



OFFICE OF POLICY, PROCEDURES, AND TRAINING

James K. Whelan, Executive Deputy Commissioner

Adam Waitzman, Assistant Deputy Commissioner
Office of Procedures

POLICY BULLETIN #19-42-SYS

VAULT CARD

<p>Date: August 9, 2019</p>	<p>Subtopic(s): D & C</p>										
	<p>This policy bulletin is to inform Job Center Center Staff of a change to the Vault Card request and issuance process. The Automated Metrocard Issuance System (AMIS) will now be used to request temporary Vault Cards for immediate use to redeem benefits for individuals who are unable to wait for a permanent card in the mail.</p> <p>The new Vault Card process will be rolled out in phases to Job Centers as follows:</p> <table border="0"> <tr> <td>July 29</td> <td>Rider Job Center, Richmond Job Center</td> </tr> <tr> <td>August 12</td> <td>Remaining Bronx Job Centers</td> </tr> <tr> <td>September</td> <td>Queens Job Centers</td> </tr> <tr> <td>October</td> <td>Manhattan Job Centers</td> </tr> <tr> <td>November</td> <td>Brooklyn Job Centers</td> </tr> </table> <p>The Vault Card will be used as a temporary card for Expedited Supplemental Nutrition Assistance Program (E-SNAP), Immediate Needs or any Emergency Issuance until the applicants/re-applicants receive their Common Benefit Identification Card (CBIC) in the mail. The Vault Card will be issued by Disbursement and Collection (D&C) in every Job Center. The Vault Card is only good for 90 days. Over the Counter (OTC) referrals are available for undomiciled persons or persons without a permanent mailing address or if they are residing in a shelter.</p> <p>To assist staff involved in the process, three separate attachments have been developed to outline and provide screenshots of system's processing based on staff roles:</p> <ul style="list-style-type: none"> • Vault Card request in AMIS for the JOS/Worker, • Supervisor Vault Card Process in AMIS, • Welfare Management System (WMS) and Electronic Benefits Transfer (EBT) for the D&C Staff. 	July 29	Rider Job Center, Richmond Job Center	August 12	Remaining Bronx Job Centers	September	Queens Job Centers	October	Manhattan Job Centers	November	Brooklyn Job Centers
July 29	Rider Job Center, Richmond Job Center										
August 12	Remaining Bronx Job Centers										
September	Queens Job Centers										
October	Manhattan Job Centers										
November	Brooklyn Job Centers										

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

Note: Undomiciled applicants/re-applicants with a mailing address will receive their permanent CBIC via the mail.

Requesting the Vault Card

JOS/Worker

To request the Vault Card, the JOS/Worker must:

- Initiate a request in AMIS for an applicant's/re-applicant's Vault Card. If AMIS is not available complete a paper **W-607A** from eDocs.

Note: The JOS/Worker must verify that the appropriate Client Identification Number (CIN) and Case Number is linked and then must confirm the mailing address. If the address is incorrect, the JOS/Worker must change the address via the Paperless Office System (POS) as per current procedure.

- Refer to **Attachment A** for details on requesting a Vault Card via AMIS.

CMU Supervisor

The CMU Supervisor will approve or deny the JOS/Workers's request to issue a Vault Card.

- Refer to **Attachment B** for details on approving or denying a Vault Card request in AMIS.

D&C Staff

D&C Staff must:

- Access AMIS to process the JOS/Worker's request which includes the applicant's/re-applicant's photo-capture process;
- Access WMS to activate the Vault Card;
- Access the EBT system to allow the applicant/re-applicant to select a PIN;
- Enter the activated Vault Card Number into AMIS.

Note: The D&C Staff must have the applicant/re-applicant create a PIN number in the EBT system to ensure that the Vault card can be used.

- Refer to **Attachment C** for details on D&C Staff's process in AMIS, WMS and EBT.

The revised **W-607A** will be used until the form is available in POS.

D&C Staff

AMIS

- If AMIS is not available, D&C will receive a paper **W-607A** from the JOS/Worker, and they must complete the form as follows:
 - select **Pickup CBIC (at OTC Site)** if applicant/re-applicant prefers an OTC referral.
 - assure that the applicant signs the form.
- take a photo of the applicant/re-applicant for the Vault Card, and process the card via WMS.

D&C Staff

WMS

- Refer to **Attachment C** for details on WMS processing.
- Select Option **1** (Temp and Perm Card, Case Update) from the **WMS Host Menu**.
 - Enter CIN, Case Number and Suffix and Transmit and advance to the **Individual Card Request and Case # Entry** screen.
- Select Function **4** (Permanent Card Only) from the **WMS ID Card Menu** and complete the fields on the screen.

Note: After completing WMS processing, return to AMIS to enter the activated Vault Card Number. And have the applicant/re-applicant sign the vault card request in AMIS using the signature pad.

EBT System Processing

- D&C Staff must swipe or enter the activated Vault Card Number and have the applicant/re-applicant select a PIN.
- Refer to **Attachment C** for details on EBT processing.

Effective August 9, 2019

Attachments:

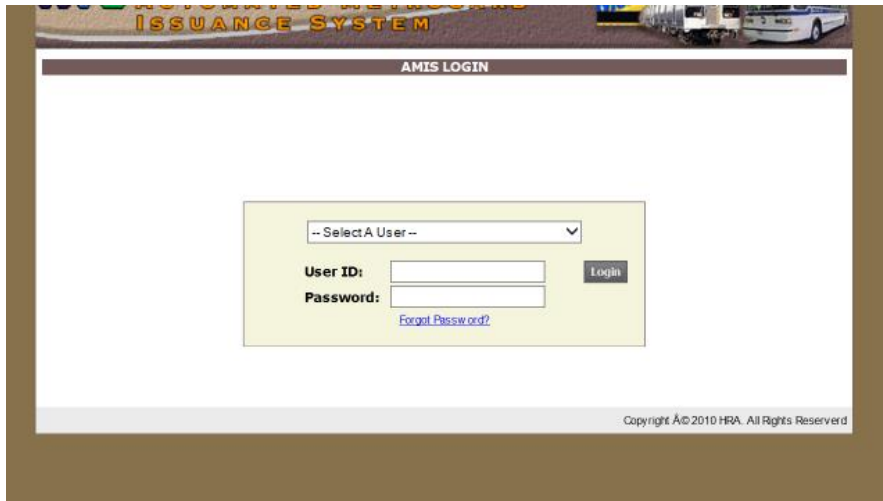
Attachment A	JOS/Worker Vault Card Process
Attachment B	Supervisor Vault Card Process
Attachment C	D&C Worker Vault Card Process
W-607A	Request for Identification Card/Temporary Medicaid Authorization /Update Existing CBIC (Rev. 08/09/19)

Related Items:

