



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #10-71-SYS (This Policy Bulletin Replaces PB #10-67-SYS)

FS POS RELEASE NOTES VERSION 4.2

<p>Date: July 13, 2010</p>	<p>Subtopic(s): FS POS</p>
<p> This procedure can now be accessed on the FIAweb.</p>	<p>Revisions to the Original Policy Bulletin</p> <p>This policy bulletin has been revised to inform all Non Cash Assistance Food Stamp (NCA FS) Center Staff that Appendix B of FS POS Release Notes Version 4.2, FS Electronic Application (“E-App”) has been removed. Appendix B is now the User Guide for Deferral Log for NCA FS Centers. The “E-App” section has also been removed from the FS POS Release Notes Version 4.2. The “E-App” process is expected to be implemented in August 2010.</p> <p>Purpose:</p> <p>The purpose of this policy bulletin is to inform all 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 the FS POS Release Notes Version 4.2 (Attachment A), Desk Guide—Introduction to POS Portal: Appendix A (Attachment B), User Guide for Deferral Log for NCA FS Centers: Appendix B (Attachment C), FS Application Interview Log: Appendix C (Attachment D), and FS Recertification Interview Log: Appendix D (Attachment E).</p> <p>These release notes can also be found on the HRA Intranet at:</p> <p>http://hrwebapps/HRAintranet/CMT_page_template.cfm?page_id=79</p> <p><i>Effective Immediately</i></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

 Please use Print on Demand to obtain copies of forms.

Attachments:

- Attachment A** FS POS Release Notes Version 4.2 FINAL revised
- Attachment B** Desk Guide—Introduction to POS Portal: Appendix A
- Attachment C** User Guide for Deferral Log for NCA FS Centers:
Appendix B
- Attachment D** FS Application Interview Log: Appendix C
- Attachment E** FS Recertification Interview Log: Appendix D

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

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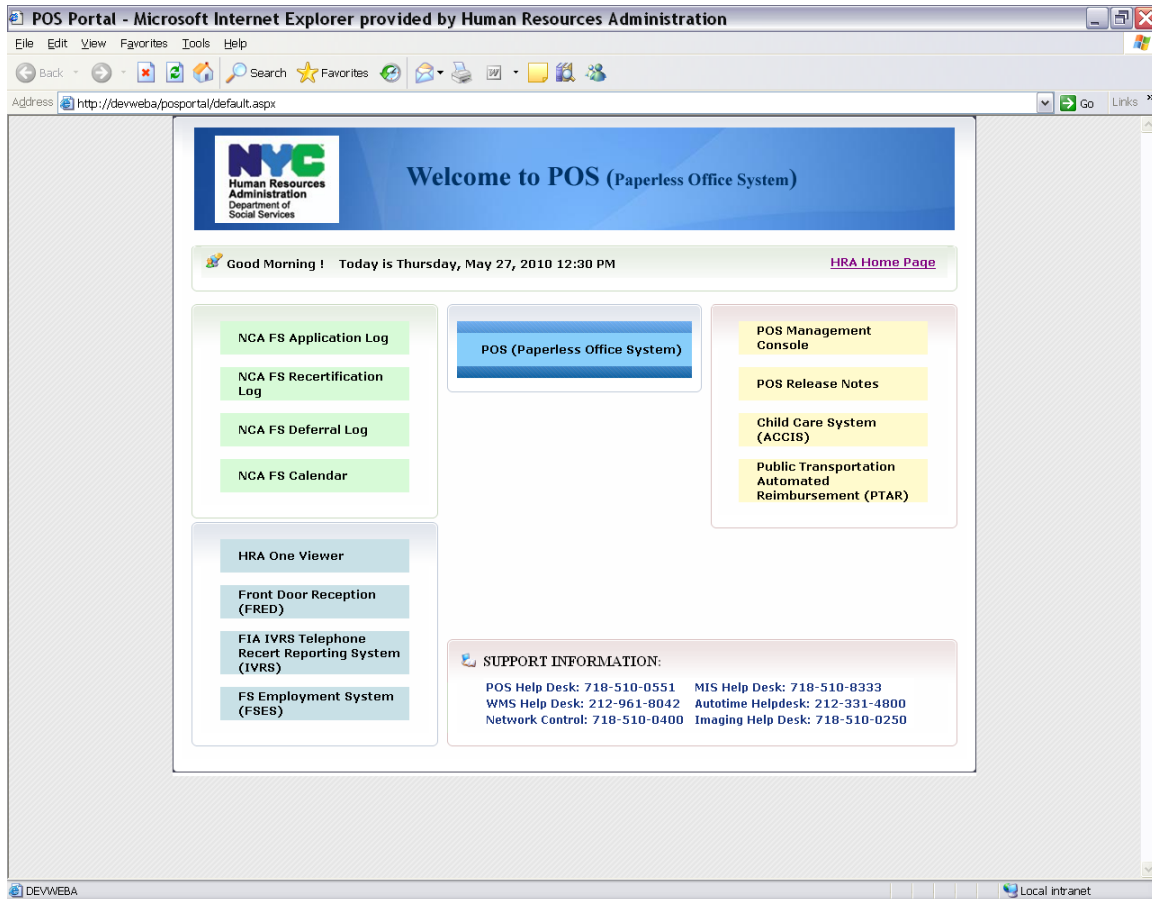
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FS POS Release Notes

Version 4.2 June 21, 2010

1. New FS POS Web Portal

A new **POS Web Portal** will allow 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 POS Portal**.

FS POS Release Notes

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2. Web-Based FS Deferral Log

The web-based **Deferral Log** will allow FS centers to close cases in SI status that were deferred for documentation and failed to return the required documents. The log will have the following functionality:

1. Displays all cases in single issue ("SI") status for a selected timeframe.
2. Displays all cases closed using closing code 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".

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

3. Web-Based FS Application Log

The FS Application Log will be available on the Intranet through the POS Portal. The log will be 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 C for the FS Application Log**.

4. Web-Based FS Recertification Log

The FS Recertification Log will be available on the Intranet through the POS Portal. The Log will be 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 will be 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 D for the FS Recertification Log**.

FS POS Release Notes

Version 4.2 June 21, 2010

5. Recertification Improvement Project at Community-Based Organizations

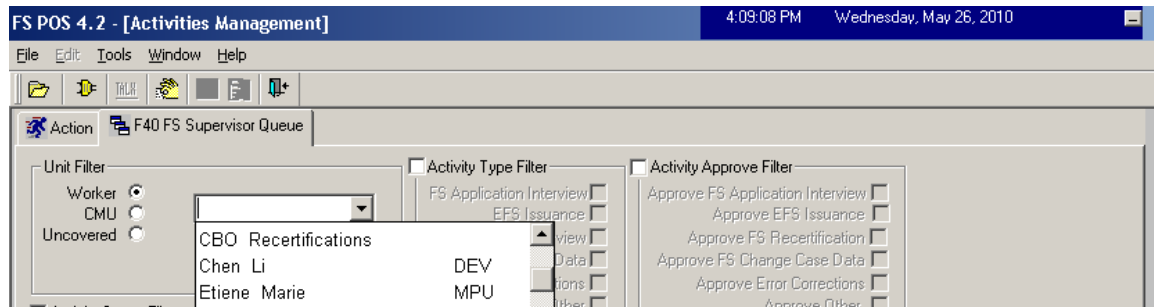
FS recipients will have an opportunity to complete their recertification at community-based organizations (CBO). The completion of these questions at the CBO site will reduce the time it takes for HRA to complete the recertification and should help reduce the rate of recipients that fail to complete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

Updates to the FS Recertification Log

A new **CBO** filter and a new **CBO** column will be 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

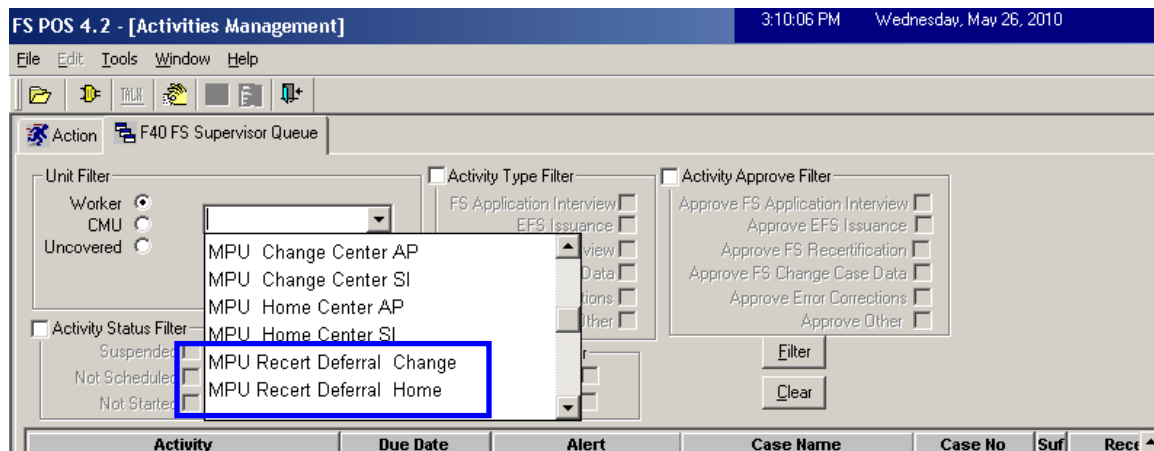
The completed recertifications will be placed in the **CBO Recertification Queue** to allow the staff to continue the activity at the time of the telephone interview with the recipient or the authorized representative.



