



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #21-31-OPE (This Policy Bulletin Replaces PB #20-73-OPE)

AUTO-INDEXING QUICK REFERENCE GUIDE

<p>Date: May 21, 2021</p>	<p>Subtopic(s): Indexing</p>
<p>Revised</p>	<p>Revisions to the Original Policy Bulletin:</p> <p>This policy bulletin is being revised to:</p> <p>Inform staff that the automatic document indexing solution (DocID system) to reduce staff time for manual document processing has expanded to additional locations. This new solution which went live on November 30, 2020 at the Waverly Supplemental Nutrition Assistance Program (SNAP) Center (S19), will now be expanded to Crotona SNAP Center (S46) and Queens SNAP Center (S53) on May 24, 2021.</p> <p>Purpose:</p> <p>The purpose of this policy bulletin is to inform Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) Center staff of the DocID, an automatic document indexing solution which could impact their current indexing process. This policy bulletin is informational for all other staff.</p> <p>The Department of Social Services (DSS) has built an automatic document indexing solution (DocID system) to reduce staff time for manual document processing. This new solution which went live on November 30, 2020 at the Waverly SNAP Center (S19), will now be expanded to Crotona SNAP Center (S46) and Queens SNAP Center (S53) on May 24, 2021. The DocID system will be rolled out in phases. In phase 1, the document indexing solution will index the most common documents from the SNAP program. These documents will be automatically indexed to the correct case number and/or Client Identification Number (CIN) in the HRA One Viewer. Additional documents will be added in the future rollout phases.</p>

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

Note: Phase 1 of this pilot rollout will only affect these three SNAP Centers and the Centralized Indexing Unit staff. All other SNAP Centers will follow the current process.

Please refer to [PB#18-02-OPE](#) and [PB#16-63-OPE](#)

The DocID process will automatically index many documents, but not all documents. The documents that the system cannot identify, or those documents not included in the list of documents for auto-indexing, will be available in the Indexing tool after scanning, as per current process. Please refer to **Attachment A** for a list of the documents that are included in auto-indexing.

Currently, the DocID process only applies to documents submitted by the applicant/participant through the self-service scanner and/or scanned by the Worker at a SNAP Center.

Note: Documents submitted by applicants/participants using the Mobile Document Upload (Mobdoc) or RightFax are not included in the DocID system at this time; documents submitted using Mobdoc or RightFax will follow their normal path.

In order for the automatic document indexing process to work:

- It is essential that documents are scanned with the correct case information (i.e., correct case number). At the scanner when entering the case number, be sure to enter the full case number with the alpha (i.e., 00012345678A).
- Forms that are scanned must contain the correct number of pages; the DocID system only accepts complete forms. For example, the **LDSS-3151** is 6 pages; if 4 pages are scanned, this document will not be auto-indexed. The images of the 4 pages will be available in the Indexing tool for manual indexing.

Please refer to the following table for further information.

Document Scanning Method	Documents that ARE included on the document list.	
	Identified by DocID	Cannot be Identified by DocID
Submitted by applicant/participant via Self-Service Scanning	These documents will automatically appear in the HRA One Viewer in a few minutes.	- These documents will behave as they normally do and will be available in the Indexing tool after scanning. - These documents will also be reviewed by DSS staff that are trained to help the auto-indexing tool recognize these documents in the future.
Scanned by Worker at the Center	These documents will automatically appear in the HRA One Viewer in a few minutes.	
Submitted by applicant/participant via Mobdoc .	Not included in DocID at this phase.	These documents will behave as they normally do and will be available in the Indexing tool after scanning.
Submitted by applicant/participant via RightFax .	Not included in DocID.	These documents will behave as they normally do and will be available in the Indexing tool after scanning.

If a scanned document(s) is part of the DocID documents for auto-indexing and does not appear in the HRA One Viewer after a few minutes, this could either mean:

- The DocID system could not identify the document, and the document has been sent for manual indexing. The Worker should check the Indexing tool; or
- The network is experiencing some delays and the scanned document(s) is taking longer to appear in the HRA One Viewer. The scanned document(s) will appear later.

Effective May 24, 2021

Related Items:

[PB#16-63-SYS](#)
[PB#18-02-OPE](#)

Attachments:

Attachment A DocID: Documents Included in Auto-Indexing

DocID: Documents included in Auto-Indexing

1. **LDSS-3151** SNAP Change Report Form
2. **LDSS-4826** SNAP Application/Recertification
3. **LDSS-4310** SNAP Periodic Report
4. **LDSS-4942** SNAP Authorized Representative Request Form
5. **LDSS-4836** NYSNIP SNAP Benefits Interim Report (NYC)
6. **W-147Q** Verification of Secondary Tenant's Residence and Housing Costs
7. **M-327h** Mail-In Recertification/Eligibility Questionnaire
8. **W-147** Letter to Landlord/Management Agent - Request for Residence Verification