

CA POS Release Notes

Version 20.2 June 20, 2016

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 20.2 scheduled for June 20, 2016. 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://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

Table of Contents

1. Database Consolidation: HASA.....	2
2. Print to Mail (PTM) Report.....	2
3. LDSS-3152-NYC (Action Taken On Your Supplemental Nutrition Assistance Program (SNAP) Updates	3
4. Updated Supervisory Approval window for Homebound Recertifications.....	3
5. Removal of Wage Reporting System (WRS) Resource File Information (RFI) from POS Employment	4
6. Client Services Screen Update.....	4
7. Update for EXP-76R (Documentation Receipt) for RA Medical Documentation.....	4
8. Activity Completion Edit to Prevent Budgeting Income without Proof of Income	4
9. Center Transfer Request Negative Action Daily Report	4
10. New Center INV for Investigations	5
11. Updated Business Rule for Single Issuance Codes SA and B8	5
12. New Single Issuance Codes BB (Tenant Based Rental Assistance Landlord Bonus).....	5
13. Updated Social Security Number (SSN) Edits in POS Intake Activities.....	5
13. Motor Vehicle Exemption Update	6
14. Update to Air Conditioning Question and SUA (Standard Utility Allowance) Level I.....	6
15. Issuance of Confirmation Numbers at Rescheduling of Bureau of Eligibility Verification (BEV) Appointments	7
16. Update for Single Issue Opening Code and Single Issuance Code Edits	8
17. M-3E Indicator POS TAD Update for BHP Cases	9
18. New Centralized Indexing Unit (Center Number 088), Phase I	9
19. Notice Selection Window Update	9
20. FIA-1021 (Notice of Able-Bodied Adult Without Dependents (ABAWD) Status) Mailer Update	9
21. Attachment B: Tracking Multi-Suffix Supplements for Center 017.....	9

CA POS Release Notes

Version 20.2 June 20, 2016

1. Database Consolidation: HASA (HIV/AIDS Services Administration)

In late June 2016, MIS will be moving the following centers onto a new database server platform that will offer increased reliability and stability for our POS (Paperless Office System). This is the continuation of the move to one database which will have a number of good consequences as we move toward new business models. This change will be transparent to staff. All sites will have full MIS (Management Information System) support coverage to monitor and assist staff during this move.

- **014** Waverly HRA Center
- **019** Crotona HRA Center
- **024** Amsterdam HRA Center
- **041** HRA 4th Floor Center
- **043** Kingsbridge HRA Center
- **048** Jerome HRA Center
- **049** Coney Island HRA Center
- **051** Queensboro HRA Center
- **072** Hamilton HRA Center
- **073** Brownsville HRA Center
- **085** Greenwood HRA Center
- **093** Richmond HRA Center

2. Print to Mail (PTM) Report

A new report to monitor PTM was added to the POS Management Console under Specialized Reports. The new report tab has a label of **PTM**.

This report helps identify the daily mail jobs that are sent via PTM. The report consists of the following views:

Detail

- a. Center Number
- b. Case Number
- c. Case Name
- d. Form Number
- e. Form Description (Title of the form)
- f. Mail Date

Detail View

Timeframe Selection

Yesterday

Past 7 Days

Past 4 Weeks

A Month ▼

Specify Range

00/00/00 to 00/00/00

Area Filter

City-Wide

SNAP Only All ▼

CA Only N ▼

Case

Form Filter

All

Form No All ▼

Report Output Label

Detail

Summary

Filter

CENTER #	CASE NUMBER	CASE NAME	FORM NUMBER	FORM DESCRIPTION	MAIL DATE

Number of Records: 152

CA POS Release Notes

Version 20.2 June 20, 2016

Summary

- a. Center Name
- b. Center Number
- c. Form Number
- d. Form Count

Summary View

The screenshot shows a web-based interface for data filtering and viewing. It consists of four main filter panels at the top, a table below, and a 'Filter' button. The 'Timeframe Selection' panel has radio buttons for 'Yesterday', 'Past 7 Days', 'Past 4 Weeks', 'A Month', and 'Specify Range' with two date input fields. The 'Area Filter' panel has radio buttons for 'City-Wide', 'SNAP Only', 'CA Only', and 'Case', along with dropdown menus for 'All' and 'N'. The 'Form Filter' panel has radio buttons for 'All' and 'Form No' with a dropdown menu. The 'Report Output Label' panel has radio buttons for 'Detail' and 'Summary'. The table below has four columns: 'CENTER NAME', 'CENTER NUMBER', 'FORM NUMBER', and 'FORM COUNT'. The 'Number of Records: 152' indicator is located at the bottom left of the interface.

CENTER NAME	CENTER NUMBER	FORM NUMBER	FORM COUNT

3. LDSS-3152-NYC (Action Taken On Your Supplemental Nutrition Assistance Program (SNAP) Updates

The **LDSS-3152-NYC** is programmed for application cases in POS. A new edit prevents the printing of this form in the recertification activities. If the Worker attempts to print the form in the **Print Forms** window or attempts to select it in the **Notice Selection** window, the following message appears: **“The LDSS-3152 cannot be printed in POS for this activity. If a manual notice is required, scan and index the completed manual notice into POS.”**

The form was also updated to remove the Worker number. The general telephone number for the center now appears in the **TELEPHONE NO.** field.

4. Updated Supervisory Approval window for Homebound Recertifications

POS has updated the **Supervisory Approval** window for Homebound applicants/participants due to the Lovely H lawsuit. This window is mandatory for those applicants who requested Home Visit Needed/Homebound Status since 9/13/2013. The window was updated in the shortened flow for participants who fail to keep the recertification interview.

