OFFICE OF POLICY, PROCEDURES, AND TRAINING



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POLICY BULLETIN #17-18-SYS

(This Policy Bulletin Replaces PB #17-17-SYS)

SNAP POS RELEASE NOTES VERSION 11.1

Date:	Subtopic(s):			
February 23, 2017	POS			
	Revisions to the Original Policy Bulletin			
	This policy bulletin has been revised to add the following bullet regarding Income Source Codes 86 (SNAP Ineligible Alien Does Not Contribute to Shelter Costs) to the Budgeting for Ineligible Individuals Under Age 18 section in Attachment A .			
	 Select Income Source code 86 for ineligible alien individuals coded with Alien Citizenship Code (ACI) E. 			
	Purpose			
	This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of POS migrated to production on February 20, 2017 Descriptions of the changes can be found in SNAP POS Release Notes Version 11.1 (Attachment A), and Overview of Streamlined POS (Attachment B).			
	These release notes can also be found on the HRA Intranet at:			
	http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx			
	Effective Immediately			
	Attachments:			
Please use Print on Demand to obtain copies of forms.	Attachment ASNAP POS Release Notes Version 11.1Attachment BOverview of Streamlined POS			

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These Release Notes contain descriptions of changes in Supplemental Nutrition Assistance Program POS Release 11.1 scheduled for February 20, 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 may also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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1. New ESNAP Indicator in Supervisor Queue

A new **ESNAP** (Expedited Supplemental Nutrition Assistance Program) **indicator** was added in the Supervisor's queue to allow the Supervisor to prioritize the ESNAP approvals. The Worker must select the **Approve ESNAP** option in the queue to see the new indicator.

2. Expansion of Selective Case Review (SCR) to Halsey TIPS 42

The Selective Case Review pilot functionality and reporting was expanded to the Halsey TIPS location effective 1/17/2017.

3. Universal Receipt / Confirmation of Contact With Your Center

A new Confirmation of Contact with Your Center (**FIA-1173**) form was created to allow the HRA (Human Resources Administration) to issue applicants and participants a receipt that will prove that they were in the center or in contact with their HRA Worker on a given day. This receipt will be issued for scheduled and unscheduled appointments, upon the request of the applicant or participant.

When the Worker opens a POS (Paperless Office System) activity, a new **Universal Receipt** popup window appears with **Yes** and **No** buttons:

Universal Receipt	
Does the applicant/participant ne contacted HRA Center?	ed a receipt indicating that they were in or
	Yes No

• If the Worker clicks Yes, the Response to Question window appears.

🛕 Response to Question		×
- Case Information	Case Number	Date of Visit or Contact 02/13/2017
Receipt Information Reason for Visit or Contact Complete application interview	•	
Canc	el Ok	٤

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The name of the head of household appears in the **Name** field. The **Name** field contains the names of all household members.

If there is an authorized representative for the applicant or participant, the Worker must select **Other** in the **Name** field. An **Authorized Representative** field will open to allow the Worker to enter the name of the authorized representative.

A Response to Question			×	:
Case Information				
Name		Case Number	Date of Visit or Contact	
Other	-		02/13/2017	
- Receipt Information				
Reason for Visit or Contact				
complete application interview	•			
			-1	
	Cancel	Ok		
			_	

If the name of the authorized representative is not completed and the Worker attempts to leave the window by clicking **OK**, a new message will pop-up requesting to enter name in **Format** field.



The **Case number** and **Date of Visit or Contact** fields are pre-filled by POS. The Worker selects a value from the **Reason for Visit or Contact** drop-down menu. Values include:

Reason for Visit or Contact (Snippet)	Available in the following POS activities:
complete application interview	CA Application Interview *
	IN/ESNAP Issuance *
	SNAP Application Interview *
	ESNAP Issuance *
	Re-Open CA Case *
complete recertification interview	CA Recertification Interview
	SNAP Recertification Interview
complete non-food emergency or special	Non-Food Emergency/Special Grant
grant	CA Change Case Data

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complete change action	CA Change Case Data
	SNAP Change Case Data
submit application	CA Application Intake
	HRA Outreach Intake
return documentation	Document Intake
	All others
complete customer service inquiry	• All
request a budget letter	• All

Once all information is completed, the worker will click OK and the Universal Receipt confirmation message will pop-up informing the worker that FIA-1173 Universal Receipt will be mailed to the mailing address on file with FIA.