6. Updates to MPU Queues for Deferred Recertifications

Cases deferred during the FS Recertification activity are moved automatically to **Deferred Recert Queues**. This process occurs 3 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.



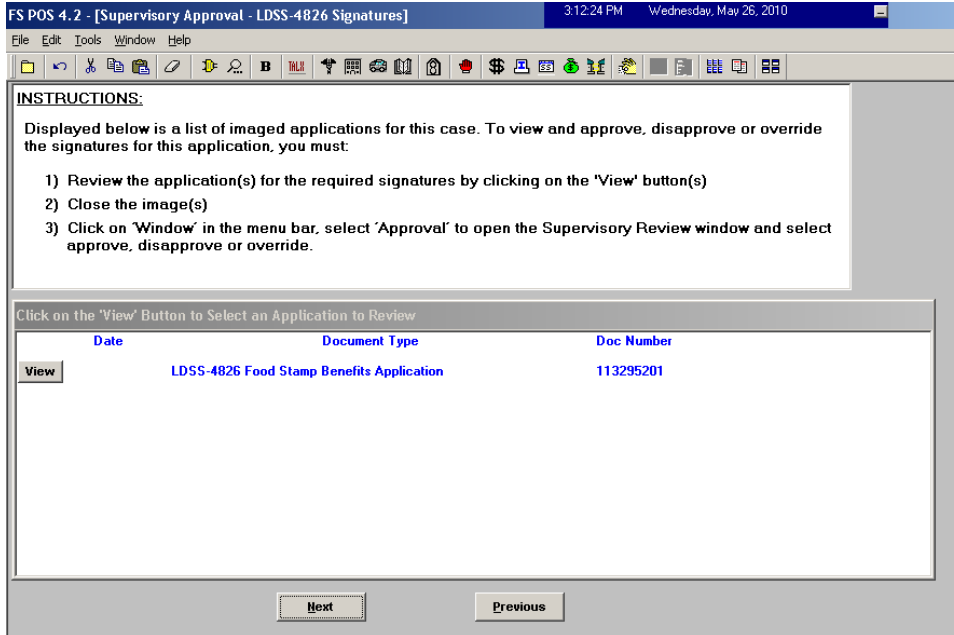
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7. Updates to LDSS-4826 Signatures Approval Window

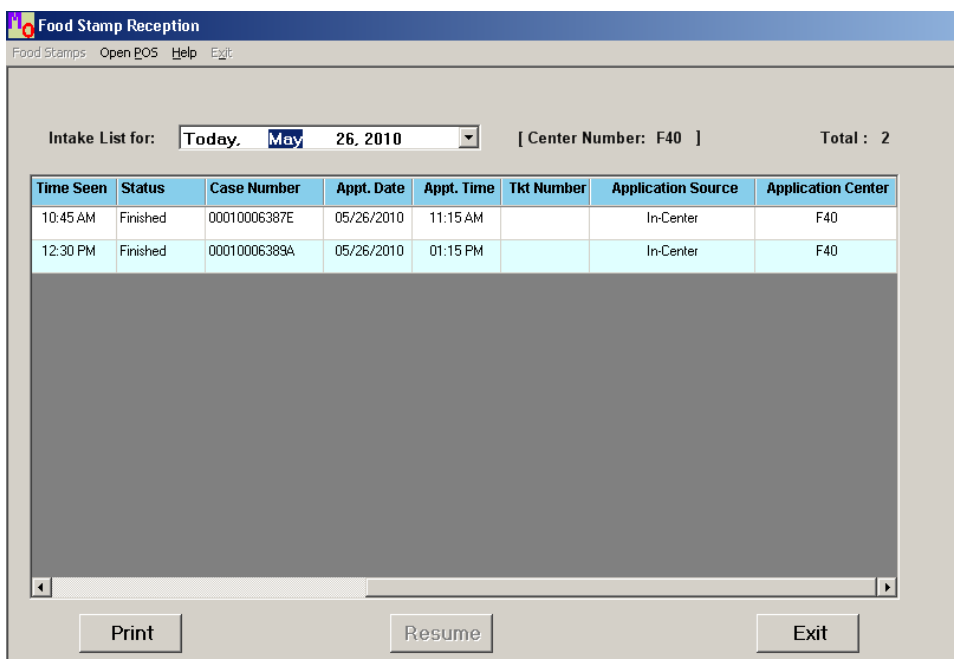
The approval window for the **LDSS-4826 Signatures** will now retrieve the following forms if they are available in the HRA One Viewer:

- **W-120**, Food Stamp Benefits Application Signature Form
- **W-129B**, Food Stamp Benefits Application Attestation Signature Form



8. Updates to FS Intake List

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



FS POS Release Notes

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9. 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 will indicate 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

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		

10. Changes for WMS Release 2010.2

The following changes will be 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 will be 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

11. Addition of Deceased Status in FS Change Case Data

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

12. Changes to Other Income Window

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

Other Income

The screenshot shows a dialog box titled "Response to Question" with a table of income data and several input fields. The table has columns for "Who", "Income Type", "Amount", "Frequency", "Start Date", and "Expected End Date". The "Who" column contains "Johnson Mary". The "Income Type" column lists various categories such as "Rental Income", "School to Employment Program (STEP)", "Severance pay - Lump Sum Payment", "Severance pay (Not Lump Sum)", "TEAP", "Income from Union Benefits (Including Strike Benefits)", "Volunteer in Service to America (VISTA)", and "Work-Experience Non-Win". The "Amount" column has a value of "00/00/0000". The "Frequency" column has a value of "M". The "Start Date" and "Expected End Date" columns both have values of "00/00/0000". Below the table, there are fields for "Income Indicator" and "Hrs. Worked". At the bottom of the dialog box, there are "OK" and "Cancel" buttons.

Who	Income Type	Amount	Frequency	Start Date	Expected End Date
Johnson Mary	Rental Income	00/00/0000	M	00/00/0000	00/00/0000
	School to Employment Program (STEP)				
	Severance pay - Lump Sum Payment				
	Severance pay (Not Lump Sum)				
	TEAP				
	Income from 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" will be 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 will be 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]).

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13. Self-Employment Window Update

The **Business Type** text box in the **Self-Employment** window will be 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

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Self-Employment window

The screenshot shows a 'Response to Question' dialog box with the following fields and options:

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

Buttons: OK, Cancel

14. Update to FS TAD Window

A new field named **APP SRC** will be 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 'Food Stamp Tad Window' within the 'FS POS 4.2 - [ELIGIBILITY]' application. The window title bar shows the time as 3:50:53 PM on Wednesday, May 26, 2010. The window contains 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: Next, Previous, Ignore Errors, Show Individual Data, Run Rules

15. 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 will be updated to resolve this type of error.

FS POS Release Notes

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16. Model Office (MONIQ) Updates

The following configuration updates were made in the Model Office systems (FRED and MONIQ) in April, May and June 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, 10DR and 10DT;
- 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;
- Double-clicking on the "Route to Selected Appt" button will only print one ticket; and
- The CA Appl Interview queue will be disabled in FRED.

17. E-Forms

The following E-Form will be updated:

- W-515X, SAVE Referral

18. Reminder: Appendices

- Appendix A, FS POS Web Portal
- Appendix B, FS Deferral Log
- Appendix C, FS Application Log
- Appendix D, FS Recertification Log

FS POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

Version 4.2 June 21, 2010

Overview

The web-based **POS Portal** provides a centralized point of access to the Food Stamp 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.

