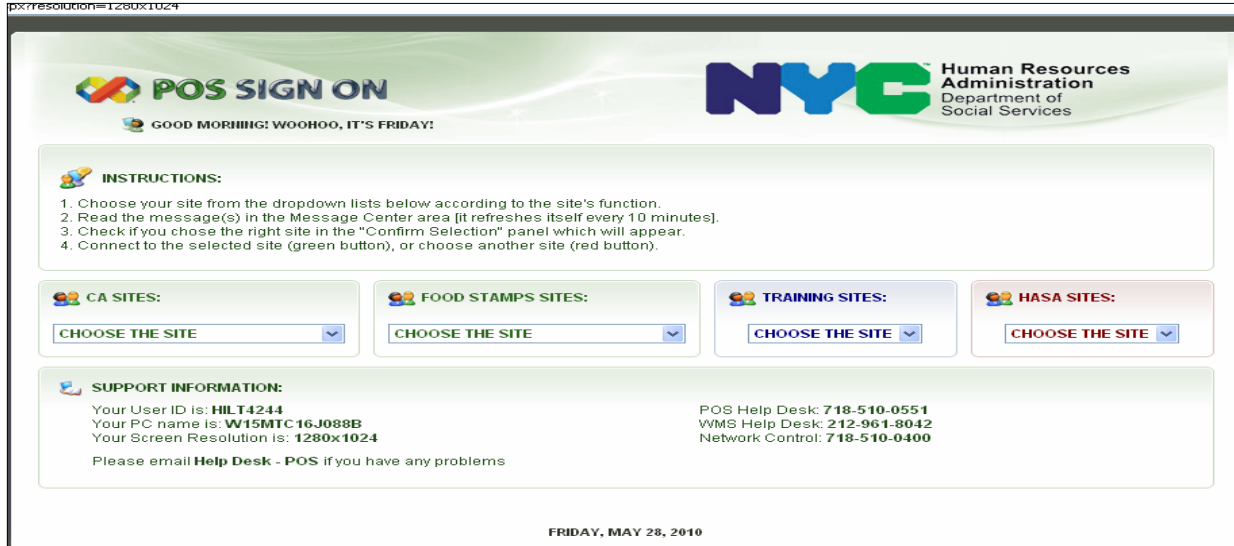
FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Paperless Office System (POS)

The Paperless Office System (POS) assists FIA staff in developing, processing and maintaining the NCA and Cash Assistance caseloads in an electronic case record.



Management Console

The management console houses reports designed to assist management and supervisory staff in their operational process.



FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

POS Release notes

Links to all published release notes located on the HRA Intranet.

Friday, May 28, 2010 - 10:55 AM

HOME | SITE ADMIN | SITE MAP | HELP | SEARCH

HRA Home > Help > HRA POS Release Notes

Commissioner

HELP TOPICS

PC Introduction -->
FAQ's -->
Contact Information -->
Forms and Documents
Center Directions

Help -- Technical Support

POS Release Notes

Welcome to the POS Release Notes section of the HRA Help! On this page, you can find summary and detailed descriptions of POS enhancements. Please distribute these documents to all POS case managers and all other interested parties.

Date	Summary	Detail
February 2010	N/A	POS release 14.1-detail
February 2010	N/A	FS POS release 4.1-detail
January 2010	POS release 13.3.1-summary	POS release 13.3.1-detail
January 2010	FS POS release 3.3.1-summary	FS POS release 3.3.1-detail
October 2009	POS release 13.3-summary	POS release 13.3-detail
October 2009	FS POS release 3.3-summary	FS POS release 3.3-detail
August 2009	POS release 13.2.1-summary	POS release 13.2.1-detail
August 2009	FS POS release 3.2.1-summary	FS POS release 3.2.1-detail
June 2009	POS release 13.2-summary	POS release 13.2-detail
June 2009	FS POS release 3.2-summary	FS POS release 3.2-detail
May 2009	N/A	Model Office 5.0 Release
February 2009	N/A	POS release 13.1-detail
February 2009	N/A	FS POS release 3.1-detail

Done

start | Inbox - Microsoft Out... | FW: portal discussion... | Microsoft PowerPoint ... | POS Portal - Microsof... | HRA F

Automated Child Care Information System (ACCIS)

Provides an integrated child care payment system that contains information on all active participants.

PLEASE CLICK ON THE BUTTON BELOW TO CONNECT TO ACCIS

ACCIS

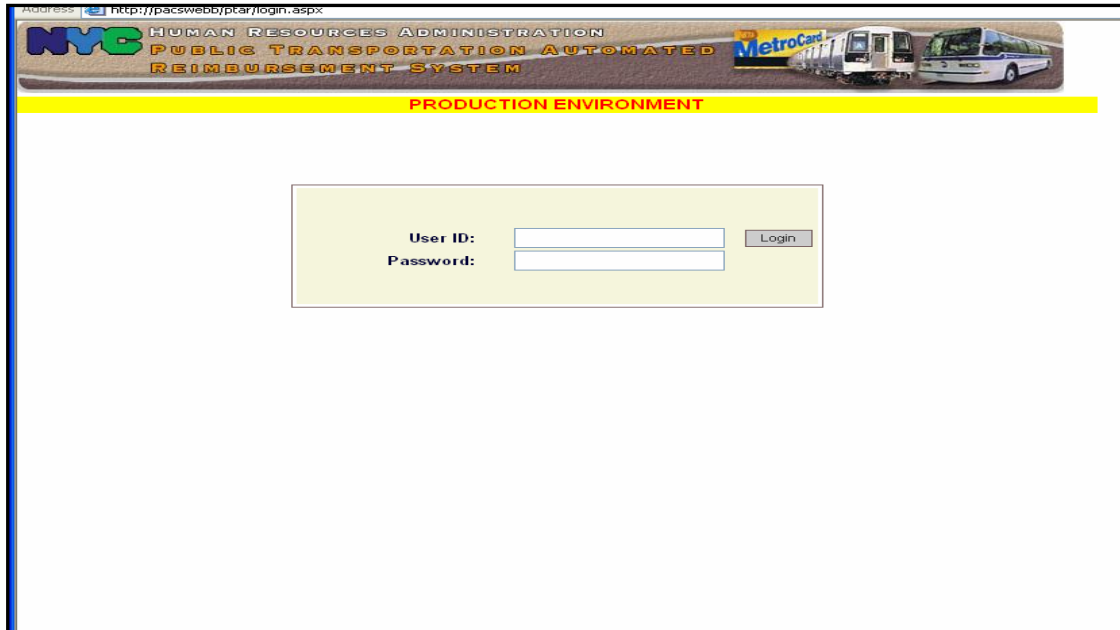
FS POS Release Notes: Appendix A

Desk Guide- Introduction to POS Portal

Version 14.2 June 21, 2010

Public Transportation Automated Reimbursement System (PTAR)

Metro card ordering system for FIA centers.



The POS Portal will provide direct links to all of the previous noted applications. The external applications outside of POS (HRA OneViewer, ACCIS, and IVRS etc.) will open in its own window allowing the Worker the ability to access and navigate the application fully.

All POS related applications will link back to the POS portal which saves time by providing access to all the featured applications. This portal will be updated to include access to other applications as they become available in the future.

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Overview: FS Online Electronic Application (“E-App”)

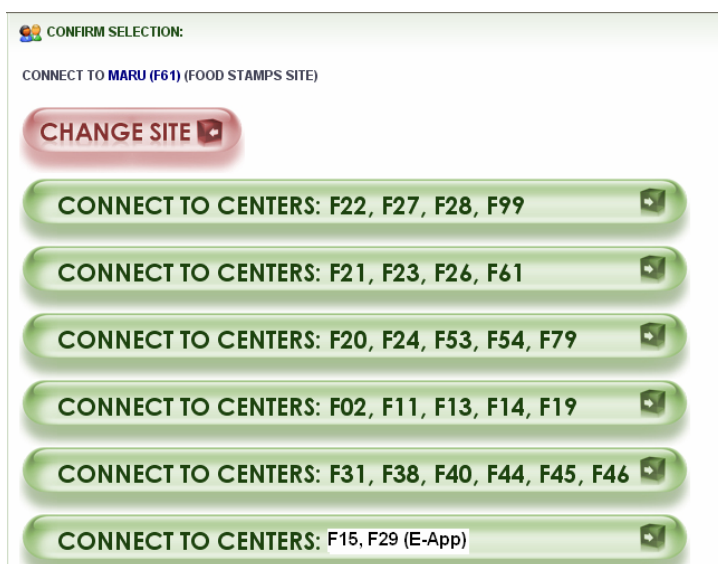
Beginning June 28, 2010, New York City (NYC) residents will be able to submit online applications for Food Stamp (FS) Benefits through the ACCESS NYC website at <http://www.nyc.gov/accessnyc>

These applications will be electronically submitted to the Human Resources Administration (HRA) for processing at the Mail Application Referral Unit (MARU).

A new activity will be available in FS POS for MARU staff, allowing them to process these applications:
Online Food Stamp Application (E-App) Intake.

Updates to Login Page for MARU

The **CONNECT TO CENTERS: F15** icon on the MARU login page will be updated to add an option of F29 (E-App).



Online Food Stamp E-Application (E-App) Intake Activity

The data entered by the applicant in the ACCESS NYC website will prefill the E-App Intake activity in the POS Central Office database.

The activity will be completed by the MARU staff and include the following windows:

- Adults
- Children
- Food Stamp Household Composition
- Address Information
- Additional Suffix Level Data
- Center Selection
- Working Families and Hardship Waiver
- Expedited Processing Determination
- Calendar
- Appointment Confirmation
- CIN Re-Use
- Case Number Re-Use
- AFIS Referral

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

MARU E-Apps Queue

MARU staff has access to a **MARU E-Apps** queue, where the submitted applications will be placed when they are received from ACCESS NYC.

Adults Window

This window contains information about the head of household and individuals age 18 or older.

FS POS Release Notes: Appendix B

FS Online Electronic Application ("E-App")

Version 4.2, June 28, 2010

Children Window

This window contains information about children younger than 18 years of age.

Food Stamp Household Composition

This window indicates whether the household members buy food or prepare meals with the casehead.

Suffix	First Name	Last Name	Mid	Relation	
1	[Redacted]	[Redacted]		Casehead	<input checked="" type="radio"/> Yes <input type="radio"/> No

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Address Information Window

This window contains address and telephone information.

Additional Suffix Level Data Window

This window contains information about the household’s language, need for interpreter services and Life Line program.