POS runs the Homebound Determination business rules to check if the individual is currently homebound in WMS (Welfare Management System), NYCWAY (New York City Work Accountability and You) and POS. If a request was found or homebound status has been determined the Supervisor must complete the **Approval** window.

CA POS Release Notes

Version 20.2 June 20, 2016

5. Removal of Wage Reporting System (WRS) Resource File Information (RFI) from POS Employment

The WRS RFI section was removed from the **Is Employed** and **Is Unemployed** windows in order to prevent obsolete data from appearing within the POS interview. The WRS RFI is available in the **RFI** section under the POS Tools menu.

6. Client Services Screen Update

The **Client Services** Screen was updated to:

- Remove the **RA Source** column to prevent user confusion;
- Display any user-entered comment(s) in the **RA Message** column along with the RA (Reasonable Accommodation) message;
- Display the mandatory user-entered comments in the **RA Message** column for the reasonable accommodations (RA) of "Help for people who are blind or visually impaired" and "Help for people who are deaf or hard of hearing"; and
- Display the RA message of "**Please arrange for American Sign Language (ASL) interpretation for this client**" for the RA "Sign language interpretation";

7. Update for EXP-76R (Documentation Receipt) for RA Medical Documentation

The **EXP-76R** form was updated to add a new **Reasonable Accommodation** checkbox and to rename the **Medical Records** to **Medical or Clinical Records**. POS was updated to check these checkboxes when the new **RA - Medical and Clinical Records** document type is selected.

8. Activity Completion Edit to Prevent Budgeting Income without Proof of Income

POS was updated to add a new completion edit requiring proof of income in the **Application Interview**, **Recertification Interview** and **Change Case Data** activities when budgeting income. If the Worker attempts to authorize a new budget without the proof of income, the following message appears: "**Income cannot be budgeted without current proof of income. There is no current income proof document exists in the HRA Viewer. The client has to provide required document(s) and you should scan and index them.**"

9. Center Transfer Request Negative Action Daily Report

A new daily report of Notices of Intent (**NOI**) for heads of household with the **RA** of **Case Transfer** or **Prevent Transfer** was created. The Centralized Database provides a daily list of all open **Case Transfer** and **Prevent Transfer** RAs to POS. POS then determines the open cases where the individuals are the head of the household (casehead or payee) and provides the cases to the MIS WMS group for generation of the report. This report is delivered by email to identified HRA (Human Resources Administration) staff for monitoring and outreach.

The report contains the following information:

- Case
- Suffix
- Tx-Date (Transaction Date)
- Tx-Stat (Transaction Status)
- Last Name
- First Name

CA POS Release Notes

Version 20.2 June 20, 2016

- Reason
- Reason Desc. (Reason Description)
- Ori-Ctr (Originating Center)
- Res-Ctr (Responsible Center)
- Dat-Ctr (Data Entry Center)
- Pend Case-Sta (Pending Case Status)
- Pa-Status (CA Status)
- Fs-Status (SNAP Status)
- Ma-Status (MA Status)
- Case-Type
- Pafs Ind (CA/SNAP Casehead Status)
- Watch-List
- Program Group
- Pend Ctrl-Rec-Nbr (Record Number)

10. New Center INV for Investigations

A new center number **INV** was added for **Investigations**. Staff enrolled under this center ID can only be re-activated in POS by the POS Help Desk with authorization from the **Office of Data Security Management (ODSM)**.

11. Updated Business Rule for Single Issuance Codes SA and B8

The Landlord Bonus codes **SA** (LANDLORD LINC BONUS PAYMENT) and **B8** (SEPS BONUS) can now be used to issue amounts greater than \$0 (zero) and less than or equal to \$1000.00 for example \$2.50, \$500.00 and \$1000.00. In the past only the exact amount of \$1000.00 was allowed to be entered for codes SA and B8. Staff is now required to enter a payment period for landlord bonus codes **SA** and **B8**. The payment period can be entered as the day the benefit issued.

For additional details, please see **Fax Flash 16-19** (LINC Landlord Bonus Issuance Code SA and new Tenant Based Rental Assistance Landlord Bonus (TBRA) Issuance Code BB).

12. New Single Issuance Codes BB (Tenant Based Rental Assistance Landlord Bonus)

New single issuance code **BB** was added in POS for Special Roll Checks, Manual E-Check or Auto E-Check. This new code has the same amount and period requirements as the **SA** Landlord Bonus Code. In order for an issuance code to be accepted in the WMS, the case must also have been issued at least one **B6** (TENANT-BASED RENTAL ASSISTANCE [TBRA]) payment at the same time as or prior to the **BB** payment.

Issuance code **BB** must be data entered via the Paperless Alternate Module (PAM) if the POS issuance transaction to WMS is not available.

13. Updated Social Security Number (SSN) Edits in POS Intake Activities

The data entry edits in POS intake activities were updated to prevent additional invalid SSN entries:

- SSN must be 9 digits and numeric.
- 1st 3 digits cannot be '000', '666', '900-999'.
- 4th and 5th digits cannot be '00' (zeroes).
- 6th-9th digits cannot be '0000' (zeroes).

These edits run in the following activities:

CA POS Release Notes

Version 20.2 June 20, 2016

- CBO (Community Based Organization) SNAP (Supplemental Nutrition Assistance Program) Intake
- CA (Cash Assistance) Application Intake
- SNAP Reception Intake
- HRA Outreach SNAP Intake

13. Motor Vehicle Exemption Update

POS was updated in the June 2016 release to match the new vehicle exemption changes published by the New York State Office of Temporary and Disability Assistance. These updates were made in the response window for the question “**Has Title or Registration to a Motor Vehicle or Other Vehicle?**”

Effective Monday May 16th 2016, the New York State Office of Temporary and Disability Assistance (OTDA) increased the vehicle exemption amount from \$4,650.00 to \$10,000.00.