A Response to Question		x] ^w
Case Information			
Name	Case Number	Date of Visit or Contact	
Other		02/13/2017	
- Receipt Information			
Reason for Visit or Contact			
complete application interview			
		Universal Receipt	×
Cancel	Ok	Form FIA-117	3 Universal Receipt will be mailed to the mailing
		address on file	e with HRA.
			ок

The receipt is also available under the Tools menu as Print Universal Receipt:

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If the applicant/participant is present in the center, the requested receipt is printed and given to them by the Worker during their visit. For all other applicants/participants, the receipt is generated via Print-to-Mail (PTM) and generated through the MIS (Management Information System) mail distribution process.

4. New Prompt for Non-Discrimination Statement in Application and Recertification

HRA must ensure that SNAP applicants and participants are made fully aware of his/her Right and Responsibilities, including reviewing and being advised of the Statement of Non-Discrimination and his/her right to file a complaint of discrimination and how to do so, during the interview process and anytime thereafter upon request.

Following a 2016 Food and Nutrition Service (FNS) Civil Rights Compliance Review report by the United States Department of Agriculture (USDA), a new Non-Discrimination Statement (NDS) message was added to the **Print Forms** section of the POS interviews. This message appears when the **Print Forms** window opens and the Worker indicated that the applicant/participant is on the phone or that the client is in person on the Communication Preferences window in Classic POS or in the Contact Info section in Streamlined POS (SL POS).

The new message has the following text, with Yes and No buttons:

The application you completed, application instructions, HRA's SNAP website and the 'And Justice for All' poster posted in HRA's waiting rooms all contain information on your nondiscrimination rights. Discrimination against you while applying for or receiving SNAP benefits is unlawful. If you feel you have been discriminated against, you have the right to file a complaint with the USDA, NYS Office of Temporary and Disability Assistance, or with HRA directly. The contact information and instructions filing a complaint are in your application packet and HRA's SNAP website. Do you have any questions regarding your nondiscrimination rights?

If the applicant or participant answers **Yes**, the Worker must address any questions posed by the applicant or participant. The following case comment is saved to the electronic record: "The Worker read the Statement of Nondiscrimination to the applicant/participant and informed them of their right to file a complaint, and what to do during the interview process and anytime thereafter upon request. The applicant/participant indicated that they had questions and the Worker addressed their questions."

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If the applicant or participant answers **No**, the following case comment is saved to the electronic record: "The Worker read the Statement of Nondiscrimination to the applicant/participant and informed them of their right to file a complaint, and how to do during the interview process and anytime thereafter upon request. The applicant/participant indicated that they did not have any questions."

5. New Prompt for Race/Ethnicity Information

Following a 2016 FNS Civil Rights Compliance Review report by the USDA, HRA reviewed its current policy and SNAP interview process regarding the collection of Race / Ethnic Affiliation information from applicants.

NYC HRA reinforced the importance of asking the applicant for his/her Race / Ethnic Affiliation information, while reminding him/her providing such information is voluntary and does not affect the household's SNAP benefit amount, during the interview process if the applicant / participant does not initially indicate such on the SNAP application.

If NYC HRA's electronic SNAP application processing system POS reflects that an applicant did not provide Race / Ethnic Affiliation information on the SNAP application and indicates "Unknown" for this applicant, HRA Workers will encourage program applicants during the interview to provide the information by explaining the purpose of data collection, encourage the applicant to self-identify, and if a response is given, enter that information into the POS.

Activity	Window
HRA Outreach Intake, Application Modification, Case Member Information	Adults in the Household, Children in the Household
SNAP Application Interview, SNAP Recert Interview	Individual Details

The new message has the following text, with **Yes** and **No** buttons:

• On the application that asks you to identify your race and ethnicity, I see you left that section blank and did not choose to provide an answer. We understand that you may not want to give this personal information, and that this information is voluntary and not required to receive SNAP benefits. HRA is required to ask you during this interview, but, if you still do not want to give it, I will record your racial and ethnic identification as "Unknown". We ask you for this information to see if we are complying with federal civil rights laws, and your answer has no effect on your application, and may be protected by the Privacy Act. By sharing this information, you will ensure you are not discriminated against. Are you comfortable with giving me this information now?