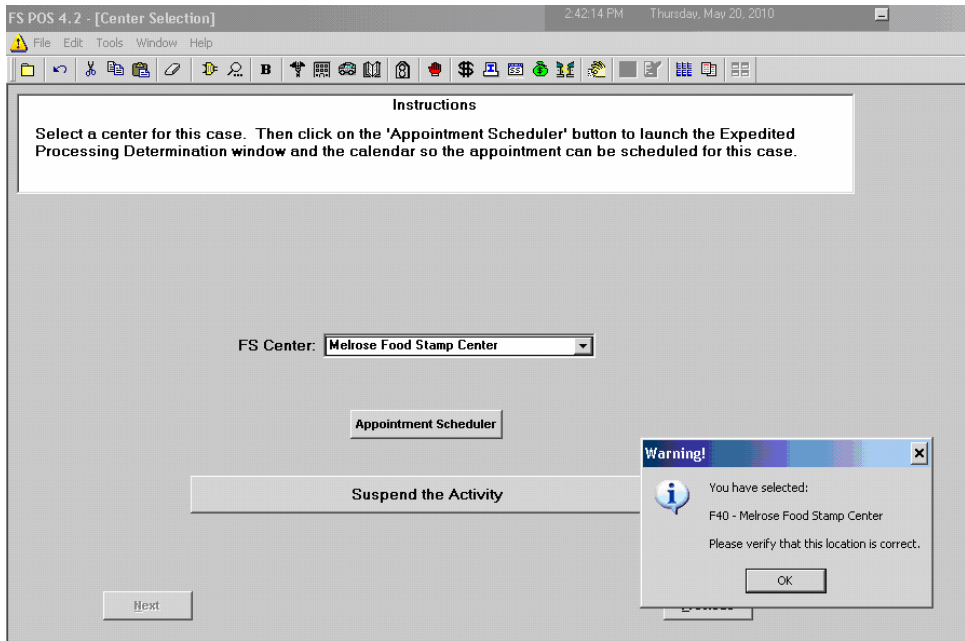
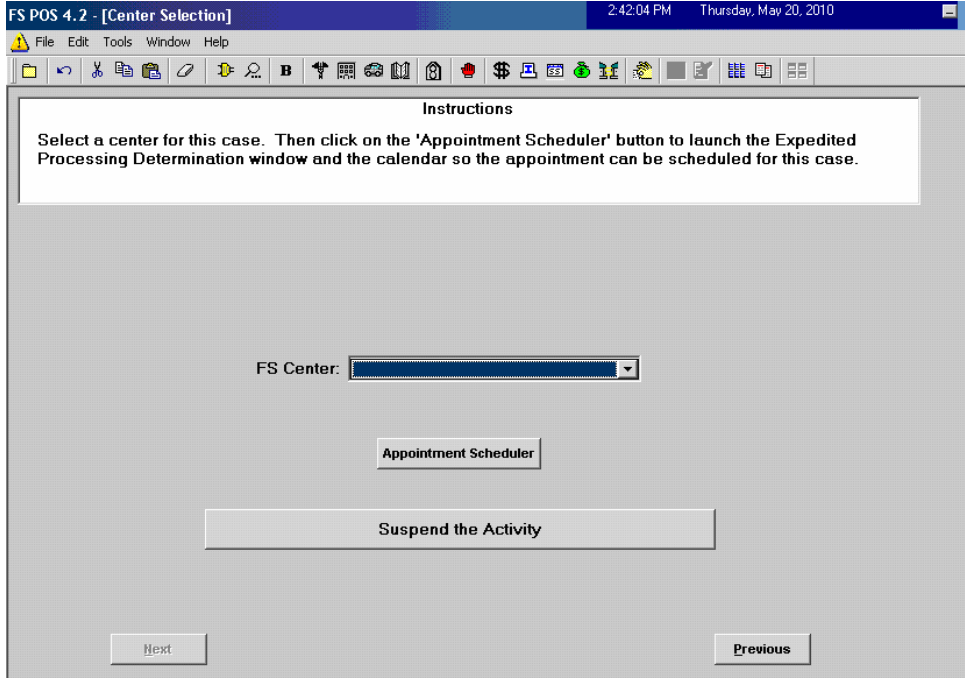
FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Center Selection

This window allows the Worker to select the Food Stamp center for the case. The **FS Center** field will be prefilled based on the zip code of the residential address.

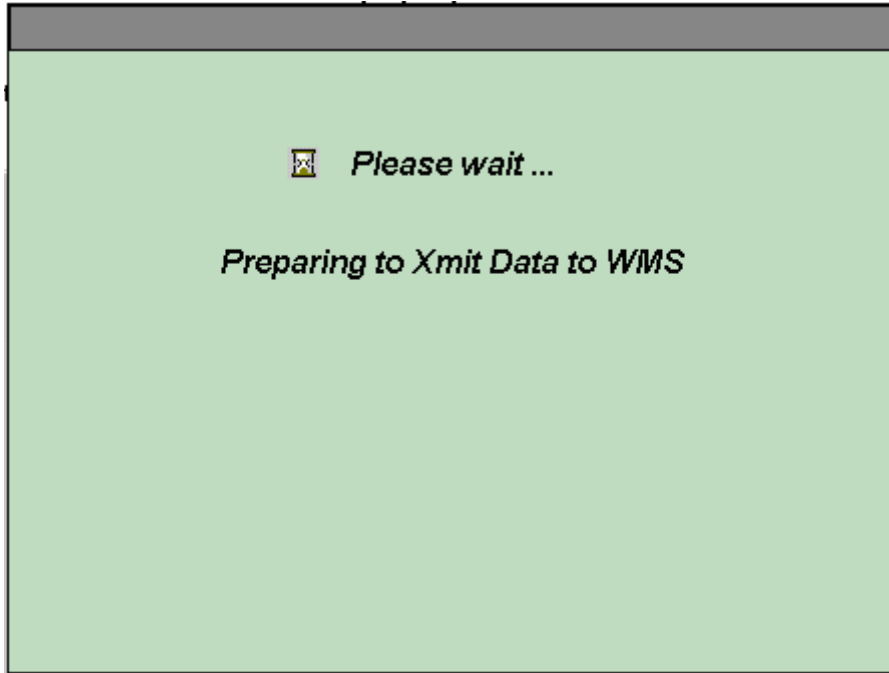


After the center is selected and confirmed, the Worker will click on the **Appointment Scheduler** button. The case will then be registered in WMS under the selected center.

FS POS Release Notes: Appendix B

FS Online Electronic Application ("E-App")

Version 4.2, June 28, 2010



Working Families and Hardship Waiver Window

The working families and hardship waiver information is prefilled with the information from ACCESS NYC.

Working Families and Hardship Waiver

Working Families and Food Stamp Initiative (WFFSI)

Is any **adult** (18 years of age or older) member of your household either working **30 or more** hours per week **or** earning **\$217.50 or more** per week? Yes No

Are any **two (2) adult** members of your household **each** either working **20 or more** hours per week **or** earning **\$145 or more** per week? Yes No

Does the household qualify for WFFSI?

Telephone Interview Selection

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

Hardship Waiver Reason:

Activity: EAP Source: TDEV Center: F40 LocId: 11 EformsServer: 10.253.32.129 CaseNumber: 00010006263H

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Expedited Processing Pre-Screening window

The expedited processing determination is automatically connected to WMS to determine whether the household already received Food Stamps benefits this month and will be prefilled with the information from ACCESS NYC.

If the expedited determination cannot be completed based on the information submitted for the application, the checkbox **Expedited Determination cannot be completed** will be selected.

When the Worker clicks the **Next** button on the window, the **LDSS-3938 NYC** (Food Stamp Application Expedited Processing Summary Sheet – NYC) will be saved to the **HRA One Viewer**.

Expedited Processing Pre-Screening

Expedited Determination cannot be completed

Household qualifies for expedited processing?

Is the household already receiving Food Stamp benefits this month?

Income for the household this month: \$

Liquid Resources for the household: \$

Shelter Type for the household:

Did the household enter a domestic violence shelter this month? Yes No

Rent/Mortgage expense for the household this month: \$

Does the household have a Heat/Air Conditioning expense separate from rent/mortgage this month? Yes No

Did the household receive, or does it anticipate receiving HEAP this year? Yes No

Does the household have a utility expense separate from rent/mortgage this month? Yes No

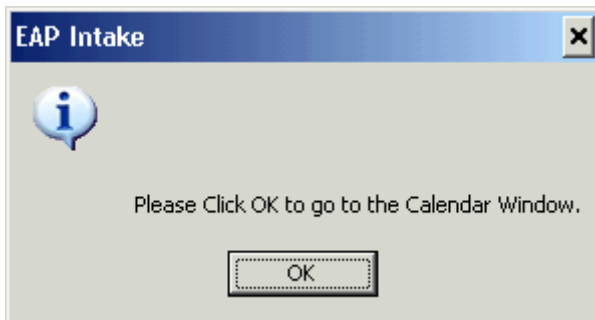
Does the household pay an additional cost for use of a washer and/or dryer in their home or apartment? Yes No

Is this a migrant/seasonal farm worker household? Yes No

Was the only income for this household terminated before this month? Yes No

Is the only income for this household new and will no more than \$25 gross income be received within ten days after application? Yes No

Activity: EAP Source: TDEV Center: F40 LocId: 11 EformsServer: 10.253.32.129 CaseNumber: 00010006263H



FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Interview Scheduling Window

The **Interview Scheduling** window allows the worker to schedule the interview. If the applicant indicated preferred interview times, they will be displayed at the bottom of the window.

Interview Scheduling

Select a Date and Time for the Interview Appointment: Schedule a Same Day Interview

Appt. Time	Thursday 05/20/2010	Friday 05/21/2010	Saturday 05/22/2010	Sunday 05/23/2010	Monday 05/24/2010
08:30 AM	10	10	0	0	10
09:30 AM	10	10	0	0	10
10:30 AM	10	10	0	0	10
11:30 AM	10	10	0	0	10
12:30 PM	10	10	0	0	10
01:30 PM	10	10	0	0	10
02:30 PM	10	10	0	0	10
03:30 PM	10	10	0	0	10
04:30 PM	10	10	0	0	10

Best Available Times
The applicant indicated that the best times to call for an interview are:

Not Found

Address: 540 - Source: TRV - Center: 540 - Link: 44 - Form: Form: 40-252-23-430 - Case Number: 00040002221

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Interview Appointment Confirmation Window

The **Interview Appointment Confirmation** window will allow the worker to save the appointment and print the appointment notice.

The Worker clicks on the **Schedule the Appointment** button.

The screenshot shows a web browser window titled "Interview Appointment Confirmation". The main content area displays the text "Interview Appointment Will Be Scheduled For:" followed by a white box containing "08:30 AM, on Monday 05/24/2010". Below this is a checked checkbox for "Telephone Interview:" and a "Contact Telephone Number:" field with three input boxes containing "212", "555", and "2121", followed by an "Extension:" field with an empty input box. A paragraph of text reads: "To confirm the appointment, click on the button labeled 'Schedule the Appointment'. The Food Stamp Interview Appointment Notice will be printed." Below the text is a button labeled "Schedule the Appointment". At the bottom left are two buttons labeled "Next" and "Previous". At the very bottom, there is a small line of text: "AppID: 540, Source: IDV, Center: 540, Link: 44, FormScreen: 403E23430, CaseNumber: 00040002320".

The screenshot shows a small dialog box titled "Appointment Confirmation" with a close button (X) in the top right corner. The text inside the dialog box reads: "Appointment saved to database. Please click OK to print Form W-129PP". At the bottom center of the dialog box is a button labeled "OK".

FS POS Release Notes: Appendix B

FS Online Electronic Application ("E-App")

Version 4.2, June 28, 2010

CIN Re-Use Window

The **CIN Re-Use** window runs the **Internal Clearance** and will allow the Worker to reuse the appropriate Client Identification Number (CIN) for each applying household member.

Case Number Re-Use Window

The **Case Number Re-Use** window allows the Worker to reuse the appropriate prior Food Stamp case number for the case.

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Finger Imaging – AFIS Window

The **Finger Imaging – AFIS** window allows the Worker to generate the **AFIS Freedom** electronic referral record by selecting the **Telephone Interview** checkbox and will complete the **E-App Intake** activity.

