



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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SNAP STREAMLINED POS VERSION 1.1

<p>Date: December 5, 2017</p>	<p>Subtopic(s): POS</p>
<p><input type="checkbox"/> Please use Print on Demand to obtain copies of forms.</p>	<p>This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of the Paperless Office System (POS) will migrate into production on December 8, 2017. Descriptions of the changes can be found in SNAP POS Release Notes Streamlined POS Version 1.1 (Attachment A).</p> <p>These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective Immediately</i></p> <p>Attachment:</p> <p>Attachment A SNAP POS Release Notes Streamlined POS Version 1.1</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
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SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

These Release Notes contain descriptions of changes in Supplemental Nutritional Assistance program,(SNAP) Streamlined POS Release 1.1, scheduled for Friday, December 8, 2017. 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 also be found on the HRA Intranet at <http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx>

Table of Contents

1. SNAP Change Case Data Activity in Streamlined POS.....	2
2. Updates to Overview Screen for SNAP Change Case Data.....	3
3. New Case Alerts in Overview Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	4
4. Update to Contact Info Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	5
5. Updates to Alerts Screen for SNAP Change Case Data.....	7
6. Update to Summary Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	8
7. Fix to ACCIS Income Source Option for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	9
8. Address Normalization.....	9
9. Alphabetical menu changes for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	10
10. Removal of Current Household Members from Active Cases at this Address and Associated Individuals from Past Cases Matches for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data.....	12

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

1. SNAP Change Case Data Activity in Streamlined POS

The following new activity type was added to the Streamlined POS (Paperless Office System) version 1.1:

- SNAP Change Case Data

The current access mechanisms will be used to access the **SNAP Change Case Data** Activity:

- The Worker can start the **SNAP Change Case Data** Activity from the POS queue.
- The Worker can start the **SNAP Change Case Data** Activity from the POS activity list, through the **Choose a Case** window.

When the case is started, the case is synchronized against WMS (Welfare Management System) for the Turn-Around Document (TAD) and the budget, if there were changes since the last time the case was touched in POS.

The new activity continues to follow the look and feel of Streamlined POS and leverages existing interfaces developed for the Streamlined POS versions of the **SNAP Application Interview** and the SNAP Recertification Interview.

SNAP Change Case Data Activity Sections

The **SNAP Change Case Data** Activity includes the following sections in Streamlined POS:

- **Overview:** This section provides an overview of the case, including household members, various relevant alerts for the user and documentation found for the case.
- **Client Services:** This section displays reasonable accommodation information.
- **Contact Info:** This section includes telephone, address, email, preferred title, preferred name, preferred pronoun and communication preference information for the case.
- **Household:** This section includes the household members, their demographic data and allows new household members to be added. When household members are added in this section and the user exits the section, Streamlined POS invokes the case member addition services to transmit the new household members to WMS.
- **Alerts:** This section includes alerts from matches and allows capture of special assessment situations.
- **Individual Details:** This section captures marital status, citizenship information, educational information, and other name information for each individual that buys and prepares meals with the head of household. The Department of Health (DOH) Vital Records match is displayed in this window for any newly added individuals.
- **Immigration:** This section displays the Classic POS interface when there is at least one non-citizen on the case. Documentation selected in this section carry over to the **Individual Docs** and **Summary** sections in Streamlined POS.
- **Individual Docs:** For each individual that buys and prepares meals with the head of household, this section includes the reuse of existing documents and capture the document selections for the demographic eligibility factors, including identity, relationship, Social Security Number, residence, household composition and citizenship.
- **Medical Info:** This section captures medical limitations, medical issues and requests for home visit or homebound status. Existing home visit match information is presented in this area.
- **Income Checklist:** This section captures the top-level answer for earned income, unearned income and strike information. If any income is recorded or a match is found, the Income Details section appears after this section.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