If the applicant or participant answers **Yes**, the Worker must request and record the race/ethnicity information from the applicant/participant.

6. PRUCOL window updates

The PRUCOL Eligibility Desk Aid Guide (**W-205JJ**) has been revised. The changes will be reflected on the document's list of the PRUCOL Window in POS.

7. New TAD Business rule V21 Closing or Rejection

This rule will prevent the user from closing or rejecting the NCA (Non Cash Assistance) cases with Reason Code **V21** (Failure to Provide Verification) if none of the pending documents is a core document.

Worker's message:

No Core document is pending for this case. The case cannot be closed/rejected with V21.

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8. Centralized Document Processing Unit- Center 88

To increase the efficiency of document scanning and indexing the FIA (Family Independence Administration) has developed the Centralized Document Processing Unit Center (088). As this center will eventually handle the scanning of all mail received we need to ensure that their indexing is done timely. Center 088 has been added to the list of available centers in the POS Management Console. The only available report for this location (Center 88) should be the Imaging report.

9. Citywide Access for SNAP Separate Determination for Center 90 (RAR/HVN)

Center 90 now has access to the SNAP separate determination activity.

10. Prohibit Entry of Certain Zip Codes

- For the ASSOC-ZIP, add HOST level edits in Undercare and Error Correction modes.
- For the Associated Address Zip code (98-344) in the 130 record, invalid zip codes beginning with '000', '001', '002', '003', '004' should result in error message "E2894 INVALID ZIP CODE FORMAT"
- For PA/FS (Food Stamps) cases and NPA/SNAP cases, <u>only valid NY State zip codes are allowed</u>. Outof-state zip codes will result in HOST level error "E0418 – INCORRECT ENTRY - SEE ITEM NO REFERENCED."
- These new edits and error messages should apply to all program areas: PA, MA (Medical Assistanace) and SNAP.

POS systems will make the corresponding changes to prevent entry of these invalid zip code.

11. Access NYC (ANYC) Updates

E-Notices

ANYC has been updated to assist the applicant/participant in filing for e-notices and text messages.

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the Tenner reger	Scroll down to vie My Depetits	w case information or jump to a spe	cific section using these links	Call	etions? HRA Infoline at 718-657-139 Me	
informed!			Mare befa 🛞	Edit Contact Information		Mare into (?)
Stay informed. You can receive below, you are agreeing to allow apply.	DMAILS shore TEXT MESSAI HBA to send you emplish and	ADS about your application and upcoming due of text messages to the contact onto above. Text r	stes. By choosing this option ressage and data tales may	Hap to be used this care to an a matter at these. By rating it, you are appearing to all the latter.	silar lani menangen almit yaur sene ami ne riffik to sereryits amala ane taut maa	anaring due ingen in the contact
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			1			

- The HRA applicant can create an online account on Access NYC and provides a combination of Date of Birth and Social Security Number or, Date of Birth and Client Identification Number to link their Access NYC account to HRA Identity in POS.
- Once the applicant successfully links his/her Access NYC account to their HRA Identity in POS, he/she must:
 - a. navigate to 'My Cases' page on Access NYC,
 - b. click 'Edit Contact Details' button,
 - c. provide a valid e-mail Address (if one is not validated already),
 - d. Set notification/ contact preference to 'e-mail' or 'e-mail and Text Message',
 - e. agree to 'Go Paperless' terms and conditions and,
 - f. click the 'Save' button to stop receiving <u>paper notices</u>. *If the applicant's email is verified do not select the verified button again as it will enroll the applicant in the Go paperless process again.

Access NYC will send an 'Update Case' request via a web service call to POS to update the Access NYC user's notification/ contact preference and eNotice Subscription Status in POS.

POS will receive the request and if valid, update the applicant/participant's contact/ notification preference and eNotice Subscription Status in POS for the case number provided in the request. If the client has more than one case numbers associated in POS, a separate request is required from Access NYC for the applicant/participant to be enrolled in e Notices.

3. If the applicant/participant is completing CA/ SNAP Initial or a Recertification Application on Access NYC, the applicant/participant can choose notification/ contact preference to 'e-mail' or 'e-mail and Text Message', agree to 'Go Paperless' terms and conditions and, submit the application to enroll in eNotices.