Finger Imaging Notice (Form W519)
 State regulations require all case members who are 18 years of age and older and minor heads of households applying for or seeking recertification of Cash Assistance and/or Food Stamps, including applicants for emergency assistance, to be finger-imaged.

An individual is exempt from this requirement if they fall into one of the following categories:

- Adult payees on "child only" cases (e.g. a grandparent who is applying for /receiving Cash Assistance on behalf of his/her grandchild unless Non Cash Assistance Food Stamp (NCA FS) household member).
- Individuals physically unable to comply with this requirement because of permanent injury or disability.
- Applicants/Participants under 18 years of age unless they are payees for their own cases or suffixes.
- SSI (F-15) or Residential Treatment (F61) cases.

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. I am applying/seeking recertification for Cash Assistance and/or Food Stamps and realize that, by not agreeing to be finger imaged, I will become ineligible and my case will be rejected or closed as appropriate.

I do **Not** agree to be finger-imaged. I am applying/seeking recertification for Food Stamp Benefits only and realize that, by not agreeing to be finger imaged, I and my entire Food Stamp Household will become ineligible and my case will be rejected or closed as appropriate.

Buttons: Done, Print, Previous

Updates to FS Intake List

The **FS Intake List** has been updated to indicate the source of the application, including applications submitted through the ACCESS NYC website.

Intake List for: Today, May 26, 2010 [Center Number: F40] Total : 2

Time Seen	Status	Case Number	Appt. Date	Appt. Time	Tkt Number	Application Source	Application Center
10:45 AM	Finished	00010006387E	05/26/2010	11:15 AM		In-Center	F40
12:30 PM	Finished	00010006389A	05/26/2010	01:15 PM		In-Center	F40

Buttons: Print, Resume, Exit

FS POS Release Notes: Appendix B

FS Online Electronic Application (“E-App”)

Version 4.2, June 28, 2010

Updates to the FS Application Log

A new **E-App** filter and a new **E-App** column has been added in the **FS Application Log** window to allow the center staff to determine the applications that were filed through the ACCESS NYC website.

FS POS Version 4.2
File Retrieve Print Filter Display Summary

Application Interview Log [Center Number: F40]

Search By

Appointment Date Case Number

Selected Date

05/26/2010

Date Range

From: To:

Last Name of Casehead or Payee

Application Type Filter

Working Families
 In-Center
 CBO E-App
 Telephone
 Expedited
 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	EApp	Contact Number

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

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**FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers
FOR TRAINING PURPOSES ONLY**

Deferral Log for NCA FS Centers

User Guide
Paperless Office System
June 2010

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**FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers
FOR TRAINING PURPOSES ONLY**

Overview

The web-based **Deferral Log** allows FS centers to close cases in SI status that were deferred for documentation and failed to return the required documents.

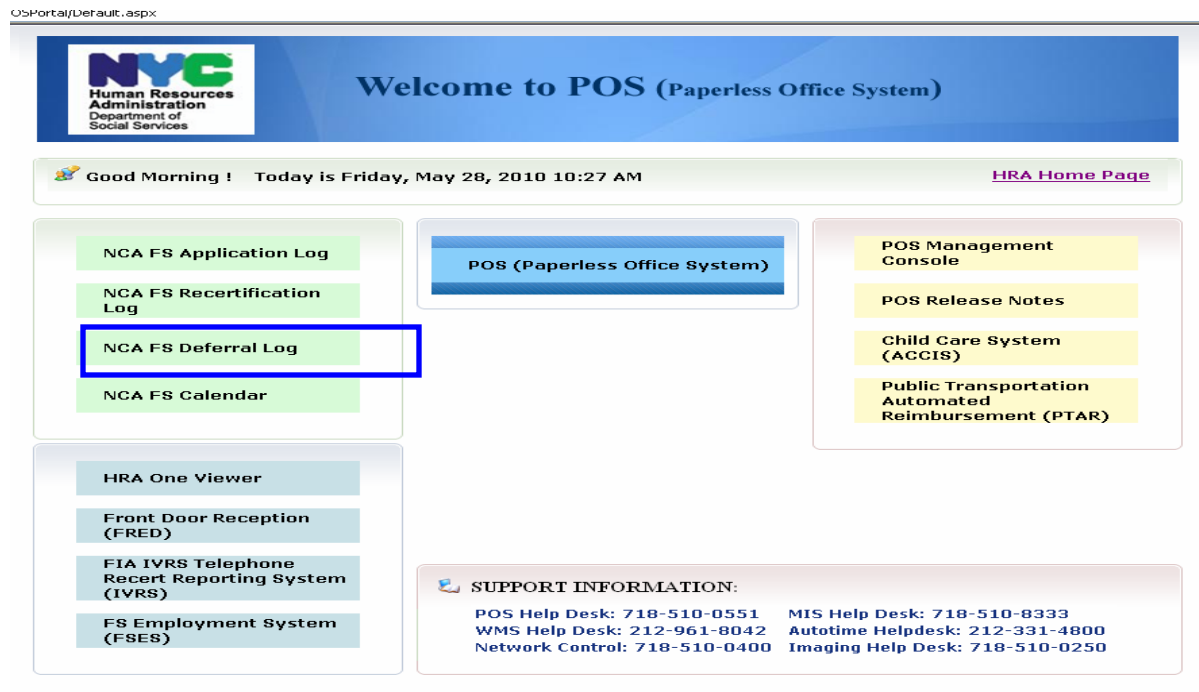
Business Details

The Deferral Log meets the following business needs and security requirements:

1. Displays all cases in single issue (“SI”) status for a selected timeframe.
2. Displays all cases closed using closing code Failure to Provide Verification-Expedited FS (No Notice) **Y29** from the FS SI Deferral Log for a selected timeframe.
3. Allows a Supervisor or CA III to route a case to an Eligibility Specialist and updates all appropriate FS POS queues and tables automatically.
4. Generates a transaction to WMS that includes FS closing code **Y29** when the case will be closed for failure to return with documentation.
5. Allows the user to search by file date, case number or case name.
6. Allows the user to select the columns to display and print.
7. Displays and print filtered output based on the user’s selection.
8. Show all case data for a single case row on the same printed page.
9. Allows Change Center staff to access the Log for multiple centers.
10. The user’s WMS login information is used to confirm access.
11. Applies security settings according to the user’s POS title.
12. The closing activity will appear in the POS case activity history as **Y29**.

New option on POS Portal

There is a link for the **NCA FS Deferral Log** on the POS Portal:



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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Access Control

After clicking on the **Deferral Log** link, staff will enter their WMS ID, password and center and click the **Login** button:

NYC Human Resources Administration
Department of Social Services

login NCA FS Deferral Log

Enter your WMS User ID and Password to login

User ID

Password

FS Sites North Brooklyn Food Stamp Center (F26)

LOGIN CLEAR

[POS Portal](#) [Help](#)

If you forget your password please contact Help desk: 718-510-0551 or send email to: Helpdesk-POS@hvr.nyc.gov

The **Deferral Log** is available for users in the following titles:

- Central Office Reviewer (57)
- FS Clerk (61)
- FS Eligibility Specialist (62)
- FS Supervisor (63)
- FS Assistant Site Manager (64)
- FS Site Manager (65)
- Deputy Regional Manager (67)
- Regional Manager (68)
- FS CA III (70)
- FS IT Member (99)

If a user with a disallowed title attempts to access, the following error message will appear:

“Your POS title is not authorized for usage of this tool. Please contact your enrollment coordinator if you should have access to this tool.”

The functionality is available to Home Center users for their own center. For example, if the user is enrolled at F40 and they attempt to access the Deferral Log for F40, they will be allowed to access. If the user from F40 attempts to access the Deferral Log for F46 and they are enrolled at F46, they will receive the following error message:

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

“Your user ID is not enrolled for the selected center. Please contact your enrollment coordinator if you should have access to this center.”

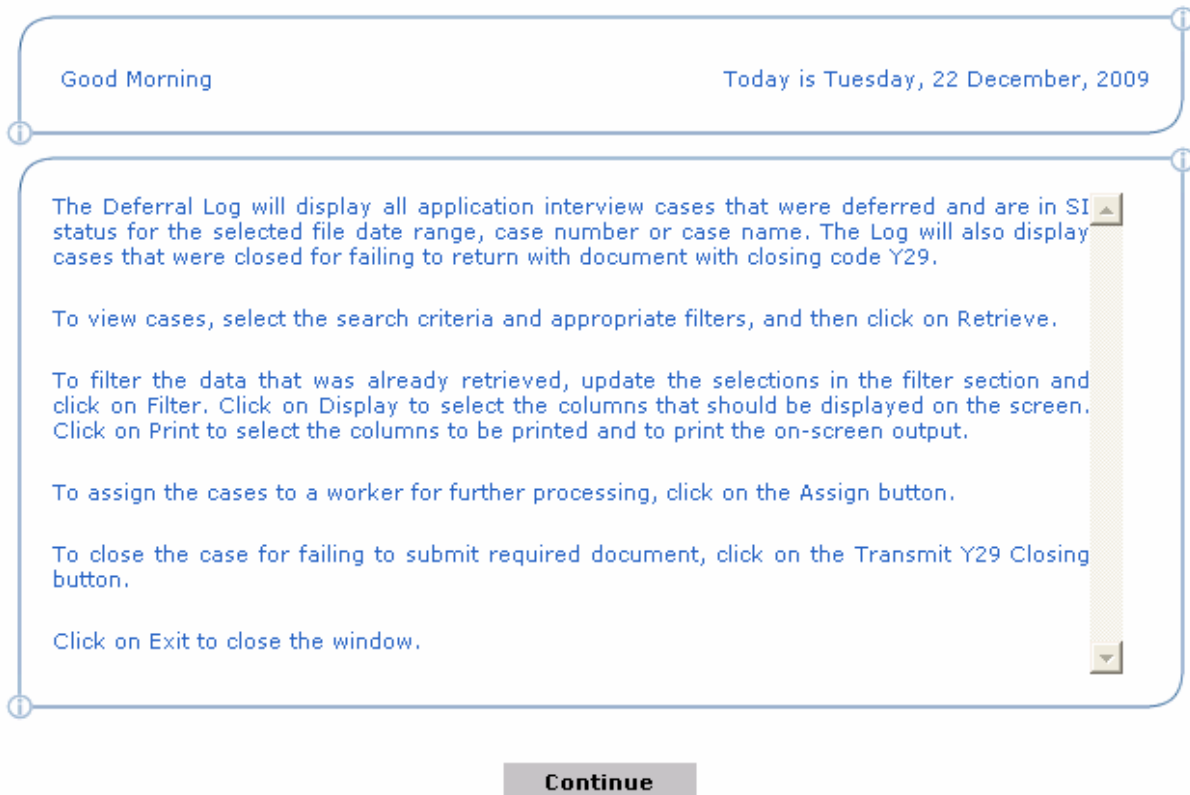
When multiple users have opened the log, the following message will appear:

“The Deferral Log is open by _____ (names).”

Deferral Log

Instructions

The instructions popup window will appear each time the window is opened. The **Deferral Log** window will open. The instructions window will have the following text:



Data Retrieved

The log will retrieve all cases that are currently in “SI” status and that currently appears in the FS Application Tracking report within the selected timeframe and filters. The log will also retrieve all cases for the time frame that were saved as transmitted for closing.