The POS Portal will allow access to the Food Stamp Paperless Office System, POS Management Console and the POS release notes. In addition; the portal will also provide access to the following Non-Cash Assistance Logs: Application Log, Recertification Log, Deferral Log and 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

OsPortal/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](#)

NCA FS Application Log

NCA FS Recertification Log

NCA FS Deferral Log

NCA FS Calendar

POS (Paperless Office System)

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

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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

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NCA Food Stamp Deferral Log

The **Food Stamp Deferral Log** will allow Food Stamp (FS) Centers to close NCA FS 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 Human Resources Administration logo. The page title is "NCA FS Deferral Log". Below the title, 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 these 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 NCA FS calendar gives FS Site Managers and Assistant Site Managers the ability to create and maintain application appointment slots for designated NCA and 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 Human Resources Administration logo. The page title is "NCA FS Calendar". Below the title, 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 these 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

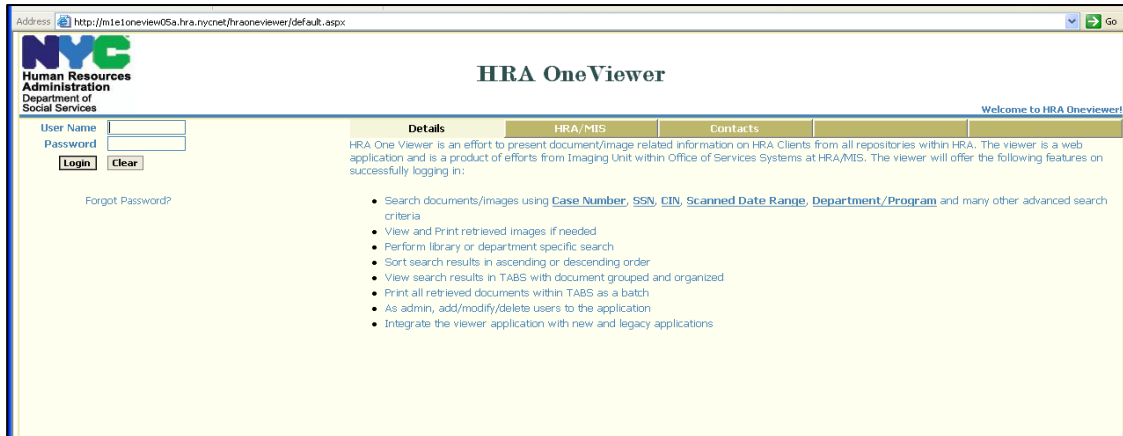
Desk Guide – Introduction to POS Portal

Version 4.2 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)

Application assist 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

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Interactive Voice Response System

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 of the 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", followed by 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 logo and the title "Food Stamp Employment System". Below the header, it indicates the environment is "TEST". A prominent "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: "User ID:" and "Password:". Below these fields is an "Enter" button. At the bottom of the form, there are links for "NYC.gov Home Page" and "Privacy Statement". A disclaimer at the bottom states: "These computerized systems are legally confidential and proprietary to the State of New York, its offices of Temporary and Disability Assistance, and related agencies and may be accessed only by lawfully authorized entities. Federal, state, and local laws and regulations protect the confidentiality of the Human Resources Administration's clients. All clients' documents accessed by HRA staff and sponsoring programs are to be used solely for the purposes of providing services. Unauthorized access to or release of system data may entail both civil liability and criminal prosecution." The version number "FSES v1.92" is printed at the very bottom.

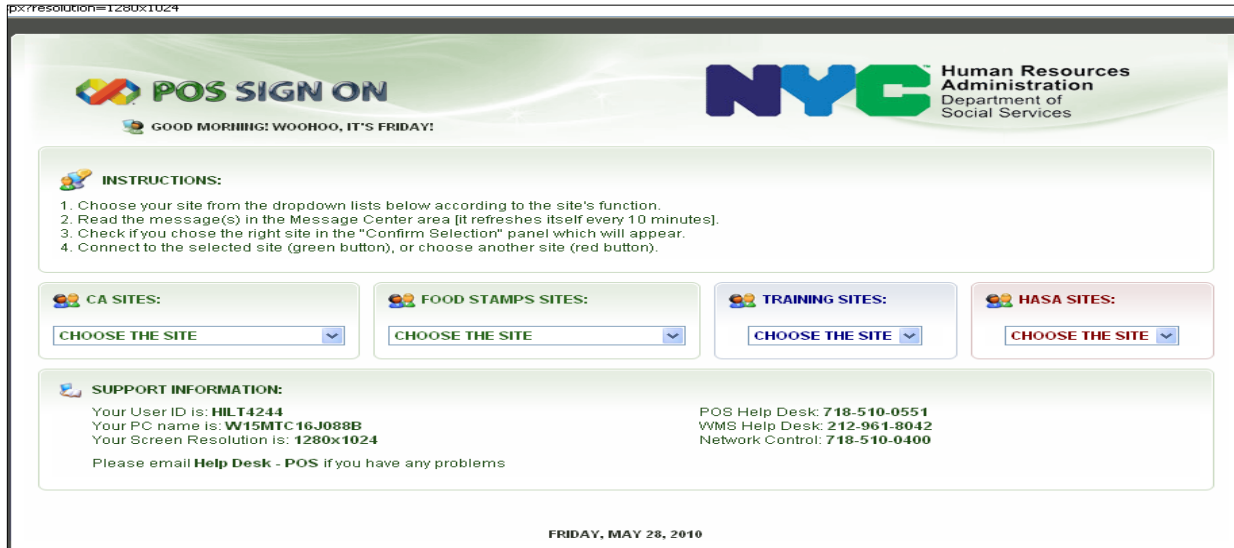
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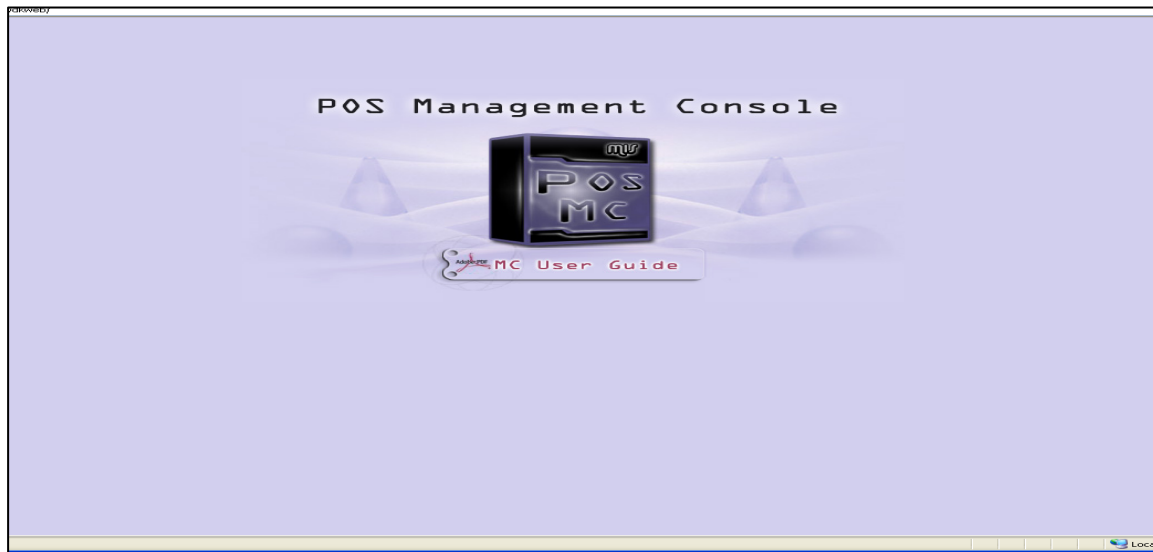
Paperless Office System

The Paperless Office system 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 4.2 June 21, 2010

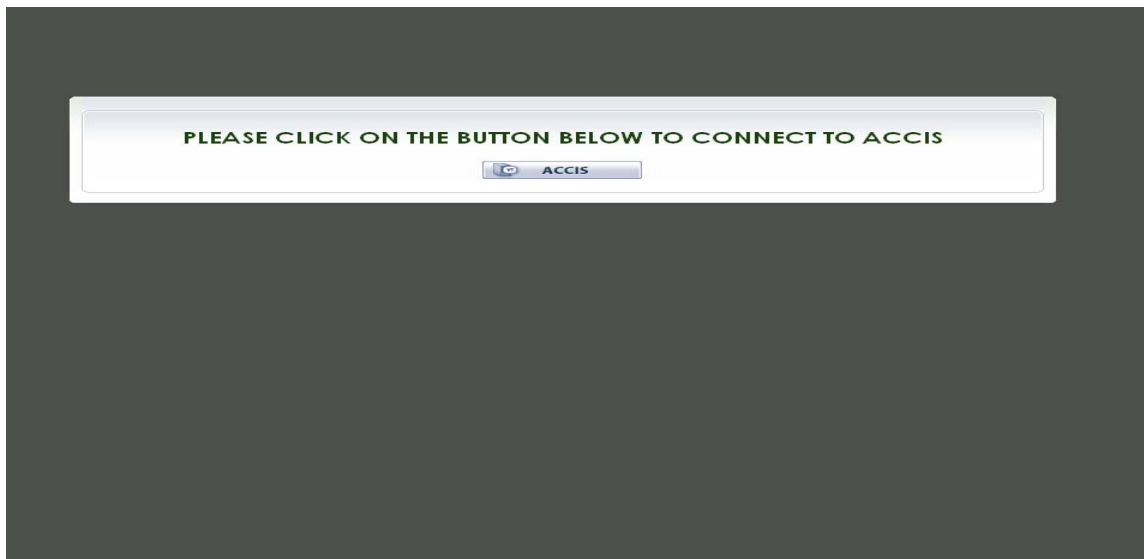
POS Release notes

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

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

Automated Child Care Information System (ACCIS)

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



FS POS Release Notes: Appendix A

Desk Guide – Introduction to POS Portal

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Public Transportation Automated Reimbursement System (PTAR)

Metro card ordering system for FIA centers.



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

All FS POS related applications will link back to the FS POS portal which would save 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.