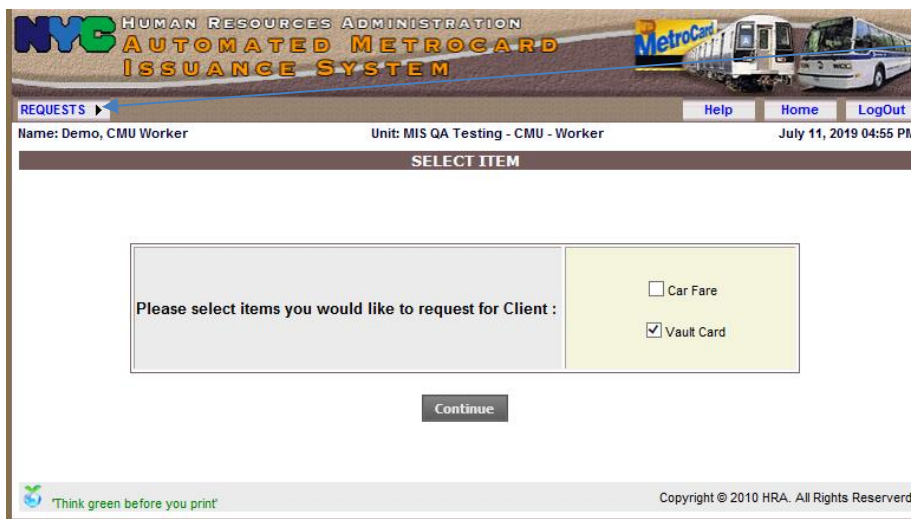
D&C Manual
[PB #17-69-SYS](#)
[PB #17-44-OPE](#)

The JOS/Worker must initiate a request to issue a Vault Card as follows:

AMIS LOGIN Screen



- Enter their **User ID** and **Password**, and click **Login** to advance to the **Select Item** screen.



Click here for Requests.

- Click on **Requests** drop down, select **Create Request**.
- Select **Vault Card** and press **Continue** to advance to the first **Vault Card Request** screen.
 - **Carfare** can also be selected

Vault Card Request Screen

- Enter the **Case Number** and **Suffix**, and click **Continue** to advance to the next **Vault Card Request Case Information Screen**.

Vault Card Request Case Information Screen

- Click **Vault Card**.

Vault Card Request Case Information Screen (con't)

- Click on the **Drop-down** to list the various documents used to verify the applicants/re-applicant's identity.
- Select two documents from the **Drop-down** under the **Name of Documents** field.

Note: If applicant/re-applicant can't provide the documents, proceed and enter reasons

- Click **Reset** to erase information and start again.
- Click **Add New** to add more documents
- Enter the corresponding numbers in the **Document ID** field, click **Continue** to advance to the next **Carfare/Vault Card Request Select Supervisor** screen to select a Supervisor to approve the request.

Carfare/Vault Card Request Select Supervisor Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS ▾ Help Home LogOut

Name: Demo, CMU Worker Unit: MIS QA Testing - CMU - Worker July 11, 2019 05:03 PM

VAULT CARD REQUEST
SELECT SUPERVISOR

Your Request will be directed to your immediate supervisor for approval. If you would like to redirect the request for approval to a different supervisor, please select from the drop down list.

Select Supervisor: Demo, CMU Supervisor ▾

Back Continue

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- Select a **Supervisor** and click **Continue** to advance to the **Vault Card Request Please Confirm Your Request** screen.

Vault Card Request Please Confirm Your Request Screen

The screenshot shows the 'Please Confirm Your Request' screen for a Vault Card Request. The page header includes the NYC Human Resources Administration logo and the title 'AUTOMATED METROCARD ISSUANCE SYSTEM'. The user is identified as 'Demo, CMU Worker' from the 'MIS QA Testing - CMU - Worker' unit, with a timestamp of 'July 11, 2019 05:05 PM'. The main heading is 'VAULT CARD REQUEST' with a sub-heading 'Please Confirm Your Request'. Below this is a 'Case Information' section with the following details: Request Date: 07/11/2019 05:03 PM; Case Name: [Redacted]; Case No/Suffix: [Redacted]; Case Status (CA): NA; Case Category: FS; Address: 213 KLDSBROOKLYN - 11206. A section titled 'Client Also Waiting For :' lists 'Vault Card' and 'Documents Provided: Photo ID, Driver's License:987456, U.S. Passport:8996532'. At the bottom, there are 'Back' and 'Submit Request' buttons. The footer contains the slogan 'Think green before you print' and the copyright notice 'Copyright © 2010 HRA. All Rights Reserved'.

- Review the information on the screen and if correct, click **Submit Request** and the **request** is forwarded to a Supervisor, and a confirmation screen appears indicating request was submitted successfully.

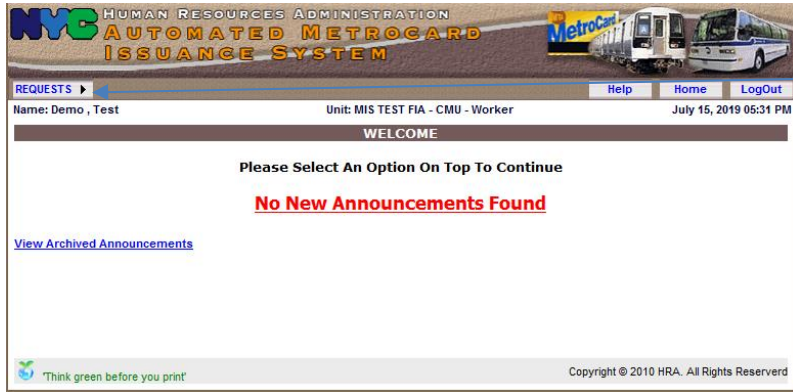
Vault Card Request (confirmation) Screen

The screenshot shows the 'Your Request has been submitted Successfully' confirmation screen for a Vault Card Request. The page header is identical to the previous screen. The main heading is 'VAULT CARD REQUEST' with a sub-heading 'Your Request has been submitted Successfully'. Below this is the same 'Case Information' section as the previous screen. The 'Client Also Waiting For :' section lists 'Vault Card' and 'Documents Provided: Photo ID, Driver's License:987456, U.S. Passport:8996532'. At the bottom, there is an 'Add Another Request' button. The footer contains the slogan 'Think green before you print' and the copyright notice 'Copyright © 2010 HRA. All Rights Reserved'.

- Click Add Another Request if requesting another vault card.

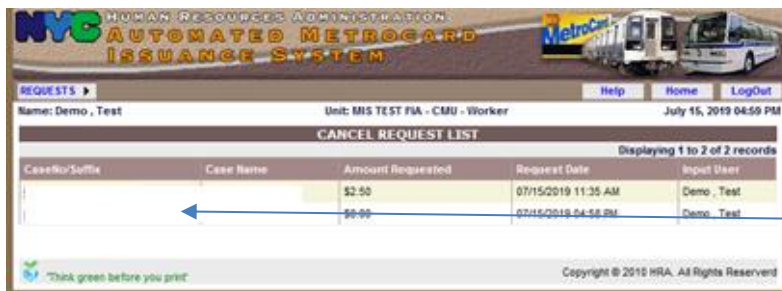
Cancel Request Process

Home Page



Click Request and select Cancel Request.

- Click on **Requests** and select **Cancel Request** to advance to the **Cancel Request List** screen.



Select the case to cancel.

- Select a case to cancel to advance to the **View Request** screen.