For all cases displayed in the log, FS POS will also confirm whether documents have been indexed or scanned since the deferral date. The log will allow the FS center to close these cases using a simplified interface and transaction.

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers
FOR TRAINING PURPOSES ONLY

Deferral Log Window

The screenshot shows a software window titled "Deferral Log Window" with a menu bar containing "File", "Retrieve", "Print", "Filter", "Display", "Summary", and "Help About".

Search By

- File Date
 - Select Date
Filed:
 - Specify Range
From:
To:
- Case Number
- Case Name

Interview Type Filter

- In Center
- Telephone

Case Status

- SI
- CL

<u>Case No</u>	<u>Case Name</u>	<u>File Date</u>	<u>Deferral Due Date</u>	<u>Valid to</u>	<u>WMS Case Status</u>	<u>Indexed Document</u>	<u>Scanned Document</u>
				12/01/2009	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No

Page 1 of 2

Transmit Closing Assign Exit

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Retrieval

The Deferral Log is retrieved according to the file date, case number or case name of the case. The user can specify a specific date or select a date range. The report output can be filtered by interview type and case status through the **Filter** menu option.

The screenshot shows a software window with a menu bar containing: File, Retrieve, Print, Filter, Display, Summary, Help About. The main area is divided into sections for search and filtering.

Search By

- File Date
 - Select Date
 - Filed:
 - Specify Range
 - From:
 - To:
- Case Number
- Case Name

Interview Type Filter

- In Center
- Telephone

Case Status

- SI
- CL

Filters for Printing and Display

The on-screen and printed output for the log can be customized using the **Print** and **Display** menu options:

Print Menu

SELECT COLUMNS

- Deferral Due Date
- Valid To
- WMS Status
- Indexed Document
- Scanned Document
- Telephone
- Assigned
- Assigned To Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

TO PRINT

- Entire Report
- Current Page

OK Cancel

Display Menu

SELECT COLUMNS

- Deferral Due Date
- Valid To
- WMS Status
- Indexed Document
- Scanned Document
- Telephone
- Assigned
- Assigned To Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

OK Cancel

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Summary

A summary view allows the user to view the number of cases in SI or CL status.

The screenshot shows a web page dialog box titled "Deferral Log - Summary -- Web Page Dialog". It contains a "Totals:" section with three rows of data:

Totals:	
Total deferred cases in SI Status	17
Total deferred cases in CL Status	0
Total deferred cases in SI or CL status	17

At the bottom of the dialog is an "OK" button.

Log Data

The following data is available in the log:

- Case Number
- Case Name
- File Date
- Deferral Due Date
- Valid To
- WMS Case Status
- Indexed Document

<u>Case No</u>	<u>Case Name</u>	<u>File Date</u>	<u>Deferral Due Date</u>	<u>Valid to</u>	<u>WMS Case Status</u>	<u>Indexed Document</u>	<u>Scanned Document</u>
				12/01/2009	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No
				01/01/2010	SI	No	No

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Log Data (continued)

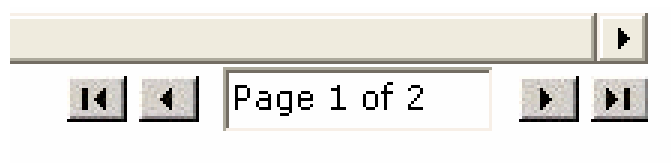
- Scanned Document
- Telephone
- Assigned
- Assigned To – Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

<u>WMS Case status</u>	<u>Indexed Document</u>	<u>Scanned Document</u>	<u>Telephone</u>	<u>Assigned</u>	<u>Assigned To Activity</u>	<u>Pending Saturday TAD</u>	<u>Y29 Closing Transmitted</u>	<u>Pending Transactions</u>
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	No	
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	No	No
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	No	No
§I	No	No	In-Center	No		No	Yes	No
§I	No	No	In-Center	No		No	Yes	No

Page Navigator

The log displays ten (10) cases per page. To view additional pages, the user must use the page navigator:

- The first left arrow with a line allows the user to view the first page of data.
- The second left arrow allows the user to view the previous page.
- The first right arrow with a line allows the user to view the last page.
- The second right arrow allows the user to view the next page of data.



Buttons

Three buttons appear at the bottom of the log:

- Transmit Closing
- Assign
- Exit

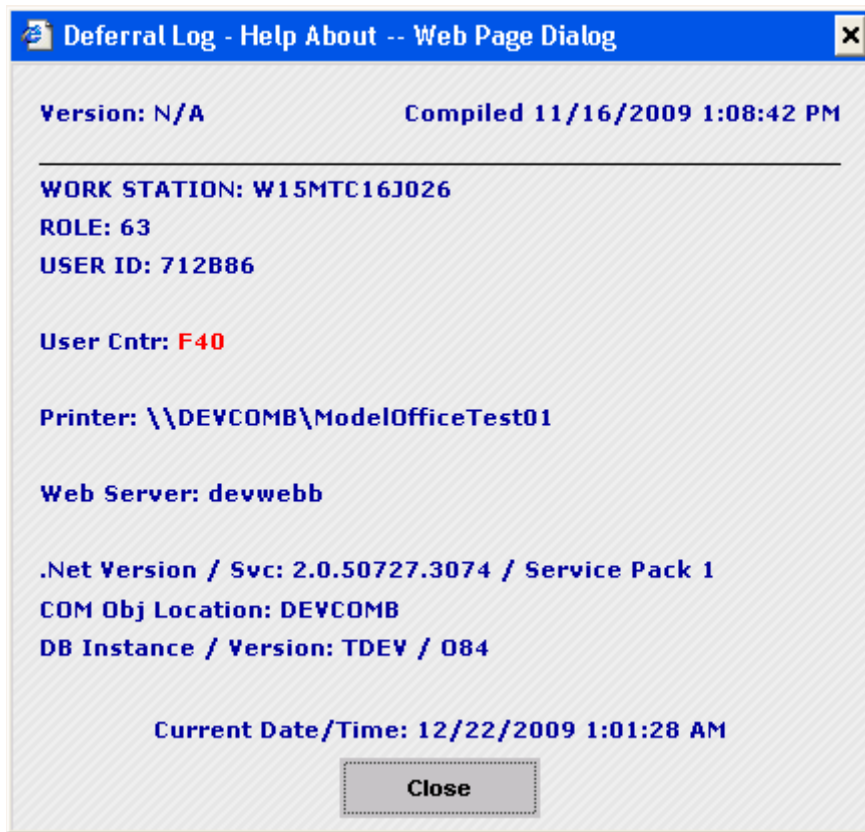


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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Help-About Window

This window allows the user to provide information to MIS about their PC and setup and will allow faster and better troubleshooting. It should be included in error reports submitted to the **POS Help Desk**.



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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Referral window

When the user clicks on the Assign button, the **Referral** window will appear. The list of workers from the user's site will appear by default.

The screenshot shows a web dialog window titled "Deferral Log: Referral Action -- Web Page Dialog". It features a "Selected Case" section with four input fields: "Case Number", "Case Name", "Casehead CIN", and "Casehead Name", all containing redacted text. Below this is a "Center" dropdown menu currently set to "F40". A list of job titles is shown on the left, including "FS Supervisor", "FS Site Manager", "FS Eligibility Specialist", "FS Assistant Site Manager", "FS CA", and "FS Supervisor". A large black redaction box covers the right side of the list. At the bottom, there is a text area labeled "Enter Comments, If Any" and a "Close" button.

Individuals with the following titles will appear in the **Referral** window:

- FS Eligibility Specialist (62)
- FS Supervisor (63)
- FS Assistant Site Manager (64)
- FS Site Manager (65)
- FS CA III (70)

Assign Procedure

The FS POS queues will be updated when the Refer window is closed:

- If a pending FS Application Interview activity is found, the activity will be routed to the queue of the selected individual.
- If no pending FS Application Interview is found, a FS Change Case Data activity will be routed to the queue of the selected individual.

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FS POS Release Notes 4.2 – Appendix C - User Guide for Deferral Log for NCA FS Centers FOR TRAINING PURPOSES ONLY

Case Closing Procedure

When the user clicks on the **Transmit Closing** button, the log will confirm whether the case can be closed, whether there is a pending transaction in WMS, and whether documents were indexed since the interview.

If the case is closed, an activity named **Y29** will appear in the case activity history for the case.

Closing Validations

If the case is no longer in **SI** status in WMS, the log will display the following error message:

“The case is no longer in SI status in WMS. The case closing cannot be completed.”

If the case is in **SI** status and there is a pending transaction in WMS, the log will display the following error message:

“There is a TAD pending in WMS for this case. The closing cannot be transmitted until the TAD is processed. Please return to the case once the TAD has processed.”

If the case is in **SI** status and the Indexed Documents column has a value of “Yes”, the log will display the following warning:

“Warning! Documents have been indexed for the case since the interview. Please confirm whether the required documentation was submitted before closing the case. Would you like to proceed with the case closing?”

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

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.

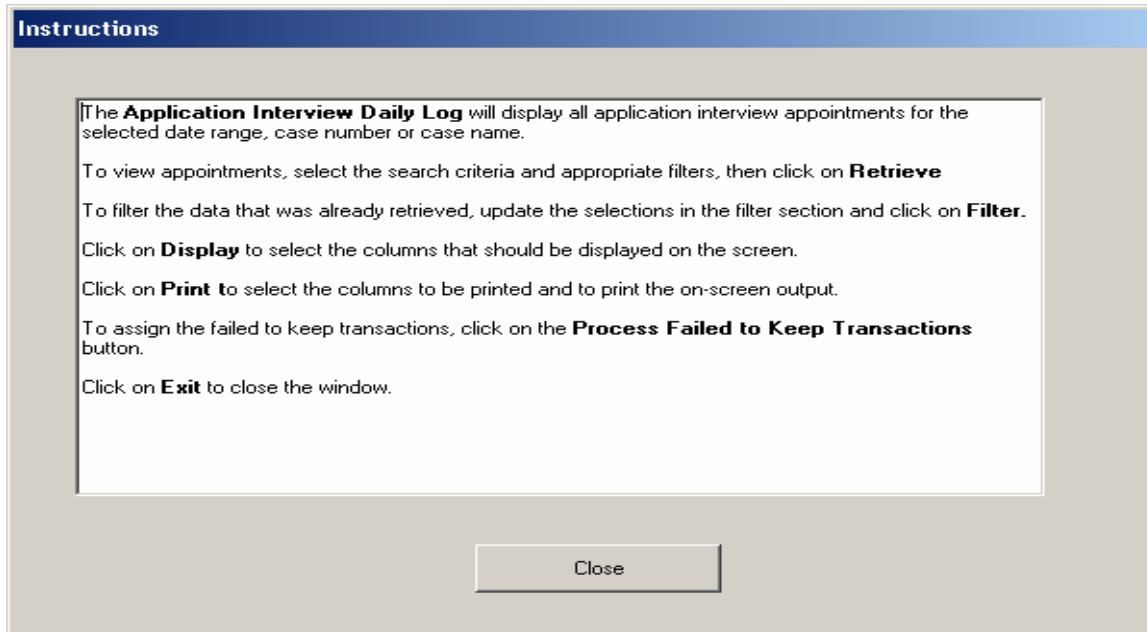
The Application Interview Log and Failed to Keep Application Interview Log windows have been updated with the following new features:

- Add a filter to track applications submitted via ACCESS NYC (“E-App”)

Instructions

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

New Instructions



FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

Updated Application Log

FS POS Version 4.2

File Retrieve Print Filter Display Summary

Application Interview Log [Center Number: F40]

Search By

Appointment Date Case Number

Selected Date

05/28/2010

Date Range

From: To:

Last Name of Casehead or Payee

Application Type Filter

Working Families

In-Center

CBO E-App

Telephone

Expedited

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	EApp	Contact Number
-------------	---------	-----------	-----------	-----------	-------------	-----	----------	------	----------------

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

There is a new column and filter in the **Application Log** for tracking of the E-Apps.