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- 4. When the applicant/participant subscribes to eNotices in POS, POS will generate the Opt-In' notice, Acknowledgment of Agreement to Receive Paperless Notices (FIA-1179) send via PTM (Print to Mil). However, the applicant must receive the notice because it includes instructions on how to log into ANYC to view the e-notices if the applicant does not know how to. If the applicant chooses the FIA-1179a the Print to Mail functionality will resume for this applicant, which will continue the PTM process.
- 5. Also, the system will make a case comment of this action -
 - "The client chose the 'Go Paperless' option on Access NYC to receive certain notices electronically."

POS 10.3 - [Address Information]	9:22:16 AM Monday, February 06, 2017 💼
Edit Tools Window Help	
) 🗸 😪 👔 🖉 👂 🖋 🖪 📖 🕈 🏾 🖓 🔝	🙆 🛄 🗶 🖽 🖓 🏛 🗘 88
resent Address	4
and the second sec	Type Apt # City
St No/Dir/Name:	
State: NY Zip Code:	
Primary Phone: Ext Home Alter	mate Phone:
Number for Text M	essaging:
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Delete Mailing Address C Yes C No	
-mail Address	
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Delete Email Address C Yes C No	
	_
Next	Previous
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Note: In a case when the Access NYC user is subscribed to eNotices but his/her e-mail address is not verified in POS, POS will not stop sending paper notices until the e-mail is verified.

Resend Verification

Once the e-mail has been verified for the case head/payee, POS will select the **Yes** button for verified. If the POS system has verified the email address please do not select **Re-Verify** button because this will dis-enroll the individual for eNotices. Only use the **Resend Verification** checkbox when you need to verify the e-mail address or if the email address has changed.

i.

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ANYC will give the applicant (case head or payee only) the option to use the Lexis/Nexus identity verification online.

	Lexis Nexis – Verify Identity	
	Get Information 🛩 🍵 Welcome, Jon Dos 👻 🌲 🛞 🛩	
Confirm Your Identity INAP Application Confirm Your Identity Help us confirm Jaris Identity Assuering the following quest This could assist us in processing the application more quick Hyou do not want to confirm Joris Identity now, check h	tions will allow us to vestly Jon's identity without additional documentation. Ny Click NEXT to continue. ere, Jon may be required to provide documentation at a later time.	Verify your Identity Online SNAP and CA Applicants will have the option to use Lexis Nexis identity verification online to verify the casehead or proceed identity
Serve & Exit	Previous Next	payee's identity.
	Confirm Your Identity SNAP Application	🛱 Walcom, Jon Doe 👻 🌲 🗇 🖛
Applicant's can choose to opt out of this feature online during their application submission.	Confirm Your Identity Your Identity Ventication Process has already been completed. Please click Yest? Io continue with the	application Submission.
	Seve & Exit	Next

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	Confirm Your Identity	in Welcone, Ant Due * 👋 🕖 *
Prevention the reactions below by the to the bed of war ability. That state issued your Social Security Number? * IA NJ IN None of the above Thich phone number do you use or have you used in the past? * None of the above Thich street do you use now or have you used as your address in the past? * None of the above Thich street do you use now or have you used as your address in the past? *	SNAP Application U guestions with an asteriak (") must be answered.	
In a state issued your Social Security Number? * IA NJ IN None of the above None of the above None of the above None of the above Which street do you use now or have you used as your address in the past? * In the above None of the above	Please assure the cuestions being for Jos to the hest of your shifty	Verify your Identity Online
 IA NJ IN None of the above Answering the questions. Answering the questions. Correctly verifies identity for that applicant. Each question is tailored to information Lexis Nexis has on that applying adult. None of the above 	hat state issued your Social Security Number? *	SNAP and CA Applicants will be
 NJ IN None of the above Which phone number do you use or have you used in the past? None of the above 	AI	presented with three questions.
 IN None of the above werifies identity for that applicant. Each question is tailored to information Lexis Nexis has on that applying adult. None of the above None of the above Which street do you use now or have you used as your address in the past? None of the above None of the above 	LN ©	Answering the questions correctly
 None of the above Bach question is tailored to information Lexis Nexis has on that applying adult. None of the above None of the above Which street do you use now or have you used as your address in the past? • None of the above None of the above 	© IN	verifies identity for that applicant.
Anich phone number do you use or have you used in the past? •	None of the above	Each question is tailored to information Lexis Nexis has on that
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hich street do you use now or have you used as your address in the past? *	None of the above	
None of the above	hich street do you use now or have you used as your address in the past	17 -
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 None of the above 	0	Next
None of the above	0	
	None of the above	