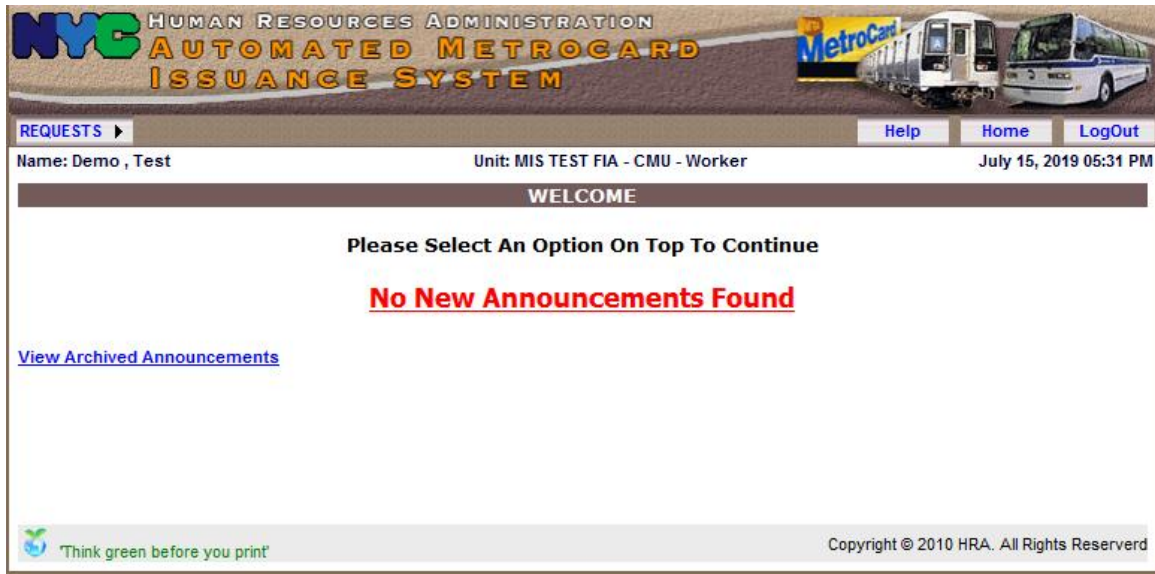


- Click **Cancel Request** and a **View Request** screen appears with a message indicating the request was cancelled.

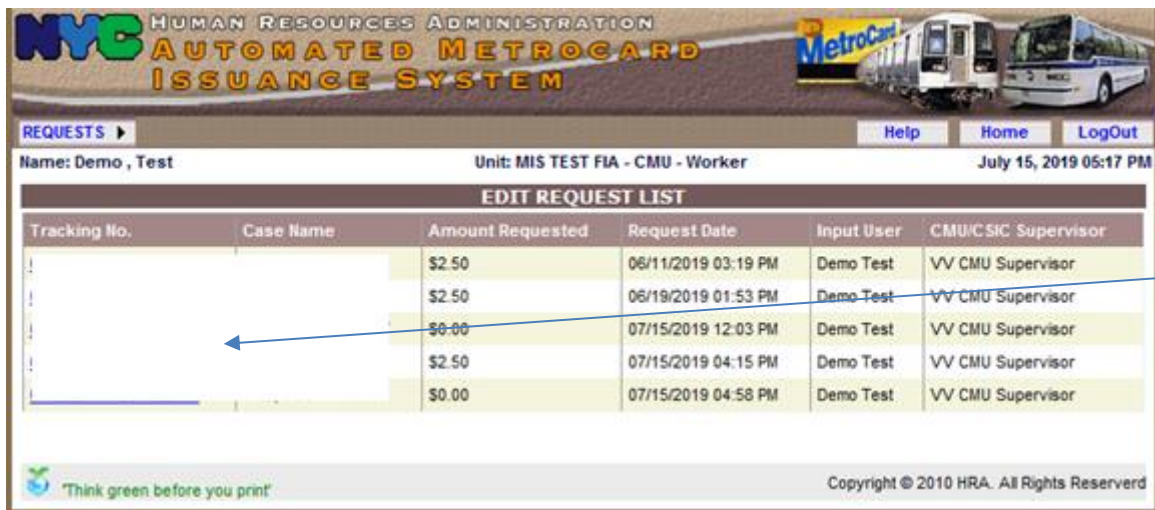
Edit Request Process

Home page

Note: A request can only be edited prior to a Supervisor's approval.



- Click on **Requests** and select **Edit Requests** to advance to the **Edit Request List** screen.



- Select a case based on Tracking number to advance to the **Select Item** screen.

Select Item Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS ▾ Help Home LogOut

Name: Demo , Test Unit: MIS TEST FIA - CMU - Worker July 15, 2019 05:15 PM

SELECT ITEM

Please select items you would like to request for Client :

Car Fare
 Vault Card

Continue

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- If attempting to add Carfare, click on Carfare, then click **Continue** and advance to the **Edit Request View Case Information** screen.

Edit Request View Case Information Screen

REQUESTS | Help | Home | LogOut
 Name: Demo , Test | Unit: MIS TEST FIA - CMU - Worker | July 15, 2019 05:19 PM

EDIT REQUEST VIEW

CASE INFORMATION
 Tracking No: 0715201916585432585 | Request Date: 7/15/2019 4:58:49 PM
 Case Name: [Redacted]
 Case No/Suffix: [Redacted]
 Case Status (CA): AP
 Case Category: FA
 Address: 1210 CHURCH ST, APT 3D, BROOKLYN, 112203000

CARFARE AUTHORIZATION
 Purpose of Carfare Issuance/Appointments: CHU, SUSAN - ZY64291G
 Special Assessment

Card Type	No of Cards	Sub-Total	Persons	Appointments
\$2.50	1	\$ 2.50	CHU, SUSAN - ZY64291G	AddEdit - 1 ✓
Select One	Select One	\$	Select One	N/A
Select One	Select One	\$	Select One	N/A
Select One	Select One	\$	Select One	N/A
Select One	Select One	\$	Select One	N/A
Select One	Select One	\$	Select One	N/A

TOTAL REQUESTED: \$ 2.50

Client Also Waiting For :
 EBT Card
 Check
 Clothing Voucher
 Health & Safety Kit
 Vault Card

Please select Identify documents below to determine Vault Card Eligibility:

Name of Document	Document ID
Photo ID, Driver's License	052309
U.S. Passport	907456

Buttons: Add New, Reset, Add New, Continue

Click on the drop-downs listed under **No of Cards** and select one from each drop-down list.

- Select **Card Type**, **Number of Cards**, **Number of Persons**, **Appointment** and click **Continue** and advance to the **Carefare and Vault Card Request** (Select Supervisor) screen.

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD ISSUANCE SYSTEM

REQUESTS | Help | Home | LogOut
 Name: Demo , Test | Unit: MIS TEST FIA - CMU - Worker | July 15, 2019 05:26 PM

CARFARE AND VAULT CARD REQUEST
 SELECT SUPERVISOR

Your Request will be directed to your immediate supervisor for approval. If you would like to redirect the request for approval to a different supervisor, please select from the drop down list.

Select Supervisor: VV, CMU Supervisor

Buttons: Back, Continue

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- Select a Supervisor and click **Continue** to advance to the **Carefare and Vault Card Request** (confirm your request) screen.