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

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

The screenshot shows a 'Search by' dialog box. At the top, there is a 'Search by' label with a callout '3'. Below it are three radio button options: 'Appointment Date', 'Case Number', and 'Last Name of Casehead or Payee'. The 'Appointment Date' option is selected. Under 'Appointment Date', there are two sub-options: 'Select Date' with a callout '3a' pointing to a date dropdown menu, and 'Specify Range' with a callout '3b' pointing to a 'From' and 'To' date range input field. The 'Case Number' option has a callout '4' pointing to its text input field. The 'Last Name of Casehead or Payee' option has a callout '5' pointing to its text input field.

Application Type Filter

6. Original appointment date
7. In-Center
 - a. Working Families
8. CBO
 - a. E-App (new)
9. Telephone Interview
 - a. Expedited
10. Exclude Dummy Case Numbers

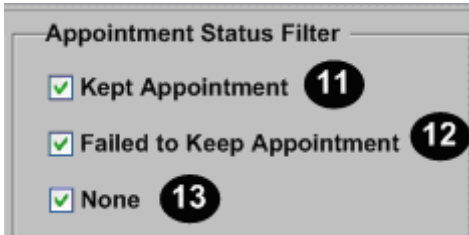
The screenshot shows an 'Application Type Filter' dialog box. It contains a list of checkboxes with corresponding labels and callouts: 'Working Families' (callout 7a), 'In-Center' (callout 7), 'CBO' (callout 8), 'E-App' (callout 8a), 'Telephone' (callout 9), 'Expedited' (callout 9a), 'Exclude dummy case numbers' (callout 10), and 'Original appointment date' (callout 6). The checkboxes for 'Working Families', 'In-Center', 'CBO', 'E-App', 'Telephone', and 'Expedited' are checked, while 'Exclude dummy case numbers' and 'Original appointment date' are unchecked.

FS POS Release Notes: Appendix D

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Appointment Status Filter

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



Application Log Columns- All Column Headers are Sortable

- 14. Intake Date
- 15. Case Number
- 16. Case Name
- 17. Appointment Date
- 18. Appointment Time
- 19. Appointment Status
- 20. POS CBOs'
- 21. Telephone Interview
 - a. E-App

14 Intake Date	15 Case Number	16 Case Name	17 Appt Date	18 Appt Time	19 Appt Status	20 CBO	21 Tel Intv	21a E-App
6/25/07			6/26/07	10:00 AM	Kept Appt	Yes	No	No

- 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

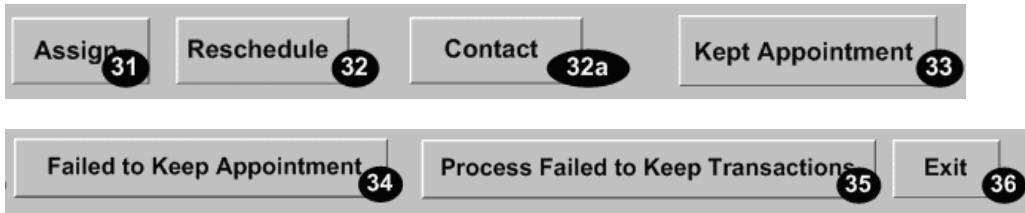
22 Contact Number	22a Number of Contacts	23 Assigned To	24 Spoken Lang	24a Interpreter	25 Interv Started On	25a Expedited	26 Case Status	27 Previous Appt	6a Orig Appt
	1	A. Turner	English	Yes	6/26/07	Yes	Active	6/25/07 11:15 AM	6/25/07 11:15 AM

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

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 Transactions
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 D

Version 4.2, June 21, 2010

Refer Action Window

Referral Window

Selected Case
 Case Number: 00010006400F Case Name: _____
 Casehead CIN: SY82710Q Casehead Name: _____

Center: F40

Refer Case To

Title	Unit	Last Name	First Name	Phone
FS Supervisor	FS		Olga	7182202222
FS Supervisor	DEV		Olga	
FS Supervisor	DEV		Kelly	
FS Supervisor	RCT		Jose	7185108589
FS Supervisor	DEV		Li	7185108588
FS Site Manager	MPU		Marie	7185100218

Enter comments, if Any

OK Cancel

Application Log Summary Window

Log Summary

Totals :

Total Kept Appointments : 0

Total Failed To Keep Appointments : 0

Total Appointments without Status : 0

Total Appointments : 0

Total Re-scheduled Appointments : 0

OK

A Log Summary summarizes the kept, failed and re-scheduled appointments from the Application log.

Read-Only Totals

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

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

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

The screenshot shows the 'Contact Attempted' window with the following fields and options:

- Case Number: [Text Field]
- Case Name: [Text Field]
- Casehead Name: [Text Field]
- Contact Number: [Text Field] Extension: [Text Field]
- Requested call time: [Text Field]
- Contact Attempt 1**
 - Did you successfully contact the client? Yes No
 - Date that the contact was attempted? [05/28/2010] [Dropdown]
 - Time that the contact was attempted? [Dropdown]
- Contact Attempt 2**
 - Did you successfully contact the client? Yes No
 - Date that the contact was attempted? [05/28/2010] [Dropdown]
 - Time that the contact was attempted? [Dropdown]
- Contact Attempt 3**
 - Did you successfully contact the client? Yes No
 - Date that the contact was attempted? [05/28/2010] [Dropdown]
 - Time that the contact was attempted? [Dropdown]
- Contact Attempt 4**
 - Did you successfully contact the client? Yes No
 - Date that the contact was attempted? [05/28/2010] [Dropdown]
 - Time that the contact was attempted? [Dropdown]
- Comments: [Large Text Area]
- Interview Type: Telephone In-Center
- New Contact Number: Yes No
- Contact Number: [Text Field] Extension: [Text Field]
- OK [Button] Cancel [Button]

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 D

Version 4.2, June 21, 2010

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?

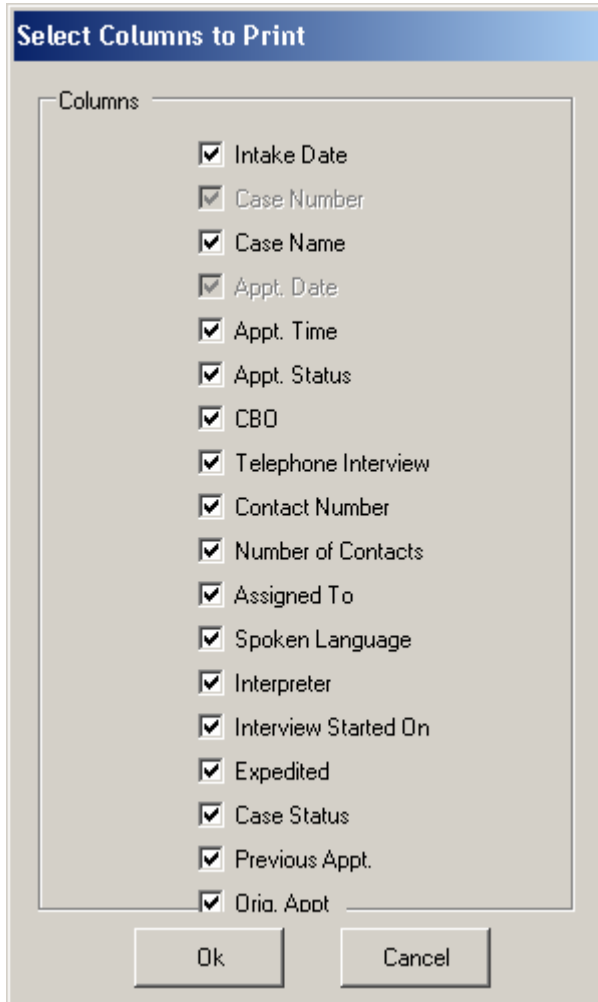
Contact Attempted 4

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 D

Version 4.2, June 21, 2010

Select Columns to Print Window



The **Select Columns to Print** window allows 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.

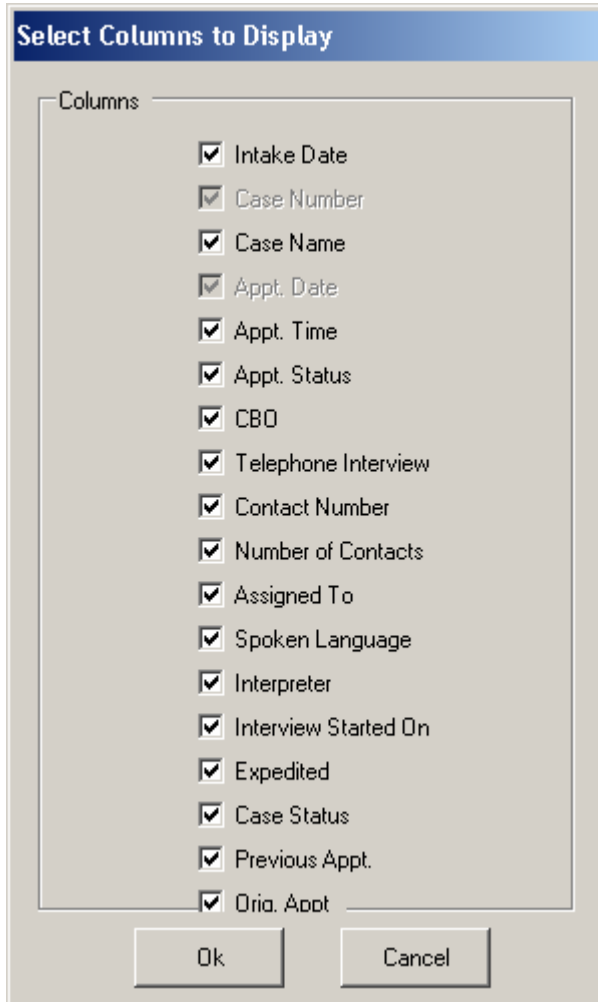
The **Case Number** and **Appt Date** checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

Once the Worker clicks **OK**, the print job will be sent to the printer. If the worker clicks **Cancel**, FS POS returns to the Log.

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

Window: *Select Columns to Display*



The screenshot shows a dialog box titled "Select Columns to Display". Inside the dialog, there is a section labeled "Columns" containing a list of 18 items, each with a checked checkbox:

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

At the bottom of the dialog are two buttons: "Ok" and "Cancel".

The **Select Columns to Display** window allows 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.