E Lexis Nexis – Verify Identity		
Image: Second window Image: Second window <td< th=""><th>who verify</th><th></th></td<>	who verify	
not need to bring identific interview. POS will pre-populate the in the Individual Details w confirming the applicant h their identity.	Identity field indow as verified	<#>

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Streamlined POS

INC		SHARE SPECIFIC METER				
MB-14.		Individual Dect #				
	٠				-	
(Internet)						
-		BCAROOR			1	
-		Species .	(Income in case of the local section of the local s		-	
*****			and the second sec			A CONTRACT OF
-		business.				
					- 1	Identity Verified
-			And and a second	1.0		identity vernied
		10				Identity field in the individual Details
		Reality Permitty	-	-		window confirming the applicant has
		Contract of Contra				verified their identity by showing the
			Second Second	-		green paper icon.

SNAP applicants will be presented with an option to reuse documentation during the ANYC application interview.

INVE		Get Information -	🛱 Welcome, Jon Doe 👻 📇 🗇 🥆
Verificatio	n Documentation		Click "Choose Document" to change the exclamation point to packade mark
ocuments Already on	File		a check mark.
you would like to use docu is option is currently only u may be required to resu	ments we already have on file, clic available online for the primary con ubmit the document or submit addit	k the 'Choose Document' button and select the tact of the household (Head of Case). ional documentation during the interview.	e document you would like to u
Category	Household Member(s)	Most Common Verification Documents	Choose Document
Identity		Photo LD. or Driver's License U.S. passport Birth Certificate	Choose Document
Age		Birth or baptismal certificate Identity document with date of birth	Choose Document
U.S. Citzen / National		Birth Certificate U.S. PassportNaturalization Certificate Hospital Records	Choose Document
Reuse	e Documents	7	
SNAP a	ind CAApplicants will be		Next
docume that do	entation for eligibility factors not change.	5	

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Clients are not able to see the document type of document they are reusing.	• •
Clients are not able to see the documents they are reusing, only the type of document they are reusing.	t ✓
Clients are not able to see the documents they are reusing, only the type of document they are reusing.	
Clients are not able to see the documents they are reusing, only the type of document they are reusing.	•
documents they are reusing, only the type of document they are reusing. Naturalization Certificate Choose Document	
Naturalization Certificate Choose Document	
Interviewers still need to verify the	к I
document is sufficient in order to avoid a	
new deferral.	
When a user completes the document reuse, they will be	be able t
continue submitting their application.	
All Lovis Novis verifications will appear in DOS as Identit	
ALL AVE NAVE VALUES UNDER WILLS OF PROTICE	atite Varif
All Lexis Nexis Verifications will appear in POO as identit	ntity Verif

Reused documents that are selected will auto populate in POS, interviewers must ensure the document in the HRA One Viewer is legible and accurate.

12. WMS 17.1 Release Changes

Effective February 2017 all application registration, eligibility, undercare, PA single issue grants and SNAP single issue grants will provide a field to post the workers user id.

13. Budgeting for Ineligible Individuals Under Age 18

According to the WLM 2016-00267, WMS was updated to allow budgeting for ineligible alien individuals under age 18. POS was updated to allow selection of Income Source Codes **86** (SNAP Ineligible Alien Does Not Contribute to Shelter Costs) and **92** (SNAP Ineligible Alien-Contributes to Shelter Costs) on the **Income on the Individual Income/Needs** window for these individuals:

• Select Income Source code 86 for ineligible alien individuals coded with Alien Citizenship Code (ACI) E .

14. PTM Report Update

The PTM monitoring report in the **POS Management Console** was updated to add the new mail jobs added since October 2016.

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15. Updated PC Bank Usage Report

The PC Bank Usage report was updated to capture PC bank usage at Cash Assistance Job Centers. The following information was added to the report:

• CA Center option in Area filter;

CACenter		
C SNAP Center	013	Waverly Job Center
C PC Papel ac	014	Waverly HRA Center
C PO Ballk LUC.	017	Family Services Call Center
Case Number	018	St Nicholas Job Center
	019	Crotona HRA Center
PC Bank C	023	East End Job Center
Location I	024	Amsterdam HRA Center
	035	Dyckman Job Center
	037	East River Job Center
	038	Rider Job Center
	039	Union Square Job Center
	040	Hunts Point Job Center
	041	HRA 4th FI Center
	043	Kingsbridge HRA Center
	044	Fordham Job Center

• New Case Type filter with options of All, CA, and SNAP;



• The Case Status filter was updated to retrieve against both CA and SNAP case types.