When determining a household's resources if the family owns a vehicle, \$10,000 of the Fair Market Value (FMV) of the vehicle must be exempted from the resource limit. For example, if the vehicle's FMV is \$11,500 then \$10,000 is exempt and the remaining \$1,500 is applied toward the \$2,000 resource limit (\$3,000 if the household has a member who is age 60 or older). In addition, the household is not required to use the vehicle to seek or retain employment for this exemption.

Lump Sum Set Aside Update

OTDA (Office of Temporary Disability Assistance) also increased the amount of the lump sum set aside up to \$10,000 when the funds are used within 90 days of receipt to purchase a vehicle that is needed to find or retain employment or for travel to and from work activities. Unlike the change to the CA Vehicle Resource Exemption policy, you must ask if the vehicle is being used for an employment-related activity to apply this lump sum set-aside. Additional increases to the lump sum set-aside are expected in 2017 and 2018.

Vehicle Bank Accounts for CA Recipients

There is no change to the existing resource exemption amount of up to \$4,650 in a separate bank account for the purpose of purchasing a first or replacement vehicle to find, obtain or retain employment.

No Change to the Resource Limit

The resource limits remain unchanged; \$2000 or \$3000 for households that contains a member age 60 or older. The exemption amount for accounts established to save up for a vehicle remains \$4,650.

Additional Details

For additional details, please see the following policy documents:

- Fax Flash 16/20- Vehicle Exemption
- GIS 16 TA-DC031 Temporary Assistance Policy Change in the Vehicle Resource Exemption and Lump Sum Set-Aside

14. Update to Air Conditioning Question and SUA (Standard Utility Allowance) Level I

The air conditioning question in the **Shelter (Housing) Expenses** section was updated to clarify the wording. The new text for the question is: “**Do you (or anyone who lives with you) pay for air conditioning in your electric bill separate from your rent or is there an additional charge in your rent for the use of your air conditioner?**”

Households that incur the air condition expense qualify for Level I SUA. Information provided by and attested to by the household during the application or recertification process regarding the SNAP household's incurrance of a separate expense for air conditioning is acceptable verification to qualify the household for a heating/cooling Level I SUA unless the information is questionable. This includes information provided on a signed application or recertification application or obtained during the application or recertification interview.

CA POS Release Notes

Version 20.2 June 20, 2016

For additional details, please see Policy Bulletin (PB) **15-12-ELI Standard Utility Allowance (SUA) Eligibility Changes and Revisions to the Shelter Type Codes/Standard Utility Allowance (SUA) Levels Desk Guide (W-205HH)**.

15. Issuance of Confirmation Numbers at Rescheduling of Bureau of Eligibility Verification (BEV) Appointments

POS was updated to issue a confirmation number to applicants when a BEV appointment is scheduled or rescheduled at the **Application Interview**. A new **Confirmation Number** field appears in the **BEV Response** section of the window.

BEV appointments after the application interview are rescheduled via the BEV centralized rescheduling unit. The rescheduling windows in the BEV-MAPPER system were also updated to generate a confirmation number.

The confirmation number begins with the call letters of the program that is generating the number. For BEV appointments, the number is generated begins with the letters BEV. The call letters will be followed by the year, the month, the date and a 5-digit ID. Example: The receipt number **BEV2016060200014** is a ticket that was generated in BEV in 2016 on June 2 and the five-digit ID is **00014**.

Schedule with Confirmation Number

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

- Is this a case re-opening due to Fair Hearing, Aid to Continue or agency error? Yes No
- Will the case be rejected because the applicant is ineligible for Cash Assistance? Yes No
- BEV Referral is required? Yes In Office Field Visit
- Case Type:
- CILOCA Case? No
- Appointment Date: 06/08/2016
- Time: 09:00 AM
- Type: SN
- View/Schedule BEV Appointment
- BEV Response section:
 - Recommendation Date: 00/00/0000
 - Confirmation Number: BEV2016060200014
 - Recommendation:
 - Reason:
- Document... Scan Comment...
- Buttons: OK, Cancel, Scroll Between Rows

CA POS Release Notes

Version 20.2 June 20, 2016

Rescheduled appointment with Confirmation Number

Response to Question

Is this a case re-opening due to Fair Hearing, Aid to Continue or agency error? Yes No

Will the case be rejected because the applicant is ineligible for Cash Assistance? Yes No

BEV Referral is required? Yes In Office Field Visit

BEV Ref Reasons (Fed Codes) NONE

Case Type New

CILOCA Case? No

View/Schedule BEV Appointment Appointment Date 06/10/2016 Time 09:00 AM Type SN

BEV Response

Recommendation Date 00/00/0000 Confirmation Number BEV2016060200015

Recommendation Reason

Document... Scan Comment...

OK Cancel Scroll Between Rows

Homebound reschedule with confirmation number

Response to Question

Is this a case re-opening due to Fair Hearing, Aid to Continue or agency error? Yes No

Will the case be rejected because the applicant is ineligible for Cash Assistance? Yes No

BEV Referral is required? Yes In Office Field Visit

BEV Ref Reasons (Fed Codes) NONE

Case Type New

CILOCA Case? No

View/Schedule BEV Appointment Appointment Date 06/15/2016 Time Type SN

BEV Response

Recommendation Date 00/00/0000 Confirmation Number BEV2016060200022

Recommendation Reason

Document... Scan Comment...

OK Cancel Scroll Between Rows

For all homebound cases the worker must select **Field Visit** to schedule the BEV appointment. For additional details about the confirmation number initiative, please see **PB 16-35-OPE Issuance of Confirmation Numbers at Rescheduling**.