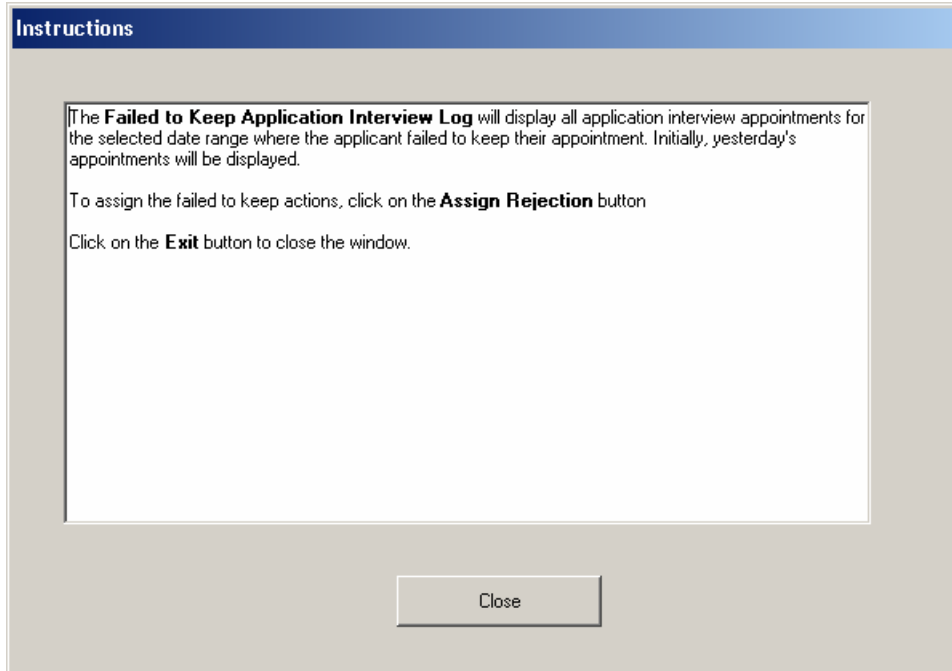
FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

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.



FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

Failed To Keep Application Log

FS POS Version 4.2
File Retrieve Print Display

Failed To Keep Application Interview Log [Center Number: F40]

Search By

Appointment Date Case Number

Yesterday Past 14 Days Specify Range

From: To:

Last name of Casehead or Payee

Intake Date	Case No	Case Name	Appt Date	Appt Time	Appt Status	CBO	Tel Intv	Assigned To
-------------	---------	-----------	-----------	-----------	-------------	-----	----------	-------------

Totals:
Total Failed To Keep Appointments

Assign Rejection Assign Interview Reschedule Kept Appointment Hold Rejection Exit

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

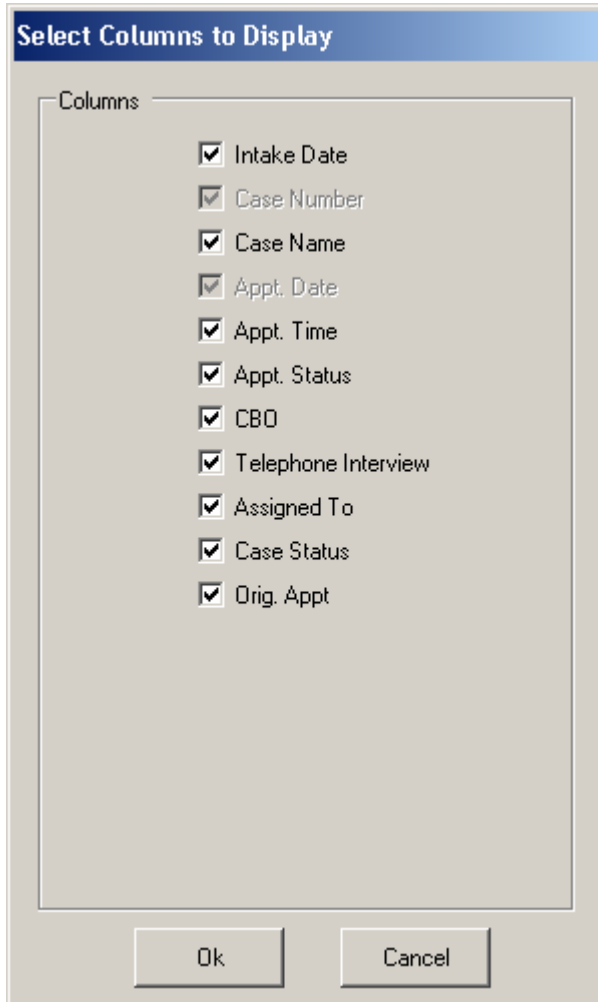
Use of these buttons will remove the case from the Failed to Keep Log and place the case back on the Application Interview Log awaiting further action.

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.

FS POS Release Notes: Appendix D

Version 4.2, June 21, 2010

Select Columns to Print Window



This window allows 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.

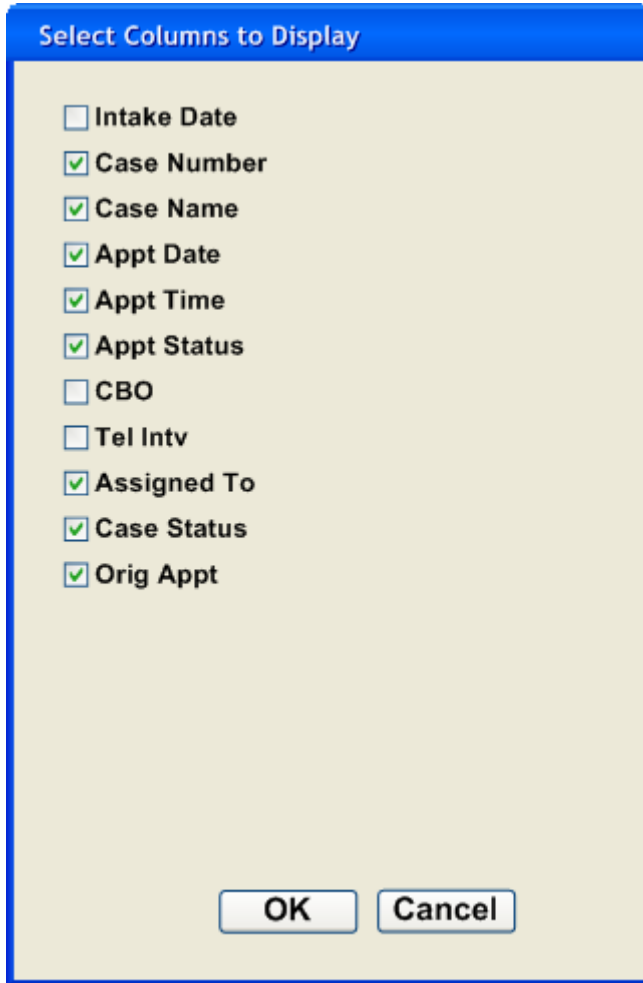
The **Case Number** and **Appt Date** checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row should appear on one page.

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 D

Version 4.2, June 21, 2010

Select Columns to Display Window



This window allows 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 E

Version 4.2 June 21, 2010

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 have been updated with the following new functionality and features:

- Filter for CBO Recertification
- AFIS Report
- New edits for transferred cases

CBO Recertification Filter

A filter will allow staff to view recertifications that were submitted through the community-based organization (CBO) project.

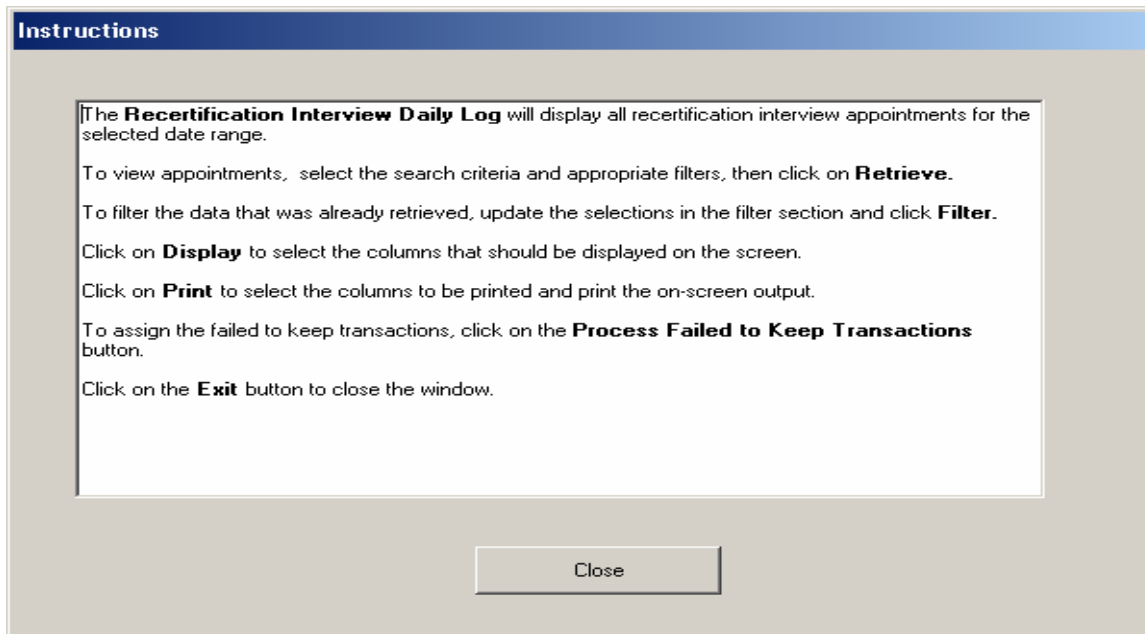
AFIS Report

A new report listing individuals that may require finger imaging will be displayed.

New Edits for Transferred Cases

New edits have been added to prevent changes to cases that have been transferred to another center.

Instructions



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

FS POS Release Notes: Appendix E

Version 4.2 June 21, 2010

Updated Recertification Log

FS POS Version 4.2
 File Retrieve Print Filter Display Summary

Recertification Interview Log [Center Number F40]

Search by

Appointment Date Case Number

Select Date

Friday, May 28, 2010

Specify Range

From: 04/01/10 To: 05/28/10

Case Name

Appointment Type

Telephone Interview

In-Center Interview

Potential IVRS

No Change

Original Appointment date

LDSS-4826 Recd CBO

Homebound Auth Rep

Appointment Status Filter

Kept Appointment

Failed to Keep Appointment

None

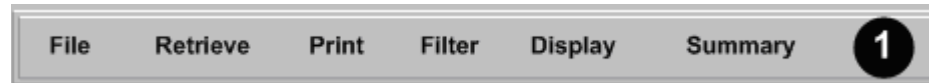
AFIS Reports

Case No	Case Name	Spoken Lang	Interpreter	Appt Date	Appt Time	LDS Recd
		English	No	05/07/2010	04:30 PM	No
		Am Ind-Crow	No	05/07/2010	04:30 PM	No
		Spanish	No	04/27/2010	09:00 AM	No

Assign
LDSS-4826 Received
Contact
Reschedule
Kept Appointment
Failed to Keep Appointment
Process Failed to Keep Transaction
Exit

Definitions

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



FS POS Release Notes: Appendix E

Version 4.2 June 21, 2010

Search Filters

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

Appointment Type Filter

6. Original Appointment date
 - a. Originating Appointment
 - 6d. Telephone Interview
 - 6e. In-Center Interview
 - 6g. Potential IVRS
 - 6h. No Change
 - 6o. CBO
 - 6p. Auth Rep

7. Kept Appointment
8. Failed to Keep Appointment
9. None

FS POS Release Notes: Appendix E

Version 4.2 June 21, 2010

- 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
 - d. **CBO**

10	11	11a	11b	12	13	13a	13b	13c	13d
Case Number	Case Name	Spoken Lang	Interpreter	Appt Date	Appt Time	LDSS-4826 Received	Telephone Interview	Contact Number	CBO
		English	Yes	7/31/2007	10:00 AM	Yes	Yes	(212) 555-1200	No