- **Income Details:** This section captures the details for each recorded income type, including the recipient of the income or the individual for whom the match was found. Income matches appear in this section, including TALX (Work Number Service) , child support income, child care provider income (ACCIS) (Automated Child Care Information System), NYC employee wage (FISA) (Financial Information Services Agency) and RFI (Resource File Integration) matches.
- **Housing Expenses:** This section captures the shelter and utility expenses for the household. Shelter matches appear in this section, including NYCHA (New York City Housing Authority) section 8 and HPD matches.
- **Other Expenses:** This section captures other expenses for the household, such as medical bills, child support, child care expenses, dependent care expenses and tuition/education fees.
- **Resources:** This section captures the resource information for the household. The household categorical eligibility for SNAP (Supplemental Nutrition Assistance Program) is determined in this section, as the interface varies according to the determination. If the household is categorically eligible, only cash on hand, checking account and saving account details are captured. If the household is not categorically eligible, the detailed resource information is captured. Resources matches will appear in this section, including RFI matches.
- **Summary:** This section provides a high-level summary of the information and follow-up actions for the case. This includes a summary of the income, resource and expense amounts for the household, a summary of the documentation requested, required notifications, a list of documents to be indexed and expected follow-up actions for the case. The ES (Eligibility Specialist) indicates whether they want to continue with processing or want to suspend the action. If the Worker clicks on the **Continue to Process** button, the **Education and Training** window in Classic POS appears.

Rollout schedule

This Streamlined POS workflow for this activity to the home centers, Telephone Interview Processing Service (TIPS), MMAP and central office locations was announced in a rollout schedule by SNAP Operations management in a separate communication.

2. Updates to Overview Screen for SNAP Change Case Data

The following changes were implemented in the Overview screen for the SNAP Change Case Data activity:

- **New Change Summary section:** This new section appears below the Case Composition in the SNAP Change Case Data activity. It displays when the activity was loaded, the changes received with the loaded activity, if any, and changes made during the Change Action tracked by the affected sections and individuals. The section has three columns: **Date Change Received**, **Description** and **Details**.
- **Move of Recent Document Request section:** This section appears below the new Change Summary section in the SNAP Change Case Data activity.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

Overview Screen for SNAP Change Case Data

3. New Case Alerts in Overview Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

The following new alerts were added to the **Overview** screen:

Alert Message	Definition
E-Application Submitted via ACCESS HRA	This alert appears when an online application was submitted in the past 90 days.
E-Recertification Submitted via ACCESS HRA	This alert appears when an online recertification was submitted in the past 90 days.
E-Periodic Report Submitted via ACCESS HRA	This alert appears when an online periodic mailer was submitted in the past 90 days. It only appears in the SNAP Change Case Data Activity .
E-Change Submitted via ACCESS HRA	This alert appears when an online client case update was submitted in the past 90 days.
Pending Transaction in WMS	This alert appears when there is a pending eligibility or undercare transaction in WMS.
Error in WMS	This alert appears when there is an eligibility or undercare transaction in error status in WMS.
Stop Adverse Document Action Pending	This alert appears when a V21 (Failure to Provide Verification) or Y29 (Failure to Provide Verification-Expedited SNAP (No Notice) clock-down closing or rejection was paused for the case.
Case Returned by Supervisor	This alert appears when a case action is returned to the Worker by the Supervisor.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

4. Update to Contact Info Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

The **Contact Info** screen was updated to capture of the preferred title, preferred name and pronoun for the head of household and to capture whether applicants or participants who are blind or low vision would like to receive alternative format for notices.

New preferred name, title and pronoun fields

Field Name	Description
Do you prefer to go by a name other than your legal name? (2 new fields)	This is a new question to capture whether the applicant/participant has a preferred name other than their legal name. If the Worker selects Yes , a text box opens to allow capture of the preferred name.
Do you have a preferred title? (2 new fields)	This is a new question to capture whether the applicant/participant has a preferred title. If the Worker selects Yes , a drop-down menu opens to allow capture of the preferred title. The options are: <ul style="list-style-type: none"> • Mr. • Ms. • Mrs. • Miss. • Mx. • Dr. • None
What pronoun would you like us to use for you?	This is a new question to capture the applicant/participant's preferred pronoun. The options in the drop-down menu are: <ul style="list-style-type: none"> • She/her • He/him • They/Them • Zie/Hir • Legal First Name • Legal Last Name • Legal Full Name • Preferred Name • None

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

New preferred name, title and pronoun fields

Do you prefer to go by a name other than your legal name?

No

Do you have a preferred title?

No

What pronoun would you like us to use for you?