16. Update for Single Issue Opening Code and Single Issuance Code Edits

POS was updated to allow processing of LINC (Living in Communities), CITY FEPS (Family Eviction Prevention Settlement), SEPS (Special Exit And Prevention Supplement) and TBRA (Tenant Based Rental Assistance) grants with the following single issue opening codes: **Y19** (Case accepted for emergencies other than shelter or utility arrears. MA will remain in NA or AP status. For one-shot deals only), **Y38** (Case accepted only for emergency shelter arrears and/or emergency utility arrears which applicant agrees to repay. MA will remain in NA or AP status. (Replaces 009.) For one-shot deals only), **Y39** (Case accepted only for emergency shelter arrears and/or emergency utility arrears with no repayment agreement. MA will remain in NA or AP status. For one-shot deals only) and **Y41** (Case accepted for immediate needs (pre-investigation). Case is applying for ongoing assistance. MA will remain in NA or AP status. [Replaces 033]). The following single issuance codes can now be processed under these single issue opening codes:

CA POS Release Notes

Version 20.2 June 20, 2016

- **Y19** – 09, S1,S2, S3, S4, S5, S6, S7, S8, S9, SA, SB, SC, SD, SE, WA, WB, WC, B6, B7, B8, and BB.
- **Y38** – 39, S1,S2, S3, S4, S5, S6, S7, S8, S9, SA, SB, SC, SD, SE, WA, WB, WC, B6, B7, B8, and BB.
- **Y39** – 39, S1,S2, S3, S4, S5, S6, S7, S8, S9, SA, SB, SC, SD, SE, WA, WB, WC, B6, B7, B8, and BB.
- **Y41** – 09, S1,S2, S3, S4, S5, S6, S7, S8, S9, SA, SB, SC, SD, SE, WA, WB, WC, B6, B7, B8, and BB.

17. M-3E Indicator POS TAD Update for BHP (Basic Health Plan) Cases

POS was updated to prevent cases that contain a combination of individuals that are eligible for BHP criteria and not eligible for BHP criteria from having the CNS (Client Notices System) notices generated at the time of CA rejection. These cases require an entry of **A** (CNS notice suppressed, manual notice required (Adequate action) in the **M-3E Indicator** field in the **POS TAD** to suppress the system-generated notice and require a manual notice (**LDSS-4013 - Action Taken on Your Application**). If the Worker fails to select the value of **A** in the **M-3E Indicator**, the following message appears: **An entry of 'A' is required in the M3E indicator field to suppress the CNS notice due to BHP mixed HH criteria.**

18. New Centralized Indexing Unit (Center Number 088), Phase I

The first phase of new Centralized Indexing Unit (CIU) was added to POS in April 2016. This unit will eventually be responsible for indexing all applicant/participant documents. The CIU, under Office Support Services, is located at 253 Schermerhorn Street and 98 Flatbush Avenue and will be phased in over the next few months. Center Staff will continue to have the ability to index applicant/participant documents after scanning them in the Center. This new unit is designated as Center Number **088** in POS and WMS.

The first phase began Thursday, April 28, 2016 and focused on the SNAP **TIPS 24** (Telephone Interview Processing Services) Center including documents received through applicant/participant Self-Service scanners, Right Fax, and scanning and indexing mail from the US Post Office box connected to that TIPS office.

19. Notice Selection Window Update

The **Notice Selection** window was updated to select the **EBT-23** (Notice of Special Cash Assistance and/or Supplemental Nutrition Assistance Program (SNAP) Benefit) when SNAP Single Issuance Codes **08** (Prorated/Partial PA), **12** (Daily Supplement (Includes Replacement of Food Destroyed in a Disaster), **16** (Single Issuance - Full Month), **19** (Disaster Related Issuance), **22** (Daily Retroactive Benefit), **26** (Replace Stolen Benefit), **39** (Disaster Card Issuance), **53** (Expedited Service – EBT, Verified for NPA/SNAP Cases) or **55** (Expedited Service - Not Verified for NPA/SNAP cases) or CA single issuance code **44** (IMMEDIATE NEEDS GRANT) is data entered in POS.

20. FIA-1021 (Notice of Able-Bodied Adult Without Dependents (ABAWD) Status) Mailer Update

The **FIA-1021** mailer was updated to match changes made to the form. This mailer is now also generated for ABAWD applicants/participants on CA/SNAP cases.

21. Attachment B: Tracking Multi-Suffix Supplements for Center 017

Center **017** (Family Services Call Center) uses the **Non-Food Emergency/Special Grant** activity and new queues to track supplements for multi-suffix cases. The instructions for this process are covered in **Attachment B**.

CA POS Release Notes

Version 20.2 June 20, 2016

These Release Notes contain descriptions of changes in Cash Assistance (CA) POS Release 20.2 scheduled for June 20, 2016. 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://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

Table of Contents

Overview	2
Adding cases to the queue.....	2
Accessing the Multi-Suffix Grants queue	2
Screens for addition of cases to the queue:	3
Screens for accessing the queue and viewing the due date:	6

CA POS Release Notes

Version 20.2 June 20, 2016

Overview

The **Non-Food Emergency/Special Grant** activity and the **Multi-Suffix Grants** queue are used by Center **017** (Family Services Call Center) to track the supplements for multi-suffix cases.

Adding cases to the queue

The Supervisor assigns cases to the queue by:

1. Accessing the **Action** menu.
2. Adding the activity to their queue.
3. Scheduling the activity for the date that the benefits are expected to be issued.
4. Assigning the case to the **Multi-Suffix** queue.