Carefare and Vault Card Request (Confirm Your Request) Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD ISSUANCE SYSTEM

REQUESTS ▾ Help Home LogOut
Name: Demo , Test Unit: MIS TEST FIA - CMU - Worker July 15, 2019 05:27 PM

CARFARE AND VAULT CARD REQUEST
Please Confirm Your Request

Case Information
Request Date: 07/15/2019 05:26 PM
Case Name:
Case No/Suffix:
Case Status (CA): AP
Case Category: FA
Address: 1210 CHURCH ST, APT 3D, BROOKLYN, 112203000

Carefare Authorization
Purpose of Carefare Issuance/Appointments: Special Assessment

Metrocards Information

Card Type	No of Cards	Sub-Total	Name of Person	Appointments
\$2.50	1	\$2.50	CHU, SUSAN - ZY64291G	View -1

TOTAL REQUESTED: \$2.50
Client Also Waiting For :
• Vault Card
Documents Provided: Photo ID, Driver's License 852369, U.S. Passport 987456

Back Submit Request

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- Confirm your request by clicking on **Submit Request** and the screen is returned with a message indicating the request was submitted successfully to the Supervisor.

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD ISSUANCE SYSTEM

REQUESTS ▾ Help Home LogOut
Name: Demo , Test Unit: MIS TEST FIA - CMU - Worker July 15, 2019 05:27 PM

CARFARE AND VAULT CARD REQUEST
Your Request has been submitted Successfully

Case Information
Request Date: 07/15/2019 05:26 PM
Case Name:
Case No/Suffix:
Case Status (CA): AP
Case Category: FA
Address: 1210 CHURCH ST, APT 3D, BROOKLYN, 112203000

Carefare Authorization
Purpose of Carefare Issuance/Appointments: Special Assessment

Metrocards Information

Card Type	No of Cards	Sub-Total	Name of Person	Appointments
\$2.50	1	\$2.50	CHU, SUSAN - ZY64291G	View -1

TOTAL REQUESTED: \$2.50
Client Also Waiting For :
• Vault Card
Documents Provided: Photo ID, Driver's License 852369, U.S. Passport 987456

Add Another Request

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- Click **Add Another Request** to edit another request.

View Request Function

All requests can be reviewed by JOS/Worker before submitting for approval.

- Select **Requests**, then **View Requests**.

The screenshot shows the 'VIEW REQUEST' form. At the top, there is a navigation bar with 'REQUESTS', 'ORDERS', and 'REPORTS' tabs. Below this, the user's name 'Demo, D&C Custodian' and unit 'MIS QA Testing - D&C - Custodian' are displayed, along with the date and time 'July 12, 2019 01:55 AM'. The main heading is 'VIEW REQUEST'. Below the heading, there is a prompt: 'Please select any one criteria to view requests.' There are two input fields: 'Enter Case No./Suffix:' and 'Enter Date Range:'. The 'Enter Date Range:' section has 'From Date:' set to '7/1/2019' and 'To Date:' set to '7/12/2019'. There are 'Search' and 'Reset' buttons at the bottom of the form. A footer contains the text 'Think green before you print' and 'Copyright © 2010 HRA. All Rights Reserved'.

- Enter **Case Number, Suffix** or a **Date Range** and click **Search** to advance to the **View Request List** screen.

View Request List Screen

The screenshot shows the 'VIEW REQUEST LIST' screen. At the top, there is a navigation bar with 'REQUESTS', 'ORDERS', and 'REPORTS' tabs. Below this, the user's name 'Demo, D&C Custodian' and unit 'MIS QA Testing - D&C - Custodian' are displayed, along with the date and time 'July 12, 2019 01:59 AM'. The main heading is 'VIEW REQUEST LIST'. Below the heading, there is a 'Selected Criteria:' field set to '7/1/2019 to 7/12/2019'. To the right, it says 'Displaying 1 to 2 of 2 records'. There is a table with the following data:

Tracking No.	Case Name	Amount Requested	Input Date	Status
07102019101943884		\$0.00	7/10/2019 10:18:44 AM	Pending Supervisor Approval
07102019145024806		\$0.00	7/10/2019 2:49:37 PM	Pending Supervisor Approval

Below the table is a 'Back' button. A blue arrow points to the status dropdown menu in the first row of the table. A text box to the right of the arrow says 'Click here to change Status.' A footer contains the text 'Think green before you print' and 'Copyright © 2010 HRA. All Rights Reserved'.

The Request is displayed with the Status “Pending Supervisor Approval.”

- Click **Status** to change the view i.e., to **Issued**.

View Request List Screen (different status)



Status changed to Issued.

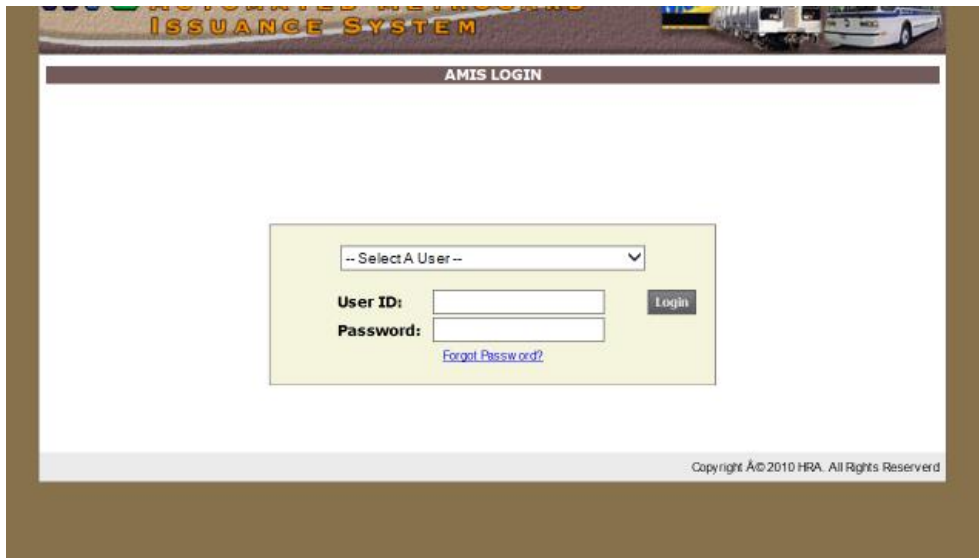
The **View Request List** screen shows requests with the updated Status of **Issued**.

- To see the details for each request, click on the desired **Tracking Number** to advance to the **View Request Case Information** screen.



The Supervisor must approve the Vault Card request as follows:

AMIS LOGIN Screen



- Enter their **User ID** and **Password**, and advance to the **Approve Request** screen.



Click here to select Approve Request.