- Case	Status
	AP
	SI
	AC
	CL
	RJ

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The following columns were added to the report output:

- CA File Date;
- CA Case Status;
- Case Type





16. Miscellaneous Special Reports

The following special reports were created for HRA program areas between October 2016 and February 2017:

- PRUCOL (Persons Residing Under Color of Law (alien status) applicant/pariticipants with country of birth;
- E-mail records for SNAP applicant/pariticipants eligible for on-demand recertifications for the Office of Evaluation and Research (OER;
- Email and contact numbers for active SNAP Bronx cases;
- Weekly SNAP rescheduling data for FIA;
- Monthly report of applicants and participants with a Disability Accommodation Indicator of Braille;
- Daily SNAP backlog data for FIA; and
- Report of failed to keep cases in December 2016.

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17. Updates to SNAP Employment Code Business Rules

Fixes were deployed to help improve selections of the SNAP employment codes.

18. New Completion Edits for Application Cases with Benefits

For application cases in AP (Applying) status, the following completion messages will appear if the Worker attempts to reject the case, but benefits were received on the application registration case or on the case number selected for reuse:

• SNAP benefits were issued for the case. The SNAP Suffix cannot be rejected and must be placed in SI status before it can be closed.

19. Auto-Save Language Questionnaire (W-680FF) for HVN/HB and Telephone Interviews

In order to comply with findings from a SNAP Management Evaluation (ME) audit, POS was updated to save the **W-680FF** for HVN/HB (Home Visit Needed/Homebound and telephone interviews if the Worker clicks **Next** on the **Print Forms** window and the form was not previously saved for the application or recertification interviews.

20. Additional Supported Reading Languages for POS Notices

POS was updated to accommodate the following additional reading languages for POS-generated notices:

- Bengali (Language Code **BE**)
- Chinese Simplified (Language Code **CS**)
- Urdu (Language Code **B**)

POS will support these languages, in addition to the existing supported reading languages as new forms and revisions are received from the HRA Office of Procedures.

21. Updated Print Edit for LDSS-3152-NYC (Action Taken On Your Supplemental Nutrition Assistance Program [SNAP] Benefits Case [NYC])

New edits were added to prevent printing of the POS-generated LDSS-3152-NYC form if the notice for the application decision is generated via the Client Notice System (CNS).

22. Updates to FHA-2 (Fair Hearing Compliance Request - SNAP) and FHA-2A (Reminder Notice of Fair Hearing Compliance Request - SNAP) Forms

The telephone numbers listed on the FHA-2 and FHA-2A were updated in POS.

23. POS E-Forms

The following E-forms were converted to the new PTM process and have been updated and revised to reflect the mailing process:

- **FIA-1173** Confirmation of Contact with your Center
- FIA-1179, Acknowledgement of an Agreement to receive Paperless Notices
- FIA-1179A, Notification of Stopped Paperless Notification
- W-132S Notice of Documentation required -Change in Household Circumstances

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The following E-forms were updated:

- FIA-1138, Do you have documents to submit to HRA
- W-129B, SNAP Application/Recertification Attestation Signature Form

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This document contains an overview of Phase 1 for the Streamlined Paperless Office System (POS) for the SNAP Application Interview and SNAP Recertification Interview. This document was distributed via HRA email. If you would like to be added to the distribution list, please contact **Sandra Hilton**.

This document and prior POS Release Notes may also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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1. Introduction

The first phase of the **Streamlined POS** (Paperless Office System) project will modernize and improve the interview process for SNAP (Supplemental Nutrition Assistance Program) applications and recertifications. This document provides an overview of the POS Streamline interview sections.