- 14. Assigned To
- 15. Number of Contacts
- 16. Interview Started On
- 17. Appt Status
- 18. Case Status
 - a. Potential IVRS
- 19. Previous Appt
 - 6i. No Change
 - 6j. Closing Requested
 - 6l. Homebound

14	15	16	17	18	18a	19	6i	6j	6l
Assigned To	Number of Contacts	Interview Started On	Appt Status	Case Status	Potential IVRS	Previous Appt	No Change	Closing Requested	Homebound
A. Turner	1	7/31/2007	Kept Appt	Active	No	6/22/07	No	No	No

- 6m. Next Recert Date
- 6n. Current Center
- 13e. Auth Rep
- 13f. Auth Rep Name
- 6a. Original Appt

6m	6n	13e	13f	6a
Next Recert Date	Current Center	Auth Rep	Auth Rep Name	Orig Appt
6/25/07 11:15 AM	F40	No		6/25/07 11:15 AM

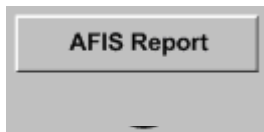
FS POS Release Notes: Appendix E

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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
29. AFIS Report



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:

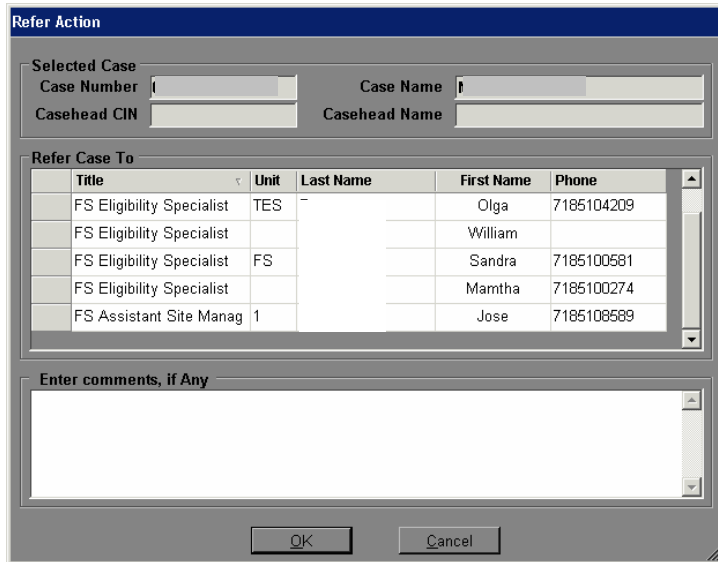
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

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) has been updated in POS.

FS POS Release Notes: Appendix E

Version 4.2 June 21, 2010

Refer Action window



The Refer Action window contains the following fields and table:

Selected Case

Case Number: Case Name:

Casehead CIN: Casehead Name:

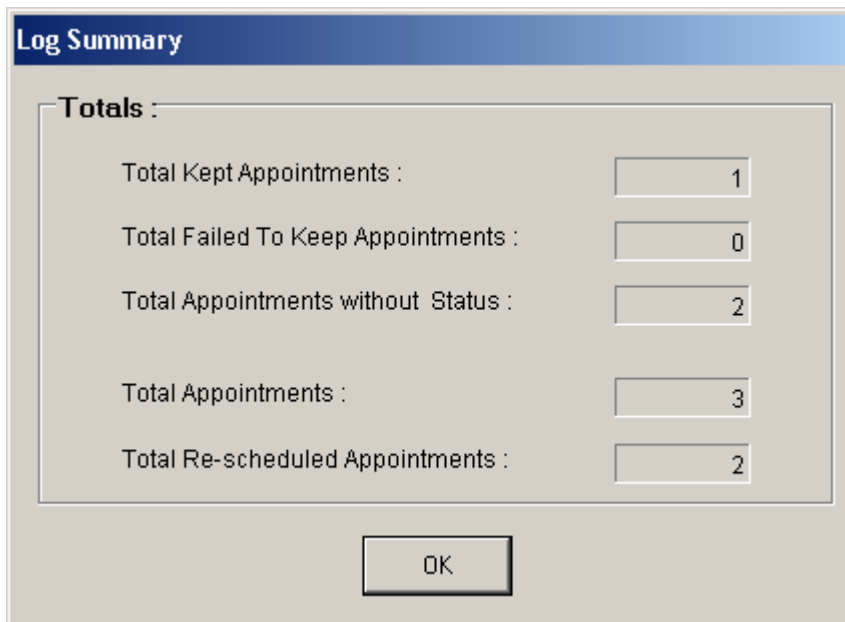
Refer Case To

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

Enter comments, if Any

OK Cancel

Log Summary window



The Log Summary window displays the following summary data:

Totals :

Total Kept Appointments :

Total Failed To Keep Appointments :

Total Appointments without Status :

Total Appointments :

Total Re-scheduled Appointments :

OK

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

FS POS Release Notes: Appendix E

Version 4.2 June 21, 2010

LDSS-4826 Received Window

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

LDSS-4826 Received Window

The screenshot shows a Windows-style dialog box titled "LDSS-4826 Received". The form contains the following fields and controls:

- Case Number: Text box containing "03620B"
- Case Name: Text box containing "N LOURDES"
- Casehead Name: Text box containing "Brown"
- Mail Returned or Undelivered?: Radio buttons for "Yes" and "No", with "No" selected.
- Date of returned or undelivered mail: Date picker showing "Friday, May 28, 2010".
- Signed LDSS-4826 received?: Radio buttons for "Yes" and "No", with "No" selected.
- Date LDSS-4826 Received: Date picker showing "Friday, May 28, 2010".
- Envelope Post-Mark Date: Date picker showing "Friday, May 28, 2010".
- Interview Type: Radio buttons for "Telephone" and "In-Center", with "In-Center" selected.
- Contact Number: Text box with a hyphen separator.
- Extension: Text box.
- Did the applicant request a new call time?: Radio buttons for "Yes" and "No", with "No" selected.
- Date: Date picker showing "Friday, May 28, 2010".
- Time: Time picker showing "03:45 pm".
- Buttons: "OK" and "Cancel".

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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".

Contact Attempted Window

The screenshot shows the 'Contact Attempted' dialog box. At the top, there are input fields for Case Number, Case Name, Casehead Name, Contact Number, Extension, and Requested call time. Below these are four sections for recording contact attempts, labeled 'Contact Attempt 1' through 'Contact Attempt 4'. Each section contains a question 'Did you successfully contact the client?' with 'Yes' and 'No' radio buttons, and two dropdown menus for 'Date that the contact was attempted?' and 'Time that the contact was attempted?'. The 'Date' dropdowns are currently set to '05/28/2010'. Below the attempt sections is a 'Comments:' text area. At the bottom, there are radio buttons for 'Interview Type' (Telephone and In-Center), radio buttons for 'New Contact Number' (Yes and No), and input fields for 'Contact Number' and 'Extension'. 'OK' and 'Cancel' buttons are at the bottom right.

Definitions of Contact Attempted Window

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

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?

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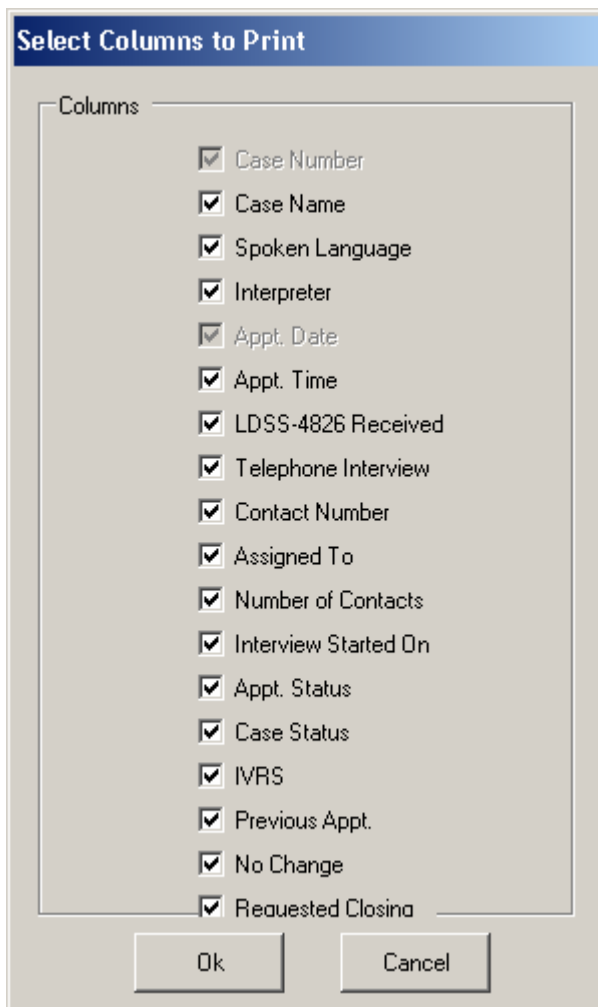
Contact Attempted 3

- 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



FS POS Release Notes: Appendix E

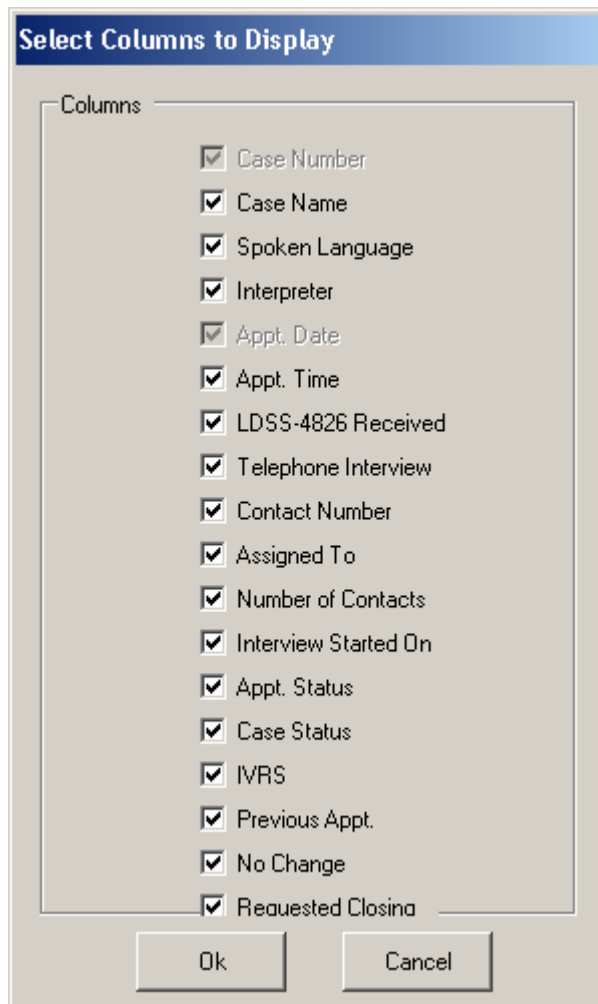
Version 4.2 June 21, 2010

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.

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.