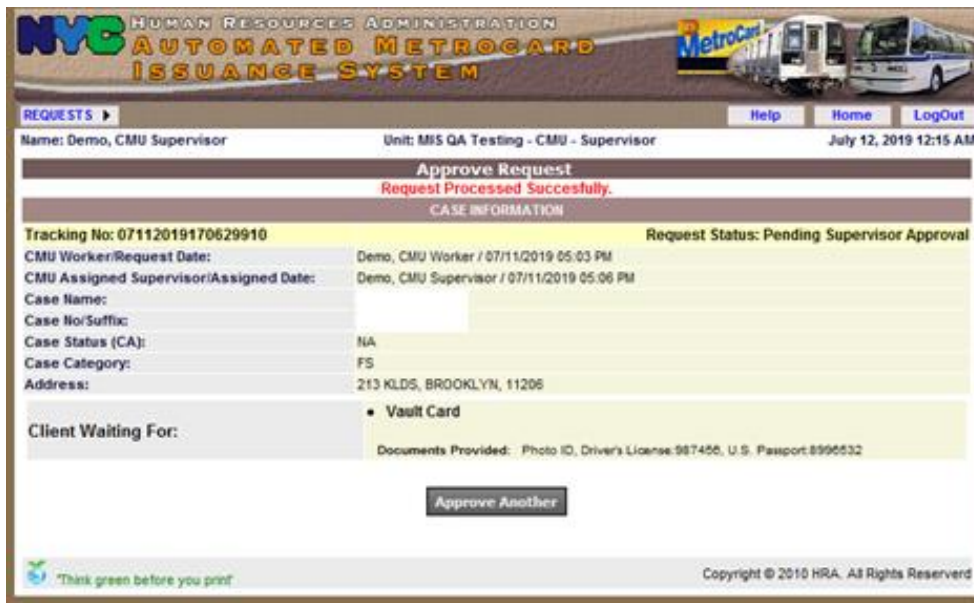
Click here on Tracking number to view request details

- Click on **Requests** and select **Approve Request**.
- Click on **Tracking No** to advance to the **Approve Request View** screen to open the details of the request.

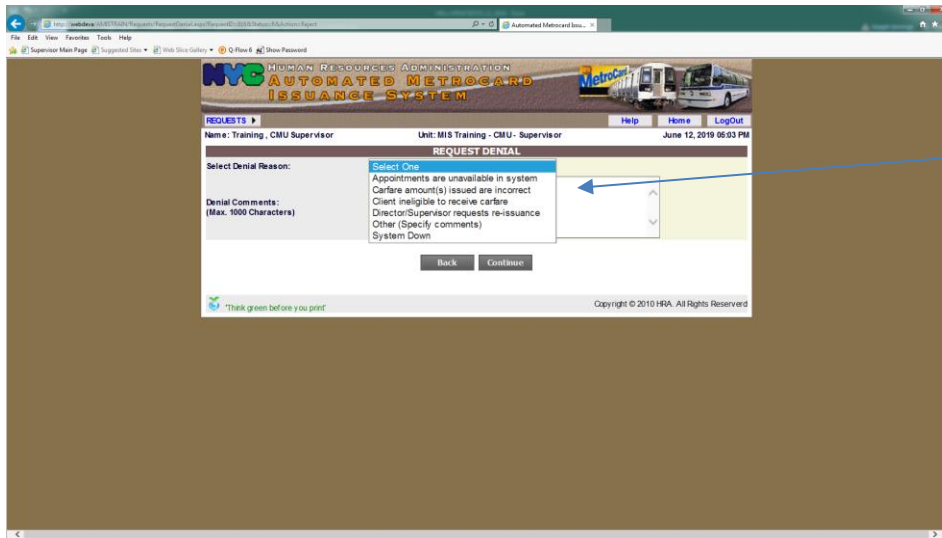
Approve Request View Case Information Screen



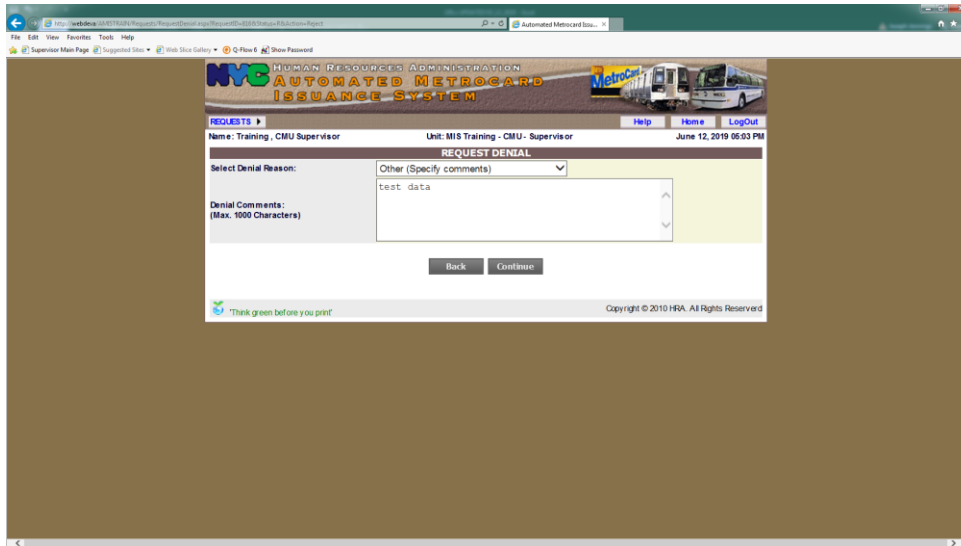
- Review the case information and if it is correct, click **Approve Request** and the confirmation screen appears below with message “Request Processed Successfully,” and the request will be forwarded to D&C Staff.
 - If the information is not correct click **Reject Request**.



Request Denial Screen



- If **Reject Request** is selected, AMIS returns the request to the JOS/Worker along with the denial reason.
 - If **Other** is selected, the following screen appears.



- Enter comments in free text to explain what Other reasons there are.

Attachment B Supervisor Vault Card Process

View Request Function

All requests can be reviewed by Supervisor.

- Select **Requests**, then **View Requests**.

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS | ORDERS | REPORTS | Help | Home | LogOut

Name: Demo, D&C Custodian Unit: MIS QA Testing - D&C - Custodian July 12, 2019 01:55 AM

VIEW REQUEST

Please select any one criteria to view requests.

Enter Case No./Suffix :

OR

Enter Date Range :

From Date:

To Date:

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- Enter **Case Number, Suffix** or a **Date Range** and click **Search** to advance to the **View Request List** screen.

View Request List Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS | ORDERS | REPORTS | Help | Home | LogOut

Name: Demo, D&C Custodian Unit: MIS QA Testing - D&C - Custodian July 12, 2019 01:59 AM

VIEW REQUEST LIST

Selected Criteria: 7/1/2019 to 7/12/2019

Displaying 1 to 2 of 2 records

Tracking No	Case Name	Amount Requested	Input Date	Status
07102019101943884		\$0.00	7/10/2019 10:18:44 AM	Pending Supervisor Approval
07102019145024895		\$0.00	7/10/2019 2:49:37 PM	Pending Supervisor Approval

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Click here to
change
Status.

The Request is displayed with the Status “Pending Supervisor Approval.”

- Click **Status** to change the view i.e., to **Issued**.

View Request List Screen (different status)



Status changed to Issued.

The **View Request List** screen shows requests with the updated Status of **Issued**.

- To see the details for each request, click on the desired **Tracking Number** to advance to the **View Request Case Information** screen.