The key features include:

- a modern, user-friendly design, including a more intuitive layout of case information;
- more visual cues, like a navigation sidebar that is always available, that help users form a mental map of where they are in the interview;
- pre-loading of data from matches and WMS (Welfare Management System), making for a smoother screen flow;
- behind-the-scenes WMS transactions where possible, meaning less interview time spent waiting on WMS;
- presenting case and match information where it's most relevant during the interview, so that the right questions/decisions can be asked/made at the right time;
- system-generated messages to help users make connections between distant data points;
- more blanket No answers, allowing users to explicitly indicate with one click that no one in the household has any items of a given type;
- a documentation interface that makes it (a) easier to use matches and existing viewer assets as verification, and (b) harder to ask for unnecessary proof on the Action Is Required! You Must Submit Documents For Your SNAP Case (FIA-1146) Form; and
- comments are visible through the entire interview;
- post-interview "to-do" messaging for applicants/participants ("here's what's coming and what you need to send back") and processors.

Note: All names and demographics used in this document were obtained from test cases and do not represent HRA (Human Resources Administration) applicant/participant information.

2. Start of Interview

The Eligibility Specialist at the home center continues to log into POS and selects the case in their queue or uses the **Choose a Case** window to start the interview.

3. SNAP Streamline Interview Sections

The Interview will be divided into sections, appearing in sequence on the navigation bar on the left. The interviewer must complete a section prior to accessing the next one. These sections are:

Section	Description
Overview	This read-only at a glance summary includes relevant alerts about the case
	and documentation and alerts about other applications and appointments.
Client Service	This section includes details of reasonable accommodations for the household
	members.
Contact Info	This section includes telephone numbers, email addresses (if any), addresses,
	authorized representatives and language preferences for the household.
Household	This section includes all household members, including closed lines (if
	applicable). It also allows the Worker to add or remove household members.
	Application modifications and case member additions are transmitted to WMS
	from this window.
Alerts	This section includes various alerts, system look-ups and matches.
Individual Details	This section includes current household members and allows capture of

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	demographic, citizenship, student, veteran, parental and pregnancy information. Case number and Client Identification Number (CIN) reuse automatically run in this window.
Immigration	This section only appears when there is a non-citizen in the case. Streamlined POS navigates the Worker to the Alien Checklist in Classic POS. Once the determination is completed, Streamlined POS returns the Worker to the interview.
Individual Docs	This section allows the Worker to capture the documentation for the case for identity, relationship, citizenship, age, household membership and student status.
Medical Info	This section allows capture of work-related exemptions, disability and daily activity limitation indicators and medical expenses.
Income Checklist	This section combines all income into a single section, with guided interview reminders, error prevention messages and integration of matches from the IVS and Resource File Integration (RFI).
Income Details	This section allows capture of the details of each income.
Housing Expenses	This section allows capture of housing and utility expenses and determination of the Standard Utility Allowance (SUA) level.
Other Expenses	This section allows capture of the details of medical, child care, child support, dependent care and tuition expenses.
Resources	This section allows capture of the countable resources for households that are categorically eligible for SNAP and detailed resource information for households that are not categorically eligible.
Summary	This section displays high level information about the household's monthly income, resources, monthly housing expenses and SUA. It also includes a summary of the pending documentation, allows the Worker to access POS forms, includes reminders about the notifications for the applicant/participant and allows review of pending and follow-up items.
Case Processing	For applications, the Worker continues to process the case in Classic POS once the interview is completed and they exit the Summary section.
	processing of the case if no deferral is required.

4. Layout of Interview Windows

Interview windows will include seven main sections:

- Navigation Bar left-hand side of the window.
- Main Data Entry Panel center of the window.
- **Message/Alert Panel** upper right-hand side of the window.
- Match/Action Panel upper right-hand side of the window.
- **Detailed Entry Panel** middle right-hand side of the window.
- **Comments** lower right-hand side of the window.