Accessing the Multi-Suffix Grants queue

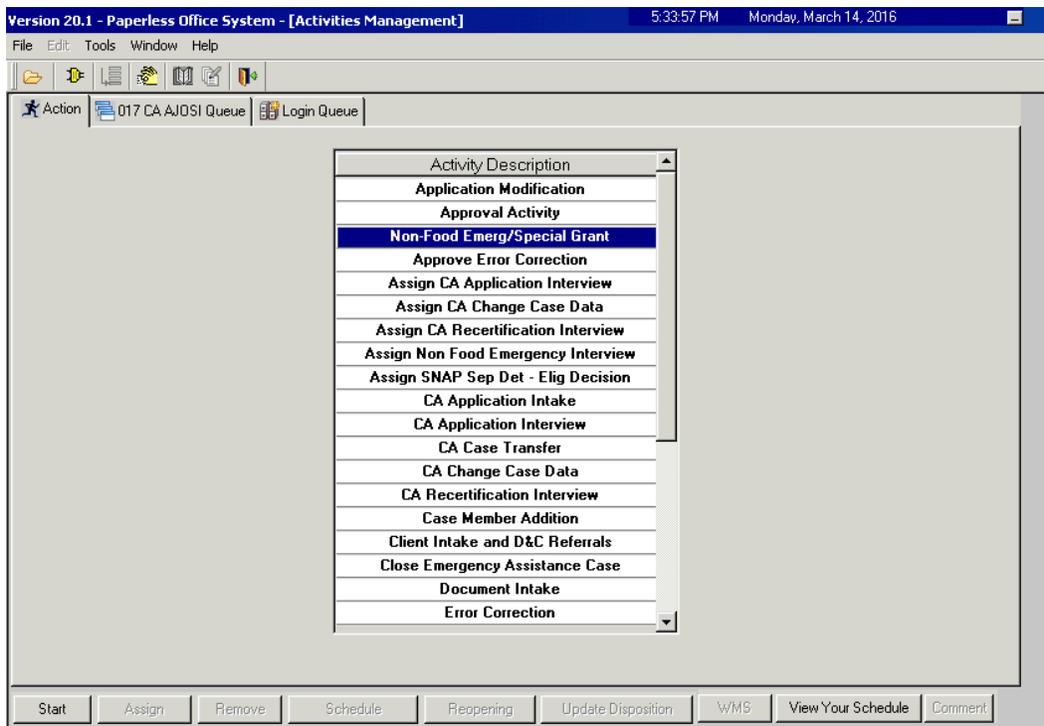
- To access the Multi-Suffix Cases queue, the Supervisor must use the Worker menu in their queue and select the Multi-Suffix Grants queue. The Scheduled For column indicates the date that was entered for each case.
- Cases can be assigned by selecting the case and clicking on the **Assign** button.

CA POS Release Notes

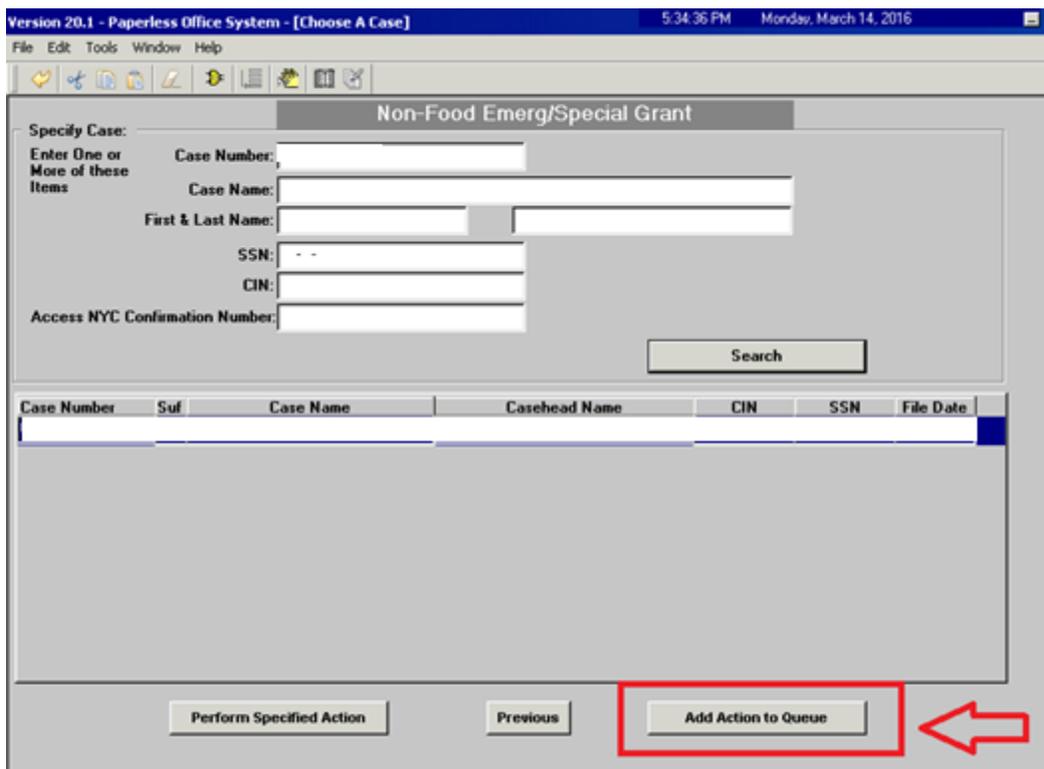
Version 20.2 June 20, 2016

Screens for addition of cases to the queue:

1. Access the **Action** menu, select **Non-Food Emerg/Special Grant** and click **Start**.



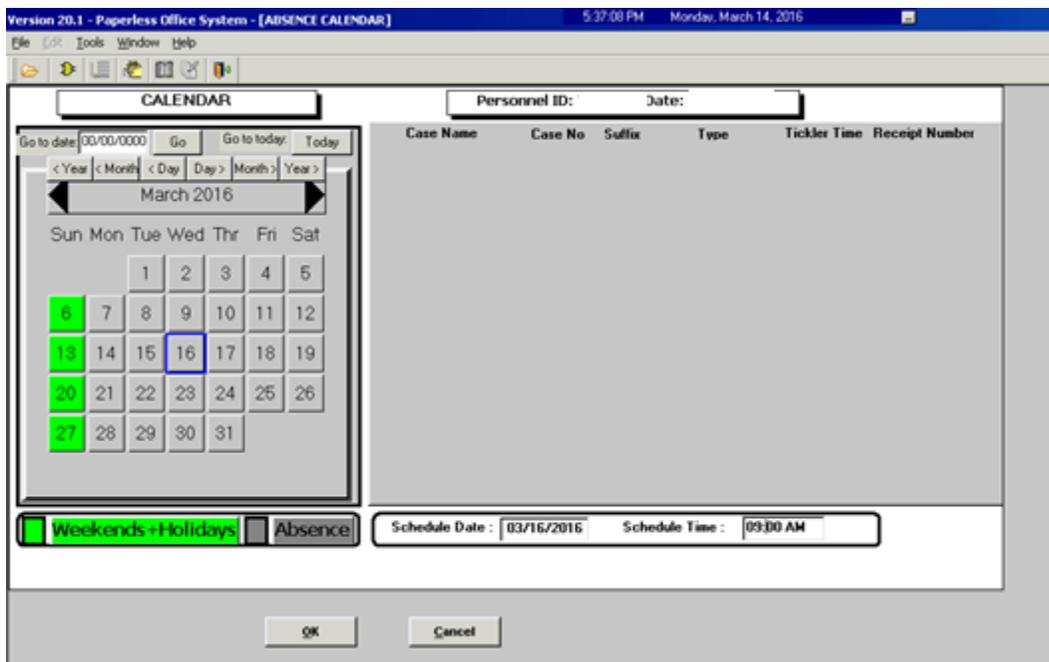
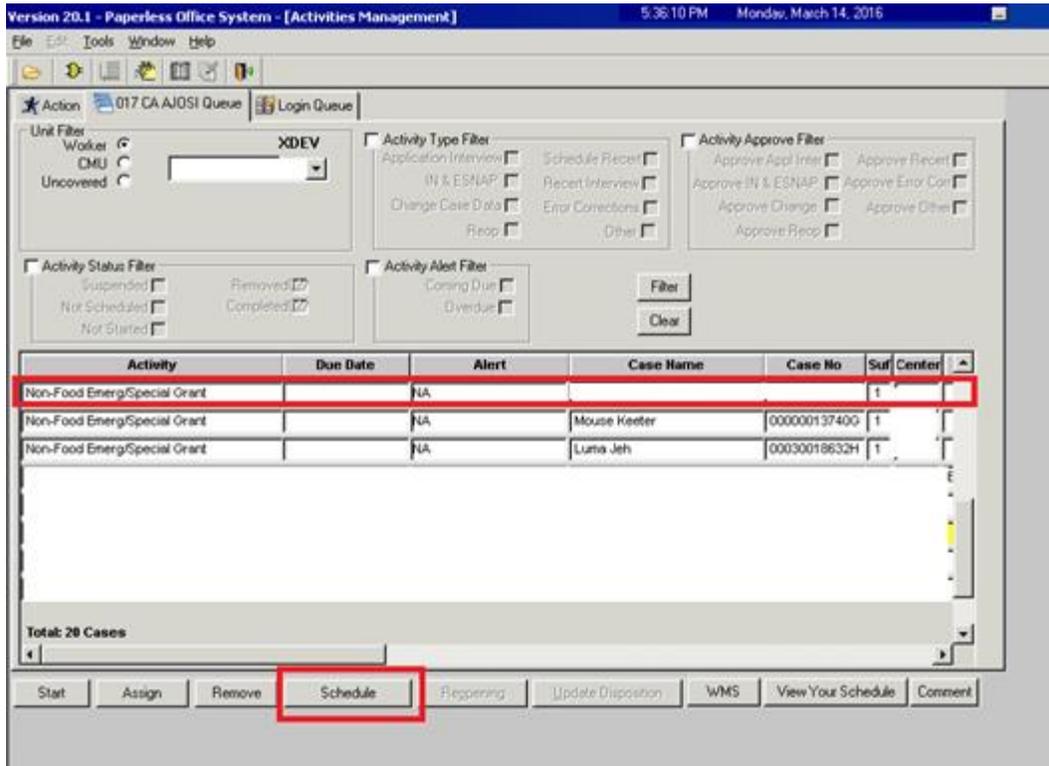
2. Enter the **Case Number**, click **Search**, select the case and click **Add Action to Queue**.