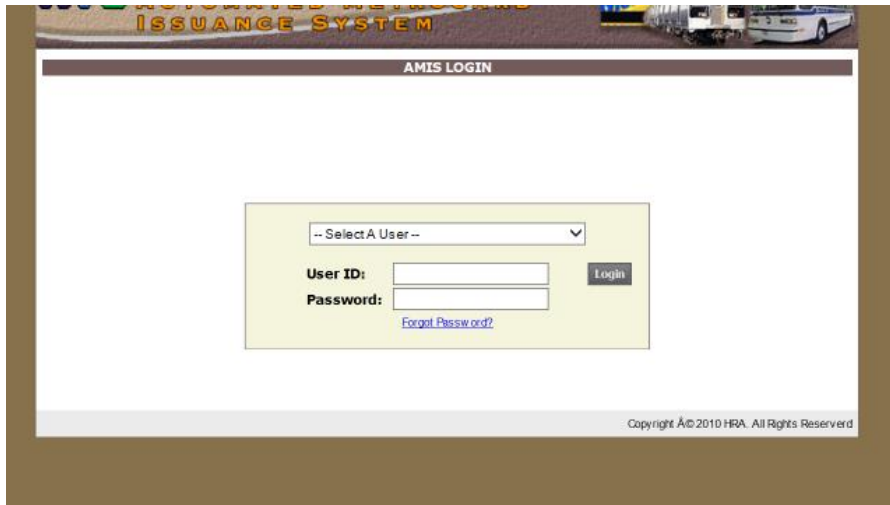


The D&C Worker must process the Vault Card request as follows:

Note: If the applicant/re-applicant is requesting a Vault Card, the D&C Worker must have the individual create a PIN (Personal Identification Number) in the EBT system to ensure that the Vault Card can be used. Refer to PD #16-19-SYS for PIN details.

AMIS Processing

- Login using their **User ID** and **Password** and advance to the **Approve Issuance** screen.



Approve Issuance Screen

Case No-Suffix / SSM	Case Name	Amount	Request Date	Requested By	Supervisor (Approver)	Client Waiting For
		N/A	07/10/2019 10:23 AM	Demo , Test	QA, Deputy Director	• Vault Card
		N/A	07/10/2019 11:08 AM	CMU Supervisor, UATTEST2	CMU Supervisor, UATTEST4	• Vault Card
		N/A	07/10/2019 11:14 AM	CMU Worker, UATTEST1	CMU Supervisor, UATTEST2	• Vault Card
		N/A	07/10/2019 02:21 PM	CMU Worker, UATTEST1	QA, Deputy Director	• Vault Card
		\$2.75	07/10/2019 02:55 PM	CMU Worker, UATTEST1	CMU Supervisor, UATTEST4	• Vault Card
		N/A	07/10/2019 02:59 PM	CMU Worker, UATTEST1	CMU Supervisor, UATTEST4	• Vault Card
		N/A	07/11/2019 05:03 PM	Demo, CMU Worker	Demo, CMU Supervisor	• Vault Card

Select the last case approved by a Supervisor.

- Click on **Request** and select **Approve Issuance**.
- Select the case listed last by a Supervisor to advance to the below **Approve Vault Card Issuance Case Information** screen.

Approve Vault Card Issuance Case Information Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD ISSUANCE SYSTEM

REQUESTS ▾ ORDERS ▾ REPORTS ▾ Help Home LogOut

Name: Demo, D&C Custodian Unit: MIS QA Testing - D&C - Custodian July 12, 2019 01:11 AM

APPROVE VAULT CARD ISSUANCE

CASE INFORMATION

Tracking No: 07112019170629910 Request Status: Pending D&C Issuance

CMU Worker/Request Date: Demo, CMU Worker / 07/11/2019 05:03 PM

CMU Approval Supervisor/Approval Date: Demo, CMU Supervisor / 07/12/2019 12:16 AM

Case Name:

Case No/Suffix:

Case Status (CA): NA

Case Category: FS

Address: 213 KLDS, BROOKLYN, 11206

Client Waiting For: **• Vault Card**

Documents Provided: Photo ID, Driver's License:987456, U.S. Passport:8990532

Back Continue Reject Issuance

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- Review information on the screen and if information is correct, click **Continue** to advance to the next **Approve Vault Card Request** screen.
- If information on the screen is not correct, click **Reject Issuance** and return it to the Supervisor.

Approve Vault Card Request Screen



Confirm documents here.

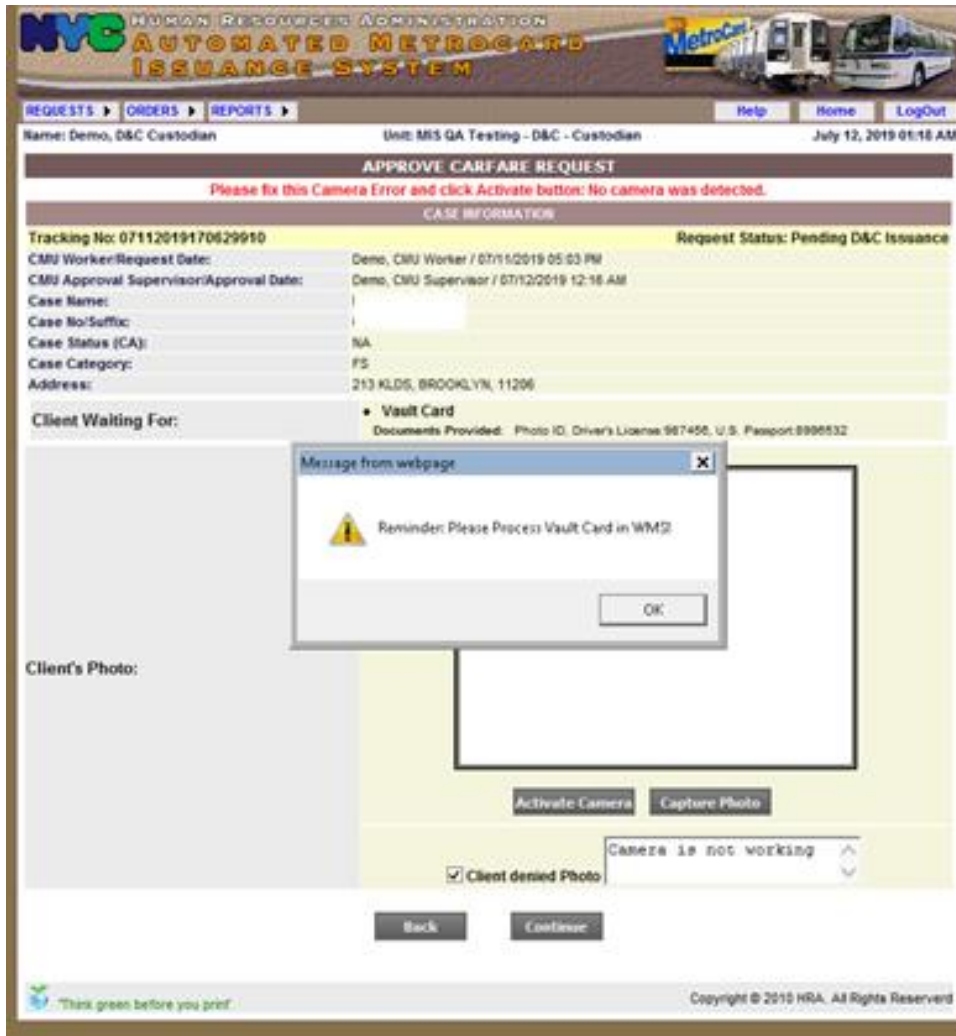
- Review the documents listed to confirm if they are correct.
- If documents are correct, take the applicant/re-applicant photo.