Attachment C

**FS POS Release Notes 4.2 – Appendix B - 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

Attachment C

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

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

Overview

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

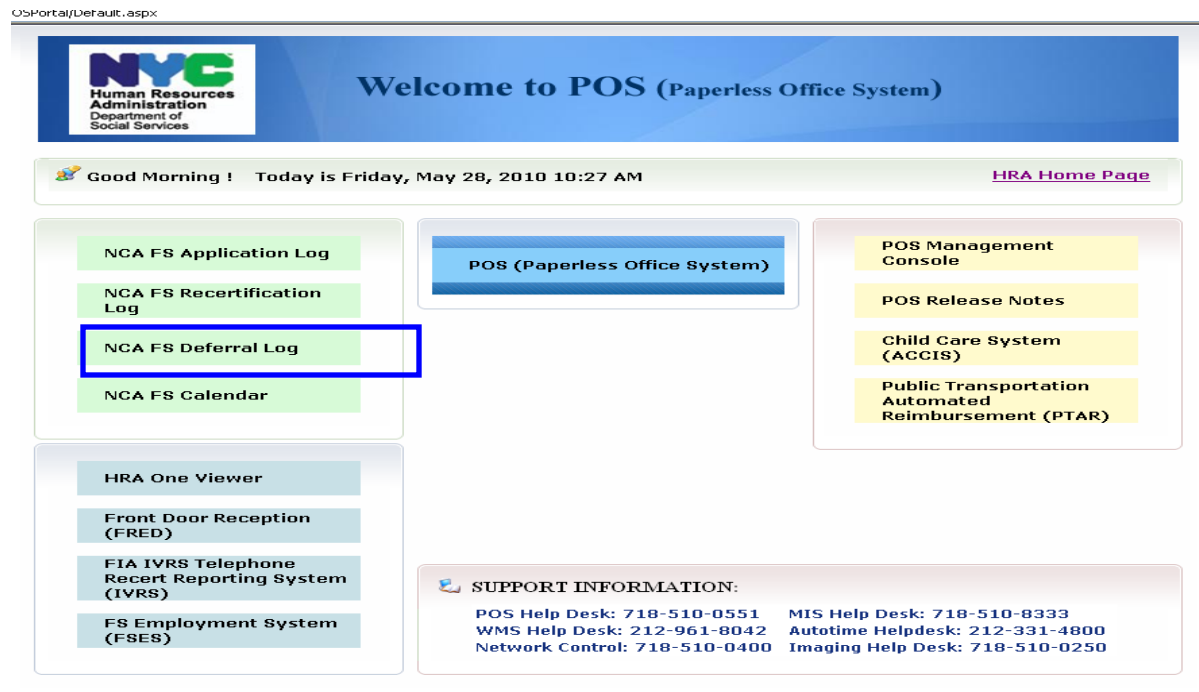
Business Details

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



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FS POS Release Notes 4.2 – Appendix B - 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** will be 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 will be 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 B - 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.”

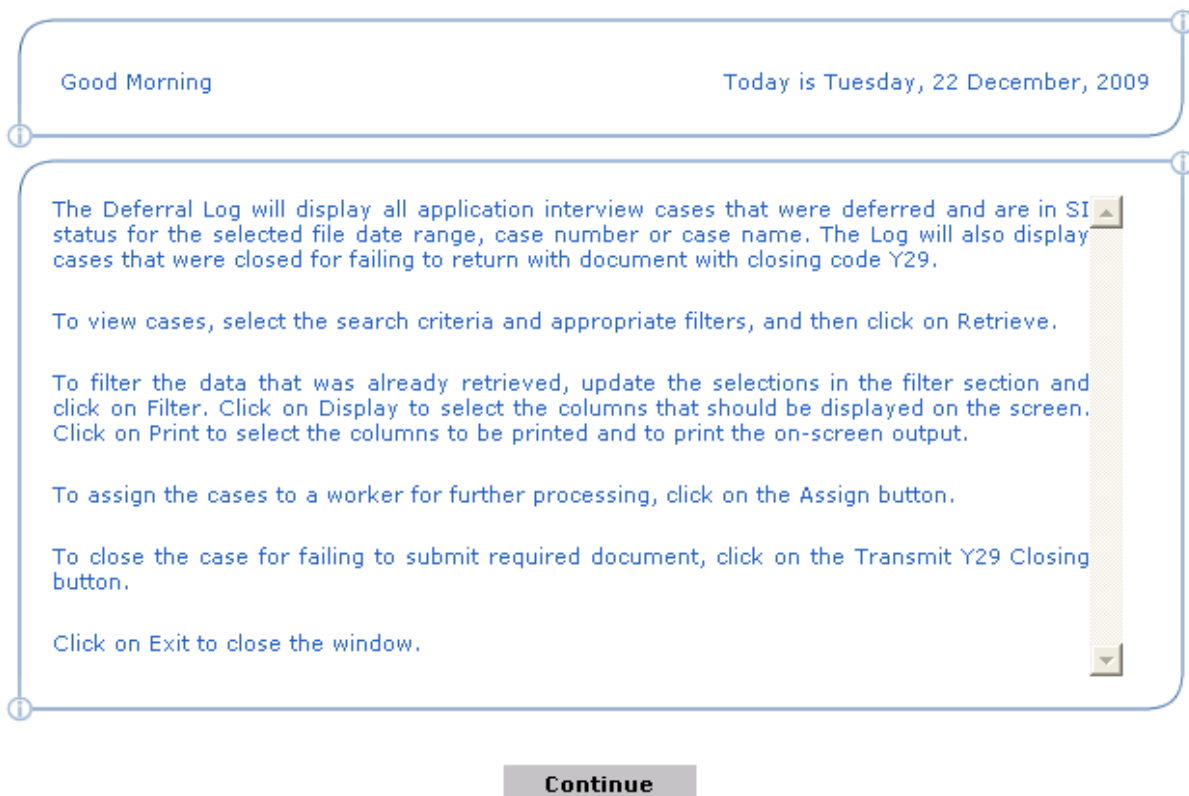
When multiple users have opened the log, the following message will appear:

“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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Deferral Log Window

File | Retrieve | Print | Filter | Display | Summary | 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
				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 B - 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:

- 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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Summary

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

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

OK

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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Log Data (continued)

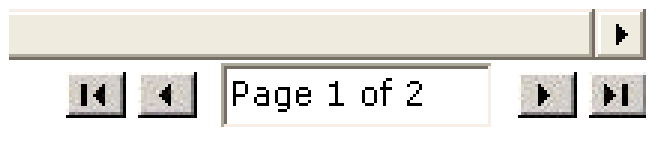
- Scanned Document
- Telephone
- Assigned
- Assigned To – Activity
- Pending Saturday TAD
- Y29 Closing Transmitted
- Pending Transaction

<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 will display 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 will appear at the bottom of the log:

- Transmit Closing
- Assign
- Exit

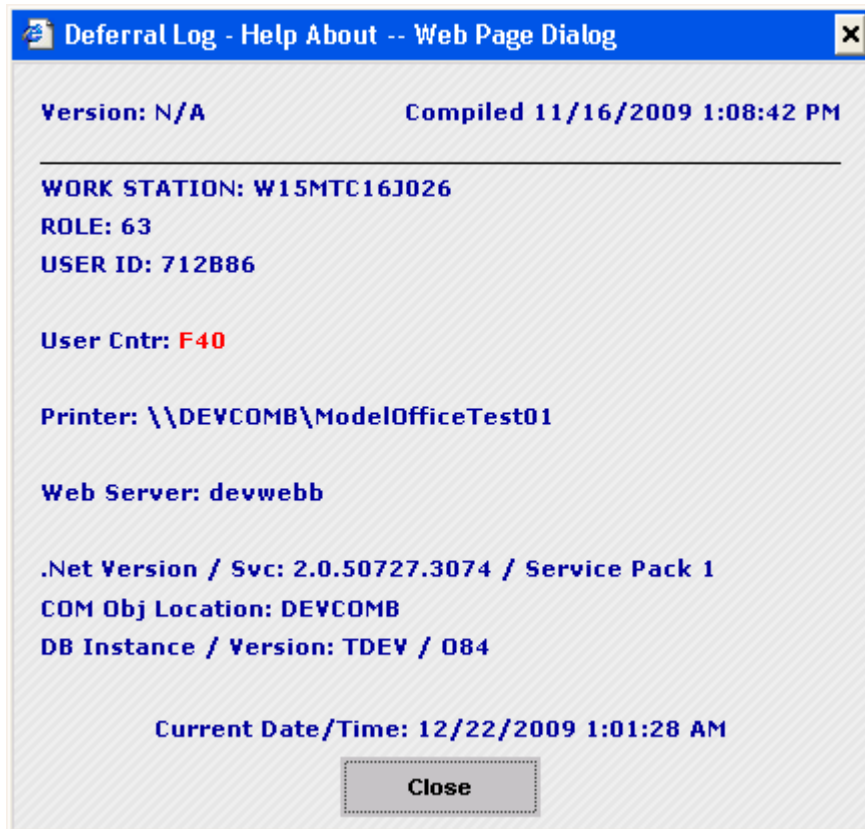


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Help-About Window

This window will allow 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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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", each containing a redacted value. 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", and "FS CA". A large black rectangular area obscures 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 B - 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?”

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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.