CA POS Release Notes

Version 20.2 June 20, 2016

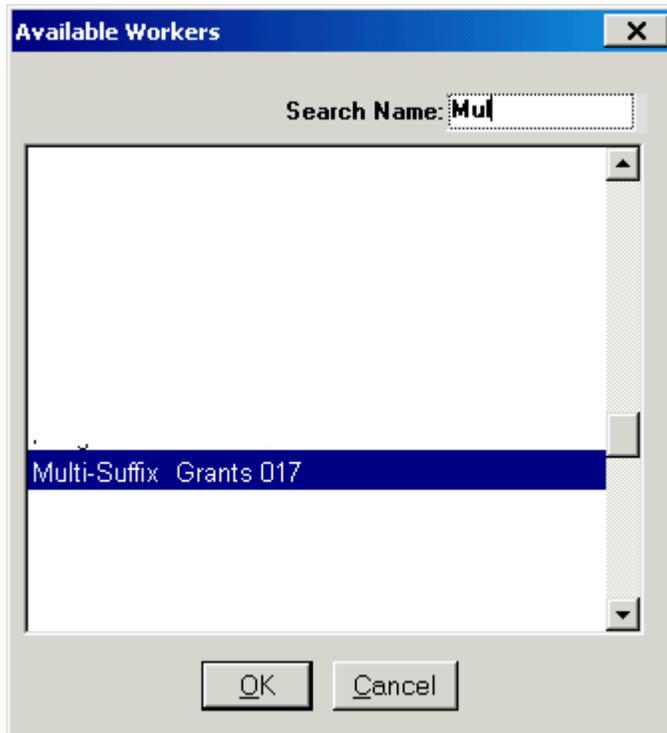
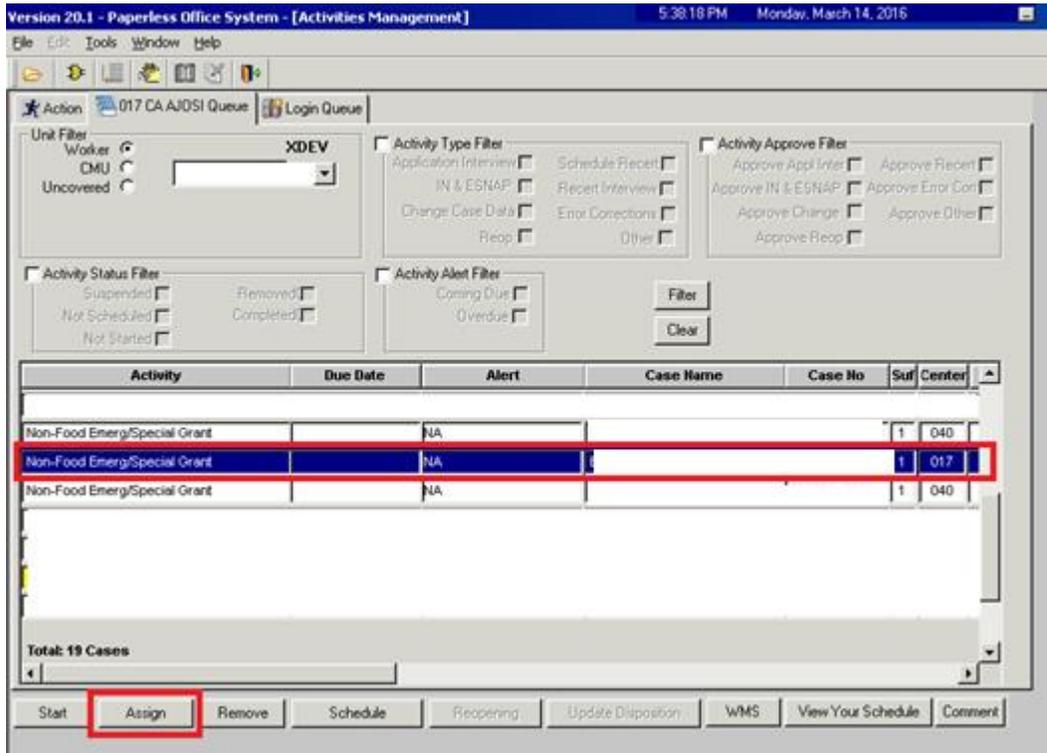
- Schedule the case with the Due Date for the benefits.



CA POS Release Notes

Version 20.2 June 20, 2016

- Assign the case to the **Multi-Suffix Grants** queue.