Approve Vault Card Request (Activate Camera) Screen



Enter comments here, i.e., if applicant refused photo or camera not working.

- Click on **Activate Camera** and **Capture Photo** or enter Comments if can't complete photo process and click **Continue**.
- Place the Vault Cards in sequence and access WMS to activate the Vault Card.



WMS Processing

- Select Option 1 (Temp and Perm Card Case Update) from the **WMS Host Menu**.
 - Enter the **CIN**, **Case Number** and **Suffix** and click **Transmit** to advance to the **Individual Card request and Case # Entry** screen.

Individual Card Request and Case # Entry Screen

```

•WIDUPD  Dist NYC  INDIVIDUAL CARD REQUEST AND CASE # ENTRY 07/22/2016
                                                    15:50:28
CIN
Name >
DOB 07/05/1983 Sex M SSN
EBT PIN Mailer
Photo NO Sig NO CC P CDC M
Current Card(s) D Type Void Date
CLIENT SEQUENCE 01 N N/NS

Case # Suff 01
Case Type MA Case Status NA/AC/NA
ndiv Status NA/AC/NA Rel CD
Case Name
C/O Name
Street 45 DISENROP_AVENUE
Apt No 4
City BROOKLYN State NY Zip 11222
Revise Mailing Address? (Enter X) _
Phone # 718-555-5555
Ofc 556 Wrkr KHBA
PA/FS Purge Date
PA/FS Payee
for Individual Card: Reason Code (Enter Value) Photo (Y/N)

ADD (A) or DELETE (D) Individual as PA/FS Payee for Case #:
TT _ Case # Suffix 01
ADD Vault (V) Card or DELETE (D) ID Card for Use:
TT V Card # 600486 2001030010400 xmt _
    
```

Review to assure that the payee name appears here.

Enter V here.

Enter the Vault Card number here.

- Enter **V** for Vault Card and the **Vault Card Number** or swipe Vault Card.
- Check to make sure the Payee Name is listed.

Note: After completing the process for selecting a temporary Vault Card, JOS/Workers must complete the next step below using Function **4** to request a permanent card.

- Select Function **4** (Permanent Card Only) from the **WMS ID Card Menu** and complete the fields on the screen.

EBT System

- Swipe the new Vault Card and have applicant/re-applicant select a PIN#.

AMIS Processing (cont.)

- Return to AMIS to enter the activated Vault Card Number and have the individual sign the Vault card request.

Approve Issuance Screen (Signature Pad)

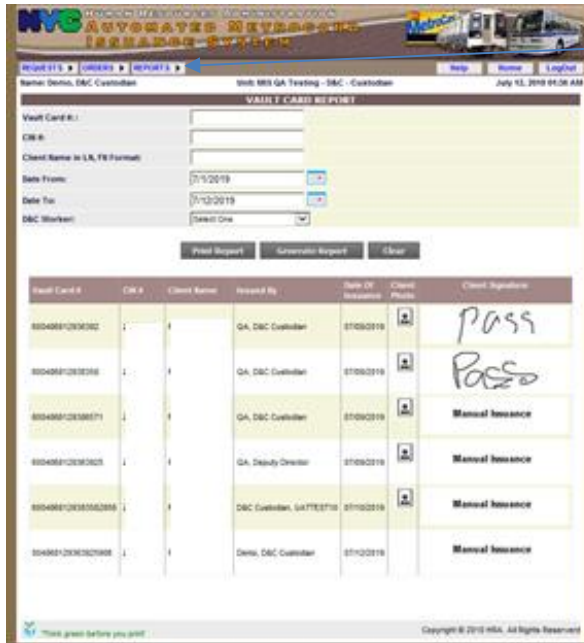
Applicant/re-applicant signs here.

- Click **Activate Signature Pad** if not already activated and have applicant/re-applicant sign in the **Client Signature** field.
- Click **Print Client Receipt** and click **Done** and this will end the Vault process.
 - If there is no Signature Pad, click **Manual Issuance**. The **W-607A** is the manual alternative when AMIS is not available.

- Enter comments for manual issuance

Vault Card Reports

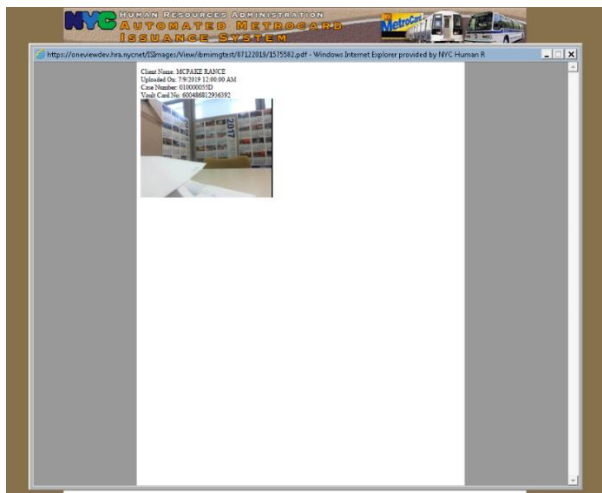
Vault Card Report Screen



Select Reports after clicking on Requests

- To access reports, select Reports and then Vault Card Reports.
- Select **Date Range** and click on **Generate Report**.

Applicant/Re-applicant Photo Report



- Click on the Icon to display the actual photo of the applicant/re-applicant along with Name, Case Number and Vault Card Number.

View Request Function

All requests can be reviewed by D&C Staff.

- Select **Requests**, then **View Requests**.

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS | ORDERS | REPORTS | Help | Home | LogOut

Name: Demo, D&C Custodian Unit: MIS QA Testing - D&C - Custodian July 12, 2019 01:55 AM

VIEW REQUEST

Please select any one criteria to view requests.

Enter Case No./Suffix :

OR

Enter Date Range :

From Date: 7/1/2019

To Date: 7/12/2019

Search Reset

Think green before you print Copyright © 2010 HRA. All Rights Reserved

- Enter **Case Number, Suffix** or a **Date Range** and click **Search** to advance to the **View Request List** screen.

View Request List Screen

NYC HUMAN RESOURCES ADMINISTRATION
AUTOMATED METROCARD
ISSUANCE SYSTEM

REQUESTS | ORDERS | REPORTS | Help | Home | LogOut

Name: Demo, D&C Custodian Unit: MIS QA Testing - D&C - Custodian July 12, 2019 01:59 AM

VIEW REQUEST LIST

Selected Criteria: 7/1/2019 to 7/12/2019 Displaying 1 to 2 of 2 records

Tracking No.	Case Rate	Amount Requested	Input Date	Status
871622181619452884		\$0.00	7/10/2019 10:10:44 AM	Pending Supervisor Approval
87162218146024896		\$0.00	7/10/2019 2:49:37 PM	Pending Supervisor Approval