Attachment B SNAP 11.1 Overview of Streamlined POS, Phase 1

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Navigatic	n										
Bar		SNAP APPLICATION I	NTERVIEW			File Date: 8/23/2016 Sta	tus: AP		Page	Header	Tools
HRA CMS		Contact Info o Contact Preferences			P	RE-RECERT-CONTACT-INFO	4	ACTIVE CAS You can ask the	SES AT THIS A e client if anyone	DDRESS listed below shares or o	contributes to
OVERVIEW	•	Primary Telephone	Extension	Secondary Telephone		Extension	L I	expenses in th household upon	e household. So clicking the Next	elected members will t button	e added to
CONTACT INFO	•						L	Name	PA MA	FS Share Expense	s Add to HH
HOUSEHOLD	•	Email Address	Ma	in Data					Mes	saging	·
ALERTS	•		E	intry 💦	EMAIL			None of the li	Pa	anel	_
INDIVIDUAL DETAILS	•	Dreferred Language for Speaking	F	'anel	Written Notices			× DISCARD	CHANGES		SAVE
IMMIGRATION		English	•	English	much houces	•		ERROR ON P	AGE		- x
INDIVIDUAL DOCS	•	Applicant is on		Does the Applicant Want	to Use HRA's Free	Interpreter Services	ш	Number is req Street Name i	uired s required		
MEDICAL INFO	•	- Select		No		•					
INCOME CHECKLIST	•	Provide reason stated by Applicant									
INCOME DETAILS	•	- Select -	•								- 1
HOUSING EXPENSES	•	Residential Address		GP1-Brots							
OTHER EXPENSES	•	Advocate Address		Authorized Representativ	ne.						
RESOURCES	•				-		•				
SUMMARY	•							COMME	NTS (0)		

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Navigation Bar

The navigation bar allows navigation within the interview section. The Eligibility Specialist cannot move forward until each section is completed.

A green check icon appears next to each tab in the navigation bar, to indicate that all requirements on that screen have been met.

Main Data Entry Panel

The main panel includes the key information for each interview section and allows the entry of information.

At the top of this panel is the page name, which always has a blue Help Circle next to it that displays pagespecific help text when selected. The information appearing below the page name depends on which page is displayed. Most pages have a table at the top, followed by a Yes/No question. Others are populated with data entry fields. The data entry panel for each page is specified in the chapter for that page.

On the pages with a table at the top, an Eligibility Specialist (ES) can select and add rowsto populate the **Record Detail** area below the table. At the bottom of the **Record Detail** area are the Discard Changes and Save Changes buttons which are only enabled when data in the **Record Detail** area has been added or changed.

All the top tables have a standard sort order as follows:

- HH Member,
- Record Type (e.g., Income Type or Expense Type),
- Source, with match rows first, followed by applicant/participant-reported rows.

However, not all columns always have data. For example, incomplete records received from ANYC (ACCESSNYC) would have "placeholder" rows in the table that would be selected for completion by anES in the **Record Detail** section.

The pages without a top table, Record Detail area or Discard/Save buttons are:

- Overview,
- Contact Info,
- Income Checklist,
- Resources when the case is categorically eligible,
- Housing, and
- Summary.

At the bottom of every page except the Summary page is a **Next** button, which runs validations and executes certain other actions that are specified in the chapter for each page.

Message/Alert Panel

The message or alter panel displays alerts, warnings and errors for each interview section.



Correct errors and provide required information.

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Action/Match Panel

The **Match Panel** includes WMS and external matches for the case in each interview section. Each page's **Action Panel** contains information that helps inform user decisions about what actions to take in the **Data Entry Panel**. Action panels are specified in each page's chapter. They can be expanded into a Modal window by clicking on the **Maximize** button in the top left corner of the panel.

ASSOCIATED INOM	DUALS FROM PAST CASES	_ 0
Name	Sex	Add to Household
		_
× CLEAR	UNSELECTED V ADD TO	HOUSEHOLD

Detailed Entry Panel

The **Detailed Entry Panel** contains information that is either optional or not important enough to be visible at all times. It is triggered by a control in the data entry pane.

First Name	Last Name		
Telephone	Extension	-	
Address	_	_	Apt
City	State	Zo	_

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Comments Panel

The **Comments** Panel is the streamlined interview's repository for all ES's comments on a case's application or recertification interview activity.

Every page has a **Comments** tab. When an ES revisits a page the text of a comment from someone other than the ES partially appears under the tab so that the ES knows there's a new comment to read. The number of new comments is also shown on the **Comments** tab itself.

Enter new comment		Tag: Section	~
			ENT
		1011	0.51
Support Income	Today, 2:35pm	Mari	k, J
Support Income Client reported tha rhoncus, ut alique dictum. In hac hab scelerisque vel vive	Today, 2:35pm at aliquam condimentur t eros malesuada. Nulla itasse platea dictumst. erra eu, ullamcorper a e	Marl n velit sit amet felis fringilla ex eget finibu Nullam ante elit, enim.	k, J 15

5. Additional Details

For additional details, please refer to the **Streamlined POS User Guide**.