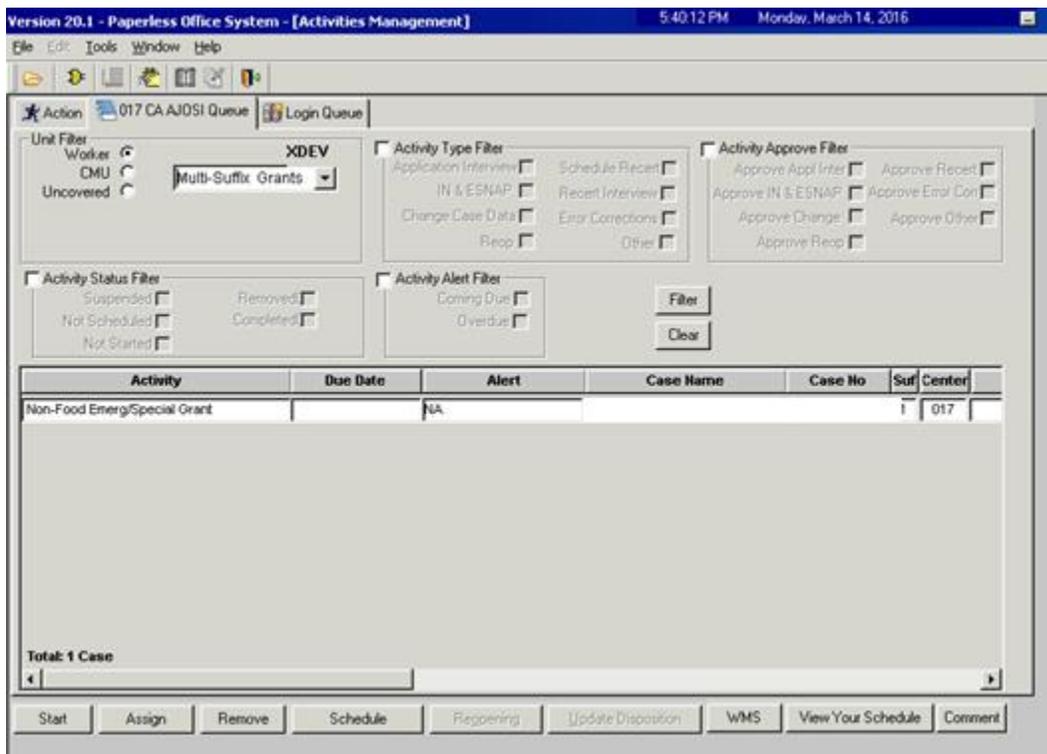
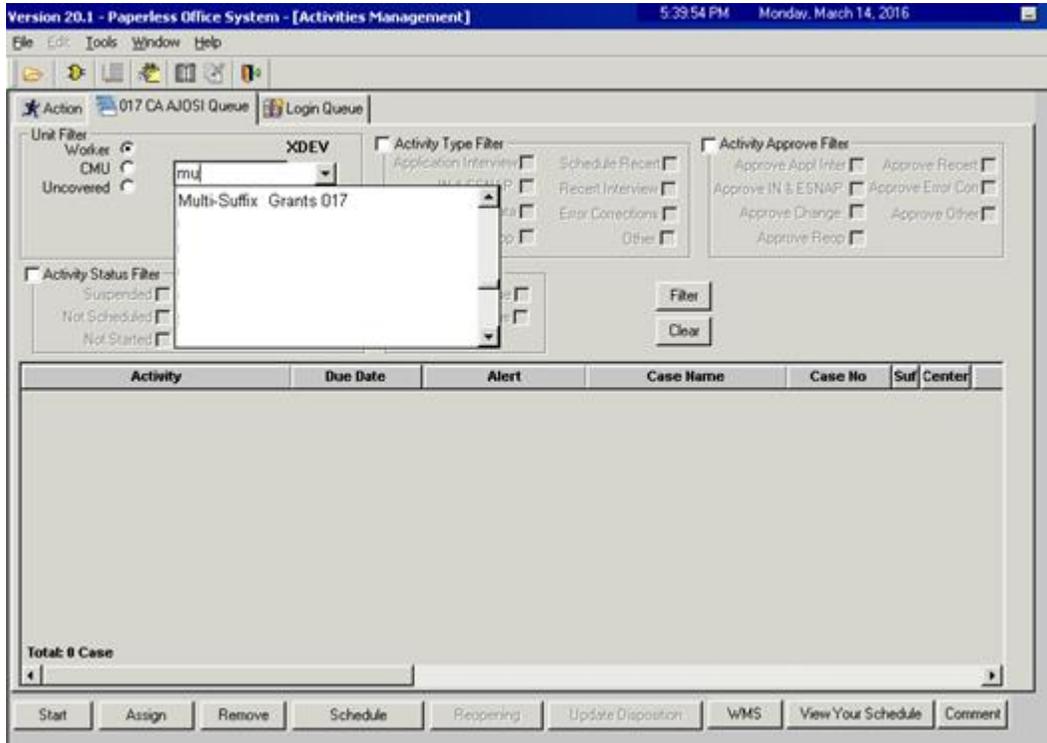


CA POS Release Notes

Version 20.2 June 20, 2016

Screens for accessing the queue and viewing the due date:

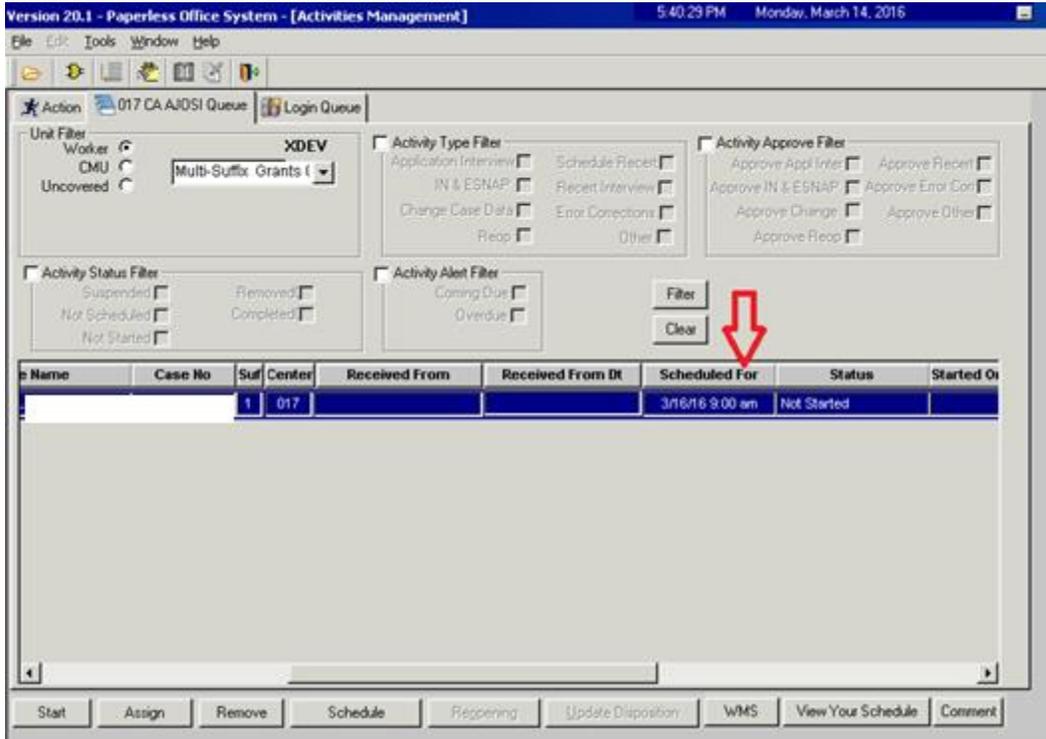
1. Select the **Multi-Suffix Grants** queue in the **Worker** menu.



CA POS Release Notes

Version 20.2 June 20, 2016

- The Due Date is listed in the **Scheduled For** column and can be updated if needed using the **Schedule** button.



- The case can be assigned to a Worker using the **Assign** button for processing of the grants.