Back

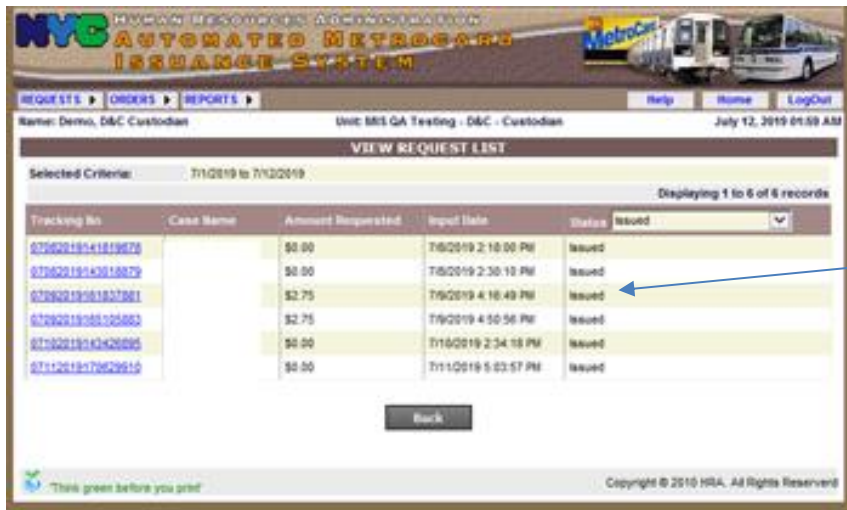
Think green before you print Copyright © 2010 HRA. All Rights Reserved

Click here to
change
Status.

The Request is displayed with the Status “Pending Supervisor Approval.”

- Click **Status** to change the view i.e., to **Issued**.

View Request List Screen (different status)



Status changed to Issued.

The **View Request List** screen shows requests with the updated Status of **Issued**.

- To see the details for each request, click on the desired **Tracking Number** to advance to the **View Request Case Information** screen.





Request for Identification Card/ Temporary Medicaid Authorization/Update Existing CBIC

Prepare in the following situations:

<ul style="list-style-type: none"> ● Replacement of CBIC or Medicaid card ● Update CBIC 	<ul style="list-style-type: none"> ● Undomiciled applicant/participant ● Issuance of Immediate Needs/Expedited Supplemental Nutrition Assistance Program (SNAP) Grant 	<ul style="list-style-type: none"> ■ Authorized representative (payee) case ■ Temporary Medicaid Authorization for applicant before case is on WMS
---	---	--

Section I: (To be completed by JOS/Worker)

To: Reception/Disbursement and Collections Unit	From: Job Center/Supplemental Nutrition Assistance Program (SNAP) Office: Caseload:				
Case Name:	Applicant/Participant's Signature: <div style="border: 1px solid black; padding: 2px; width: 100%; text-align: center;">Picture</div>				
Authorized Representative (Payee) Name (print):	Authorized Representative (Payee) Signature: <div style="border: 1px solid black; padding: 2px; width: 100%; text-align: center;">Picture</div>				
Fingering Imaging/Photo/Signature Completed <input type="checkbox"/>	Applicant/Participant CIN: Applicant/Participant Case Type/Case No./Registry No./Suffix:				
<p>Check Reason for Action:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> 01 Lost card <input type="checkbox"/> 02 Stolen <input type="checkbox"/> 03 Defective <input type="checkbox"/> 04 Mutilated </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> 06 Surrendered <input type="checkbox"/> 09 First card/never received <input type="checkbox"/> CBIC update (no CBIC referral required) </td> </tr> </table>	<input type="checkbox"/> 01 Lost card <input type="checkbox"/> 02 Stolen <input type="checkbox"/> 03 Defective <input type="checkbox"/> 04 Mutilated	<input type="checkbox"/> 06 Surrendered <input type="checkbox"/> 09 First card/never received <input type="checkbox"/> CBIC update (no CBIC referral required)	Identification documents witnessed for applicant/participant or authorized representative; the same two pieces must be presented to the Disbursement and Collections (D&C) Unit.		
<input type="checkbox"/> 01 Lost card <input type="checkbox"/> 02 Stolen <input type="checkbox"/> 03 Defective <input type="checkbox"/> 04 Mutilated	<input type="checkbox"/> 06 Surrendered <input type="checkbox"/> 09 First card/never received <input type="checkbox"/> CBIC update (no CBIC referral required)				
	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;">Document</td> <td style="width: 50%; border: none;">ID Number</td> </tr> <tr> <td style="border: none;"> </td> <td style="border: none;"> </td> </tr> </table>	Document	ID Number		
Document	ID Number				

SAMPLE

Section II: Reason for Request (To be completed by JOS/Worker)

<input type="checkbox"/> Photo card? <input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> Is the mailing address different than that on WMS? <input type="checkbox"/> No <input type="checkbox"/> Yes If yes, complete below.	<input type="checkbox"/> Is applicant receiving expedited SNAP benefits and/or an immediate needs grant? <input type="checkbox"/> No <input type="checkbox"/> Yes Is the payee correctly established? <input type="checkbox"/> No <input type="checkbox"/> Yes If No: <input type="checkbox"/> Delete current payee _____ CIN <input type="checkbox"/> Add new payee _____ CIN
	Care of Name <hr/> Street Apt. No. <hr/> City State Zip	
<input type="checkbox"/> Mail Permanent Card and Temporary Medicaid Card (LDSS-4113-2) (CBIC menu function 1) <input type="checkbox"/> Over-the-Counter Permanent Card Request (LDSS-4113-2) (CBIC menu function 2) <input type="checkbox"/> Vault Card and Mail Card (CBIC Menu Option 1)		

(Turn page)

Section II: Reason for Request (To be completed by JOS/Worker)

<input type="checkbox"/> Authorized Representative Card (CBIC menu function 3) Be sure to send authorized representative to the AFIS Unit for photo and signature only. Check one: <input type="checkbox"/> Agency pickup (at OTC Site) <input type="checkbox"/> Mail <input type="checkbox"/> Vault Card			
Authorized Representative: _____ <div style="display: flex; justify-content: space-between; width: 100%;"> First Name M.I. Last Name </div>			
<input type="checkbox"/> Temporary Medicaid Authorization (LDSS-2831-A) Complete Section IV.			
JOS/Worker's Signature _____		Date _____	
Supervisor's Signature _____		Date _____	

Section III: Signature Verification (To be completed by D&C or SNAP Reception)

<input type="checkbox"/> Vault card (Temporary) issued			
<input type="checkbox"/> Permanent card mail request processed (to be decided by D&C or SNAP Reception) <input type="checkbox"/> Pickup CBIC (at OTC Site)			
Applicant/Participant's Signature _____		Date _____	
Authorized Representative (Payee) Signature _____		Date _____	
Signature(s) verified and documents listed in Section I seen.			
SNAP Reception/D&C or Card Producer's Signature: _____ Date: _____			

To be Completed by Job Center ONLY

Section IV: Additional information for Temporary Medicaid Authorization (LDSS-4113-2/ LDSS-2831A) (To be completed by JOS/Worker)

Name	Last	First	
Address	Street		
	City	State	Zip Code

Enter 7-digit case number and 1-digit suffix	Leave blank	If enrolled in HIP or HMO plan, enter "P." For all others, enter "A."
↓	↓	↓
Case Number		Category

CIN	Last Name	First Name	Sex	Date of Birth	Ins. Code	Cov. Code	SSN

If temporary Medicaid card (**LDSS-2831A**) is issued, please also give the Applicant/Participant _____
 From _____