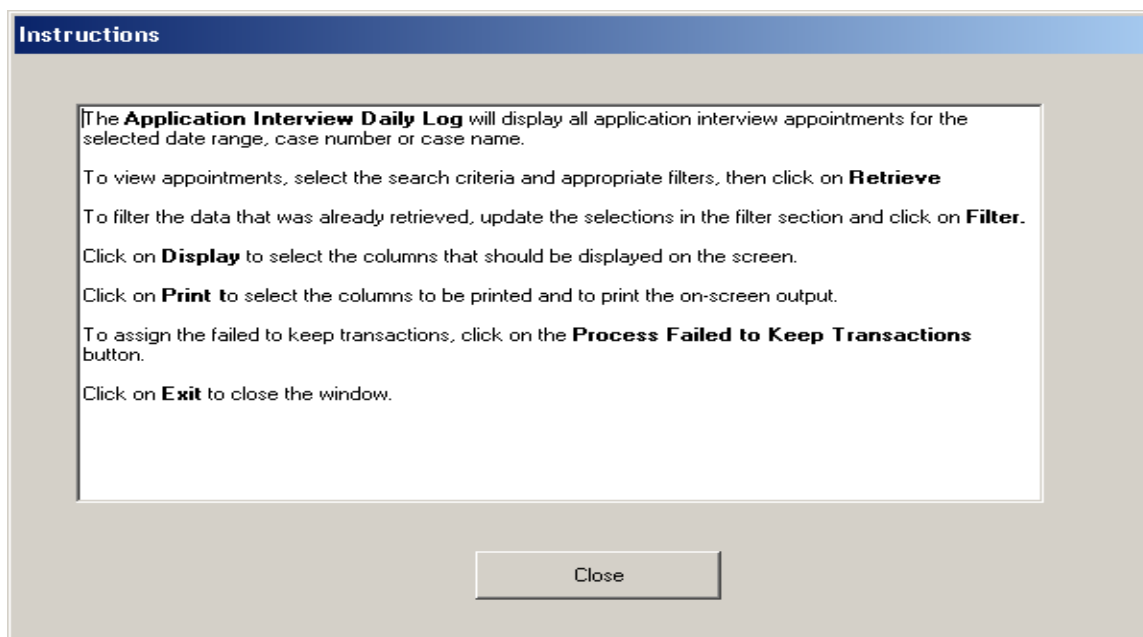
The Application Interview Log and Failed to Keep Application Interview Log windows will be updated with the following new features:

- 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



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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 will be a new column and filter in the Application Log for tracking of the E-Apps.

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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 two radio buttons: 'Appointment Date' (selected) and 'Case Number'. Under 'Appointment Date', there are two options: 'Select Date' with a callout '3a' pointing to a date dropdown, and 'Specify Range' with a callout '3b' pointing to 'From' and 'To' date input fields. Under 'Case Number', there is a text input field with callout '4'. Under 'Last Name of Casehead or Payee', there is a text input field with callout '5'.

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 several checkboxes with callouts: 'Working Families' (checked, callout '7a'), 'In-Center' (checked, callout '7'), 'CBO' (checked, callout '8'), 'E-App' (checked, callout '8a'), 'Telephone' (checked, callout '9'), 'Expedited' (checked, callout '9a'), 'Exclude dummy case numbers' (unchecked, callout '10'), and 'Original appointment date' (unchecked, callout '6').

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Appointment Status Filter

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



Appointment Status Filter

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

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	00000538905A	Lorne Anne	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

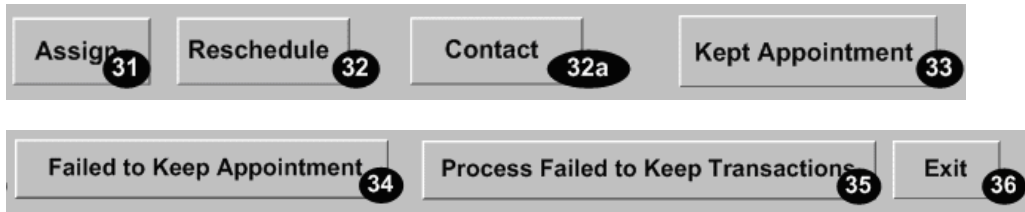
22 Contact Number	22a Number of Contacts	23 Assigned To	24 Spoken Lang	24a Interpreter	25 Interv Started On	25a Expedited	26 Case Status	27 Previous Appt	6a Orig Appt
	1	A. Turner	English	Yes	6/26/07	Yes	Active	6/25/07 11:15 AM	6/25/07 11:15 AM

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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.

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Refer Action window

Selected Case

Case Number: 00010006400F Case Name: KHAN RAZA

Casehead CIN: SY82710Q Casehead Name: Khan Raza

Center: F40

Title	Unit	Last Name	First Name	Phone
FS Supervisor	FS	Batov	Olga	7182202222
FS Supervisor	DEV	Batov	Olga	
FS Supervisor	DEV	Booker	Kelly	
FS Supervisor	RCT	Breton	Jose	7185108589
FS Supervisor	DEV	Chen	Li	7185108588
FS Site Manager	MPU	Etiene	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

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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: 00010006400F
Case Name: KHAN RAZA
Casehead Name: Raza Khan
Contact Number: _____ Extension: _____
Requested call time: _____

Contact Attempt 1
Did you successfully contact the client? Yes No
Date that the contact was attempted? 05/28/2010
Time that the contact was attempted? _____

Contact Attempt 2
Did you successfully contact the client? Yes No
Date that the contact was attempted? 05/28/2010
Time that the contact was attempted? _____

Contact Attempt 3
Did you successfully contact the client? Yes No
Date that the contact was attempted? 05/28/2010
Time that the contact was attempted? _____

Contact Attempt 4
Did you successfully contact the client? Yes No
Date that the contact was attempted? 05/28/2010
Time that the contact was attempted? _____

Comments: _____

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

OK Cancel

Contact Attempted Window

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

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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?

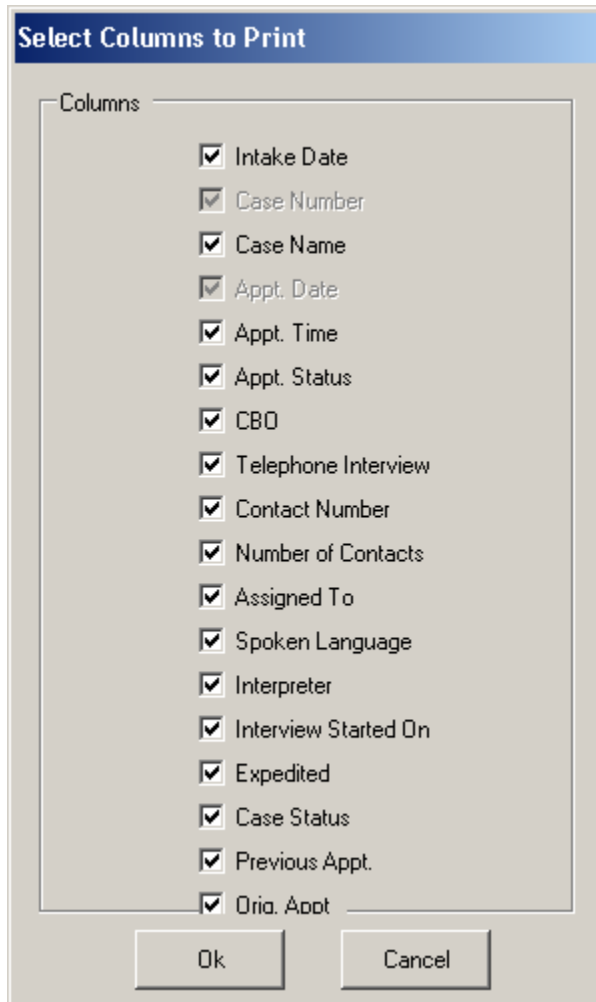
Contact Attempted 4

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

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Window: Select Columns to Print



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.

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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.

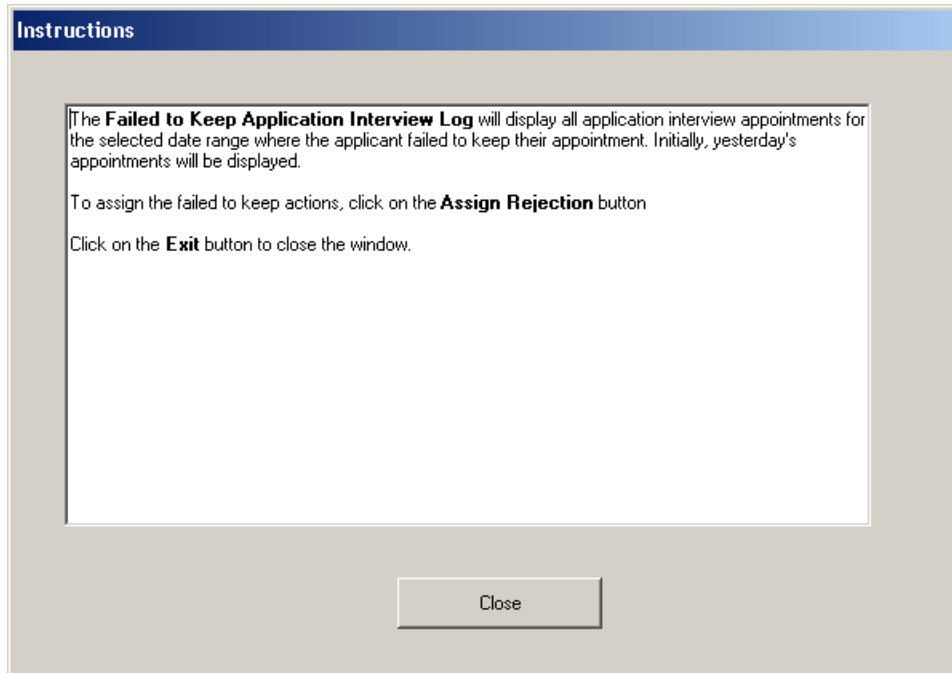
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Failed to Keep Application Interview Log

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.