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AFIS Reports

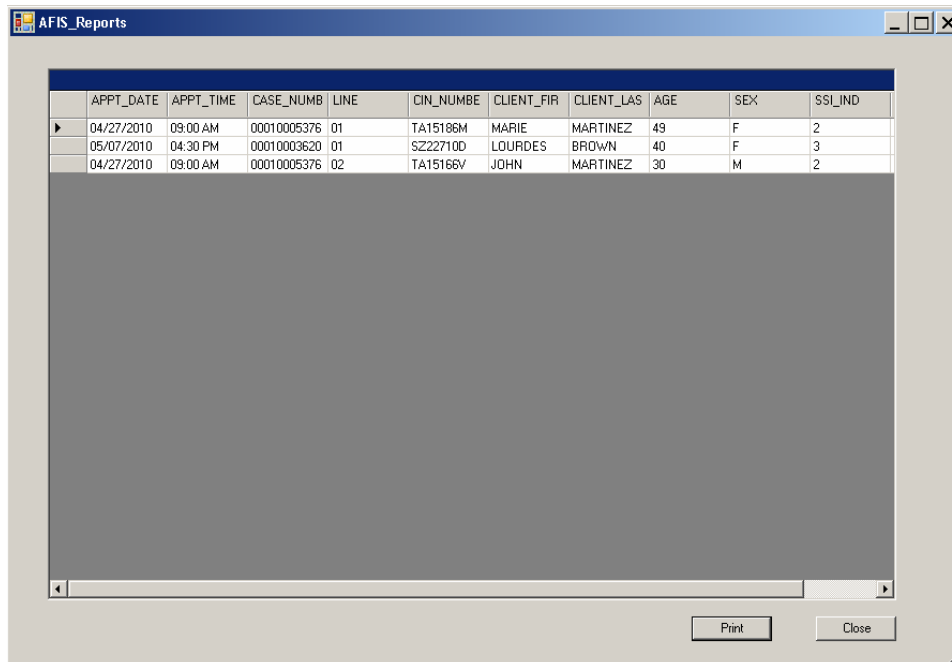
The **AFIS Report** window will be available when the Worker selects an appointment date range and clicks on the **AFIS Reports** button.

The report will display individuals 18 years of age or older known to POS that have not been finger imaged, were marked as temporarily exempt from finger-imaging or whose finger imaging record was purged.

The following columns will be displayed:

Label	Description
APPT_DATE	Appointment Date
APPT_TIME	Appointment Time
CASE_NUMBER	Case Number
LINE	Line Number
CIN_NUMBER	Client Identification Number
CLIENT_FIRST_NAME	Client First Name
CLIENT_LAST_NAME	Client Last Name
AGE	Client's Age
SEX	Client's Sex
SSI_IND	Client's SSI Indicator
AFIS_IND	Client's AFIS Indicator

AFIS Reports



The screenshot shows a window titled "AFIS_Reports" with a table containing the following data:

APPT_DATE	APPT_TIME	CASE_NUMB	LINE	CIN_NUMBE	CLIENT_FIR	CLIENT_LAS	AGE	SEX	SSI_IND
04/27/2010	09:00 AM	00010005376	01	TA15186M	MARIE	MARTINEZ	49	F	2
05/07/2010	04:30 PM	00010003620	01	SZ22710D	LOURDES	BROWN	40	F	3
04/27/2010	09:00 AM	00010005376	02	TA15166V	JOHN	MARTINEZ	30	M	2

At the bottom of the window, there are two buttons: "Print" and "Close".

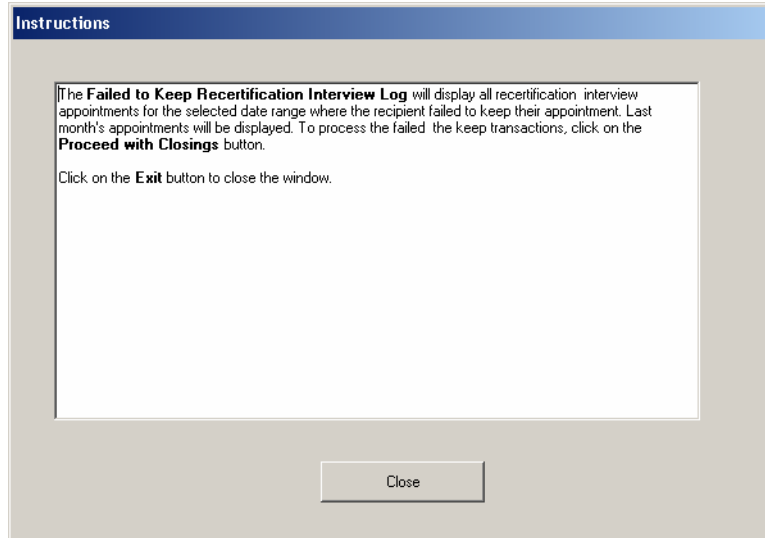
The Worker will be able to print the report for follow-up by clicking on the **Print** button. To close the window, the Worker will click on the **Close** button.

FS POS Release Notes: Appendix E

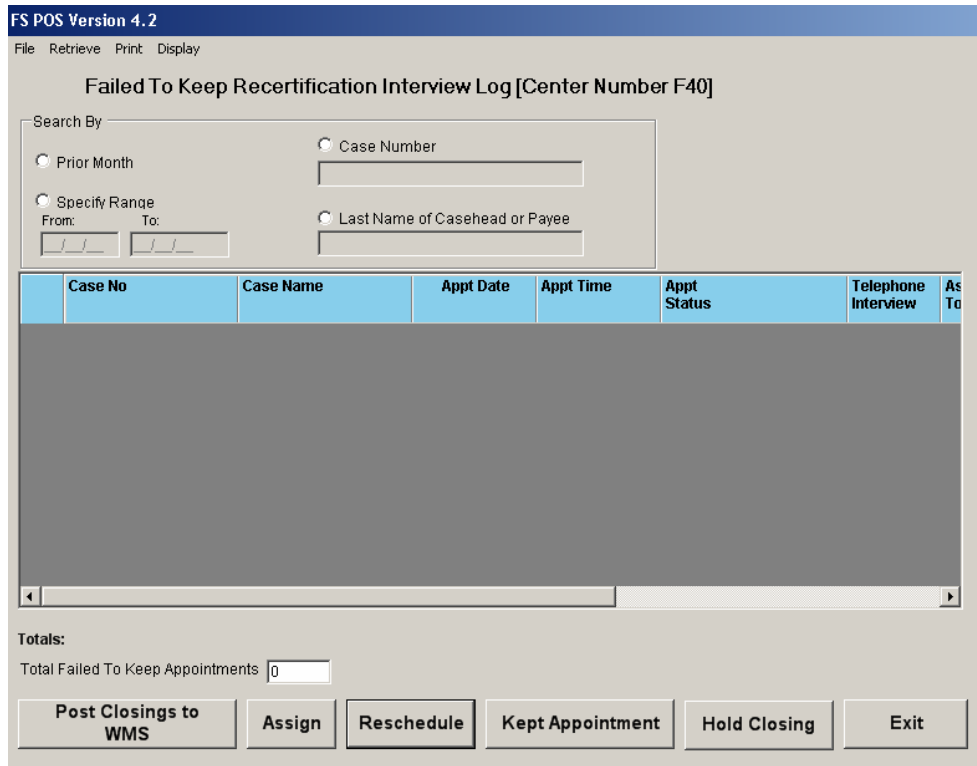
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Failed to Keep Recertification Interview Log

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.

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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

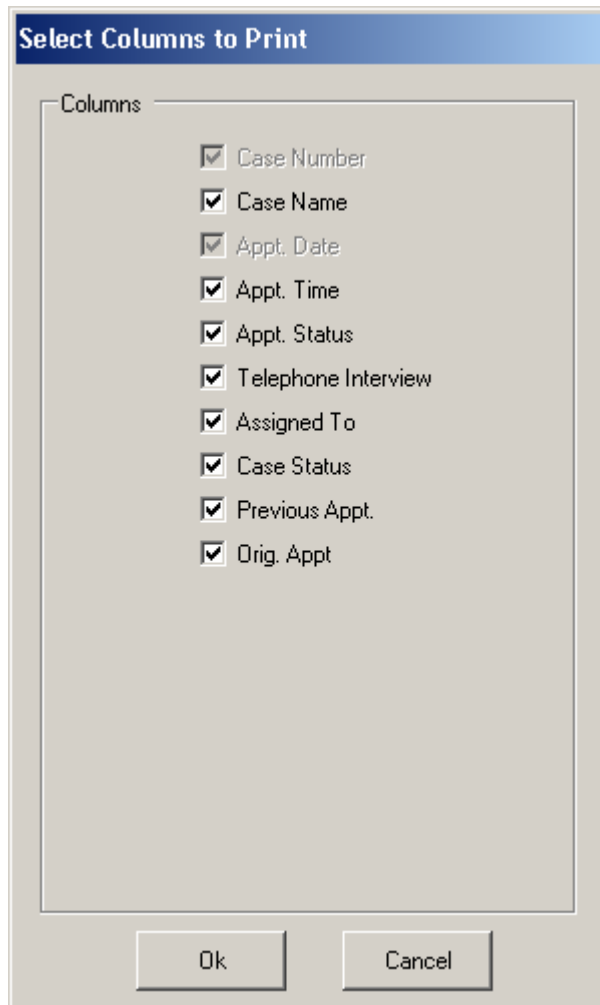
Buttons in Log

13. Post Closings to WMS-All closing will be processed **Y10** (Failure to Recertify [No Notice Required])
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

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Select Columns to Print Window



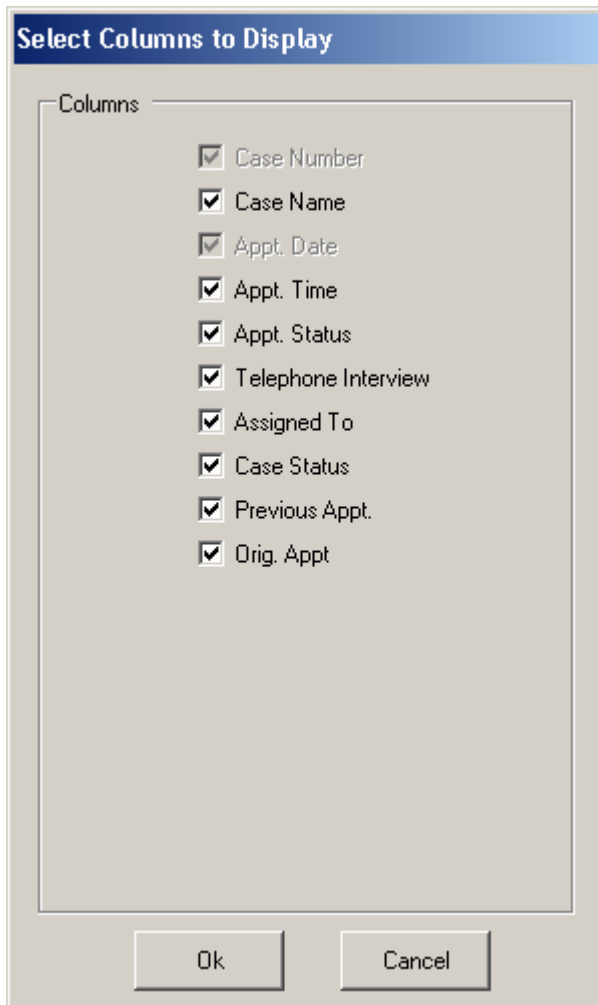
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The **Case Number** and **Appt Date** checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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.

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Select Column to Display Window



This window allows 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.