Select

New Blind/Visually Impaired and Alternative Format for Written Notices fields

Field Name	Description
Blind / Seriously Visually Impaired	This new checkbox allows the ES to indicate that the head of household is blind or low vision.
Alternative Format for Written Notices for Blind or Visually Impaired	<p>This new drop-down menu allows the Worker to select an alternative format for written notices for an application who is blind or low vision.</p> <p>The options in the drop-down menu are:</p> <ul style="list-style-type: none"> • None • Large print • Data CD • Audio CD • Braille

*New **Blind/Visually Impaired** checkbox*

Blind or Seriously Visually Impaired



SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

New Alternative Format for Written Notices for Blind or Visually Impaired field

Alternative Format for Written Notices for Blind or Visually Impaired

None

None

Audio CD

Braille

Data CD

Large Print

Updated Contact Info screen

NYC HRA/CMS

SNAP CHANGE CASE DATA

Status: AC

TOOLS

Zoom In Zoom Out

Line 1 of 1

CONTACT INFO

Primary Telephone Extension Secondary Telephone Extension

Email Address

Re-Enter Email Address

SEND VERIFICATION EMAIL

Preferred Language for Speaking Preferred Language for Written Notices

English English

Do you prefer to go by a name other than your legal name?

No

Do you have a preferred title?

No

What pronoun would you like us to use for you? Participant is

Select --- Select ---

NEXT

ACTIVE CASES AT THIS ADDRESS

Name	PA	MA	FS	Share Expenses	Add to HH
No Other Active Cases Found					

COMMENTS (7)

5. Updates to Alerts Screen for SNAP Change Case Data

The Alerts screen for SNAP Change Case Data does not include the lookup for SNAP benefits received in the current month.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

6. Update to Summary Screen for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

The **Summary** screen was updated to improve the display **Household Finances** section, add an alert for the, remove the **Employment Summary** section and add a new **Deferred Periodic Report – W-132S Only** checkbox in the **Notifications** section for periodic mailers.

For the **SNAP Change Case Data** activity, there will be a **Suspend Activity** button, since this activity is not an interview.

The SNAP employment code and ABAWD (Able Bodied Adult Without Dependents) code determinations take place in the **Employment Code Determination** window in Classic POS.

Updated **Summary** screen

Household Finances	
Monthly Income	\$0.00
Resources	\$0.00
Monthly Housing Expenses	\$1650.00
Other Expenses	\$0.00
SUA	\$0

Updated **Household Finances** section

The **Household Finances** section now includes the following rows of information:

- **Monthly Income:** All current income converted to a monthly total.
- **Resources:** Total countable resources entered for the case.
- **Monthly Housing Expenses:** Monthly amount entered as rent, mortgage or shelter expense
- **Other Expenses:** Monthly total of other expenses
- **SUA:** Amount for the SUA (Standard Utility Allowance) level or homeless shelter deduction for the household.

New message for amounts in **Household Finances** section

A new alert was added: “Amounts shown on Summary screen are tentative and may vary from WMS budget.”

New **Deferred Periodic Report – W-132S Only** checkbox

A new checkbox named **Deferred Periodic Report – W-132S Only** added in the **Notifications** section for the **SNAP Change Case Data** Activity.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

7. Fix to ACCIS Income Source Option for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

The spelling of the **ACCIS** option for the **Income Source** drop-down for **Employed**, **Self-Employed** and **Unemployed** income types in the **Income Details** screen was fixed in this release.

8. Address Normalization

A new **Address Normalization** service was added to Streamline POS in the **Contact Info** and **Housing Expenses** screens. This service validates the addresses entered during the application, recertification or change action against a United States Post Office (USPS) service. This service allows for speedier and more accurate mail delivery when a validated address is used.

This service runs for the following types of addresses:

- Residential address (with exception of homeless addresses)
- Mailing address (with exception of PO boxes)
- Landlord address (with exception of PO boxes)

If the address entered in POS is different from the address found by the USPS service, the ES is presented with a screen with the screen shown below. The screen displays the address entered in POS and the address found by the USPS service.

Address Normalization window

Address Normalization

Address entered in POS:

House No	Street	Apt/Suite
845	baretto St	5F
City	State	Zip Code
Bronx	NY	104740000

Address found by United States Postal Service (for speedier and more accurate mail delivery):

House No	Street	Apt/Suite
845	BARRETTO ST	5F
City	State	Zip Code
Bronx	NY	10474-3302

Would you like to use the address found by United States Postal Service?

Yes No

Message:

✖ DISCARD CHANGES
✔ SAVE CHANGES

- The ES must indicate whether they want to use the address found by the USPS. If the ES selects **Yes**, the address in POS is updated with the address found by the service when the ES clicks the **Save Changes** button. If the Worker selects **No**, the address entered in POS continues to be used and no changes is made. The service only runs once per activity, unless another change is made for the address type.