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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

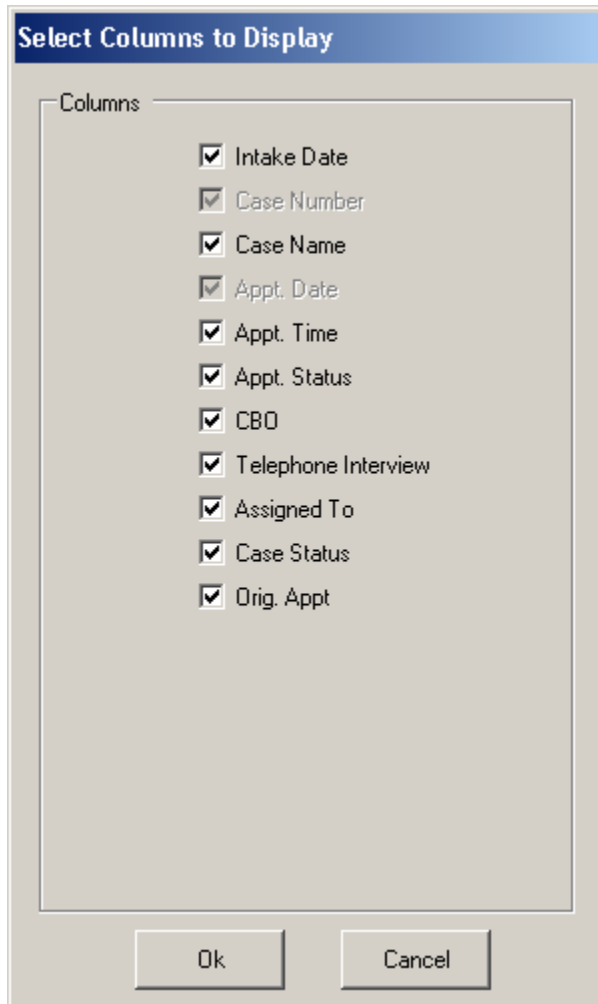
Use of these buttons will remove the case from the Failed to Keep Log and place the case back on the Application Interview Log awaiting further action.

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.

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Version 4.2, June 21, 2010

Window: Select Columns to Print



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.

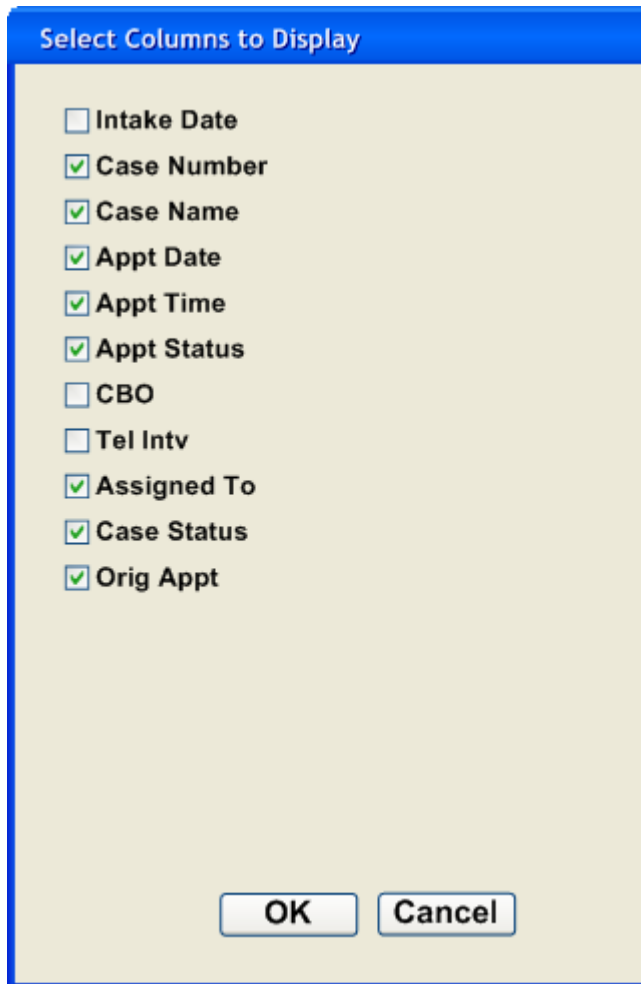
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row should appear on one page.

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 C

Version 4.2, June 21, 2010

Window: Select Columns to Display



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 D

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 will be 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.

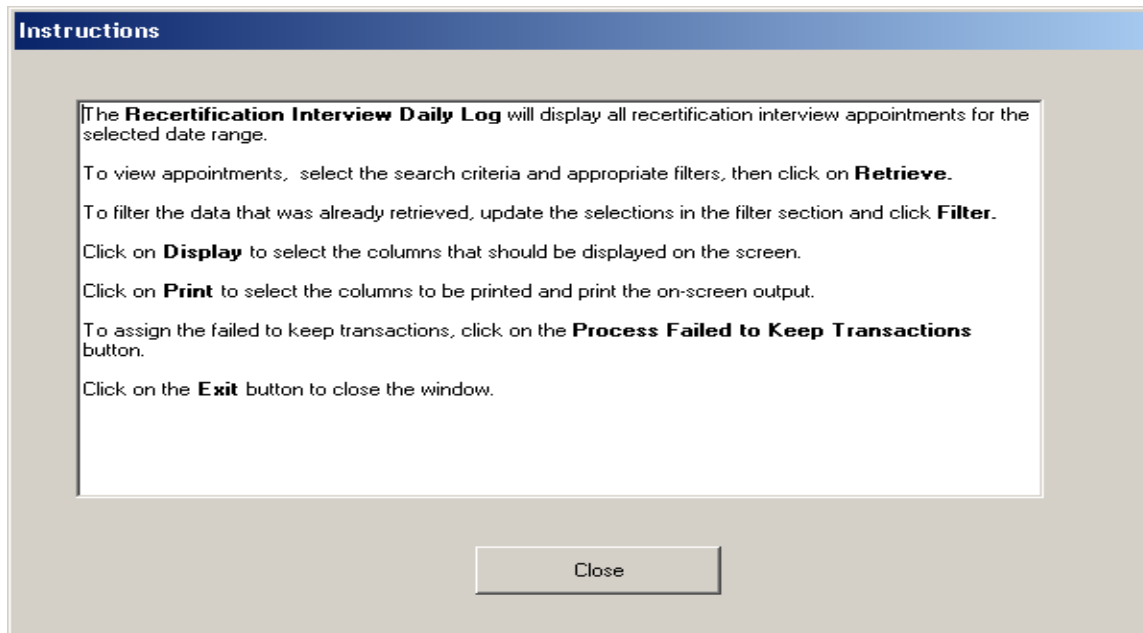
AFIS Report

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

New Edits for Transferred Cases

New edits will be 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 D

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

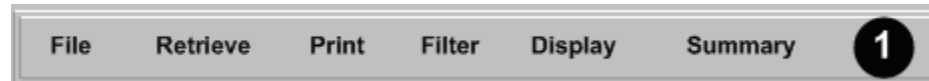
AFIS Reports

Case No	Case Name	Spoken Lang	Interpreter	Appt Date	Appt Time	LDS Recd
00010003620B	BROWN LOURDES	English	No	05/07/2010	04:30 PM	No
00010004792H	SOREL ZERO	Am Ind-Crow	No	05/07/2010	04:30 PM	No
00010005376I	MARTINEZ MARIE	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 D

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

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- 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
00000538905A	Lorne Anne	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

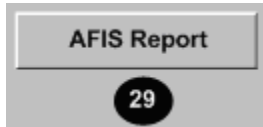
FS POS Release Notes: Appendix D

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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:

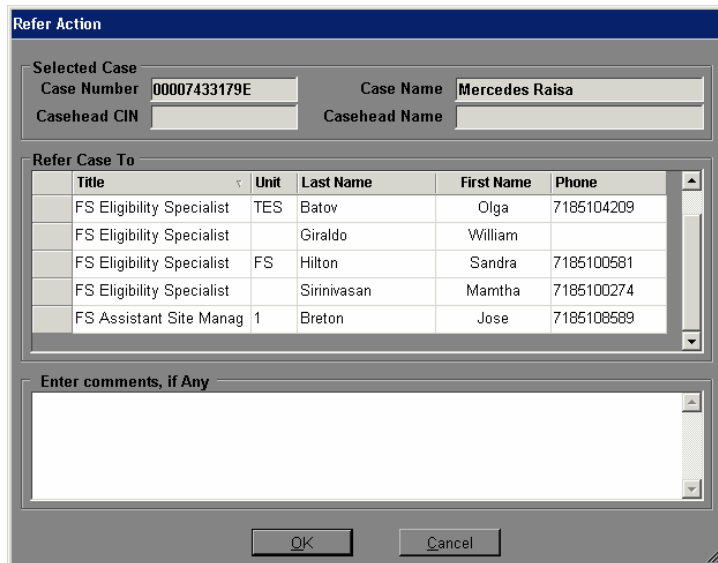
- FS Site Manager
- FS Assistant Site Manager
- FS Supervisor
- FS Eligibility Specialist
- Designated FS Clerk

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) will be updated in POS.