If there is an error returned by the service, a message is displayed for the ES that the service failed and that the ES should review the address.

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

9. Alphabetical menu changes for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

Drop-down menus in several screens were updated to appear in alphabetical order.

Contact Info screen

The **Preferred Language for Speaking** and **Preferred Language for Written Notices** drop-down menus were updated to list English and Spanish at the top of the menu. The remaining options appear in alphabetical order.

Household screen

The following drop-down menus were updated to list the options in alphabetical order:

- Social Security Number Status
- Sex
- Reason for Removal

The **Relationship to Head of Household** drop-down menu was updated to list the legal spouse, adopted daughter, adopted son, foster daughter, foster son, natural daughter, natural son, step daughter and step son options at the top of the menu. The remaining options appear in alphabetical order.

Alerts screen

The following drop-down menus were updated to list the options in alphabetical order:

- Social Security Number Status
- Sex
- Alert Type
- Documentation
- Property Type (Sold, gave away, or transferred cash or property...)
- Transaction Type (Sold, gave away, or transferred cash or property...)
- State (Applied for benefits outside NYC)
- County (Applied for benefits outside NYC)
- Income Changes (Changed or quit job jobs or reduced any form of income in the last 30 days-including reduced work hours or income)
- Taking care of (Is needed to care for a child under the age of 6 or a person with a disability)

Individual Details screen

The **Marital Status** drop-down menu was updated to list single-never married and married living together at the top of the menu. The remaining options appear in alphabetical order.

Individual Docs screen

The **Documentation** drop-down menu was updated to list the options in alphabetical order.

Medical screen

The following drop-down menus were updated to list the options in alphabetical order:

- Medical Issue Type
- Documentation
- Daily Activity Limited Due to (Limited daily activity due to illness or temporary disability, Permanent disability like blindness or vision disability)
- Medical reasons for ABAWD status (Limited daily activity due to illness or temporary disability, Permanent disability like blindness or vision disability)

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

Income Details screen

The following drop-down menus were updated to list the options in alphabetical order:

- Income Type with the exception of the Other Income option, which appears as the last option in the drop-down menu.
- Source
- Match Resolution
- Dispute Documentation
- Dispute Results
- Documentation
- Pay frequency
- Frequency
- Expense Frequency
- Type of Work
- Benefit type (Veteran's Benefits)
- Permanently homebound/In need of aid and assistance (Veteran's Benefits)
- Meals Provided per Day (Room and Board)
- Other Income Type with the exception of the Other Unearned Income option, which appears as the last option in the drop-down menu (Other Income)
- Program Indicator (Other Income)

Housing Expenses screen

The following drop-down menus were updated to list the options in alphabetical order:

- Documentation
- Frequency
- Provider
- Heat Type
- Other Utility Type

Other Expenses screen

The following drop-down menus were updated to list the options in alphabetical order:

- Expense Type
- Documentation
- Frequency
- Given to (Court-Ordered Tuition/Education Expenses)
- Paid by (Court-Ordered Tuition/Education Expenses)

Resources screen

The following drop-down menus were updated to list the options in alphabetical order:

- Resource Type, with the exception of Other Resource which appears as the final option in the list.
- Documentation
- Match Resolution
- Dispute Documentation
- Dispute Results
- Frequency
- Real Estate Type (Real Estate)
- Other Resource (Other Resource)

SNAP POS Release Notes

Streamlined POS Version 1.1 December 8, 2017

10. Removal of Current Household Members from Active Cases at this Address and Associated Individuals from Past Cases Matches for SNAP Application Interview, SNAP Recertification Interview and SNAP Change Case Data

Current household members will no longer appear in the **Active Cases at this Address** match in the **Contact Info** screen and the **Associated Individuals from Past Cases** match in the **Household** screen.

Current household members includes the head of household (casehead or payee), all individuals with an open SNAP status (Applying [AP], Single Issue [SI], Active [AC] or Sanctioned [SN]) and any individuals with an answer of **Yes** for the “Buys/prepare meals with the head of household” question in the **Household** section.

- If there is a need to add a person to the case and the person already appears on the WMS case, the Worker can add the person back to the case by selecting **Yes** for the “Buys/prepare meals with the head of household” question in the **Household** screen.

Active Cases at this Address match

Name	PA	MA	FS	Share Expenses	Add to HH
No Other Active Cases Found					

Associated Individuals from Past Cases match

Name	Sex	PA	MA	FS	Add to Household
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