FS POS Release Notes: Appendix D

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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:

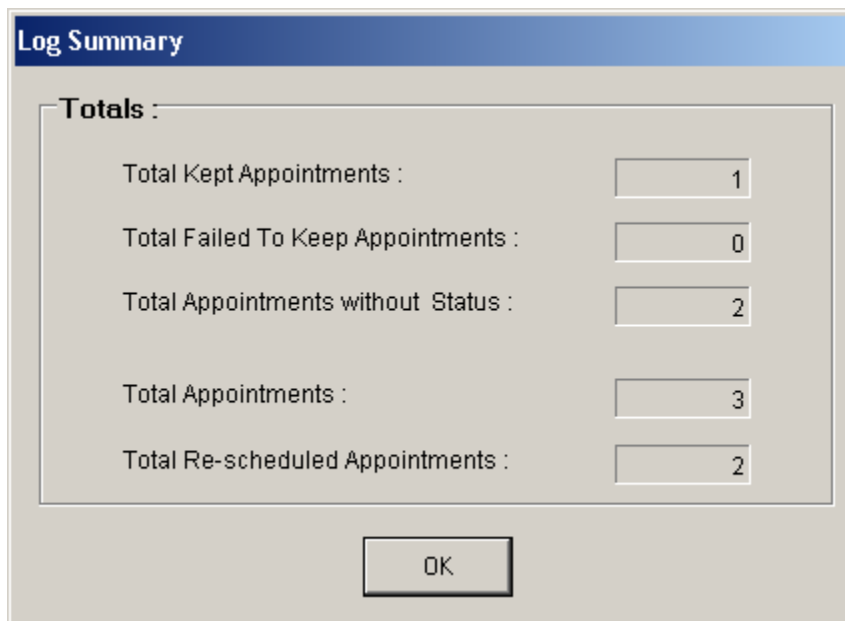
Refer Case To

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 :	<input type="text" value="1"/>
Total Failed To Keep Appointments :	<input type="text" value="0"/>
Total Appointments without Status :	<input type="text" value="2"/>
Total Appointments :	<input type="text" value="3"/>
Total Re-scheduled Appointments :	<input type="text" value="2"/>

OK

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

FS POS Release Notes: Appendix D

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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:
- Case Name:
- Casehead Name:
- Mail Returned or Undelivered?: Yes No
- Date of returned or undelivered mail:
- Signed LDSS-4826 received?: Yes No
- Date LDSS-4826 Received:
- Envelope Post-Mark Date:
- Interview Type: Telephone In-Center
- Contact Number: Extension:
- Did the applicant request a new call time?: Yes No
- Date: Time:

At the bottom of the window are two buttons: "OK" and "Cancel".

FS POS Release Notes: Appendix D

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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

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?

Contact Attempted 3

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

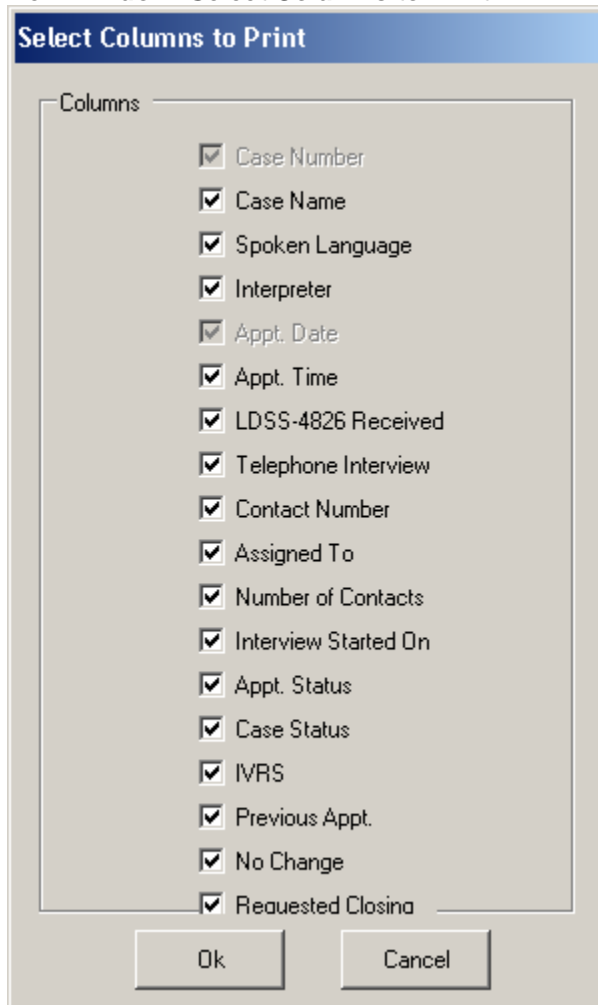
FS POS Release Notes: Appendix D

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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.

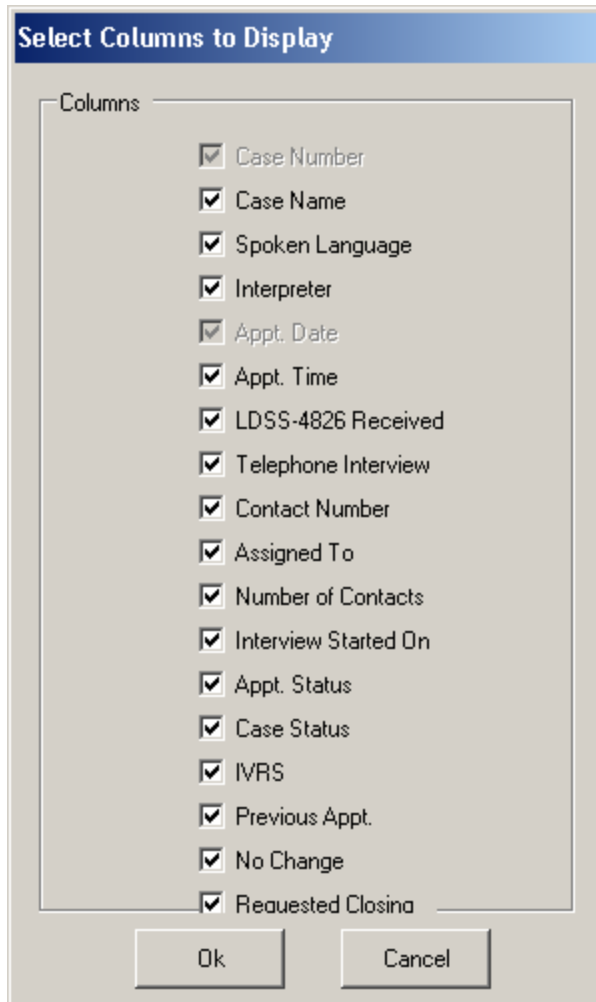
The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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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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 D

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AFIS Reports

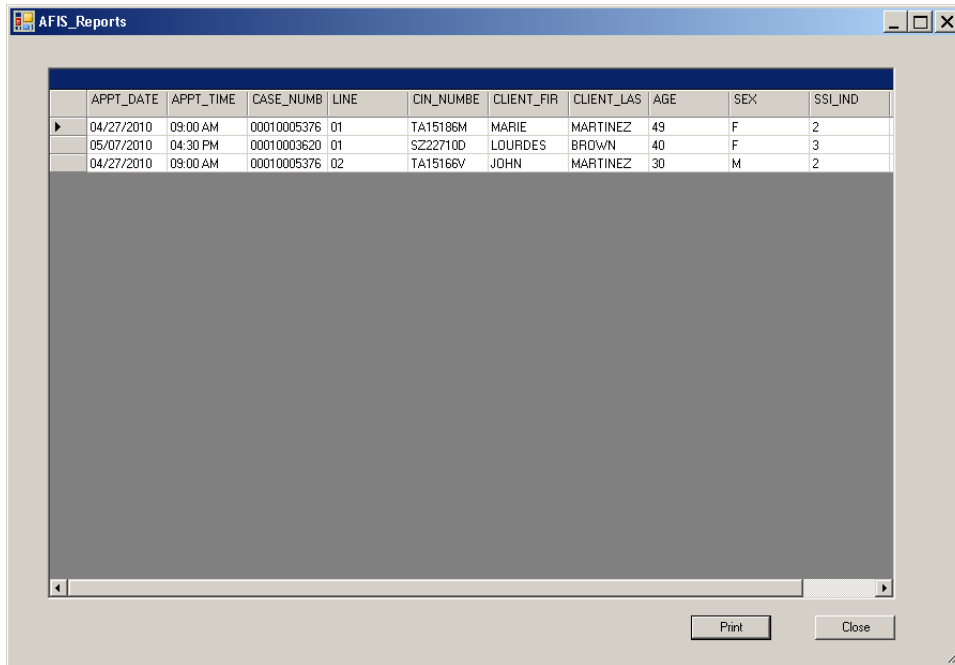
The AFIS report window will be available when the Worker selects an appointment date range and clicks on the **AFIS Reports** button.

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



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

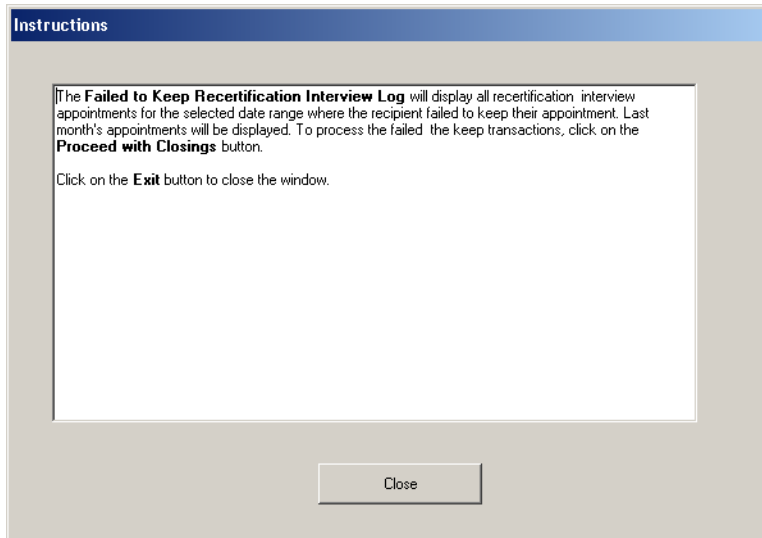
The Worker will be able to print the report for follow-up by clicking on the **Print** button. To close the window, the Worker will click on the **Close** button.

FS POS Release Notes: Appendix D

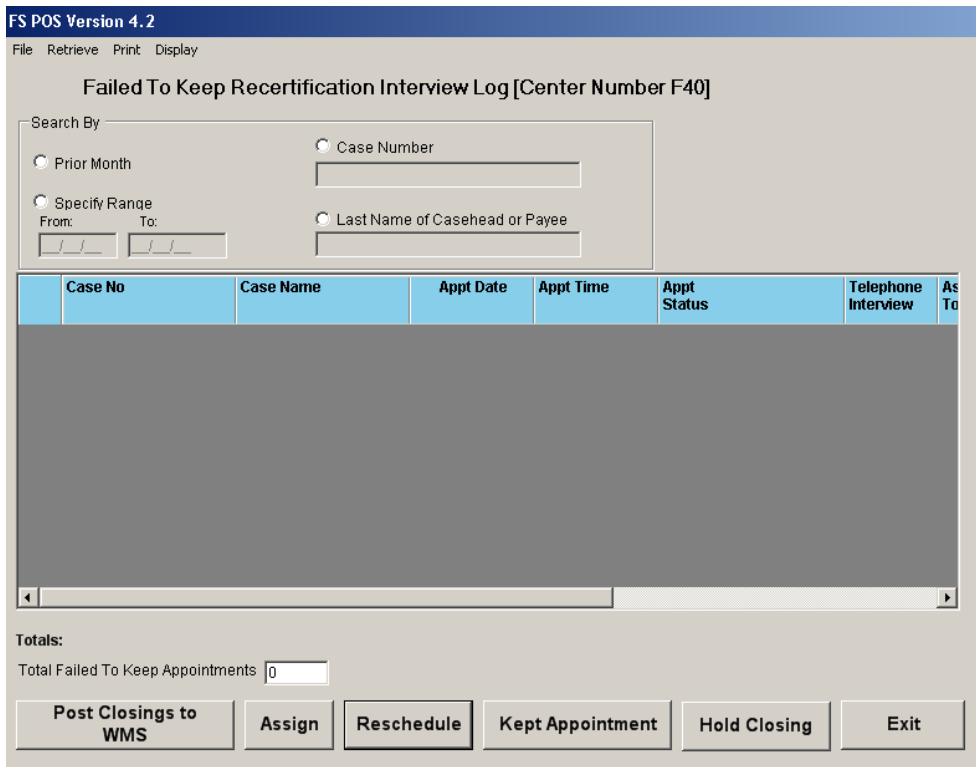
Version 4.2 June 21, 2010

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 D

Version 4.2 June 21, 2010

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

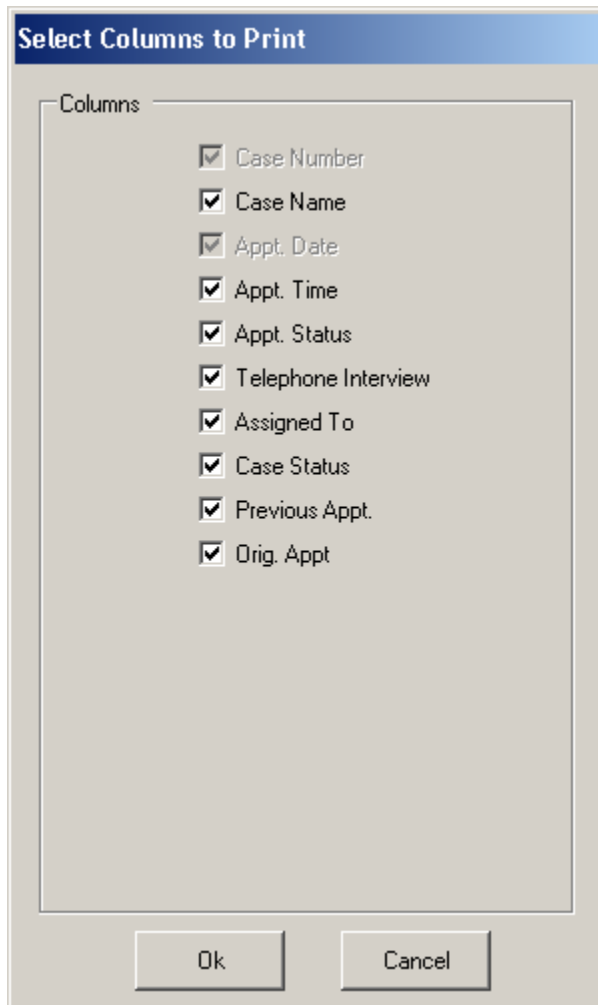
Buttons in Log

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 D

Version 4.2 June 21, 2010

Window: Select Columns to Print



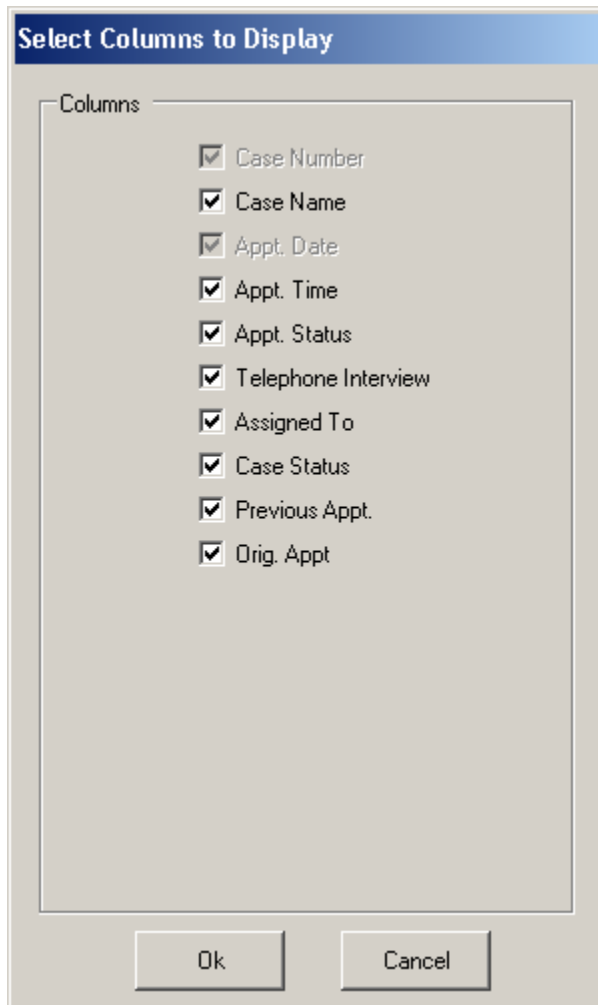
This window will appear when the Worker clicks the Print option in the menu at the top of the log. The Case Number and Appt Date checkboxes will be pre-selected. Any chosen filters will carry over to the print job. Additionally, all data for a single case row will appear on one page.

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 D

Version 4.2 June 21, 2010

Window: Select Column to Display



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.